

The Unitarian Universalist Church  
Rockford, Illinois



Annual Report 2023—2024

# The Unitarian Universalist Church

## 2022-23 Annual Report

### INDEX

Officers, Board of Trustees, Committee Chairs, Team Leaders and Staff.....	3
President’s Report .....	4
Mission, Vision, and Ends.....	5
Senior Minister’s Report .....	11
Director of Religious Education’s Report .....	14
Music Director’s Report .....	16
Assistant Minister’s Report .....	17
Treasurer’s Report .....	19

### COMMITTEE REPORTS

Building & Grounds Committee .....	20
Library Team .....	21
Finance Committee .....	22
Investment Panel .....	23
Denominational Affairs Committee .....	24
Caring Team .....	25
Membership Team .....	25
Religious Growth & Learning.....	26
Faith in Action Team.....	26
Music Team .....	27
Minutes of the 2022 Annual Meeting .....	28

# Officers of the Congregation

## 2023-2024

President: Spitty Tata                      Vice President: Matt Menze  
Treasurer: Steve Blomgren              Clerk: Kim Lowman Vollmer

### Board of Trustees

Rebecca Beneditz                      Sarah Greer                      Clark Logemann

### Committee Chairs & Team Leaders

**BUILDING & GROUNDS** ..... Dave Schubert  
**LIBRARY TEAM**..... Mike Ullrich  
**FINANCE COMMITTEE** ..... Steve Lewis  
**Investment Panel** ..... Teresa Wilmot  
**Memorials & Special Gifts**..... Pat Lewis  
**Generosity Committee**..... Linda Johnson and company  
**DENOMINATIONAL AFFAIRS COMMITTEE** ..... Teresa Wilmot  
**MEMBERSHIP TEAM**..... Rev. Joyce Palmer  
**RELIGIOUS GROWTH & LEARNING** ..... Lindsay Trank, DRE  
**FAITH AND ACTION TEAM** ..... Rev. Dr. Matthew Johnson  
**WORSHIP TEAM**..... Rev. Dr. Matthew Johnson  
**Music Team**..... Tim Anderson, Music Director  
**CARING TEAM**..... Wanda Hoover  
**NOMINATING PANEL**..... Linda Johnson

### Staff

**SENIOR MINISTER** ..... The Rev. Dr. Matthew Johnson  
**ASSISTANT MINISTER**..... The Rev. Joyce Palmer  
**DIRECTOR OF RELIGIOUS EDUCATION** ..... Lindsay Trank  
**MUSIC DIRECTOR** ..... Dr. Tim Anderson  
**MINISTER EMERITUS** ..... The Rev. David R. Weissbard  
**MUSIC DIRECTOR EMERITA** ..... Kay Hotchkiss  
**OFFICE MANAGER** ..... Autumn Powell  
**RELIGIOUS EDUCATION ASSISTANT** ..... Lauren Smith

# President's Report 2023 - 2024

I have been honored to serve as President of the Board of Trustees this year and am proud to have served with the following members of the Board: Matt Menze, Vice President; Kim Lowman Vollmer, Clerk; Steve Blomgren, Treasurer; and Sarah Greer, Clark Logeman and Rebecca Beneditz, Trustees.

In September, the Board met in retreat to review, revise, and/or create the annual strategic plan. We decided that we would focus on supporting our Anti Racism, Anti-Oppression, Multicultural Congregation (ARAOMC) goals. Toward that end, Julica Hermann De La Fuente facilitated and guided our leadership through ARAOMC training and provided a rubric to assess our current situation and work to fill gaps in our own culture.

The Board's role is to support the work of the staff and lay leaders when requested or required. We met with Lindsay Trank, the RE Director and listened to an in-depth description of our RE program. We offered to provide help, as needed. The Senior Minister provided a sabbatical plan for the next year, including ministerial coverage for when he is away. It was well thought out and allowed for the needs of the membership around the US election. The board approved the plan. The Senior Minister continues to represent our values and beliefs in the community by his presence, words and actions.

The Board approved the construction of our entrance Canopy and work has been completed on an attractive entrance that stays with the theme of the building and provides shelter to our members as they enter in inclement weather. There is concern that we will need to replace the 50-year old siding on the church relatively soon. This is a large undertaking and will have to be funded in the next few years.

In April we kicked off our Stewardship campaign, Nourishing Roots, Opening Wings, to signify the transformation out of a debilitating pandemic. The Stewardship campaign has been the most successful in a decade, reaffirming the direction of the Church. Thanks to the strong response from our Church members, we are able to raise salaries for our staff, bringing them closer to parity with UUA recommendations and contribute generously to the UUA.

The neighborhood food pantry on our Church grounds has continued its successful run. Several members have helped and we need to invite more members of the church to participate.

We have now converted our Church software to ChurchCenter from Breeze. The new software is more functional and Breeze has been bought by a company that does not reflect our values. We voted to support the admittance of one amendment to article 2 of the UUA bylaws to the General Assembly ballot .

The nominating committee, led by Gary Lawrence, has identified strong leaders for the coming year. It is well rounded and includes many young members of the church, strengthening the bridge to the future of the church. We are very grateful for the church members who have agreed to serve in these leadership positions.

Respectfully submitted Spitty Tata, President

# Mission, Vision, & Ends

## Vision

A loving congregation that connects with ourselves, one another, and the larger community.

## Mission

We care for ourselves, each other, and our neighbors while taking risks acting for justice. We are continuously building an inclusive, empowered, anti-oppressive, anti-racist, multicultural congregation. Our connections foster radical love for ourselves and others.

## Ends

Each person in the congregation is invited into a spiritual life. We are inspired and equipped to share radical love<sup>1</sup> through our daily lives and authentic conversations.<sup>2</sup>

Strategy 1A: Our leaders and staff develop worship and programs to enrich our spiritual lives.

1A1: Creative, multicultural, loving worship and music. Worship invites spiritual living, (re)connects people, and gives people energy and hope for living their lives. We continue to use multi-platform worship with online and in-person options. High quality and diverse guest preachers and speakers and guest musicians are added to our current offerings. The choir is a source of joy, connection, and is an inclusive and increasingly diverse group. We give more care to make the space beautiful and joyful, in connection with the theme.

Resources: Increase guest preacher budget by \$1000/year and guest musician budgets by \$2000 per year.

Ministers and Music Director focus on this area.

Timeline: Begin with 22-23 church year. Recruit musicians and guest preachers who will be regular guests. By 24-25, we will have regular roster of guests and worship will be noticeably more multicultural than it is today. During Rev. Matthew's next sabbatical (probably 24-25), ensure that a large percentage of the guest preachers are Black, Indigenous, and/or People of Color.

1A2: Heart-centered, caring small group ministry and adult learning, all of which equip people to share radical love in their daily lives, and to have authentic conversations. Support the Touchstones/Covenant Groups, and other small groups.<sup>3</sup> Support the Sauk Valley Group<sup>4</sup>. Offer creative and engaging adult programs, and programs that grow intercultural competencies<sup>5</sup> and build relationships. Share opportunities in our community partners and with

---

<sup>1</sup> See <https://www.betterhelp.com/advice/love/what-is-radical-love/> for a good explanation. There, it says "The term *radical* is used to describe something that is whole, complete, and thorough. A radical change, for instance, is one that completely overhauls existing standards. Radical love, then, is love that is not fractured in its expression or experience. In more common terms, radical love is unconditional love." "Radical love is the kind of love that can be felt for all of humankind; for everything on earth, alive or not, seeing everyone and everything as interconnected, and vibrant."

<sup>2</sup> Authentic conversations are meaningful, honest, and deep conversations characterized by respect, curiosity, and growth. People talk about their fears and hopes, sources of meaning, and learn about themselves and others through these kinds of conversations.

<sup>3</sup> Includes ramblers, India House, Pickleball, CUUPS, and similar groups.

<sup>4</sup> UU's in Dixon, Oregon, Leaf River, and nearby communities. They gather monthly for a theme conversation and meal, and have sponsored an Afghan Refugee family.

<sup>5</sup> Intercultural Competency and Cultural Humility. Competency here means knowledge about your own cultural patterns and that of others, and the skills to navigate cross-cultural situations well. Humility means knowing that we do not fully understand

UU organizations, especially for people with marginalized identities.

Resources: Current support for Assistant Minister, Theme-Based Ministry (Touchstone or Soul Matters) Subscription, should be sufficient. Look at partnerships with Womanspace, art groups, and others.

Timeline: 22-23: Enliven existing groups, start new ones, and begin at least one partnership with arts/spirituality organization. Regular support for Sauk Valley Group.

23-24: Census of members; goal: at least 100 members total in a variety of small groups. Support creation of new groups/programs where there is interest.

24-25: Create second partnership with arts/spirituality organization.

1A3: Religious Education for children and youth, which supports and engages caregivers and families, demonstrates and encourages radical love, and develops UU spiritual life and values. Building on our strengths in nature-based learning, sexuality education, and justice work – especially including antiracism, anti-oppression and multicultural work--, design and execute an effective and volunteer-efficient plan.

Resources: Consider stipends and partnerships to supplement volunteers and staff. Budget for 3-month sabbatical (not necessarily all at once) for Lindsay Trank (\$5000, saving 2500 a year in 22-23 and allocating 2500 in 23-24).

Timeline: 22-23: Design and implement a plan, in consultation with caregivers, children, youth, and other members of the congregation, to offer religious education given current habits, constraints, and opportunities. Matthew, Lindsay, and Lauren to lead; also to recruit through this process a team to support RE.

23-24: Implement this plan. Manage Lindsay's sabbatical.

24-25: Adjust, improve, and implement the plan.

1A4: Create a family camp/conference weekend for regional Unitarian Universalists. We have attempted to promote existing camps, but they are too far away/too long. We will create a weekend camp at a retreat center in Southern Wisconsin or Northern Illinois and invite Unitarian Universalist families from around the region to attend. In the design and program we will be sure to center multicultural families.

Resources: Staff time, and a planning team from the congregation to get started. Though the camp should be self-sufficient, we will want a scholarship fund (which could be the Minister's Discretionary Fund).

Timeline: 22-23. Recruit team, choose location and days, advertise.

23-24: Hold first gathering. Learn from and build on experience.

24-25: Hold second gathering.

Strategy 1B: We connect more people to worship and programs.

1B1: We use key tools to spread the word about activities, events, and our mission within the church and in the wider world. We use social platforms, email, texts, and postal mailings to inform our folks and others about what we are up to and how to get involved, with a focus on our anti-racism, anti-oppression, and multicultural (ARAOMC) programs and outreach to diverse populations.

Resources: Staff time, and a small team of volunteers to make suggestions. Small ad budget for social (already in the budget).

Timeline: Ongoing, with regular review.

1B2: Members enthusiastically invite others to participate in the church. Members are trained and encouraged to invite others to participate – both existing participants to get more involved, and potential newcomers to come for the first time. These invitations will be culturally competent/humble.

Resources: Existing staff time.

Timeline: Ongoing. Hold at least 3 "Bring a Friend" Sundays/year. Write and preach about having a culture of invitation and outreach.

---

another person's culture(s) and being curious, non-judgmental, and open. Key to both concepts is recognizing that the white, middle-class, Midwest culture is one among many, and not the "default normal."

1B3: Engage more people to participate in small group ministry. Start new groups at least 2x/year. Advertise openings and the opportunity to start interest-based groups. Include/support/center participation of Black, Indigenous, and other members and friends of Color.

Resources: Existing staff time. New facilitators.

Timeline: Ongoing, with big push in fall 2022.

1B4: Hold 2x/annual "Engagement Fair" to encourage joining teams/committees. Teams should use resources from 1C2 to ensure what their work is aligned with our ARAOMC goals.

Resources: Some staff time, leaders to staff tables.

Timeline: Start spring 2022, and continue with October / March? each year.

Strategy 1C: Lay leaders and members are inspired and equipped to lead these programs.

1C1: Training and support for small groups leaders. Assistant minister offers regular support and training to leaders of Touchstones/Covenant groups and other small group ministry programs, and interest-based groups. Intercultural competency/humility and anti-racist leadership is included in this support.

Resources: Existing staff time.

Timeline: Ongoing. Some gatherings, and often one-to-one coaching.

1C2: Share best practices for team and committee leaders, especially about how to welcome and include and to bring anti-racist, multicultural practices into their work. Staff and Board liaisons work with their teams and committees to share these practices and monitor progress, with more direct coaching as needed.

Resources: Existing staff time. Commitment from team and committee leaders.

Timeline: Spring 22: Share best practices with leaders.

Fall 22: Make assessment of each team and committee, with a plan to improve the team's operations.

Follow through on plan.

Reassess each November.

1C3: Substantial focus on recruiting and supporting volunteers for religious education for children and youth. The RE staff and the Ministers will encourage, support, recruit, and assist in this work. We'll consider stipends as needed. Volunteers will be equipped to put our ARAOMC goals into practice.

Resources: Existing staff time. Potential stipends.

Timeline: Beginning spring '22 and ongoing. We want to see a highly robust roster of reliable volunteers by fall '22.

1C4: Encourage participation in UUA programs for leadership development. UUA programs now always include an ARAOMC lens. The Denominational Affairs Coordinator and the Senior Minister will share leadership development opportunities with leaders in the church. Scholarships provided from Minister's Discretionary Fund as needed.

Resources: Existing, including continuing to be Fair Share to the UUA.

Timeline: Ongoing.

End #2: In our interdependent covenantal congregation, our church is nurtured by our members and our members are nurtured by our church.

Strategy 2A: Our Members are Nurtured by our church

2A1: The caring team provides supportive, loving, culturally-competent, and appropriate lay pastoral care to members and friends of the church. They are well-trained and equipped for this ministry.

Resources: Assistant Minister time.

Timeline: Ongoing. Annual trainings offered by Assistant Minister.

2A2: We care for, connect, and enrich the lives of our families with children (including parents, grandparents, and more). We have social gatherings, resources to support caregivers in their role as religious educators, and offer pastoral and spiritual support to families, especially those with very young children who have experienced so much disruption due to COVID-19. This ministry embodies our ARAOMC commitments.

Resources: Time for RE Staff and ministers, connection with UUA resources, volunteer time to lead social gatherings.

Timeline: Ongoing, and included in RE plan noted above. Restart social gatherings as soon as it is safe to do so.

2A3: We have strong and theologically-grounded safety and well-being policies, and enforce them. This includes policies to support public health, child safety, anti-harassment, right relations, ecological sustainability and anti-racism, disability justice and accessibility, and fair compensation.

Resources: UUA examples, Board time, staff time.

Timeline: Board task force created in '22 to examine, revise, and create policies related to safety and well-being.

2A4: We grow and strengthen our practices and culture of belonging and inclusion as part of our work of becoming a more multicultural, multiracial, and beloved community. This includes genuine accessibility for disabled people, intercultural competency and cultural humility, being a vital Welcoming Congregation, and working for justice, equity, and inclusion in the congregation as well as in the world.

Resources: Ministers, lay-leaders

Timeline: Spring '22: Transform Membership Team into Inclusion Team, which includes AIM (accessibility in ministry), Welcoming (GLBTQ), and BIPOC (Black, Indigenous, and People of Color) focus. Review progress and next steps. At least 2x/year, ministers provide or bring in others to grow cultural competency/humility. Create and conduct annual assessment.

2A5: We provide a beautiful and well-cared for physical place which nurtures the diverse people who come to the church and use its indoor and outdoor space. We use our property in ways that move us toward being net-zero for carbon and methane emissions, which are accessible, which support economic and racial justice, and which support the rental income of the church.

Resources: Minister, Office Manager, Members. Income from permanent funds, including some of expected Evelyn and Stuart Johnson Bequest.

Timeline: Spring '22: Research on net-zero gap. Planning begins.

Agreement with Spectrum on long-term land/property use.

Fall 22: Begin implementation. If campaign needed, plan for raising funds. Consider need for staff to support volunteers.

2A6: Staff and lay leaders work to rebuild and build anew vital community and participation in a pandemic/post-pandemic world. We reach out to those who have not yet returned, connect with those seeking community, rebuild social connections, and address the trauma, fear, and longings that people are experiencing.

Resources: Staff and lay leadership focus on time, mailings, outreach, etc. Consulting with leadership from UUA or UU resources.

Timeline: Beginning spring 2022 and continuing for years to come. Begin mailings to congregation. Make invitational phone calls in Summer/Fall. Advertise safety measures.

Strategy 2B: Our Church is Nurtured by our members

2B1: We cultivate a robust, multicultural culture of lay ministry, volunteering and leadership. We continue to train and support leaders, through the Harvest the Power UU leadership development curriculum, and one-on-one coaching, and encouraging volunteerism (see Engagement Fair and RE recruitment, above). We celebrate volunteers and leaders.

Resources: Staff time to lead programs and support. The time and energy of members who volunteer and lead.

Timeline: Ongoing. Plan for Harvest the Power in 23-24.

2B2: Members offer their generous financial support to the church, through annual giving, legacy giving, and



fundraisers. An ongoing Generosity Team helps plan the annual campaign, connects with newcomers about giving, and follows up with non-giving members. We talk about giving in culturally competent ways. We regularly promote legacy giving and thank our legacy givers. We run a fun and successful Auction.

Resources: Volunteers on Generosity Team. Minister and Office Manager time to support campaigns. Volunteers to run Auction, Office Manager time to support.

Timeline: Ongoing.

2B3: Financial, Building, and Governance leaders take steps to increase, secure, and support non-pledge income which also advances our values, including the Woodsong Nature School, rental income, and the ethical management of our permanent funds. Ethical management includes ARAOMC goals. We seize opportunities to advance our values while funding our mission. Connects with 2A5 above.

Resources: Budget for Woodsong staff and supplies, building utilities and upkeep, time of finance, investment, board, building and grounds, and staff.

Timeline: Ongoing. For 22-23 year and ongoing, increase support for Woodsong staff (including vacation/sick coverage). See if we can come to a long-term agreement with Spectrum School (they have renewed through June 2023).

End 3: Accountable to our faith, we act to foster a world of understanding, equity, repair, and solidarity.

Strategy 3A: We inspire and equip each other to act in faithful ways for justice in their personal, volunteer, and/or professional lives.

3A1: We offer strong training for cultural competency/humility, anti-racism/anti-oppression, and faith-based justice making as well as resources to our members and friends to resource putting their faith in action (see also, 2A4). We create ways to hold ourselves accountable to our values and expectations for covenantal behavior while doing this work.

Resources: Staff time, guest presenters (some funds).

Timeline: At least 2x/year, if not more.

3A2: We share clearly, often, and effectively about opportunities to get involved in justice ministries, especially ministries that further our ARAOMC work. This sharing includes testimonials, revamp of website section on this, event invitations, one-to-one outreach, pulpit announcements, and social media sharing.

Resources: Attention from staff and Faith in Action leaders.

Timeline: Ongoing.

3A3: We hold a "Nourish + Sustain Circle" to support those who are doing front-line justice and mercy work. This circle provides pastoral supporting, faith grounding, ARAOMC coaching and networking for those doing this work in our wider community.

Resources: Senior Minister time.

Timeline: Begin in late spring 2022.

Strategy 3B: In collaboration with community partners, organized teams in the congregation and the ministers of the church expand and nurture the beloved community.

3B1: We successfully implement the new Faith in Action plan, creating effective "cluster teams" for ecojustice, sexuality and gender justice and racial and economic justice. These cluster teams have strong, inclusive leaders grounded in faith, and organize effective action efforts in which engage many church members and our partner organizations.

Resources: Staff and volunteer time.

Timeline: Recruit in spring 2022 and begin meetings. Ongoing support and training. Have at least one major

action per year in 22-23, per cluster, and two in 23-24.

3B2: As part of our new Faith in Action plan, we create an Organizing Crew which will work with our cluster teams and with both Rockford Urban Ministries and the Unitarian Universalist Advocacy Network of Illinois to advance campaigns for faith-based justice.

Resources: Support for Rockford Urban Ministries and the Unitarian Universalist Advocacy Network of Illinois, partially with Philon bequest.

Timeline: Recruit in spring 2022, offering yearly trainings, support at least 5 campaigns in 22-23 and 8 in 23-24.

3B3: The Senior Minister engages strategic efforts to advance our values. Currently, and for the foreseeable future, this is as co-leader of the Ready to Learn Team<sup>6</sup>, working to ensure that every young child has a real opportunity to flourish and be loved in our wider community.

Resources: Senior Minister time.

Timeline: Ongoing.

---

<sup>6</sup> See <https://alignmentrockford.com/ready-to-learn/>. Ready to Learn is a community collaboration to improve outcomes for young children in Rockford.

# Senior Minister Rev. Dr. Matthew Johnson Report

It is the end of my sixteenth year with you as your Senior Minister. It's hard to believe. We have been through much together in this time.

This year we have emerged much from our covid year and things are really happening. Especially since the New Year, we have seen an influx of visitors and newcomers, including those with children. Our K and Under room is hopping, youth group is connecting, groups are meeting and good things are popping up. It feels like the energy is returning, and folks are deciding that church really does matter to them. We had a fantastic stewardship campaign – and I want to thank the Board, the Generosity Team, and the Finance Team, and all of you, for making that happen. I hope you feel the momentum and the energy.

A lot of the credit for this goes to the staff. I hope you will take the time to thank them. Rev. Joyce Palmer, just finishing her third year with us as our half-time Assistant Minister, continues to do great ministry in the areas of membership, caring, and adult faith development. Autumn Powell, our office manager, has taken on increasing responsibility and authority this year, especially with finances and data. Lauren Smith and Lindsay Trank, our assistant DRE and DRE, respectively – as well as Woodsong Co-Directors – have rebuilt a thriving RE program while continuing to need more volunteers, managed the Woodsong Nature School (which continues to have a long wait-list) and contributed to the life of the church overall in countless ways. And Tim Anderson continues to lead and make beautiful music and lead our choir faithfully and with excellence. These fine people are a pleasure to work with, and I hope you know how lucky you are to have them all on the team.

I preached 34 sermons this year – exactly the same number as last year. I went to many meetings, both in person and on Zoom. I made a host of pastoral visits. I serve on one national UUA committee and continue to mentor a new minister. I've enjoyed very much my service as a Good Officer for Call and Contract for the UU Minister's Association – advising colleagues who are beginning or ending ministries on their letters of agreement or difficult leavings. I served on the Alignment Rockford Operating Board, one of their committees, and have joined some housing-related teams as I grow interested in this issue as a key justice issue.

I performed 6 memorial services or committals this year: for both Lola and Gus Gustafson, a delayed simple ceremony for Sally Trefz, and services for Louise Mayhall, Marge Eliot, and Jan Scott. I performed two weddings, for Jen and Deb Rose and for a non-member couple, Mandy and Alicia.

A year ago, I made goals for this year. They, *and my progress towards them*, were:

1. Heartfelt, engaging worship. I want to continue our movement toward worship that engages the whole person, celebrates our diversity, and changes lives. Working with Rev. Joyce, Tim, Lindsay, our worship associates, and our guest preachers and musicians, we will push ourselves to bring more heart-centered and body-inclusive elements to worship.

This continues to be a work in progress. I've named this goal a few years and keep pushing for it. I think we've done a few things in this direction, especially with some visual additions such as short videos and the chancel displays. I have tried in the content of my preaching to lean into soul-work and make space for magic. The guests we had this year were very well received and offered some of this depth. And I work with Tim to bring more contemporary and heart-centered music. But I think there's more work to do here, and I hope to continue to make movement in this area.

2. Faith in Action. We will go deeper with our issue/action teams, leverage our power and connections to do more organizing, collaborate more with key partners including the LIAM Foundation, Sustain Rockford, Eliminate Racism 815, and Rockford Urban Ministries, offer more opportunities for service and connection, support mutual aid, grow cultural humility and anti-racism skills, and empower and support our leaders in this area. This includes working with our UUANI Congregational Catalyst (Allyson Rosemore) and with RUM to do a strong listening campaign and focus on engagement.

Our Faith in Action teams are doing good work and our new model is becoming more stable. The Racial and Economic Justice Team is very much clocking along in their work and partnerships. We did some cross-team work on housing and made some good connections. The Sex and Gender Justice team is now coalescing and there's good energy for our work with our primary partners – LIAM Foundation and Winnebago County Citizens for Choice. The EcoJustice Team has continued to operate the Little Free Pantry, which is a great ministry in our community. It is used regularly. A huge thank you to Dawn Nimmo who took over this work and is making it happen. Allyson Rosemore did excellent work as our congregational catalyst and team-leader, especially in encouraging our Faith in Action work to be grounded in our theology and spiritual hunger. They moved away from this role this spring, but I'm grateful for their critical work in getting it stable and strong for what's next.

3. Lay Leadership Development. I will lead the Harvest the Power leadership program, and The Shared Pulpit, a worship leadership program, to train and support more leaders. We'll do more to encourage, train, and connect leaders and to help teams and committees actualize and be accountable to our goals around belonging, inclusion, and anti-oppression.

We used the Centered Leadership program, which is the updated Harvest the Power program of leadership development and had a wonderful group of about a dozen church leaders who completed the program. They are already in leadership in the church and moving into more. We continue to work to support leaders and participation, and will be doing more in this area. I decided not to do the Shared Pulpit program at this time, because I did not sense that the congregation or I had the capacity. We did get actual team members for all the team areas for the church, and will be working on strengthening their work. We held a leaders happy-hour where we thanked our leaders and got great feedback about the church and our programs.

4. Outreach, Evangelism, and Growth. People are hungry for liberal and liberating spiritual community. We need to reach them, connect them, and engage them. I will work with our staff and volunteers to do more outreach to potential visitors, to grow our capacity to make invitations, authentically welcome people, and turn visitors into engaged and active members whose lives are better for being part of the church.

There's no doubt this was the greatest area of success this year. Collaborating closely with Rev. Joyce and the rest of the staff, we have prioritized integrating new folks into the life of the church. We changed up our format for the membership process, which is making it much easier for folks to learn about the church and decide to join. We're spending a lot of time to track folks along the process and encourage their engagement, and it's paying off. Do keep inviting people you know to explore the church – it works.

Overall, I would count it a very strong year where major progress was made and the church entered a time of more vitality, generosity, and engagement.

For the 2024-2025, my goals are:

1. Manage and complete a restoring and successful sabbatical. I will be on sabbatical for a total of 16 weeks in the coming year. In addition to treating that time with intention and making it useful for ministry, I will work with staff, leaders, and guest preachers to ensure that quality and stable ministry happens while I am away. I hope that the congregation will take the time to grow its strength and lay ministry as well.
2. Support the mission, vision, and ends work that the board will lead. It is time to revisit and reaffirm our claims about who we are and who we wish to be. Rev. Allison Farnum, who will be our main sabbatical preacher, will work closely with the board to lead this work. I will provide some support -including onboarding a Change Team this summer, helping the Board get ready, and following through with strategies and tactics in the Spring – to this work.
3. Strengthen our teams and committees. Working with staff and lay leaders, I'll work to firm up, integrate, and empower our teams and committees so that they effectively do their ministry.
4. New member integration. I'll work with Rev. Joyce to continue to move folks along toward engaged and active membership, reach out to the wider region about who we are, and celebrate and connect those who join our community.

I'm looking forward to the year ahead – both my sabbatical time and our shared ministry together.

In faith,  
Matthew

# Director of Religious Education Annual Report

## Religious Education

---

Our Religious Education program is thriving! We continue to structure our Religious Education programming around the Soul Matters themes that are also used for worship and small groups. Whenever possible, Religious Education classes are held outside to soak up the beauty of the church grounds.

Children and youth are divided into four age ranges: K & Under, Grade 1-3, Grade 4-6, and Grade 7-12 (youth group) with one staff person per group. Religious Educators provide developmentally appropriate, theme-based activities for the children and youth in attendance. The Grade K & Under group focuses on values and the principles of the faith, and The Grade 1-3 group focuses on notable Unitarian Universalists. The Grade 4-6 group is beginning to learn about world religions. Youth group completed some of the Coming of Age curriculum as well as some of the Neighboring Faiths curriculum and wowed the congregation with the youth-led service that they planned in January. The youth of the church also participated in the Our Whole Lives Sexuality Education curriculum that began in October and continued through May and was facilitated by Lauren Smith and Amy Brandon.

The Religious Education program has gained a handful of new volunteers, which makes the challenge of scheduling and meeting our Children and Youth Protection Policy a bit easier, but, as always, we could use more reliable volunteers to help out once a month in the Religious Education program.

This year included the formation of the Religious Education Team which includes Verónica Soria Martinez, Kendra Asbury, and Art Beneditz. The team meets regularly to discuss how to support the Religious Education program, plan events that provide an opportunity for fellowship with families and encourage families in the community to visit the church.

Finally, Lindsay coordinated with our senior minister, Matthew Johnson, to select and read the story for all ages throughout the year, offer a backpack blessing, and child dedication, put on the Christmas pageant, welcome new members to the congregation, and do long-range planning for the Religious Education program to align with our updated mission, vision, and strategic plan.

## Woodsong Nature School

---

This year we have continued to offer programming 5 mornings per week, which allows parents to choose from 2, 3, or 5 days per week. We continued to have strong enrollment each month with complete enrollment of 16 children all year. Our Summer 2024 session is full, as is the 2024-25 school year. We also have a lengthy waitlist. We've done very little advertising this year since it seems as though word of mouth has been the most effective means of marketing.

We are seeing a number of Woodsong families visit church on Sundays, as well as existing church members sending their children to Woodsong. We have a great relationship with Spectrum School, and many families with more than one child take advantage of the opportunity to have all their children go to school in the same building. It's also been great to see our program become more accessible to more families, as our 2-day schedule option is very affordable.

We underwent our second annual renewal of our DCFS license, which went smoothly. We have recruited more substitute teachers to ensure that we have a robust roster of qualified subs to fill in during sick days, vacation time, and maternity leave.

We look forward to the opportunity to continue offering this program and hopefully expand the ages that we are able to serve. It brings us such joy to spend our days out in nature with curious two and three-year-olds and provide much-needed support to parents of young children in our community!

**In Gratitude** \_\_\_\_\_

We would like to thank the following people for their time and commitment to volunteer: Aida Rosemore, Kim Lowman Vollmer, Lisa Volkman, Katy Conrad, Lillie Christensen.

*Respectfully Submitted by Lindsay Trank & Lauren Smith*

# Music Director's Report

I am writing this report in anticipation of completing my twentieth year as your Music Director. As I have often told friends and colleagues over the years, it is a rare thing for church musicians to be able to work for the church that they would choose to attend if they weren't working in church music. I have always felt and continue to feel particularly fortunate to serve this religious community in my capacity as Music Director, and I hope to make it a few more years with you before I retire from church music altogether.

The music program this past year at the church was far from typical in large part because of the unexpected death of my partner, Javier, in November. I am very appreciative of the ample bereavement leave granted to me by the church to allow me the necessary time to process the loss and attend to important matters in Costa Rica. I also am profoundly thankful to the various individuals who stepped in to cover for me during my absence by playing for worship and working with the **Unicantors**, especially **Jesse Parker**, **David Lantz**, **Timm Adams**, and **Lisa Redd**. Their gifts of time and talent were and continue to be a blessing both to me and to our congregation.

Because of my absence while on leave, we made the difficult decision to cancel our plans for the December Music Sunday. We did, however, celebrate Music Sunday in May by presenting the *Missa Brevis Pro Serveto: A Mass for Unitarian Universalists*. The text of the mass, written in Latin by Rev. Frances Dearman and set to music by Canadian composer Tobin Stokes, offers a new take on what arguably is one of the most traditional forms in liturgical music, the short form of the Mass. The **Unicantors** were small in number, but mighty in voice, and were joined by a number of guest musicians: cellist **Michael Beert**, clarinetist **Mark Bond**, violinist **Rachel Handlin**, French horn player **Bob Hessel**, flutist **Jacques Saint-Cyr**, and percussionist **Scott Stich**. The work was received enthusiastically by the congregation, and by all accounts, the service was a great success.

While in large part we are no longer dealing with the complications presented to us and to all music makers during the COVID pandemic, our new normal continues to pose certain challenges as we work together to provide music for worship in a way that takes into consideration the needs of the most vulnerable among us. While masking is optional during worship services for both the congregation and the choir, we continue to mask during rehearsals, erring on the side of caution given the amount of time involving singing in close proximity to one another and the continuous resurgence of COVID infections too often involving novel strains of the virus. Additionally, we struggle somewhat with the cultural phenomenon seen widely in our society that since the pandemic has manifested in a reluctance to make commitments, especially long-standing commitments, to participate in opportunities for engagement.

We were fortunate to welcome several musical guests during the past program year whose talents enriched our worship greatly. Oboist and good friend **Erin Mashinter** joined us for our Homecoming service in September. UU songleader **Amanda Thomas** led us in worship for our service at the end of September, and UU troubadour and percussionist **Matt Meyer** joined us at the end of March to lead us in worship.



In closing, I wish, as always, to thank the congregation for the support provided for our music program. We continue to work to diversify the music we present in worship in ways that both respect the integrity of that music and capitalize on the particular strengths of our program. I truly appreciate serving as Music Director for a community that values music as an integral part of its worship experience.

Respectfully submitted,

Tim Anderson

Music Director

## **Assistant Minister Rev. Joyce Palmer Report**

As I reflect on this past year serving alongside this congregation, I'm grateful for the ways we have lived our commitment to be a loving congregation that connects with ourselves, one another, and the larger community. We have worked together to strengthen the program areas of membership, caring, and adult programs. In this report, I will outline some of the activities from each of these program areas from the past year and look forward to setting goals for next year.

### **Membership**

We started the year with a training workshop on Multicultural Welcome and Multicultural Competence, meaning we reflected on how we can provide a nurturing religious community where people of all races, ethnicities, and cultures see their cultural identities respected and affirmed in all of congregational life. We thought together about how to create a fully inclusive community. There was also anti-racism training led by members committed to growing their awareness and skills to have respectful interracial and intercultural encounters. The Multicultural Ministry Team offered the Process Observer tool as a way for congregational teams to become more aware of power and privilege in team meetings.

This year we also implemented a rotation of congregational groups leading Sunday morning Hospitality. Thank you to the Board, Racial and Economic Justice Team, and Caring Team for signing up for regular Sunday volunteer dates. Thank you to our many members who regularly volunteer on Sunday morning and to those willing to jump in to assist as needed.

Our path to membership offerings changed this year to a monthly rotation of sessions led by church staff. The 30-minute sessions provide newcomers with an overview of our history, theology, religious education, social justice, and programs. We have welcomed 11 new members at this point in the church year. We hope to welcome at least 6 new members at our upcoming New Member Ceremony.

### **Caring**

The Caring Team continues to offer support to members and friends during times of need. We served meals, provided rides to appointments, and offered a listening and compassionate ear to many this year. Rich McKnight and I led a multi-session Grief Support Group. Our team supported and led the Blue Christmas Service which continues to grow in attendance. This year following the suggestion by Rev. Matthew, we started the Caring Connections Table. Once a month we have a table set up in Deale Hall for members and friends to send a note of encouragement, celebration, or support to anyone in the congregation. It is a wonderful way to express our love and support to one another.

### **Adult Programs**

We had new programs begin this year: Spiritual Direction led by Gloria Perez, Our Whole Lives Sexuality (OWL) for Adults led by Wendy Bennett and Leah Krippner, Non-violent Communication led by Lia Gima, Barb Basaj,

and Ellyn Ahmer, and Sunday Morning Meditation begins soon with Mario Caputo.

We offered a training session on the Prison Industrial Complex led by Rev. Allison Farnum from UU Prison Ministry of Illinois. We are in the process of beginning to hold a Solidarity Circle to provide support to a person recently released from prison. We have members of the congregation trained and willing to enter into this process.

We continued to offer 2 Wonderful Wednesday sessions each month. This year one of the sessions was organized and led by members of our Faith in Action Teams. I am grateful for the participation and partnership involved in planning these Wonderful Wednesday sessions. I enjoyed planning the following sessions Genealogy, Family2Family tutoring, Fascism, Virtual Dementia Tour, and others.

In the category of other duties, I enjoy working with our youth. We worked on creating a worship service led by the youth to share what is on their hearts and minds. The service was well received, and we hope to build on the experience to lead a service next year. We are currently planning a trip to Minneapolis, Tim Palmer and I will serve as Youth Advisors for the trip. We discussed the events leading up to George Floyd's murder and the aftermath. We'll visit with Black Lives of Unitarian Universalism Minnesota and George Floyd Square.

### **Professional Development**

I attended a course on Attachment-Focused Therapy. I participated in Finding Our Way Home conference for UU religious professional of color and I am a support for UU Advocacy Network of Illinois (UUANI) BIPOC Catalyst Support. UUANI has hired a young person of color to work on connecting with UUs of color in congregations in IL. I work with a group of UU leaders to support the work.

### **Community Work**

I have had to narrow my involvement in the community. I am working with Alignment Rockford on growing the access to reading material in our community with the hope of improving literacy levels of young children in our area. I am on the Laundry Cares Team, working to install book nooks in places where children and their families gather. We have placed nooks in barber shops, community centers, and laundromats.

Thank you for your continued support.

Respectfully submitted,  
Rev. Joyce Palmer

## Combined Treasurer's and Finance Committee Annual Report 2023-2024

The Finance Committee monitors the financial status of the church and helps to maintain its sound condition by its activities and recommendations to the Board of Trustees.

The Treasurer is the financial officer of the church and sits on the Board of Trustees as well as the Finance Committee and the Investment Committee.

Summary of activities during the current year:

- Reviewed the church's income and expenses monthly, as well as the status of the fundraising activities, service contracts, memorials, and other financial matters.
- As of May, the church finances for the year are very much in control. Expenses and Income are running according to plan and project to end the year within about 1 % of the budget.
- The Balance Sheet is healthy, with balances exceeding \$19,000 in both the Deficit Reserve, and the Building Maintenance Reserve. The Legacy Funds have a balance of \$1,872,000, which allows for an annual income distribution of \$92,000 to help special building projects, fund outreach work, and maintain daily operations.
- It is a tribute to the generosity of church members that pledge income is meeting the budget and maintaining a robust church program.
- Alexis Simmons and Katie Kerr chaired an Octoberfest party and church auction that raised a much needed \$9,316.
- Tightened up the fiduciary controls on church accounts. The finance committee reviews all church expenditures and periodically verifies the reconciliation of the checking account bank statement versus the church accounting statements. We've also appointed Steve Hall to audit the investment accounts versus the church accounting. We also added second signature security onto the investment accounts.
- Requoted church insurance policies. We were able to slightly decrease costs while significantly increasing the building coverage limits, and also the church liability coverage.
- Requoted the church gas contract for a savings.
- Resumed paying for an annual Rockford Promise scholarship.
- With the minister, built a balanced annual budget for fiscal year 2024-2025.

Committee Members: Steve Lewis (Chair), Sue Molyneaux, Teresa Wilmot (Investment Panel Chair), Steve Blomgren (Treasurer), Pat Lewis (Chair Memorials & Special Gifts), Keith Kruchten, Dave Zinn.

Respectfully submitted, Steve Lewis, Finance Chair and Steve Blomgren, Treasurer

<b>Balance Sheet</b>				
		<b>Jun-23</b>	<b>Apr-24</b>	
<b>Assets</b>				
	Operating Fund	28,777	20,272	
	Memorials Fund	9,472	11,048	
	Maintenance Reserve	2,280	20,963	
	Deficit Reserve	19,946	18,946	
	In / Out Special accounts	54,140	40,072	
	Legacy Fund - Justice Outreach	161,540	179,252	
	Legacy Fund - Building	663,234	1,241,861	
	Legacy Fund - Church Program	403,634	450,828	
	<b>Total Assets (less Land &amp; Bldg)</b>	<b>1,343,023</b>	<b>1,983,242</b>	
<b>Income Statement</b>				
		<b>2023-24 Budget</b>	<b>Budget thru April</b>	<b>Actuals thru April</b>
<b>Income</b>				
	Stewardship Pledges	364,300	303,583	302,216
	Woodsong Tuitions	95,280	79,400	80,000
	Spectrum & Rentals	47,400	39,500	40,771
	Allocations from Legacy Funds	92,900	92,900	92,900
	Other	47,150	41,292	41,309
	<b>Total Incomes</b>	<b>647,030</b>	<b>556,675</b>	<b>557,196</b>
<b>Expenses</b>				
	Salaries	335,964	275,024	276,790
	Fringe Benefits	107,466	94,501	92,753
	Insurance	13,400	11,167	13,590
	Office Expense	20,200	16,833	17,698
	Building & Grounds	52,200	43,417	53,358
	UUA Dues	19,400	-	-
	Activities, R.E., and Outreach	98,400	87,500	91,601
	<b>Total Expenses</b>	<b>647,030</b>	<b>528,442</b>	<b>545,790</b>

# Committee Reports

## U.U. Church Building & Grounds Committee

Name of Committee: Building & Grounds Committee

Committee's purpose: The Building and Ground Committee plans, budgets for and executes maintenance and improvements to the Church property, building, furnishings, and equipment. It prepares recommendations for the Church Board and / or the Congregation, as appropriate, for major maintenance, significant, or Capital level improvements.

### Summary of committee's activities during the current year.

1. **July 2023** The JCI smoke & motion detector W/O was finally completed. Additional CCVT cameras were installed in the Narthex and Deale Hall. Conceptual drawings and cost estimates for the Atrium canopy were initiated. Research into an ADA ramp in the Sanctuary was begun. The EcoJustice Neighborhood Pantry project began.
2. **August 2023** Saavedra Group Architects (SGA) continued to develop drawings for construction and permitting prior to sending them to Bennett Construction for estimates. ADA ramp put on hold due to cost estimates. Hearing aid loop extension into the Choir loft was approved. Neighborhood Pantry project was proceeding.
3. **September 2023** The hearing aid loop was installed and tested. SGA forwarded canopy drawings to the City for review and approval. A site meeting with Bennett Construction was scheduled following the initial proposal approval by B&G, Finance Committee, and the Board.
4. **October 2023** A site meeting was conducted to compare the construction drawings with the existing construction. An additional handrail along the Floridium to the Dias was installed. Wildlife issues along the South fence and sidewalk were resolved.
5. **November 2023** The Annual inspections and tests have been completed, except for the elevator. Annual holiday tree installed.
6. **December 2023** No significant building or equipment issues. Bennett Construction has officially "Closed for business."
7. **January 2024** DPI Construction has taken over the contract for the construction of the entrance canopy. Their proposal is exactly the same as the previous Bennett Construction proposal and the Project Manager and majority of the construction work force are now DPI employees. Their Collective Bargaining Agreement has been verified. Holiday tree removed.
8. **February 2024** Canopy drawings still remain with the City of Rockford for approval. Permit finally issued Feb. 29, 2024. Additional HVAC issues with furnaces blower motors. Narthex roof leaks were inspected by McDermaid Roofing and repairs to the Narthex and Office roof areas were completed. Inspection of the original building siding determined that the siding has deteriorated and needs to be replaced.
9. **March 2024** Elevator inspection & test were completed. A meeting with representatives from LP-SmartSide / Diamond Kote, DPI Construction and B&G Committee members was held to evaluate the use of the Diamond Kote product that was used on the Office addition. Cost estimates for the siding replacement were being compiled for the material and construction costs to provide to the Long Range Planning Group.
10. **April 2024** A Capital Expense Meeting was held to review the major expense estimates for the siding replacement and possibly the parking lot repairs. The prairie area was successfully burned, with extraordinary, ongoing, brush removal and plans for 2025 replanting by Allen Penticoff and Kim Vollmer. Narthex entrance canopy construction began. Solicitations for the repair and repainting of the exterior windows of the Library, Narthex, and Deale Hall were requested. Memorial tree locations were identified.

11. **May 2024** The Atrium canopy construction is nearing completion with the main structure, electrical work finalized, with painting, roofing and final trim work yet to be done.

**Hopes for the coming church year:**

Continue with the identification and resolution of major building capital funding upgrades, and maintenance repair items, and Church facilities improvements as identified by the B&G Committee and others. (e,g Replacement of the original building siding, Sealing and re-striping of the parking lots, Repairs to the concrete sidewalk areas, Painting / restaining / repairs of the Library, Narthex and Deale Hall exterior windows).

Committee members (names):

Skip Abare, Jim Dehler, Clark Logemann, Allen Penticoff, Fred Stellema, Kim Vollmer.

Committee chair: D.J Schubert

# Library Committee

Committee Members: Mike Ullrich (chair), Kathy Young (secretary), Rhea Overley, Jan Dunham

This year we met monthly in the library on the fourth Sunday after the service and plan to continue for the foreseeable future. We bought some books this year as well as added some donated books to our collection. We also repaired books that needed it, created a new category called "Social Justice", updated our catalog, and created an online catalog of our materials. Special thanks to Autumn Powell for all she has done for us this year and in the past.

Mike Ullrich  
05/20/2024

# **Finance Committee Annual Report – 2022 – 2023**

Please see the combined Treasure & Finance Report on page 19

## **Memorials and Special Gifts**

*Committee's purpose:* To act as a sensitive liaison with families and/or donors in the selection of memorials that reflect the life and interests of the memorialized person(s) and are appropriate to the needs, priorities and décor of the church; and to review proposed donations to the church.

*Summary of committee's activities during the year:*

Since the Memorial Patio was completed and dedicated last summer, our year has been quiet.

Committee activities this year included the following expenditures of memorial funds:

- Approval of purchase of new camera equipment to enhance the church's broadcasts of Sunday services
- Approval of purchase of two new benches for the atrium.

We are currently preparing an order for additional brick engraving for the Memorial Patio. We are planning to complete these and have them placed this summer. Maintenance of the new patio remains an ongoing activity.

*Committee members 2023-24:* Francie Barnes, Mary Caskey, Jackie Dehler, Alice Enichen,  
Kay Hotchkiss, Pat Lewis, Ruth Little

Patricia Lewis, Chair



# Investment Panel

## Permanent Fund Allocations to 2023-24 Operating Budget

Approval of the 2023-2024 Permanent Fund Income Allocations	Teresa Wilmot
Building Fund	\$ 61,000
Program and Futures Fund	22,200
Justice Fund	8,800
<b>Total Allocations</b>	<b>\$ 92,000</b>

This year's "Legacy Fund" was increased 36% by the second installment of the bequest of Evelyn and Stuart Johnson. Their bequest benefited the Building Fund.

Overall, our investments earned about 5.4% between July 1, 2023, and April 30, 2024. The market has swung up and down, and April was a downer, but our strategy is long-term growth.

Major changes were made this fiscal year. We divested of Wells Fargo Advisors, our financial advisor for decades. The parent company, Wells Fargo Bank, has been disciplined repeatedly in the past several years for unethical and even illegal policies. We invest in socially responsible funds; we could no longer justify investing through a questionable company.

We maintained our investment in the UUCEF, the Unitarian Universalist Common Endowment Fund, whose investments are chosen to reflect our principals as well as being socially responsible. Through them, we support diversity, environmental issues, and economic equity.

We moved the Wells Fargo funds into Charles Schwab as a broker, not as an advisor. We no longer pay a percentage of our investment as advisor fees. We added several Calvert funds to balance our economic sectors, foreign and domestic funds, and equities vs fixed income. Most of our investments through Schwab are Calvert funds, all of which are socially responsible.

### Members:

Teresa Wilmot, chair  
Steve Blomgren  
Jim Dehler  
Steve Hall  
Ed Kuehl  
Steve Lewis  
Sue Molyneaux

# Denominational Affairs Committee

Committee's Purpose: The Denominational Affairs Committee informs the congregation about the larger denomination--the MidAmerica Region and the UUA--and provides feedback from the congregation to the UUA.

Summary of Committee's Activities During 2023-2024: Worked with the UUCEF, Unitarian Universalist Common Endowment Fund, as the Chair of our Investment Panel. Forwarded opportunities for training and cooperation between members and the MidAmerica Regional Staff. Served as a delegate to General Assembly in Pittsburgh, registering virtually.

I spent time and energy endeavoring to defeat a proposed business resolution that would restrict both the decisions of the UUCEF (Unitarian Universalist Common Endowment Fund) and appropriate a large amount of those funds for reparations not approved by the UUA Board. This overlaps my responsibility as chair of our Investment Panel. I spoke in both a mini-assembly prior to GA and in a discussion session prior to the vote at GA. The resolution was defeated.

The Rev. Dr. Sofia Betancourt was elected President, the first woman of color and first out queer person to be elected President of the UUA.

A motion to continue discussion of the proposed revision to Article II of the UUA Bylaws was passed with a 86.3% majority. The final election on this revision will take place at this year's General Assembly in June.

All three proposed AIW's (Action of Immediate Witness) passed: "Rise Up to Stop Cop City; "Organizing for Health Equity;" and "Protect the Dreamers, the Recipients of Deferred Action for Childhood Arrival (DACA) with a Pathway to Permanent Residence."

This year's GA is totally virtual, and I will again be a delegate. This year's theme is "Love Unites, Stories Ignite"

I attended the MidAmerica Region Assembly in April virtually, serving as a delegate.

Other Church Members and Friends Who Have Assisted the Committee:

Gloria Perez (Virtual Delegate to MidAmerica Assembly 2023 in Madison this April)

Li'm Blacker (Delegate to GA 2023 in Pittsburgh, PA last June)

Submitted by Teresa Wilmot

# Caring Team Annual Report

**Caring Team's Purpose** At the Unitarian Universalist Church, Rockford, the purpose of the Caring Team is to assist the congregation in its ministry to members, especially during times of major life changes; isolation because of age, mobility issues, or other factors; health problems, illness, and hospitalizations; and death of a family member or friend.

Please see the Assistant Minister's report for information about Caring Team activities.

## Membership Team

The Member Team transitioned to the Accessibility and Inclusion Team.

**Accessibility and Inclusion Team's Purpose** The AIM Team strives to welcome individuals with disabilities and their families into the congregation. The main purpose of the team is to keep track of the big picture of the congregation's welcome and accessibility, address issues of concern and possibly develop strategies to address these concerns.

Please see the Assistant Minister's report for information about AIM Team activities.

## Membership Information and Rites of Passage

### Weddings

Jen and Deb Rose, Rev. Dr. Matthew Johnson, Dec. 30, 2023

Mandy and Alicia, Rev. Dr. Matthew Johnson, Feb 9, 2023

### Memorials and Committals

Lola Gustafson, June 30th, 2023

Eugene "Gus" Gustafson, July 22nd, 2023

Sally Trefz, July 30, 2023

Louise Mayhall, Nov. 11, 2023

Marge Eliot, Nov. 27th, 2023

Jan Scott, Dec. 2nd, 2023

### New or Reactivated Members since June 2023

Katie Kerr

Dawn Nimmo

Paula Christensen

Barbara Kober

Jennifer Rose

Joey Stoyas

Kathren Conrad

Katie Linderman

Kay Ostberg

Kendra Asbury

Mario Caputo

# Religious Growth & Learning

Please see the Director of Religious Education Report

## Faith in Action Ministry

We reorganized our Faith in Action (aka Social Justice) ministry last year and have been working on living into this new model and vision. We are focused on three issue/action teams and are adding a "UU The Vote" team. In all this new work, the emphasis is on spiritually grounded partnerships and learning, acting, and organizing that brings people together and builds community. There is a Core Team that coordinates this work and does administrative work of this ministry.

### Sex and Gender Justice team

The Sex and Gender Justice team has new leadership this year and participated in the Rockford Pride parade. The team is currently led by Lia Gima and Jennifer Riley.

### Racial and Economic Justice team

On 4/3/24 we hosted a Wonderful Wednesday, "Being Unhoused: Some personal stories & resources" at the community room of The Inscape Collective.

This Wonderful Wednesday created a lot of energy within the team toward looking at and working with the issue of the unhoused people in Rockford. We partnered with the Eco Justice Team and the Sex and Gender Team to create this presentation.

On January 2024 we created a Wonderful Wednesday "Inscape Collective Tour", presenting the location and the work in the community which The Inscape Collective does. We learned about the relationships the Collective is establishing in the Midtown area.

In September, the Faith In Action teams began taking a moment during the offertory introduction of the worship service to share about our activities and our choices for Share the Plate. Our team started the rotation. We have added Black Lives of Unitarian Universalism Native American Awareness Council as partners whom we help support.

We continue to facilitate the Sermon Reflection discussion on the third Sunday of the month.

On March 9th several members of the team attended the workshop presented by Julica Hernandez de la Fuentes on Liberation and the UU Church.

We continue having a presence at the congregation's Activity Fair

We have supported the Eco Justice Team and the Sex and Gender Team in some of their work for example, the Forum on Racism and Gender and the presentation "Being Unhoused".

Respectfully submitted - Kathie Mattison and Gloria Perez

## **Eco-Justice Team**

In the past year, the Eco Justice Team has planned three Wonderful Wednesdays, including a neighborhood canvassing event in November, a local food panel that featured local snacks in March, and our final event, which will happen the first week of June and will highlight our church grounds. We have also made a new trail map of the grounds, completed restoration work on our grounds, hosted pantry pop-ups throughout the summer, and hosted a clothing swap in September. Thanks to a lumber donation from Schmeling, a grant from CFNIL, and generous support of time, talent and treasure from church members, the full Free Pantry shed was completed in fall 2023. The team showed resilience in the face of obstacles when dealing with an unhoused individual in the shed, which then led to more cross-team conversations about the state of the unhoused situation in Rockford. The pantry crew, led by Dawn Nimmo, continues to stock the pantry and will be hosting several pop-up events this summer which will include visits from the Rockford Public Library's Mobile Library. We plan on this pop-up series culminating in a celebration involving a live mural painting being painted on the pantry structure by a local artist (thanks again to a CNFIL grant) in September 2024. In the coming year, we also hope to keep the pantry steady, engage more members in the work, and recommit to our local partner organizations.

Submitted by Rebecca Beneditz

## **Music Team**

See Music Director Report.

# Annual Meeting Agenda

## Sunday, June 11, 2023 ♦ 11:05 a.m.

Meeting began at 11:10am

Judy Gustafson

Judy reviewed the Rules of Procedure for Congregational Meeting

1. The Chair will verify that a quorum has been reached, validating any actions taking at the meeting.
2. Only members may vote; friends may speak but not vote.
3. The Parliamentarian will advise the chair as necessary to enforce compliance with the church bylaws, the rules adopting to govern the meeting, and Robert's Rules of Order.
4. Rulings on procedure will be made by the chair, may be appealed by seconded motion, and may be overturned by simple majority.
5. Speakers will speak only to the motion under consideration.
6. The first speaker will speak in favor of the motion, with subsequent speakers alternating between against and in favor of the motion. Each speaker will be limited to three minutes.
7. At any time, any member may call the question. At that time, the chair will inquire if there is any further discussion. If there is further discussion, it will precede.
8. At any time, any member may move the previous question, which is a motion to close debate. If two thirds of those present support the moving of the previous question, the motion under consideration will immediately be voted upon without further debate.
9. Voting will be done by voice vote. For some meetings, the Board may determine that the voting may be done by secret ballot. If a verification is requested, voting will be by showing of hands holding membership verification cards. If a member leaves the meeting before adjournment, the member must return the membership verification card to the membership committee table.
10. The meeting will be conducted in a civil manner.

Approval of Minutes of June 12, 2022, Annual Meeting (posted online in the Annual Report)

Motion to approve: Bob Babcock

2<sup>nd</sup>: Peggy Menze

Motion Approved

Annual Report for 2022-2023 is available online and in the church office upon request.

Election of Officers

Linda Johnson

President	Spitty Tata (1 year term)
Vice President	Matt Menze (1 year term)
Clerk	Kim Lowman Vollmer (1 year term)
Treasurer	Steve Blomgren (1 year term)
Trustee	Clark Logemann (3 year term)
Trustee	Rebecca Beneditz (2 year unexpired term)

Note: Sara Greer will continue to serve as Trustee.

Election of Nominating Panel members:

Linda Johnson

Judy Gustafson (2 year term) Aida Rosemore (2 year term) Gary Lawrence (2 year term)

Motion to approve: Bob Babcock

2<sup>nd</sup> Leslie Mayhan

Motion Approved

Note: Judy Johnson, Dan Fellars, and Amanda Tapfield will continue to serve for a second year on the Nominating Panel.

Election of Covenant and Safety Team Linda Johnson

Wendy Bennett (3 year term) Matt Menze (2 year term) Amy Brandon (1 year term)

Motion Approved: Kim Lowman Vollmer

2<sup>nd</sup> Spitty Tata

Motion Approved

Approval of the 2023-2024 Permanent Fund Income Allocations

Steve Blomgren

Programs and Growth	\$22,000
Facility and Equipment	\$26,100
Capital Reserve*	\$36,000
Outreach (Justice)	\$8,800
Totals	\$92,900

*\*In approving the allocation of these funds, the congregation authorizes the Board to approve expenditures of the Capital Maintenance Reserve Fund, upon the recommendation of the Building and Grounds and Finance Committees, without additional approval from the congregation.*  
(Steve read aloud)

Motion Approve: Kim Lowman Vollmer

2<sup>nd</sup> Carolyn Baily

Motion approved

Approval of 2023-2024 Annual Operating Budget

Steve Blomgren

See page 5 for additional discussion, and motion to approve.

Recognitions:

Those completing terms of office (Spitty, Bob Spelman, Judy Gustason)

Spitty Tata

Charles Parker Connolly Award

(Presented by Allyson Rosemore to Rebecca Beneditz

Memorial Moment (names listed)

Matthew Johnson

Twenty-Five & Fifty-Year Members (see below)

Matthew Johnson

Unitarian Universalist of the Year-by proclamation: Jim Callahan

Matthew Johnson

25 Years

Dianne Stenerson

Jackie Dehler

Jim Dehler

Julie Parks

Roger Benedict

50 Years

Barb Oehkle

Jim Spelman

Joanne Johnson

Sue Hall

Shiraz Tata

Adjournment:

Motion to Adjourn: Dave Black

2<sup>nd</sup> Teresa Palmeno

Meeting Adjourned

Judy Gustafson

# 2023-2024 Budget

## Key Points

Total pledge income is projected at 364,300. This is basically flat from last year – which is much better than many congregations are doing. This is the year that folks who stopped coming in COVID have stopped giving. But your generosity and new folks allowed us to stay even. Now we can start rebuilding.

Woodsong income is projected at \$95,280. The program is fully enrolled for summer and fall, with 2-day, 3-day, and 5-day options for programs. Lindsay Trank and Lauren Smith deserve much credit and thanks for making this happen.

Spectrum renewed their contract for two years with two one-year options to extend, for \$46,800 in annual rent. An increase is built in each year. This continues to be a good relationship for both parties.

There is an auction in this budget, scheduled for Sept. 23<sup>rd</sup>, with Katie Kerr and Alexis Simmons as co-chairs. Please participate!

The board set the goal that our staff would be paid at the new UUA recommended fair compensation level. These amounts are substantially higher for religious education and office staff, after the UUA concluded – and we agreed – that these positions were underpaid. We have achieved this goal for all employees other than the Senior Minister, where we did 50% of the recommended increase. Details below.

We will pay 65.32%, \$19,400, for our UUA Fair Share. We hope to return to full fair-share as soon as possible.

This budget is possible because of your generosity, our non-pledge income (mostly Woodsong and Spectrum), and because of very strong legacy giving, including the addition to our permanent funds of bequests from Stuart and Evelyn Johnson.

Most of the rest of the budget is flat, with minor changes here and there.



## 2023-2024 Budget Summary

Steve reviewed pages 4 & 5 below.

<b>Income</b>				
	Pledges		364,300	
	Misc. Income & Rentals		176,528	
	Fundraisers		12,000	
	Church Organization Income		1,250	
	Allocations of Permanent Funds Income		92,900	
	<b>Total Income</b>		<b>647,030</b>	
<b>Expenses</b>				
<b>Staff Salary &amp; Benefits</b>				
		Goal	Proposed	Difference
	Minister Salary (and Housing)	107,017	105,009	-2,008
	Minister Benefits and Other Expenses	46,351	46,351	0
	Dir. of Religious Education Salary	58,225	59,225	0
	Dir. of Religious Education Benefits/etc	23,551	23,551	0
	Music Director Salary	41,164	41,164	0
	Music Director Benefits/Other	10,187	10,187	0
	Assistant Minister Salary	34,513	34,513	0
	Assistant Minister Benefits/etc	11,811	11,811	0
	Office Manager Salary	37,400	37,400	0
	Office Manager Benefits	7,915	7,915	0
	RE Assist/Woodsong Co-Director Salary	34,816	34,816	0
	RE Assist/Woodsong Co-Director Benefits	13,280	13,280	0
	Bookkeeper (contracted)	n/a	8,400	n/a

	Custodial (contracted)	n/a	9,500	n/a
	Subtotal		443,430	
<b>Administration Expense</b>				
	Insurance, Office, Finance		70,600	
	Building and Grounds		52,200	
	Denominational Contribution		19,400	Goal: 29,700
		Subtotal	142,200	
<b>Programs and Committees</b>				
	Worship & Music		9,000	
	Religious Growth & Learning and Woodsong		19,500	
	Outreach & Social Justice		26,000	
	Other Committees		6,900	
		Subtotal	61,400	
	<b>Total Expenses</b>		647,030	
<b>Total Net Income</b>				
			<b>0</b>	

Discussion:

1. Is insurance put out for bid? Ans: Matthew: yes.
2. Why is the minister's pay not in line with the goal? Ans: Matthew volunteered to take less in order to balance the budget.
3. When we under-pay our annual UUA dues, is there an expectation to repay? Ans: No.
4. Outreach and Social Justice. Steve and Matthew listed them off from our budget.

Judy asked for a motion to approve the 2022-2023 Annual Operating Budget. So moved by Matt Menz. 2nd by Bob Babcock. Motion passed.