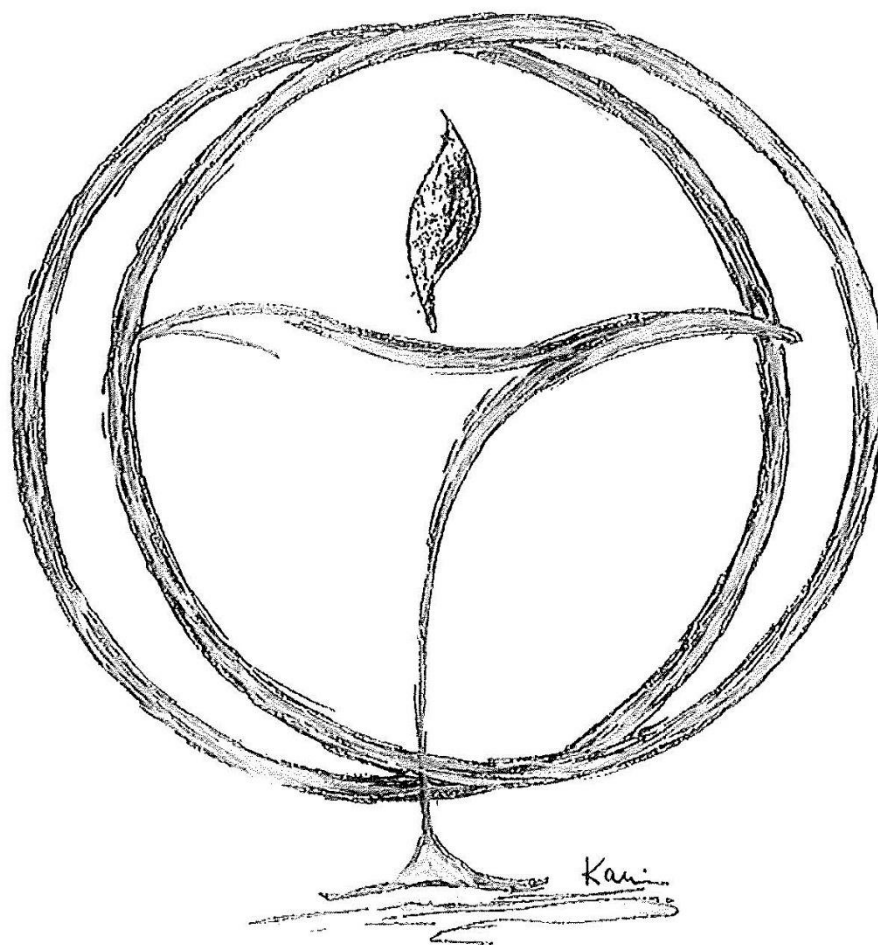

ANNUAL PROGRAM REPORTS

June 1, 2025



FIRST UNITARIAN UNIVERSALIST CHURCH OF ROCHESTER
1727 Walden Lane SW

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AGENDA

ANNUAL MEETING OF THE CONGREGATION

First Unitarian Universalist Church of Rochester
June 1, 2025

- | | |
|---|----------------------------|
| 1. Call to Order and Quorum Verification. | Paul Trewartha-Weiner |
| 2. Chalice Lighting | Rod Milbrandt |
| 3. Approve 2025 Meeting Agenda | |
| 4. Approve 2024 Annual Meeting Minutes | |
| 5. Reports of the 2024 – 2025 Church Year | |
| a. Presidents Report | Paul Trewartha-Weiner |
| b. Treasurer and Financial Stewardship Team | Jamie Bingner-Care |
| c. Shared Ministry Reports | |
| i. Administration | Barb Foss |
| ii. Congregational Life | Lisa Talcott |
| iii. Faith Development | Stephanie Evans-Hanson |
| iv. Social Justice | John Tacinelli |
| v. Worship and Music | Heather Vinge-Hanson |
| d. Building Our Future Report | Ann Hutton & George Huston |
| e. Minister's Report | Rev. Luke Stevens-Royer |
| 6. Election Slate from Nominating Committee | Gus Braga |
| a. Nominations for Board Member | |
| b. Nominations for Nominating Committee | |
| 7. Congregation Business and Sharing: | Members, Board, Staff |
| Questions and Discussion | |
| 8. President's Award | Paul Trewartha-Weiner |
| 9. Instillation of 25 – 26 Board | Rev. Luke Stevens Royer |
| 10. Closing and Adjourn | Paul Trewartha-Weiner |

2024 Annual Meeting Minutes

Annual Meeting of the Congregation – Sunday, June 2, 2024

Our Mission: To be a compassionate, welcoming community that nurtures spiritual growth and practices justice.

1. Call to Order and Verify Quorum: Kim Reid verified there was a quorum and called the meeting to order. 98 people are present.
2. Chalice Lighting was provided by Rev. Ruth McKenzie
3. Approve 2023 Meeting Agenda: Moved by Ann Hutton, seconded by Pat Wimmer, motion carried.
4. Approve Minutes from the 2022 Annual Meeting: moved by Margaret Dalen seconded.
 - a. John Helmers offered one amendment – a correction to the spelling of his name. Motion carried.
5. Reports of the 2023-24 Church Year
 - a. President's Report: Kim Reid presented a report which shared highlights the accomplishments of the church over the past year and highlighted items from her report in the annual program.
 - b. Treasurer's & Financial Stewardship Team Report: John Helmers presented the treasurers report which shared highlights of the budget as outlined in the annual program report. Connie Shulka was also recognized for her many years of service to the church
6. Shared Ministry Team Reports
 - a. Administration: Barb Foss shared a summary of their annual report.
 - b. Congregational Life: Lisa Talcott shared a summary of their annual report.
 - c. Faith Development: Stephanie Evans-Hanson shared a summary of their annual report.
 - d. Social Justice: Brianna Berg shared a summary of their annual report.
 - e. Worship & Music: Beth Atkinson shared a summary of their annual report.
7. Paul Trewarth-Weiner shares an update on the Shared Ministry Leadership Teams for next year. Honoring those who are leaving Shared Ministry Teams and those who are joining.
 - a. Eric Egglar leaves the Administration Team and Ronice Donovan joins.
 - b. Jill Boethcer joins the Congregational Life Team.
 - c. The Financial Stewardship team thanks Dave Edmonson and welcomes Randy Stone.
 - d. Faith development thanks Jessica Hoffman welcomes Brendan Shea.
 - e. The Social Justice Team welcomes Marty Aleman and Kim Harris and thanks Sara Felts.
8. Building Our Future Beyond Ourselves Team: a summary of their report was provided by Ann Hutton
9. Bylaws Amendments: Kim Reid introduced the bylaw changes by describing the process for revision and review. x total members checked in. x members present at time of vote. x votes needed to approve.
 - a. Update to article xi. Disposition of Assets on Dissolution in alignment with current MN State statutes
 - i. Section 7.8 Responsibilities of the Officers to allow the board to delegate authority to sign documents to other board or church members for a very specific purpose or limited term as needed to conduct the business of the church.
 1. A motion was made to approve Kathy Brutenile bylaw, seconded by Beth Atkins moved to approve both amendments to the bylaws recommendations as recommended by the board. Motion carried.
 2. Ken Councileman raised the comment that it is essentially not changed.
 - a. John Helmers wanted to add some language to maintain the new land in it's natural state. To incorporate that level of protection. Jamie Bigner Care shared similar concerns and asked for a point of clarification. Eric Egglar, also asked for clarification re: the president to delegate and wonder about how this would be John Tacinell suggested to approve both and then ask the board to review John Helmers concerns in more

depth for next year. Kim Reid recommended to separate the motion to Ken Councilman asked for the congregation to consider our church polity and spoke against the resolution and would like our property to be for the good of the City of Rochester. Kathy Bruitenal suggested it be passed so that it in alignment with current law Kim E. also reiterated that. John Helmers shared the opinion that the law would take care of things.

i. opposed. Motion carries.

10. Election Slate from the Nominating Committee Robin Taylor.

a. Nominations for Board Members Paul Trewartha-Weiner, President; Aleta Borud Vice President; Jamie Bingner-Care, Treasurer; Brianna Berg, Secretary; Kim Edson, John Tacinelli Laurel Podulke Smith Rod Mildbrandt Board of Directors.

i. Mark Brutinel moved passages of the slate listed above, seconded by Ann Hutton x. Motion carried.

b. Nominations for Nominating Committee

i. Alex Higano – 1st year of 1st term, Paula Horner 1st Year pf 2nd Term, Julie Larson-Keller 1st year of 2nd term, motion made by Jay Smith seconded by Shelly Rhoe to approve nominating team.

ii. Motion carried

11. Business of the Congregation: Questions & Answers Members, Board and Staff

a. There were no questions, but the congregation was invited to contact Paul if any came up.

12. President's Award: Kim Reid presented the president's award to Capital Campaign team – Gail Bishop and Jamie Binger-Care and Laurel Poluke-Smith.

13. Installation of Board Officers and Directors Rev. Ruth Mackenzie

14. Adjournment Paul Trewartha-Weiner offered closing words and adjourned the meeting.

15. Kim Reid and John Helmers were acknowledged for their services.

MINISTER'S REPORT

A year ago, I was on sabbatical with Rev. Ruth serving as Sabbatical Minister. I was nearing the end of my time away, ready to return, as well as holding on to the precious days of rest and re-creation. During those days, I visited congregations nearby, as well as in Tulsa and Boston. I learned that so much of our work is the same, but all held in context. In Tulsa, members spoke to me about preparing to move from their generations-long home to places like Minnesota with more safety for their queer family. In Boston, they spoke about how to use these beautiful, old churches, built in a time when Unitarianism was a big thing there, not as relics of the past, but a vehicle for the work of Sanctuary for immigrants, food for the hungry, affirming space for queer folx.

We're doing that work, too. If I'm honest, I don't know where it will continue to lead us. Mostly, I believe deeply that we are called to create circles of communal care that expand ever-wider. It calls us to reflect on what our mission is in the world – and as reminder, it is to be a place of welcome, compassion, where we nurture spiritual growth and practice justice. Because we believe that those things are intertwined. Spiritual growth is about a growing awareness of the beauty and sacredness of this life, this planet, especially those on the margins of care. And justice is what we do with that awareness in practical acts of advocacy and love.

At an institutional level, we are doing well. Our budget is astonishingly healthy, our staff is thoughtful and skilled, doing so many other duties as assigned I can hardly keep track of the unnoticed things they do for which I am grateful. We have built up both our Social Justice staff position and continue to build our adjunct ministry support, for which I'm so grateful Rev. Ruth will stay with us in the coming year with a little more support. We

continue to work in creative and tangible ways so folks find nourishment to care for themselves so they can care for our community.

We are held by a Board and lay leaders who continue to say yes to the uncertain and wild work of supporting and guiding and holding not only the policies of how we do church, but the larger questions of why, and how can we continue to grow deeper in our shared values.

Beyond that, my hopes for the coming year are to continue to create and hold space for our generations-old work of love and justice to flourish. In the coming year, we'll continue to find ways to meet families where they are at to build connection and community with a wide range of life circumstances and needs. It might mean creating new groups around grief, or institutional reflection on racial and accessibility justice, and gathering our queer beloveds for circles of support and nourishment.

It also, and always, means creating space where we gather around inspiration in music, story, testimony, and joy – because we build community through shared experience of beauty to remind us this world is beautiful, and broken, and it calls us to live toward love.

Lynn Ungar writes it this way:

*I don't know how this all turns out, and neither do you,
but I confess it doesn't look good.
I wish we were headed for a picnic, for a waltz in the park.
I wish we were not ruled by broken men who want to damage
everything that they cannot possess.
I wish I could tell you what we do now...
Tonight there will be frost, and tender buds will burn.
But still, the woods are unfolding into green,
and just outside my door some frog is bellowing for all he's worth.
Who knows what happens next?
All I can tell you is that the fields are ablaze with dandelions
who have never known the meaning of defeat.*

We are called to be in the fields ablaze with resilient, stubborn life
that keeps finding its way – pushing up through rock and pavement and more.
We have a place up on the hill, waiting for us –
and in the midst of uncertainty, and in the threat of values from every side –
perhaps the boldest response to hate
is to build a house of love on a hill. We're still on our way.

And the newcomers entering our doors each week, and the children navigating those narrow halls, and a community needing a little more space to hold all we're holding – to be the refuge for body and soul we are increasingly called to be –

I tell you this: we, and our future, is worth the risk. We are always *on the way*.

PRESIDENT'S BOARD REPORT

Members of the 2024-25 Board

Paul Trewartha-Weiner - President
Aleta Borrud - Vice-President
Brianna Berg - Secretary
Carrie Bingner- Care - Treasurer
Kim Edson - Member at Large
Laurel Podulke Smith - Member at Large
Jodi Edmonson - Member at Large
Rod Milbrandt - Member at Large
John Tacinelli - Member at Large

Purpose:

The Board of Directors is the governing body of the Church, responsible for the property of the church, the conduct of its business affairs, and the administration of its services.

Board Report:

2024-2025 was a busy year for the congregation but relatively quiet for the board. Everything mostly stayed in place (knock on wood, we don't want to jinx it). This year did not start with trees falling on the roof requiring a crane, nor did we face a massive insurance premium increase. Thankfully, our minister was in town, providing the leadership we have come to depend on.

As usual, the Board began the year by discussing and approving goals to guide us during the church year. These goals build on those developed by the previous year's board and may seem familiar as you read this report.

Goal 1: Continue to work with the Building Our Future team to develop our new church home on the Viola Land.

The Board continued to support and oversee the Building Our Future team as our church works to move to our Viola land site. Building Our Future team members met with the Board monthly for progress updates. The focus has been on:

- Completing easement issues discovered while prepping this building for sale. This work with the City of Rochester and our Jehovah's Witness neighbors is wrapping up and will soon be resolved.
- The Board worked with the BOF team at the end of the schematic design phase. We reviewed the Architect's designs, discussed engineering concerns from our engineering contractor (Locus), and discussed discrepancies between estimated construction costs provided by our construction manager (Kramer) and projected funds from the building sale and Capital Campaign.
- The Board collaborated with the BOF team, analyzed the local commercial real estate market, and adjusted the asking price of our building to attract more potential buyers.
- The Board recently approved the Land Stewardship document developed by the BOF team and the Green Sanctuary Congregational Profile starting us on our journey for the Green Sanctuary transforming our campus through climate justice.

The Board would like to recognize and honor the many, many hours of work that has been done by the volunteers on each of the Building Our Future teams as they work to create a new building design, prepare the Viola land and do so in a way that adheres to our UU values.

Goal 2: Support the growth of the ministries and activities in the church through the Shared Ministry Teams and supporting staff as they develop and implement congregational programming.

Our congregation continues to grow and thrive now with well over 400 members. As we have grown, the responsibilities of the staff to develop and maintain effective programming have become increasingly challenging. The implementation of Shared Ministry teams has helped the board support staff in their work.

- This year, the Board approved the Social Justice Shared Ministry team's review and revision of policy documents.
- The Board welcomed staff members to Board meetings to share their work, discuss their vision, and identify issues and concerns in implementing programming. These discussions helped the Board understand what staff do and provided opportunities to offer support as our congregation grows.

Goal 6: Create opportunities for communication between the congregation and church leadership.

This was a difficult year for most UU's living in Rochester, Minnesota, and the United States. Policies and practices of those in power have directly assaulted many of our values of Justice, Compassion, and Love. Many in our congregation and community recognize First UU as a place for resources, support, and community building when supportive structures seem to be falling apart. The Board has discussed these concerns and begun responding.

- The Board has diligently gathered congregational input and responded to individual concerns or supported discussions when members bring forward questions, concerns, or suggestions related to community activities and church matters.
- We have made every effort to listen carefully and identify solutions. The Board had sharing tables between services, giving congregants opportunities to speak directly to board members about Justice concerns in the community and Church concerns at First UU.
- The Board also created a concerns, comments, and questions page on the First UU website, where staff can share concerns privately with us.
- The Board gathered the information shared during Table Sharing opportunities and will respond to them as we are able during the rest of this year and into the 25-26 year.

As Board President, I would like to gratefully acknowledge this year's Board members. They have cheerfully devoted many, many hours to fulfilling their board duties and all of their hard work is very much appreciated. This congregation could not have asked for a better group of leaders than this Board!

FINANCE REPORTS

2025-2026 PRELIMINARY BUDGET

AS OF MAY 20, 2025*

			2024-25 Goal	2025-2026	% Change
Income			\$637,706.90	\$669,938.77	5.05%
1	Donations		\$44,000.00	\$43,000.00	-2.27%
	1.1	Fundraisers	\$35,000.00	\$35,000.00	0.00%
	1.2	Plate (Justice Partner)	\$9,000.00	\$0.00	-100.00%
	1.3	Plate (In House)		\$8,000.00	
2	Other income		\$50,340.00	\$49,700.00	-1.27%
	2.1	Interest	\$1,000.00	\$1,200.00	20.00%
	2.2	Dividends	\$2,400.00	\$3,500.00	45.83%
	2.4	Building Usage Fees	\$3,000.00	\$4,000.00	33.33%
	2.5	Reserves & Transfers	\$42,940.00	\$36,000.00	-16.16%
	2.6	Budget carryover		TBD	
	2.7	Free-will offerings	\$1,000.00	\$5,000.00	400.00%
3	Pledges		\$543,366.90	\$577,238.77	6.23%
	3.1	Current pledges	\$546,770.00	\$580,143.07	6.10%
	3.2	New pledges	\$10,000.00	\$10,000.00	0.00%
	3.3	Previous year pledges	\$3,000.00	\$4,500.00	50.00%
	3.4	Unrealized pledges (3%)	-\$16,403.10	(\$17,404.29)	6.10%
Expenses			\$624,624.69	\$669,938.77	7.25%
4	Administration & Communication		\$76,446.00	\$80,200.00	4.91%
	4.1	Background Checks	\$500.00	\$200.00	-60.00%
	4.2	Bank Charges	\$3,000.00	\$500.00	-83.33%
	4.3	Comms & Advertising	\$250.00	\$200.00	-20.00%
	4.4	Computer & Tech Supplies	\$1,000.00	\$1,500.00	50.00%
	4.5	Copier Lease	\$816.00	\$900.00	10.29%
	4.6	Internet Access	\$960.00	\$1,200.00	25.00%
	4.7	Legal Fees	\$500.00	\$500.00	0.00%
	4.8	Loan/Debt Service	\$35,000.00	\$35,000.00	0.00%
	4.9	Mileage	\$200.00	\$200.00	0.00%
	4.10	Payroll and Taxes		\$1,200.00	
	4.11	Phone	\$1,260.00	\$1,300.00	3.17%
	4.12	Postage	\$1,000.00	\$1,000.00	0.00%

	4.13	Prop&Liability Insurance	\$24,000.00	\$26,000.00	8.33%
	4.14	Processing Fees (online)	\$0.00	\$2,000.00	
	4.15	Software Licensing	\$3,700.00	\$3,700.00	0.00%
	4.16	Supplies and printing	\$4,000.00	\$4,000.00	0.00%
	4.17	Website Management	\$760.00	\$800.00	5.26%
5		Building & Grounds	\$44,818.00	\$44,850.00	0.07%
	5.1	Coffee & Donuts		\$3,500.00	
	5.2	Elevator Service	\$1,500.00	\$1,500.00	0.00%
	5.3	Fire Alarm Monitoring	\$1,000.00	\$1,000.00	0.00%
	5.4	Flowers & Decorations	\$0.00	\$0.00	
	5.5	Garbage	\$1,518.00	\$2,150.00	41.63%
	5.6	Kitchen Supplies	\$1,500.00	\$1,500.00	0.00%
	5.7	Landscaping	\$300.00	\$200.00	-33.33%
	5.8	Maintenance and AV	\$7,500.00	\$7,500.00	0.00%
	5.9	MN Energy Resources	\$13,000.00	\$11,000.00	-15.38%
	5.10	Rochester Public Utilities	\$10,500.00	\$10,500.00	0.00%
	5.11	Snow Removal	\$8,000.00	\$6,000.00	-25.00%
6		General Programming	\$1,250.00	\$1,280.00	2.40%
	6.1	Program Support	\$500.00	\$500.00	0.00%
	6.2	Soul Matters Resources	\$750.00	\$780.00	4.00%
7		Congregational Life	\$1,500.00	\$1,200.00	-20.00%
	7.1	Membership	\$500.00	\$500.00	0.00%
	7.2	Social & Fellowship Events	\$750.00	\$500.00	-33.33%
	7.3	Spiritual Care	\$250.00	\$200.00	-20.00%
8		Worship & Music	\$11,750.00	\$8,250.00	-29.79%
	8.1	Guest Speakers	\$2,500.00	\$3,000.00	20.00%
	8.2	Music (guests & supplies)	\$9,000.00	\$5,000.00	-44.44%
	8.3	Worship Supplies	\$250.00	\$250.00	0.00%
9		Faith Development	\$2,500.00	\$2,500.00	0.00%
	9.1	Adult Faith Development	\$500.00	\$500.00	0.00%
	9.2	Children, Youth & Family	\$2,000.00	\$2,000.00	0.00%

10		Social Justice	\$1,500.00	\$1,500.00	0.00%
	10.1	Social Justice	\$1,500.00	\$1,500.00	0.00%
11		Fundraisers	\$500.00	\$0.00	-100.00%
	11.10	Fundraisers (moved)	\$500.00	\$0.00	-100.00%
12	Minister		\$152,496.12	\$158,606.00	4.01%
		Benefits & Professional Expenses	\$44,552.12	\$47,423.68	6.45%
	12.1	Retirement	\$10,794.40	\$11,118.23	3.00%
	12.2	Insurance	\$17,500.00	\$18,800.00	7.43%
	12.3	Professional Expenses	\$8,000.00	\$9,000.00	12.50%
	12.4	FICA (7.65% house&salary)	\$8,257.72	\$8,505	3.00%
		Salary & Housing	\$107,944.00	\$111,182.32	3.00%
	12.5	Housing	\$36,050.00	\$37,131.50	3.00%
	12.60	Salary	\$71,894.00	\$74,050.82	3.00%
13	Staff		\$292,921.58	\$336,252.77	14.79%
	13.1	Adjunct Minister		\$10,000.00	
	13.2	Salary: Operations Director	\$51,000.00	\$52,530.00	3.00%
	13.3	Salary: Finance Coord.	\$22,000.00	\$22,660.00	3.00%
	13.4	Salary: Coord of Cong. Life	\$26,550.00	\$27,346.50	3.00%
	13.5	Salary: Property Steward	\$19,600.00	\$20,188.00	3.00%
	13.6	Salary: Dir. of Faith Dev	\$37,537.00	\$38,663.11	3.00%
	13.7	Salary: Music Dir. /Choir	\$21,650.00	\$22,299.50	3.00%
	13.8	Salary: Music Dir./Cantor	\$25,550.00	\$26,316.50	3.00%
	13.9	Salary: Social Justice Coord.	\$5,800.00	\$11,646.00	100.79%
	13.10	Salary: Faith Dev. Asst.	\$9,300.00	\$9,579.00	3.00%
	13.11	Salary: Coord. of Faith Exp.	\$15,500.00	\$15,965.00	3.00%
	13.12	Hourly: Accompanist		\$5,000.00	
	13.13	Retirement: Operations Dir	\$5,100.00	\$5,253.00	3.00%
	13.14	Retirement: Finance Coord.	\$2,200.00	\$2,266.00	3.00%
	13.15	Retirement: Dir Faith Dev	\$3,753.70	\$3,866.31	3.00%
	13.16	Retirement: Cong Life	\$2,655.00	\$2,734.65	3.00%
	13.17	Retirement: Prop Steward	\$1,960.00	\$2,018.80	3.00%
	13.18	FICA: Staff	\$17,938.26	\$18,476.40	3.00%

	13.19	Insurance: Dental	\$720.00	\$1,100.00	52.78%
	13.20	Insurance: Disability	\$3,440.20	\$3,773.00	9.67%
	13.21	Insurance: Health	\$8,000.00	\$18,000.00	125.00%
	13.22	Insurance: Life	\$1,852.42	\$2,371.00	27.99%
	13.23	Insurance: Worker's Comp.	\$2,615.00	\$2,700.00	3.25%
	13.24	Staff Dev: Office Admin.	\$500.00	\$500.00	0.00%
	13.25	Staff Dev: Cong. Admin.	\$500.00	\$500.00	0.00%
	13.26	Staff Dev: Cong. Life	\$500.00	\$500.00	0.00%
	13.27	Staff Dev: Director of FD	\$1,500.00	\$3,000.00	100.00%
	13.28	Staff Dev: Music/Choir	\$500.00	\$500.00	0.00%
	13.29	Staff Dev: Music/Cantor	\$500.00	\$500.00	0.00%
	13.30	Staff Dev: Coord. Faith Exp.	\$1,500.00	\$3,000.00	100.00%
	13.31	Staff Dev: Soc. Just.	\$500.00	\$500.00	0.00%
	13.32	Child Care	\$2,200.00	\$2,500.00	13.64%
14		Dues & Annual Giving	\$38,943.00	\$35,300.00	-9.35%
	14.1	UUA/MA Dues	\$36,443.00	\$32,800.00	-10.00%
	14.2	MUUSJA membership dues	\$1,500.00	\$1,500.00	0.00%
	14.3	Isaiah membership dues	\$1,000.00	\$1,000.00	0.00%
15		Reserved & Restricted Funds	\$232,713.67	\$226,713.67	-2.58%
		Fund	As of 4/30/2025	\$0.00	
	15.1	Additional Ministry	\$6,000.00		\$0
	15.2	Audit	\$5,600.00	-\$2,500.00	\$3,100
	15.3	Chalice Camp	\$4,464.10		\$4,464
	15.4	Hawthorne Helps	\$6,677.22		\$6,677
	15.5	Human Needs	\$1,046.09		\$1,046
	15.6	Immigration Justice Fund	\$8,167.34		\$8,167
	15.7	Instrument Fund	\$7,847.51		\$7,848
	15.8	Insurance Donations	\$0.00		\$0
	15.9	Furnishings	\$1,972.36		\$1,972
	15.10	Major Main. & Replace	\$6,135.98		\$6,136
	15.11	Memorial	\$21,323.65		\$21,324

	15.12	Memorial Garden	\$3,014.55		\$3,015
	15.13	Minister Prof. Dev. Fund		\$0.00	\$0
	15.14	Operating Reserves	\$50,525.52		\$50,526
	15.15	Roof Replacement	\$30,000.00		\$30,000
	15.16	Sabbatical	\$4,452.49	\$1,000.00	\$5,452
	15.17	Staff Prof. Dev. Fund	\$205.71	\$1,500.00	\$1,706
	15.18	Storm Damage Fund	\$59,881.52		\$59,882
	15.19	Technology Fund	\$2,615.89		\$2,616
	15.20	UU Heritage & Identity Scholarship Fund	\$3,376.46		\$3,376
	15.21	Wed. Night Suppers	\$1,925.50		\$1,926
	15.22	Youth Fund	\$7,481.78		\$7,482
	Building Our Future Funds		As of 4/30/2025		
	16.1	Building Our Future Funds	\$1,343,236.63		
	16.2	Property Loan	-\$434,370.88		
	Banking Reserved/Restricted Funds		As of 4/30/2025		
		F&M Money Market	\$144,980.46	(basically a savings account for our funds - includes prepaid pledges)	
		Fidelity Money Market	\$35,942.95	(when we sell stock, this is where the cash is deposited)	
		Est. Value of Stock	\$63,543.47	(we hold onto some stock that produces dividends)	
		Endowment Fund	\$227,133.88		

*A final version of the Board Approved 2025-2026 budget will be available after June 30, 2025.

SHARED MINISTRY TEAMS

Financial Stewardship Team

Team Members

Staff: Amy Nelson, Finance Coordinator

Board: Jamie Bingner Members: Katherine Logan, Elizabeth Schmidt, Randy Stone

Purpose of the Team

Monitor the financial health of the church and help establish a culture of generosity in the congregation.

Highlights from the year

- The transition from Connie Schuelka to Amy Nelson handling the church books has gone smoothly. Amy is now only asking Connie 1 or 2 questions a month.
- As of May 15, 2025 (to be updated after the end of the fiscal year with final totals)
- We completed our 'short and sweet' pledge campaign in just over 3 weeks in March. Our annual pledge drive raised over \$580,000 with 231 pledge units.
 - This is fewer pledging units than last year, however, we had a significant number of unfulfilled pledges for the 2024-2025 fiscal year. Taking that into account, we took a more conservative approach to renewing pledges this year.
- Some quick statistics
 - 135 people submitted a pledge
 - We had 19 new pledgers!
 - 38 pledges at the 8% request
 - 35 pledged greater than 8%
 - 11 increased their pledge less than 8%
 - Only 7 units decreased their pledges, and we had 3 units cancel their pledge for the 2025-2026 budget year.
- That leaves 96 people who did not submit a pledge form, but we are accounting for them at the same rate as 2024-2025.
- We have completed the first year of our 3-year capital campaign. We have received almost ½ of our capital pledge total, over \$1.4 million in just the first year. There is an additional \$302,000+ in non-pledge income as well.
- Property insurance has stabilized. While more expensive than prior to 2024, we have been able to budget for the new insurance rates.
- One change approved by the board was to hire an outside company to do the monthly payroll and taxes. Clergy Financial out of Maple Grove works exclusively with churches, so they are familiar with the unique status of ministers as well as federal and state taxes and reporting.
- Our fundraisers for the year, the service auction, handcrafted bazaar, drag show, and 1866 social raised over \$26,000. Fixed price items, the raffle, and silent auction items were online to allow for wider participation.
- Thank you to our members, friends, and the many volunteers who worked on and donated to these efforts. Your support of this religious community is invaluable.

Goals for the next fiscal year

- Continue to monitor the income and expenses of the budget.
- Conduct fundraising through special events, such as the auction, and through the annual pledge drive.

Worship and Music Team

Team Members

Staff: Rev. Luke Stevens-Royce, Joe Mish, Rose Mish

Board: Rod Milbrandt

Members: Beth Atkinson, Trish Braga

Worship Associates: Beth Atkinson, Anne Black-Sinak, Gus Braga, Trish Braga, Stephanie Evans-Hanson, Heather Vinge-Hanson, Ann Hutton, Darin Podulke-Smith, Paul Trewartha-Werner, and Greg Wimmer

Purpose of the Team

The goal of this team is to enhance the spiritual life of the congregation through worship and music.

Highlights from the year

- We deepened our Adjunct Ministry role with Rev. Ruth MacKenzie returning for the year, providing leadership for several services and a reflection writing workshop for worship associates. She also led a special puppet-based story for Easter Sunday, helping us explore more embodied liturgy.
- Broadening our music program: we continued to deepen the role and consistency of the Prairie band, including regular member musicians.
- Midyear, we added regular paid accompanists for choir and ensembles, as well as calling on them for special or occasional services.
- We worked to increase children and youth voices more regularly in Sunday services.
- We invited multiple voices from the congregation to share readings, special reflections, chalice lightings, etc., including general members as well as Board and other leadership.
- We continued to create a welcoming and inclusive worship experience for families with young children, celebrating their presence in structural and subtle ways.

Goals for the next fiscal year

- Continue to add multiple voices, including a wide range of experiences, culture, and age, to services for various roles: special reflections, readings/chalice lightings, etc.
- Continue to deepen engagement of children/youth in services.
- Support possible trainings/workshops on embodied and reflective services for worship associates, musicians, etc. with outside guest experts.

Faith Development Team

Team Members

Kim Edson (board liaison), Stephanie Evans Hanson, Chantelle Feddersen (staff), Amy Nelson (staff), Derik Robertson (staff), Brendan Shea

Purpose of the Team

To provide opportunities for spiritual development for all ages.

Highlights from the year

- Chalice Camp- July 2024 - 40 campers (Entering K through 7th Grade) 17 counselors (entering 8th grade and older)
 - Theme was “Creature Camp” - both real and imaginary - and we focused on having Love at the Center of all we do.
- Adult Pilgrimage - August 2024 - 10 Adults, 4 staff (Derik Robertson, Amy Nelson, Luke Stevens-Royer, Rose Mish)
 - Boston, Cambridge, Concord, Lexington - [2024 Itinerary - DRAFT](#)
- Trunk or Treat - 40 children and youth participated, 15 ‘stations’ around the building for kids to visit for treats
- Pancakes & Pajamas Party - Annual winter event with 20 kids participating. Youth hosted craft, dance, game, quiet, and movie rooms.
- Winter Program - held a Sunday morning service Winter Program - From Now to Forever More (Holiday Spirits) - with almost 20 children and youth participating in the program and Chalice Choir to put on the service. It was extremely well received by the congregation!
- Stuffy Sleepover - Held the same night as the Auction (in January) 10 kids participated in the Storytime and left their stuffies for a fun evening in the church
- Valentine’s Dance - Youth hosted the second annual Valentine’s dance. 40 dancers joined the youth group in the Commons for an evening of food and dancing. The event raised over \$1,200 for the youth group.
- Youth sponsored family board game night and movie night. 12-15 people attended both events.
- Switched Middle School classes to meet during the service. The first half of the year was spent exploring different parts of the service - staff members came to classes and answered questions about their role in Sunday service. During the second half of the year, the youth watched service together and discussed what was happening in real time.
- Continued offering High School classes between services, focusing on the UU values. Youth were encouraged to attend either the 9am or 11am service. We worked on offering engaging activities for youth to participate in during the service, to varying degrees of success.
- Faith Development for Children - used the Soul Matters curriculum to stay with the monthly theme and expand on our Principles, Sources, and Values. Attendance averaged 15-20 between the two services over the church year. Children made cards, helped fill bags for Hawthorne Helps, and helped care for our shared space.
- Registration: 6 months of age through 5th grade - 39 children registered with another 5 or so that attend on a semi-regular basis (at least monthly) | 6th-12th grade - 16 youth registered with Sunday attendance averaging 5 for middle school (6-8) and 6 for high school (9-12)
- We are entering a period of low enrollment at the high school level - most likely due to covid quarantine causing a disconnection of feeling involved. There is an influx of middle schoolers this coming year, so the hope is that youth attendance will grow in the coming church years.
- Offered a variety of small groups and faith development opportunities for adults.
 - Principle 4 - Facilitated by Anne Black-Sinak
 - Monthly discussions around a ‘hot-button word’
 - A Chosen Faith - Facilitated by Anne Black-Sinak
 - Monthly book discussion around UU leaders’ views, both past and present
 - Zen Buddhist Group - Facilitated by Darin Podulke-Smith
 - Meditation practice in the Soto Zen Buddhist tradition.
 - A Course in Miracles - Facilitated by Peggy Marchesani
 - A study group for students of A Course In Miracles: a complete self-study spiritual thought system.

- Average attendance of 6 per weekly meeting. They meet in a hybrid setting weekly on Mondays. It is not uncommon for them to have visitors who are in Rochester for medical reasons.
- Sisterhood Circle - Facilitated by Roxanne Schlasner and Jade Joyce
 - Share our spiritual journey, through book study, meditation, and energy work. Meets twice a month with 10 active members and average attendance of 5 per meeting.
 - Held a Fall Women's Renewal Retreat with over 50 participants.
- Soul Collage - Facilitated by Anne Black-Sinak
 - Meets monthly.
 - Also, a day-long retreat was held in February.
- UU Reflections - Facilitated by Jane Iddings
 - Time to think and write about UU experiences, history, beliefs, thoughts, hopes & dreams – in other words, our reflections about UU and all that UU means to us as individuals. Average attendance of 9 each month. Find their writings, along with other groups', on <http://janesmemoirists.com/>
- Love at the Center book group - Facilitated by Rev. Luke Stevens-Royer
 - A 3-week discussion group about the collection of essays in "Love at the Center". Over 30 people participated in the large group that then broke into smaller discussion groups.
- Rethinking Your Religious Past class- Facilitated by Derik Robertson.
 - Focused on discussion around past religious experiences and how those might fit into an ongoing spiritual journey. Attendance has been averaging 12 adults over the 4 meetings.
- Pilgrimage Preparation - Facilitated by Derik Robertson
 - We have 8 adults registered for this summer's pilgrimage, plus 3 staff.
 - Attendance at these classes has been around 9 people.

Goals for the next fiscal year

- Adult Pilgrimage - more accessible - in August 2025
- Youth/Mentor/COA Pilgrimage in August 2026
- Continue to expand Adult Faith Development opportunities
- Continue to reimagine Middle School faith development
- Offering Taking Flight classes for middle school youth, expanding to other age groups based on interest and availability.
- Offer Coming of Age extension opportunity
- Working with adults to widen the pool of facilitators and leaders

Congregational Life Team

Team Members

Melissa Egglar, Coordinator of Congregational Life (Membership/Chalice Circles)

Jodi Edmondson, Board Liaison

Laurel Podulke-Smith, Board Liaison

Lisa Talcott, Hospitality

Deb Mowry, Fellowship (Term ending Summer 2025)

Jill Boettcher, Cook Teams

Julie Gilkinson, Caring Committee

Purpose of the Team

To nurture or support aspects of church life that contribute to and nourish the sense of community, participation and caring. Areas of responsibility focus on development of programming related to visitors, membership, small group ministry and program development.

Highlights from the current year:

Membership: Melissa supports the growth of a healthy and vibrant membership at First UU by engaging with visitors and prospective members, listening deeply to their interests, connecting them with meaningful activities, and guiding them thoughtfully on their path to becoming members.

We held 4 "New UU" Gatherings, 4 New Member Sundays and

We welcomed and celebrated 38 members into the church through 2024-2025 fiscal year.

Held a New Member Luncheon to promote new relationships, and share information on hospitality, fellowship, stewardship and involvement with new members of First UU.

Caring Committee: Julie Gilkinson & Robin Taylor served as co-leaders of the committee, which included 23 additional caregivers serving in two-week blocks. They coordinated care, calls, meals, rides, and cards for our congregants in times of celebration, sadness, and need. Robin and Julie held a breakfast for the group in October and will hold another in June to discuss ongoing cares and concerns. The committee will be losing a couple of caregivers, but we are trying to recruit new ones. The congregation continues to be deeply appreciative of the care and connection.

Fellowship: Gratitude to Deb Mowry, whose term ended this spring.

Highlights of Fellowship through 2024/2025 include: State Park Hikes lead by Anna Lovrien, Development of a D&D Game group, multi-generational "Chalk the Lot" event with chalking the parking lot and a Kool-Aid Stand, Pie Day at Perkins, All Birthday Potluck event, the continuation of Arm Chair Travelers, Creative Arts Series, Mix & Mingle Dinners and the Chili Cook-Off event for the Annual Auction, with 18 Chili submissions!

Hospitality: We have 6 Circle Team Leaders, overseeing volunteers for each Sunday morning welcoming, visitor table and ushers. Volunteers can sign up prior to their Sunday or help at the last minute.

Chalice Circles: Organized and guided the Soul Matters Chalice Circles with 6 groups, 9 facilitators and 70 members meeting from September-May/June.

Cook Teams: Organized and guided 4 Cook Teams for Wednesday Night Tupper Suppers with 60-90 attending each week. Popular dinners were Rice Bowls, Pasta from Pasquale's and Pad Thai!

Goals for the next Fiscal Year:

We will remain committed to fostering healthy growth in our membership while deepening the sense of connection and belonging among visitors, members, and friends through our efforts in membership, hospitality, and fellowship. Our ongoing support and engagement with the Caring Community, Hospitality Team, Fellowship activities, Cook Teams, and Chalice Circles will continue to be a priority. We will also maintain a strong focus on welcoming, informing, and involving visitors, ensuring they feel truly included beginning as they enter our church home.

Social Justice Team

Team Members

Staff: Rev. Luke Stevens-Royer, Shelly Rohe

Board: Brianna Berg, John Tacinelli

Members: Alex Higano, Jade Joyce Morgan, Kim Harris, and Marty Aleman

Purpose of the Team

Encourage and equip the church for the collective practice of justice and service.

Highlights from the year

The Social Justice Shared Ministry Team grew from two members-at-large to four, giving more focus and clarity to the purpose of the team. We have seen an increase in people signing up to volunteer for events or joining in on larger gatherings, although there is still not a huge interest in joining committees that meet monthly. The atmosphere created by the current administration has been given as the reason for some of this. There was great interest in Social Justice during Nurture Your Soul Sunday and people are very excited about the new Side With Love gear and scarves! A refreshed Love Your Neighbor sign was installed outside of our building along with a new Pride flag. Insights from the Social Justice survey are forthcoming and greatly anticipated. We welcome anyone to volunteer with any of our committees/teams!

Wide Welcoming Team – work internally on issues of identity oppression so that all congregation members are included and welcome.

Our mission is to extend radical welcoming to each person who enters our door so that a beloved community is created and sustained. The Wide Welcoming Team is a collaboration of members from the Welcoming Congregation Team, Disability Inclusion Team, and Racial Justice Team. These teams have all combined and work together on projects to dismantle oppression within our congregation.

This year we worked to complete the Five Practices of Welcome Renewal for 2024. This powerful work ensures that First UU Rochester, MN is meeting the needs of queer and trans congregants and the wider community. Activities included welcoming worship services, participation in LGBTQ+/TGQNB days of observance, religious education, and supporting a welcoming project with MedCity REFUGE. In celebration of our church history supporting the queer community we had Drag Show and Dance with Rochester Girls, Inc. We celebrated the 34th anniversary of the signing of the Americans with Disabilities Act (ADA) by doing a worship service focused on Disability Justice, specifically Intersectionality. The Teal Pumpkin Project, which focuses on food allergies, encouraged the team to do a group costume from the movie *Inside Out* for Table and Treat. This helped us to promote mental health awareness by having a movie marathon held March 8 for *Inside Out* and *Inside Out 2*. As we continue to focus on mental health awareness, we are planning a Healing Hotdish Wednesday as well as participating as a team in the NAMIWalks this year.

Community Outreach and Service – organizations such as Hawthorne Helps and Family Promise that congregation members organize and help us to support as well as other volunteer opportunities in our community.

Our congregation shared the offering plate each month with Social Justice Partners and participated in justice campaigns. We raised funds for immigration needs, gender affirming care, and racial justice causes, as well we participated in rallies and town halls. A plethora of opportunities and events continue to be posted to our Social Justice Congregational Group on Realm. We also participated in many educational forums such as, Understanding NAMI, Mental Health & Self-Care with Lee Famosa from NAMI, Global Risk and the Importance of Building Personal

and Community Resilience with Ivan Idso, and Empowering Mobility Options for a More Connected Community with Jennifer Dens Higano.

Hawthorne Helps – Beginning in 2015, Hawthorne Helps (a UU Social Justice Outreach) has partnered with Rochester Public Schools' Hawthorne Education Center to encourage adult student success, be a welcoming presence & affirm personal dignity. With support from UUs, local faith communities, nonprofits & business groups, HH distributes essential items, school supplies and books year-round; seasonally, winter ware & garden plants, Significant community donations in 2025 included UCC Congregational \$1100, Mayo eMERGING Leaders' collection of 3,700 school supplies, Rochester Area Foundation Give365 \$1500 grant and Think Bank 1000 backpacks. February UU Plate donations surpassed other years at \$3,652. UUs of all ages fill our volunteer needs.

Virtually and in person, 1000+ students ages 17-80 (85% living at or below poverty level) from 70 countries speaking 44 languages struggle to make a better life for themselves and their families. 2025 marked Hawthorne Helps' 10th Anniversary. Our congregation celebrated with a reception between services on. Hawthorne Education Center & Hawthorne Helps hosted an Open House with HEC building tours on May 6. 27 guests attended.

2026 Goals - continue fund raising and community outreach to cover ever increasing costs - update Coordinator job description and divide HH administrative tasks between 5-6 UU recruits

Family Promise - Julie Gilkinson kept in contact with Family Promise and communicated information to the SJ team and members who had been volunteers in the past. In 2024 Family Promise worked to draw up a memorandum of understanding with Olmsted County to manage a new bigger shelter at 1621 10th St SE. While the building is older, the interior has all been redone and furnished with all new things, so it is beautiful. The shared plate offering from First UU collected in December made it possible to donate \$2,261.45. The congregation also participated in the Miracle on First program where we adopted a family of five: a mom and 4 children. They had a list of wants & needs, and the congregation responded generously. The "Peace Mitten Tree" was utilized for this with Family Promise being the only recipient in 2024. On March 27, an open house and ribbon cutting celebration took place. Their executive director resigned in January and hiring a new one as well as more staff has slowed progress. Carrie Moscho was announced April 25, 2025, as the new Executive Director of Family Promise Rochester. New volunteers are always welcome!

Liberation Advocacy – efforts to assist and support asylees and others seeking immigration through the Immigration Justice Fund and the First UU Housing Aide, LLC.

First UU members have been offering assistance to a number of families immigrating to Rochester. First UU volunteers have provided access to health and dental care and transportation to work, immigration appointments, and shopping. Funds from the church's Immigrant Justice Fund have been used for rent, utilities, and immigration-related legal fees. The current administration has made this sacred work even more necessary. The LLC is no longer needed as the rental property we were assisting with is no longer under a yearly lease. Chris Wendt, local Immigration attorney and member of First UU gave a training to church leadership titled, 'Legal Considerations for Minnesota Congregations Serving Immigrant Communities.' Preparations are in the works for a presentation for the congregation. The congregation continues to support immigrants through rallies and protests.

Environmental Justice – work on the Green Sanctuary program through the UUA and other environmental justice initiatives.

On September 29, First UU participated in a Climate Revival Sunday worship service from the UUA on Climate Justice. In November, Alex Higano, the Environmental Justice member of the Social Justice Shared Ministry Team showed the movie, *Cooked* which was open to the congregation. The interest from the congregation in climate justice efforts have prompted a group to form. People interested in environmental justice and the Building our Future Green Energy Team are joining forces to create the Green Sanctuary Team. This team will focus on the Green Sanctuary Program through the UUA but not be restricted to only these efforts. This team will be cochaired by two congregation members, Barb Foss and Larry Herbison. They are hoping to hold an initial training on May 14th and develop a meeting schedule from there.

Democracy and Electoral Justice – promote voting and other political education efforts through membership with ISAIAH, MUUSJA, Side With Love, and UUSJ.

Congregation members at First UU continue to be active in ISAIAH. In November, a school referendum supported by ISAIAH in Rochester passed. ISAIAH is grateful to have built a good relationship with both the school board and the superintendent and looks forward to continuing to advocate for strong and well-funded public education. ISAIAH held a town hall, Leave No One Behind, on April 27th with local legislators that was heavily attended. In this legislative session where the state budget is being voted on, ISAIAH is working to maintain the programs and funding that were won in 2023, like Paid Family and Medical Leave and inclusion of immigrants in the MinnesotaCare expansion. They are also advocating for a medical debt reset program, ending taxpayer funding of the reinsurance program, and eliminating data center tax breaks so that we can fund a moral budget that supports all Minnesotans. ISAIAH continues to be an important organization in our community and anyone from our congregation is encouraged to join.

On April 22, Rev. Luke spoke at a MUUSJA online event about immigration and sanctuary churches, The Call to Sanctuary for Minnesota UUs. We continue to look for representation for MUUSJA's Congregational Connector program.

Goals for the next fiscal year

The team will reflect on best practices of justice work in service to the church mission, and our model of Shared Ministry.

- To continue to work with subgroups and their members and help promote their efforts within our congregation and community.
- To connect more fully with the larger UUA and the Minnesota Unitarian Universalist Social Justice Alliance. (MUUSJA).
- To be the conduit for connection and awareness between congregants and justice opportunities within the church and the community.
- To reach out and connect with new members who have indicated an interest in Social Justice sent by the Congregational Life Coordinator.
- To promote justice events happening statewide and within our community.
- To offer forums, book reads, etc. that provide deeper reflection within the context of our UU values.
- To select shared plate recipients that not only mirror our values but address the most pressing justice needs that may arise in our greater Rochester area.
- To have current and relevant information on the church website that is reflective of our Shared Ministry Team Governance leaves.
- To compile, review, and implement data from the Social Justice Surveys.

- To address our institutional practice of justice, i.e., socially responsible investments, staff compensation, environmental use of our space, etc.
- To continue to use the southeast corner of the Commons for a Social Justice Table to display brochures and flyers for partner and other social justice events.

Administration Team

Team Members

Staff: Erika Fetterman

Board: Paul Trewartha-Weiner

Members: Barb Foss, Ronice Donovan

Team Subgroups

Memorial Garden, History

Purpose of the Team

The Administration Team supports church programs by caretaking our property and communications.

Highlights from the year

- Policies were updated and approved by the Board
- Three additional trees (2 very large) have fallen on the land above the parking lot. Members removed branches and brush of the smaller of the 3 trees, as it was more visible. For now we have chosen to leave the larger 2 trees as fallen and have marked off areas where foot traffic is not recommended.
- Members worked together on July 13 to remove 1 evergreen tree from the easement with the Jehovah's Witness land, to help settle the easement negotiations necessary to prepare for the sale of the Walden Lane land. (Credit members: Eric Egger, Phil Wheeler, Matt Ribikawskis, Bill Thompson, Rick Devine, John Trnka, George Huston, Kirk Payne, Nathan Harff, others?)
- John Trnka reported: brush and weeds were cleared from the emergency exit sidewalk. The buckthorn is getting out of control again.
- The Administration Shared Ministry Team group has been created in Realm with the intention of moving more communications to Realm as well.
- Recommendations about recycling have been provided by Anthony Wittmer (Olmsted County Environmental Resources) and signage updated in the recycling area. ?? (I know there are still comments about what can be recycled)
- Barb Foss's term ends and a new member will be installed – Thank you Barb!
- The Land Stewardship Team has formed to address needs of both Viola Road and Walden Lane land in our care.
- The yearly roof inspection was done on 5/13/2025. The report states there is 0-2 years of life left on the roof and a few immediate repairs were needed. Immediate repairs have been scheduled.

Goals for the next fiscal year

- Clean out of the boiler room remains to be done; consider also spaces church-wide in preparation for packing and moving.
- Schedule an Indoor/Fall cleanup day to address deep cleaning needs in the kitchen and throughout the building.
- Transport and re-purpose mulch from Viola land to Walden Lane as seasonal land stewardship outdoor workdays are scheduled.

BUILDING OUR FUTURE: BEYOND OURSELVES

Core Team

Team Members

George Huston and Ann Hutton serve as Co-Leads working with members: Gail Bishop, Erika Fetterman, John Helmers, Jean Murray, Dave Pesch, Walt Rothwell, Rev. Luke Stevens-Royer, and Greg Turosak

Purpose of the Team

The BOFBO Core Team serves as an initial point of contact with project professionals, the congregation, and church leaders. The Team coordinates the work of the topical teams: Energy, Generosity, Gratitude, Land Stewardship, and Location.

Highlights from the year

- Continued working closely with Locus Architecture and refined the building design.
- Shared the “final” schematic design with the congregation in January.
- Concluded the schematic design phase but due to financial challenges placed additional design work and progression to the design development phase on temporary hold.
- Submitted the Site Development Plan to Rochester Community Development and, after receiving agency comments, began working through requests for additional information or clarifications.
- Participated in a neighborhood meeting required prior to submitting the Site Development Plan.
- Acknowledged the Land Stewardship Plan as prepared by the Land Stewardship Team and as registered with the Minnesota Department of Natural Resources.
- Continued to monitor the easement deliberations with the Jehovah Witness church and local government officials.
- Initiated a congregational naming exercise that will conclude in September to identify the road name that will be the address of the new building.
- Continued working with our realtor and recommended to the board a reduction in the asking price for 1727 Walden Lane.
- Recommended to the Board contract extensions with Kramer Contracting for building consultation and with Widseth for civil engineering support.
- Explored interest earning options to maximize revenue and provided ongoing financial reports of revenue and expenses, investment accounts, cash flow analysis, and general financial oversight of all BOFBO funds.
- Provided regular updates to the Board and to the congregation through the weekly eNews and at periodic forums.

Goals for the next fiscal year

- Continue working with Kramer Contracting and Widseth to refine building and land purpose designs and, as funds permit, consider reengaging Locus Architecture for the design development phase.
- Conduct naming exercise with the congregation and, once selected, register the name of _____ Place with Olmsted County GIS.,
- Finalize required modifications to the Site Development Plan and gain approval from Rochester Community Development.
- Prepare and submit the required Development Agreement
- Resolve easement issue with Jehovah Witness
- Extract stone medallions from Mayowood, restore and store for installation.
- Conduct project benchmark celebrations, including street naming events.

Location Team

Team Members

Greg Turosak (lead), John Helmers, Ann Hutton, George Huston, Gail Bishop, Dave Pesch, Erika Fetterman, Kim Reid, Alex Mayer

Purpose of the Team

Location Team works on sale of the Walden Lane building and land, annexation of the new land, access to the new land, easement issues of the Walden Lane land, working with the city for permitting, etc.

Highlights from the year

- Sale of current church/land
 - No strong interest in Walden Lane site.
 - Continued work with local Realtor.
 - Asking price lowered to \$3.75 million.
- Annexation
 - Process completed to annex Viola land within city.
- Easement
 - First UU and Jehovah's Witnesses agreed on all details regarding 20-foot easement along east side of Walden Lane property.
 - Final paperwork being prepared and still needs to be signed by both parties, notarized and filed with county.
- Site Development Plan
 - Discussions begun with city regarding Site Development Plan and Development Agreement, both needed before bids and site work.
- Future of Location Team
 - Location Team folded into Core Team.

Goals for the next fiscal year

Continue to work on issues above within the framework of the Core Team, with the possibility that the Location Team could be restored if needed.

Gratitude Team

Team Members

Walt Rothwell (team lead), Kim Edson (Board Rep), Beth Atkinson, Myatt Helmers, Barb Foss, Ronice & Gary Donovan in partnership with Paul Scanlon, Sue Wheeler & the History Committee

Purpose of the Team

Appreciating and honoring our church heritage through special events, community projects, rituals of leaving, and curating what comes with us.

Highlights from the year

- On August 4, at Rev. Luke's request, the team hosted a Sunday service reflecting on Gratitude. Many thanks to Stephanie Podulke, Barb Foss, and Myatt and Laurie Helmers for contributing to the service with stories, readings, music, and memories!
- The architects are aware of our desire to incorporate a time capsule in the new church, as well inclusion of the reclaimed medallions (currently pending) and reuse of exterior iron fixtures from First Universalist Church.

- The Team contributed an article in each issue of Grace Notes through the Spring issue, highlighting aspects of our heritage. The publication is now “on hiatus” so we will explore other means to expand awareness of our church heritage and legacy in Rochester.
- After inspection of the Grace Church masonry medallions on the Mayowood property by geologists John Tacinelli & Katherine Logan, Building Restoration Services Corp was contracted for retrieval and storage of the relics. The \$4500 bid for this project was approved by the Core Team in view of the estimated weight of up to 900 lbs each. Retrieval was also approved by Mayo Clinic leadership. BRC did not retrieve them in 2024 but will proceed when weather/moisture conditions are best. We will get photos/video of retrieval. Over months the medallions will dry and stabilize, while we seek bids for restoration, and possible grant or state funding to support this. Grant application training and preservation vendor bids are being explored. Placement at the new church will come as a more final plan for building & grounds emerges.
- Further investigation of the family and career of Eliza Tupper Wilkes continues to be pursued, including books relating to early Universalist ministry in the Midwest and the “Iowa Sisterhood.”
- The History Center of Olmsted County has looked for any possible remaining stained glass from our previous churches in their archive. No record of this currently exists. They have also confirmed that the church can borrow our 1899 signature quilt for future events. The HCOC has been a rich source of historic photos and church-related records.
- Walt continues to develop a historic timeline of our Rochester congregation (ministers, churches, music program, etc.), and the relevant social context (local, national) over time.
- We are working with the History Committee and CB Guild on the Ice Cream Social in May.

Goals for the next fiscal year

- Edit interior video taken before & during the 2023 holidays.
- Work with the Worship Team & Rev. Luke to consider observances, celebrations, and related events.
- Pursue placement options for the Saltzman art collection with help from Paul Scanlon.
- Seek funding to support preservation & display in the new church, relocation of musical instruments, & future heritage displays.
- Further planning for items to be included in the time capsule.
- As the timeline for groundbreaking is defined, we will continue to partner with Rev. Luke and the Core Team to fulfill the Team's mission in the coming months and years.

Generosity Team

Team Members

Jean Murray, in collaboration with Amy Nelson. Overseen by Ann Hutton, George Huston and Jaime Bingner-Care, with input from all members of BOF Core and Financial Stewardship.

Purpose of the Team

Record, report and manage BOF income, expenses and assets

Highlights from the year

- Continued to improve the bookkeeping and timely reporting as needed to improve BOF Committee and Capital Campaign Team, and as recommended by Financial Stewardship.
- The bookkeeping system expanded in 2024 to include an `accounts receivable` for unpaid Capital Pledges.
- In collaboration with Amy Nelson and Financial Stewardship, a BOF investment account was opened at Fidelity. BOF Fidelity funds are held in FDIC insured CDs and a government money market fund.

BOF Financials as of May 13, 2025:

Income of \$1.77M ITD (Inception To Date)

Expenses of \$377K (thousand) ITD for architecture, engineering, construction services

Assets:

\$1.412M (million) in checking, Money Market and CDs.

\$1.768M Campaign Pledge Receivable (future income)

\$\$\$K Viola Site

Liabilities:

\$\$\$K Walden Lane Mortgage

Goals for the next fiscal year

As new members join the church, solicit for annual and capital campaign pledges.

SHARED MINISTRY SUB-GROUP REPORTS

Memorial Garden

Team Members:

Marty Aleman, Mary Amundsen, Margaret Brandel, Marge Dalen, Ronice Donovan, Ann Lien, Katherine Logan, Beth Plumhoff, Linda Thompson, and Julie Larson Keller, Chair.

Purpose:

To maintain oversee, and facilitate all upkeep, expansion, and renewal of the area named "Memorial Garden," and to assist in the process of inurnment in the Memorial Garden space.

Highlights from the current fiscal year:

Several members of the group visited the Viola Road site in June 2024 to start envisioning what could happen with the new Memorial Garden. A list of design concepts was compiled, with a member of the Building Our Future Core Committee, to be considered by the landscape architect, master gardeners, and horticulturists. Minimal planting and watering was done during the summer as Mother Nature took care of most of that. The Garden was tidied and decorated for the Day of the Dead celebration.

Goals for the next fiscal year:

The Memorial Garden on Walden Lane will continue to be watered, weeded, and cared for until the church moves from the Walden Lane location and/or to the Viola Road location.

OTHER GROUP REPORTS

First UU Book Club

Team Members:

We have about 30 members on our email list and monthly attendance ranges from 10- 18. Linda Thompson is the current communication lead for the group.

Purpose:

To share recommended reading, make our selections, review and discuss books of interest, and enjoy fellowship and discussion with other interested readers.

Highlights from the Current Fiscal Year

This long-standing book club at First UU usually meets in person on the third Tuesday evening, September through May. We usually can provide a zoom connection for those interested in joining from home or afar, and when the weather makes it difficult to get to church. The group starts with a refreshment/socializing time at 6:30 pm, with members bringing snacks and beverages. Discussion of the monthly selection starts at 7 pm.

We usually meet at church but sometimes meet at a member's home.

Members make book recommendations in late summer including both fiction and non-fiction selections. The group votes on the recommendations and decides on our book selections at our first gathering in September. We often try to include a Minnesota author, as well as make use of Rochester Public Library's Book Bag selections. Members volunteer to review and lead discussions on the selected books, and another member helps with the set up and cleanup of the refreshments.

This year's selections, reviewers & hosts:

Oct. 15: The Tender Land (William K. Krueger, fiction w/ touch of history): Reviewer: Joyce Wood; Host: Julie Gilkinson

Nov. 19: Small Things Like These (C. Keegan, political fiction): Reviewer: Ann Jones; Host: Ann Lien

Dec. 17: Finding Margaret Fuller (Pataki, historical fiction): Reviewer: Margo Stich; Kay Eberman will host at her home (moved to meeting at church due to some weather concerns). Thanks also to Derik Robertson for offering to meet with those interested in February, to share his perspective on this historical fiction selection.

Jan.21: James (Percival, fiction): Reviewer: Eileen McCully; Host: Julie Gilkinson

Feb.18: Fever in the Heartland: the Ku Klux Klan's Plot to Take Over America, and the Woman Who Stopped Them (T. Egan, non-fiction): Reviewer: Julie Gilkinson; Host: Linda Thompson

Mar.18: The Heaven and Earth Grocery Store (J. McBride, fiction): Reviewer: Mary Jane McHardy; Host: Eileen McCully

Apr.22 (date changed due to conflicts): Soul of an Octopus (Sy Montgomery, non-fiction): Reviewer: Cynthia Daube Host: Marge Dalen

May 20: Dreams of a Floating House (poetry by previous First UU member Karen Sandberg). Karen is attending this session to provide her background on her poetry and writing process:

Reviewer: Sandy MacLaughlin Host: Linda Thompson

Goals for the Next Fiscal Year

Thank you to all who participated, served as reviewers and hosts! We plan to continue in the same format for 2025-2026. Start creating your list of recommendations for next year!

Clara Barton Guild

Team Members:

Currently there are about 45 UUs on our email distribution list. Most members are retired & over the age of 65, but the group has always been open to anyone interested. Historically, it started as a women's group in the church. We met every other month on the second Tuesday afternoon of Sept., Nov., Jan., March and May. The Guild maintains its own accounts & makes independent decisions regarding use of the existing funds.

Purpose:

The First UU Clara Barton Guild was founded in 1916. It promotes & advances justice for women, children, and families through service to the Church and the greater community. The activities of the Guild support the spiritual, service, and social missions of the church.

Highlights from the Current Fiscal Year

- Treasurer, Mary Amundsen, reports our checking balance is \$2970. Our \$10,000 CD renewed in Apr. 2025 & the principal of \$10,000 was put into a 13 month CD w/ interest of \$494 added to checking.
- Besides our time to socialize & make plans together, in:
 - Sept., we packed bags for a Hawthorne Helps distribution;
 - Nov., we welcomed Anne Page (St. Paul office of Planned Parenthood), to hear the impact on the North Central division of PP, as a result of the states who have enacted women's health care restrictions (caused by the Supreme Court ruling which overturned Roe v. Wade, returning the question of abortion care to each state);
 - Jan., Phil Wheeler gave an update on the immigrant families the church is currently assisting & ways to support immigration justice in our community (via Southeastern Minnesota Interfaith Immigrant Legal Defense fund & via our church Immigration Justice Fund).
- We organized, hosted, prepped & provided the food for two Tupper Suppers this year:
 - Oct. 29, Tupper supper (preceding Trunk or Treat)- serving pizza, veggies, fruit (supper donations of \$349 are set aside to fund need (to be determined) in the Faith Development area of future church building;
 - Jan. 29,: organized Chinese New Year supper, serving veggie and chicken stir fry, rice, fortune cookies (supper donations of \$311 were given to our church Immigration Justice Fund).
- On May 10th, we organized, hosted & funded the inaugural 1866 Spring Social (a fundraiser for the church's operating budget).
 - Those attending enjoyed a pie & apron raffle, First UU history scavenger hunt, ice cream w/toppings & activities including churning homemade ice cream, horseshoes, jacks, marbles, dominoes, checkers, hopscotch and Cat's cradle string game.
 - In addition to volunteers who provided pies, aprons & helped staff the event, gratitude is given to our 1866 Social planning group: Phyllis Beery, Margaret Brandl, Ronice Donovan, Barb Foss, Laura Lukes, Linda Thompson, Sue Wheeler, & Erika Fetterman/office.

Goals for the Next Fiscal Year

In May, we will gather for our annual luncheon at Charter House. Thanks to Phyllis Beery for making the arrangements. We plan to continue meeting every other month on the 2nd Tue. of the month at 1:30 pm in Sept., Nov., Jan., March, May. We will offer a blend of social & informational sessions & continue to create ways to support our mission. Linda Thompson can continue as communication lead & we thank Mary Amundsen for her service as Treasurer the last 2 years. We will be choosing a new Treasurer by the fall.

RECORDS OF THE CONGREGATION

Transitions

2024-2025

Births/Adoptions to Members: (1)

Sean and Dessa Samson, Baby Girl, Imogen Samson born 5/14/2025

Child Dedications: (0)

Coming of Age Students: (0)

Weddings of Members: (1)

Michael Hamilton to Mary Lucky-Hamilton

Deaths: (2)

Sandra Soltiz (1/29/2025)

Steven Smith (4/21/2025)

New Members: (40)

Matthew Care

Mason Robinson

Steven Dubois

Kathleen Yost

Alice Kurtzhals

Tosca Wohl

Allison Beito

Kim Rogers

Michele McGinnis

Addie Seabarkrob

David Stoeger

Cletus Mueller

Jana Keller

Dan Nemes

Anna Calhoun

Larry Herbison

Natalie Arend

Heather McKenzie-Roberts

Alexandra McKenzie-Roberts

Ingrid Thompson

Devin Thompson

Andi Sutton

Mary Slack

Pat Reuvers

Lynn Reuvers

Devon Penn

Mary Olofson

Chris Olofson

Rose Fleischman

Barbara Fleischman

Jen Domnick

Ingrid Alvarez

Richard Wolfgramm

Maggie Covarrubias

John Evans

Eileen McCully

Eric Hsi

Michael Melnik

Lisa Melnik

Kayla Betzold

Reinstated Members: (5)

Lori Elward

Rachel Froud

Lyndon Froud

Ryan Shriver

Diann Schmid

Resigned or Removed from Membership: (15)

Armando Manduca

Cathryn Manduca

Jason Sumner

James Sweet

Cyndi Sweet

Craig Wruck

Elizabeth Wruck

Sandee TePoel

Heidi Nelson

Jennifer Ruehle

Chelsey Lehnerr

Janel Keller

Robert Harveland

Jade Joyce

Mary Mulholland-Kafer

Members Moved: (0)

Membership:

40 new members were added,
5 members were reinstated,
2 members died,
and 15 members were removed from membership.

Our membership now stands at **446**.

Board of Directors Covenant of Installation

First Unitarian Universalist Church Rochester, Minnesota

The membership of the First Unitarian Universalist Church has elected you to be responsible for establishing policy and acting as stewards of the business of the Church. In assuming office, each of you accepts delegated responsibility for the spiritual and temporal welfare of the church. By your actions you have the power to shape the effectiveness of this congregation in living up to the principles we espouse. We are ready to hear your covenant.

Board

We, the members of the Board of Directors of the First Unitarian Universalist Church, covenant to act as stewards of our church,
acknowledging and accepting the trust placed in us to support and uphold our common mission.

Congregation

We recognize that you serve as models to promote involvement, commitment, stewardship, and community within our church.
We covenant to join with you in supporting the life of this religious community through our active participation and leadership.

Board and Congregation

We promise to deal forthrightly and honestly with one another.
We pledge to keep foremost in our hearts the health and well-being of our church.

Congregation

Acknowledging the significant commitment of time and energy that you make as Directors, we pledge you our support.
We thank you and offer you our trust
to represent us and lead us in the time ahead.

Minister

On behalf of the congregation that has elected you
and has committed itself to active involvement with you in the life of this community, we welcome you as Board members.

May you always keep the mission of this church in your heart and discernment. May you hold fast the trust invested in you,
to guide and articulate our mission
of being a compassionate and welcoming church to nurture
spiritual growth, and to practice justice.

May the blessings of hope and the power of love guide us all.