



# 2024 Annual Report

Cedar Valley Unitarian Universalists

# 2024 Annual Report

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# 2024 Annual Meeting Agenda

May 19, 2024, 11:15 a.m.

Meeting to be held following regular Sunday service, in the sanctuary at the CVUU building. An on-line attendance option through the Zoom platform will be available.

Call to Order

\* Approval of Agenda

\* Approval of Minutes from May 21, 2023 Annual Meeting

\* Election

- 2024-2025 Board
- 2024-2025 Nominating Committee

\* 2024-25 Budget (FY2025: July 1, 2024 – June 30, 2025)

Selection of Beneficiaries to Receive Monthly Social Action Collections

President's Report

CVUU Unsung Hero Award

Acknowledgements/Thank Yous

Passing of the Gavel

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\* Action items

# 2023 Annual Meeting Minutes

Held May 21, 2023, 11:15 a.m., in-person and over Zoom

Rob Boody, Secretary

**Attendance:** 44 members attended (35 Sanctuary & 9 Zoom). Zoom host Steve Chamberlin.

The meeting was called to order by President Huber-Otting at 11:20. Presence of a quorum was verified.

**Agenda:** Agenda stands as written (unanimous vote).

**Approval of Minutes from the May 22, 2022 Annual Meeting:** Motion made to accept as written. Seconded and unanimously approved.

## Elections

- **Board elections:** It was moved by the Nominating Committee and seconded that we vote on the proposed slate of Board Nominees (previously approved by the Board). Voting was unanimous in the affirmative.
  - President – Dennis Harbaugh (1<sup>st</sup> term)
  - Vice President – Karen Impola (2<sup>nd</sup> term)
  - Finance – Mike Knapp (1<sup>st</sup> term)
  - Secretary – Rob Boody (2<sup>nd</sup> term)
- The Parliamentarian (Al Hays) ruled that as the four trustees were already Board-approved, they did not need to be voted on by the entire congregation. For the congregation's information, they were the following:
  - (Trustee) Social Action – Lizzy O'Loughlin (1<sup>st</sup> term, 2<sup>nd</sup> year)
  - (Trustee) Building and Grounds – Richard Henry (2<sup>nd</sup> year of vacant position)
  - (Trustee) Religious Education & Programs – Desiree Cunningham (1<sup>st</sup> term, 2<sup>nd</sup> year)
  - (Trustee) Congregational Life – Stacey Bartz (1<sup>st</sup> term, 1<sup>st</sup> year)
  - (Trustee) Shared Ministry – Floralyn Groff (2<sup>nd</sup> term, 1<sup>st</sup> year)
  - (Trustee) Religious Services – Dick Warhol (1<sup>st</sup> term, 1<sup>st</sup> year)
- **Nominating Committee election:** Voted for the new member only (per the Parliamentarian): Margie Miller. Vote was unanimous.

## Approval of the 2023-2024 Budget

The budget was explained by Mike Knapp of the Finance Council. He also responded to several questions from the congregation. This slide was a summarized version (also

included in the packet) as the line-by-line budget was gone over in the 2<sup>nd</sup> hour meeting May 7.

He also reported that unlike many congregations, ours was able to move to meet the new UU guidelines for minister and staff. The Finance Council gives kudos to the Stewardship Committee for raising enough money to make this possible.

The Finance Council moved that we approve the proposed FY 2023-2024 budget; seconded. The vote was unanimous.

### **Article II Proposed Changes Straw Poll**

Preliminary remarks were made by President Huber-Otting, Pastor Emma, Al Hays, and Mary Kay Madsen. The poll was filled out on paper in the sanctuary and on a poll run by Steve Chamberlin for Zoom participants. See report by Secretary Boody for results.

### **Process to Select Beneficiaries of Social Action Plate**

- Vote online for your favorite organizations by June 29th

### **Minister's Report (Pastor Emma Peterson) – see report for details**

- Thanks and gratitude!
- Ongoing work on building security. The staff feel safer – especially after the break-in.
- The successful Stewardship Campaign, aided by the Finance Council.

### **President's Report (Sheri Huber-Otting) – see report for details**

It was a very busy year for the Board, including:

- New theme was created.
- The Coordinator of Children's Religious Education, Kate Flynn, was promoted to Director.
- Chartered Troop and Pack 44.
- Adopted the spirit of the 8<sup>th</sup> Principle.

Take time off in July and recharge!

**CVUU Special Thank Yous** – Time spent recognizing many aspects of being part of the CVUU! Thank you to everyone.

**Passing the Baton** – transfer of Presidential role from Sheri Huber-Otting to Dennis Harbaugh. Certificate awarded to Sheri. Short remarks were made by incoming President Harbaugh.

**Adjournment** – Moved and seconded to adjourn. Unanimously approved. Adjourned at 12:27 PM.

# Minister's Report

Pastor Emma Peterson

Each spring, the CVUU gathers to review the year behind us, and prepare for the year ahead. We've had a tremendous year, on all fronts. We are growing, not only in membership, but in organizational strength and shared mission. I recently learned that Unitarian Universalism is the only religion in the Western world currently attracting new members at a measurable level. I believe at my core that the CVUU is essential to the Cedar Valley, and that we will continue to grow as the years go on. I am so excited for our future!

Under President Dennis Harbaugh's outstanding leadership, we've improved our communication congregation-wide. We've developed new ad-hoc committees to address issues of the moment, including an ad-hoc committee focused on welcoming and incorporating new members into our Beloved Community. I am energized, inspired, and deeply grateful for the year we've had, and am eagerly looking to the year ahead.

As you know, I am on Sabbatical May through July. I will return to the CVUU in August. As you convene for this year's Annual Meeting, please know I am with you in spirit, beaming all my love and pride to you!

## **Joys and Gratitudes:**

The Annual Report offers the minister an opportunity to express thanks and gratitude for the multitude of volunteers who shape, nurture, and sustain the CVUU. "Team work makes the dream work" is one of my favorite cliches for a reason – it is deeply true. From our paid staff, to the leadership of our Board, to the committees and task forces, to the thousands of small, collaborative gestures from so many people – the CVUU is the interdependent web incarnate. If you aren't already, I encourage you to get involved in the inner-workings of our congregation. Each of us is responsible for our collective thriving. Below are my thank-yous to the leadership of the CVUU. You make and shape this place, and for that we are all deeply grateful.

## **Staff**

**Jess Lieb, Music Director:** Your work is a ministry, through and through. This year, I've observed you take on new challenges and breathe new life into old programs. Our CVUU choir feels particularly reinvigorated, more tightly organized, and filled with joy. Thank you for choosing this place, and for all the ways you enrich and sustain our individual and collective spiritual growth. Thank you.

**Kat Beane Hanson, Office Administrator:** You. Are. A. Wizard. I will never cease to be in awe of the work you do. I continue to learn so much from you! Thank you for your

professionalism, attention to detail, and keen perspective on the big picture. I think to myself, on a literal daily basis, that my ministry would not be nearly as strong as it is if it weren't for you. I truly can't express with words how abundantly grateful I am (and we all are) for you! Thank you.

**Kate Flynn, Director of Children's RE:** Thank you for continuing to breathe life back into our children's programming, for building a stellar team of support, and for consistently demonstrating Good Church. I reflect often on your philosophy – that all we do is Religious Education. What an honor to witness your unfolding formation. You have made this a better community, and I am so grateful. Thank you.

### **The Board**

**Dennis Harbaugh, Board President:** Dennis, working with you this year has been one of the most profoundly joyful and transformative experiences of my ministry. You have a natural leadership ability, and a wealth of skills that have left me awed. From your banger of a call to action to draw up nursery volunteers, to your demonstration of Repentance and Repair in action, you've catapulted the CVUU to a whole new level. I've learned so much from you and will remain eternally grateful for your leadership. I am certain your year of service will have a long term, positive impact. Thank you.

**Thank you to all of the members of the CVUU Board:** This year, you've faced challenges, dreamed big dreams, and improved the professionalism of our organization. Thank you to Karen Impola, Vice President; Rob Boody, Secretary of the Board; Mike Knapp, Finance liaison and Finance Chair; Lizzy O'Loughlin, Social Action liaison; Desiree Cunningham, REAP liaison; Dick Warhol, RSC liaison; Floralyn Groff, Shared Ministry liaison; Richard Henry, Building and Grounds liaison, Stacey Bartz, Congregational Life liaison.

### **Newsletter**

**Gerry Chamberlin:** Your work is a remarkable service to this community, and I look forward to reading the newsletter each month. Thank you for your creativity, attention to detail, and love and care for the CVUU. If only we realized the many, many times your keen eye has "saved the day." (I do think we've begun to be clued in to this fact!) Thank you, also, for your tender grace and endless patience with a minister who lives primarily in outer space. The CVUU is better because you are here, and I'm a better minister because I know you. Thank you.

### **Stewardship Committee**

We continue to smash records and accomplish incredible feats. It takes a village, indeed! Thank you for never giving up, for inspiring our congregation, and for ensuring another year of continued thriving. Thank you to the members of this year's Stewardship team, Karen Impola, Mandy Boody, Michaela Rich, Steve and Gerry Chamberlin.



## **Religious Services Council and Tech and Worship Team**

I am consistently amazed by the caliber of the RSC and the worship and tech teams. This year, for me, has been one of renewal, reawakening, and inspiration. Thank you all for your creative ideas, inspiring meetings, and creation of sacred space.

**Mandy Boody, Chair:** As you pass the mantle of leadership to embark on new ventures, I send you off with my eternal gratitude, happy memories of collaboration, and many plates of chicken fried rice. You are a gift to this congregation, and to me. That will always be true, no matter what, okay? Thank you.

**RSC, Worship Team and Worship Associates:** Mandy Boody, Jess Lieb, Callie Amiday, Dick Warhol, Ken Taylor, Kathi Bower, Karen Impola, and Lynn Brant.

## **Social Action Council**

I am consistently impressed by this Council's dedication to Social Justice efforts. Our focus on Social Action continues to be a draw for folks who are not yet a part of our congregation, and a beacon to a world desperate to repair itself. It seems new people are always joining the Council, which has made it hard to keep track of all of you! Thank you for fighting the good fight, for stirring up good trouble, and staying focused on the cause.

**Austin Evens and Lizzy O'Loughlin:** I'm including you both because from my vantage point, you lead together. You two are a breath of fresh air and an inspiration to me and the entire congregation. We are the luckiest, thank you, thank you, and thank you.

**Thank you to all members of the Social Action Council:** Al Hays, Pam Hays, Lizzy O'Loughlin, Austin Evens, Priscilla Nieman, Carollyn Hartsfield, Sally Browne, Jill Miller, Kathi Bower, Shirley Whiteside, Byron Plumley, Mollie Wallsteadt, Rosa Torres.

## **Shared Ministry Council**

I am deeply grateful for the work of the Shared Ministry Council. This is the Council that takes the pulse of the congregation, influences and supports healthy congregational culture, mediates conflict when called to do so, trains church leaders, and encourages all of us to build Beloved Community. I am moved by the care the members of this Council demonstrate as they tend to our congregation, and personally indebted for their advocacy and protection of the health of the ministry. Thank you for your tremendously good and imperative work.

**Heather Flory, Chair:** Thank you for your hours of work, and the many visible and invisible contributions you've made to ensuring the health of the CVUU. I learn from you each time we connect. You are truly one of the most remarkable, gifted, inspiring people I've ever met. I am so, so grateful for you. Thank you.

**Thank you to all members of the Shared Ministry Council:** Floralyn Groff, Deb Kyler, Nancie Groszkruger.

### **Nominating Committee**

It's occurred to me recently that many members of our congregation are unaware of the "behind the scenes" efforts of this committee. Thank you for your dedication to finding the right leaders for each season we encounter, and for approaching your work thoughtfully, and with deep intention.

**Thank you to all members of the Nominating Committee:** Heather Flory, Karen Impola, Floralyn Groff, and Michaela Rich.

### **Engagement Committee**

What a joy that this Committee is a necessity as we grow at the CVUU! What an awesome demonstration of good communication, of welcoming growth without fear or trepidation, of fun and fellowship and deepening relationship! It's been awesome to witness the creativity and collaboration of this group. Special thanks to Heather Flory and Juanita Williams for jumping in feet first.

**Thank you to all members of the Engagement Committee:** Heather Flory, Juanita Williams, Rita Waggoner, Mollie Wallsteadt, Rosa Torres, and Michael Jamosky. Thank you, also, to Jill Miller for helping to get this committee off the ground, and your (awesome, inspiring, creative) ideas and collaboration.

### **Congregational Life**

I am so inspired by the creative work of this Council! From hospitality, to marketing, to our Caring Team, Congregational Life keeps Good Church alive. Thank you, all, for your care and nurturing of our community as it grows. Thank you, also, for your support as my ministry shifts in the face of unprecedented growth. We're all in this together, indeed.

**Juanita Williams, Chair:** Thank you for your leadership. I think, sometimes, you don't recognize how truly special and gifted you are. Never in my life have I met a more welcoming spirit. Your ability to draw people in, make connections, and make each person feel seen and known is profound. Thank you for being exactly who you are.

**Thank you to all members of the Congregational Life Council:** Mica Lorenz, Dan Bower, Stacey Bartz, Leigh Zeitz, Jill Miller, and Chelsea Toppin.

### **Building and Grounds**

Thank you for all you do to keep our building safe, clean, and well managed. Your work often occurs behind the scenes but does not go unnoticed. The building would \*literally\* fall apart if it weren't for all of you. From an office full of giant ants, to a crumbling staircase, thank you for promptly replying to maintenance needs, no matter how big or how small.

**Roger Hahn, Chair:** Roger, I'm sure there are countless projects you've completed without my awareness. Thank you for all of the ways you take care of our home!

**Thank you to all members of the Building and Grounds Council:** Richard Henry, Bill Brown, and Roger Hahn.

### **Building Security Team**

The work continues! Thank you for your efforts in creation of policy, your sensitivity to the concerns regarding safety of our Staff and those who are frequently alone in our building, and your commitment to getting it right and collaborating.

**Thank you to all members of the Ad-Hoc Building Security Team:** Gary Kroeger, Roger Hahn, Nate Smith, and Kat Beane Hanson.

### **REAP Council/Ad-Hoc Policy Committee**

Thank you for never giving up on nurturing and supporting our children and yoUUth. The best is yet to come! I've especially enjoyed watching y'all do the hard work of policy creation. Your conversations are always deep, often hilarious, and deeply rooted in good faith and good works. All we do is Religious Education, indeed!

**Thank you to all members of the REAP Council and Ad-Hoc Committee:** Desiree Cunningham, Jeff Chapin, Seth Chadwick, and Jennifer Hopkins.

### **Finance Council**

This is the Council that keeps our budget balanced and ensures the continued thriving and financial health of the CVUU. I learn something at each Finance meeting and am continuously impressed by your shared commitment to sustaining our congregation. Thank you, also, for keeping all of us grounded in reality and the cold, hard facts.

**Mike Knapp, Chair:** Thank you for your continued leadership on this Council, and your willingness to work collaboratively with a skilled team.

**Thank you to all members of the Finance Council:** Mike Knapp, Mary Kay Madsen, Jena Talbert, Bill Brown, Dave Steege. A special thank you to Tom Hesse and Dave Steege for undertaking this year's audit.

## Personnel Council

We were once a congregation with a minister and one or two very part-time staff. We are now a congregation with a full-time minister and three staff, two of whom are part-time benefitted. It is my dream that we can one day be a congregation with a full-time minister and three full-time staff. Just imagine! (I think it's possible!) The work of this Council ensures the professionalism of the organization and protects both the staff and the congregation. Thank you all for your support of our staff, your advocacy, and your care of the community.

**Karen Impola, Chair:** Thank you for your strong advocacy of our staff, as we continue to grow as a professional organization. Thank you.

**Thank you to all members of the Personnel Council:** Mike Knapp, Desiree Cunningham, Karen Impola.

## Concluding Thoughts

This year, our church theme was “Rooted in Purpose, Rooted in Values.” In many ways, this year has felt set apart. We’ve returned fully to one another after many dark, uncertain years of pandemic church. We’ve grown, not only in numbers, but in clarify of mission and shared purpose. I often preach that Unitarian Universalism can save the world. I believe we are doing just that, in our little microcosm. Like a stone cast into a pond, our efforts here will ripple out to create a better, brighter world. I am deeply proud and profoundly grateful to be this congregation’s minister. I’ll miss you during my sabbatical, but I’m beaming all my love to you! See you in August.

# President’s Report

Dennis Harbaugh

Our year at the CVUU was one of new beginnings, challenges, and progress on many fronts. The arrival of new members, combined with hard-working Councils, committees, and task forces, created a rich mosaic of activity both inside and outside CVUU’s walls.

**Theme & Goals:** Early in the year, Board members created a theme – “*Growing in Purpose, Rooted in Values*” – which reflected the importance of identifying our local CVUU purpose, while recognizing the development of common UU values at the national denominational level. The Board identified several Goals and Action Steps to help guide both Board and congregation activities. Some of these goals were met; work remains to be done on

others. Staff and volunteers worked together as a team toward positive growth and improvement. Progress was made toward all goals...

Goal #1: Make our congregation a more welcoming place for young families.

- Regular, consistent nursery coverage for 0-4 year-olds was provided for the first time in many years.
- Religious Education programming was held for children each Sunday morning.
- More potlucks were held after Sunday services, which provided convenient meals and opportunities for young families to connect.
- In the spring, family-friendly First Friday potlucks began, which created additional changes for families to share a meal and enjoy fellowship and games with other young families.
- Our house band Burning Heretics, and our choir, offered opportunities for musically-inclined young parents to share their talents as part of a no-hassle music group.

Goal #2: Identify and encourage specific efforts to live out our values of Justice and Equity, and our previously adopted 8<sup>th</sup> Principle.

- Pastor Emma shared sermons which incorporated information about the 8<sup>th</sup> Principle, as well as sermons which focused on UU values of justice and equity.
- At least one layperson presented a sermon focused on the history of racism.
- Our emphasis on justice & equity was reflected through work in the larger community:
  - Participated in a Waterloo Voting Rights March;
  - Attended the Martin Luther King, Jr. dinner as a group;
  - Over 25 members contacted Iowa legislators to help defeat legislation which would strip away LGBTQ+ rights.
  - To address economic inequity, continued to help with Community Meals, began monthly CVUU work afternoons at the Northeast Iowa Food Bank, continued to stock our Little Food Pantry, participated in a homeless shelter fundraising walk, and made our building available to economic justice community organizers.

Goal #3: Improve systemic communication throughout the CVUU.

- A communication structure was installed to strengthen communication between Board members.
- Board actions were publicized to members through monthly newsletters and weekly email reports.
- Council chairpersons were encouraged to collaborate and communicate directly.
- Pastor Emma's ongoing commitment to meet regularly with lay leaders helped "connect the dots", which resulted in very few items of importance falling through the cracks. Pastor Emma sets an excellent example by being a clear communicator.

Although progress was made toward achievement of these goals, several planned Action Steps did not get completed. We were not perfect, a few things fell through the cracks, and we can always improve. However, considering that much of our progress was driven by volunteers, our achievements are admirable!

To bring additional attention to our theme, a 2<sup>nd</sup> Hour Adult forum explored the question “What is the CVUU’s Purpose?” 40 members attended either in-person or on Zoom, and 17 members shared their perspectives on our past, current, and potential future purpose. It’s hoped this topic will continue to be explored in future years.

### **Other 2023-2024 Highlights**

**New Members:** 16 new members joined the CVUU this year, and the opportunity to welcome and interact with them was joyful and exciting! These new members, combined with the 12 new members who joined in the six months prior to the start of the fiscal year, resulted in many new faces and fresh energy throughout our building. This represents significant and rapid growth for our congregation, whose membership now stands at 147 members. Even more encouraging is that many of the newer members are already actively involved in CVUU activities, including assisting at First Friday potlucks, helping greet on Sunday mornings, involvement in 2<sup>nd</sup> Hour Forums, volunteering in the nursery and with other CVUU members out in the community, and sharing ideas for the future. Significant energy was devoted to help new members acclimate and integrate into the CVUU, including the establishment of First Friday potlucks and New Member dinners. We believe our newer members will nourish, stimulate, and help guide our congregation for many years to come!

**Expanded Community Involvement.** From beginning monthly volunteer sessions at the Northeast Iowa Food Bank, to organizing during Coffee Hours to contact Iowa legislators, to attendance at marches and rallies, to becoming a co-sponsor of local legislator forums, to opening our building to neighborhood organizers, to supporting our community by offering our building as an election polling place – there’s no doubt the CVUU increased our involvement and visibility in the Cedar Valley during the past 12 months.

**Strong Committee & Task Force Work.** In addition to Board and Council members providing leadership throughout the year, numerous committees and task forces crafted important policies which will impact the CVUU for years to come:

- The **Accessibility Task Force**, which began its work in 2019, only to be temporarily halted by the Covid-19 pandemic, resumed their work with several new members. After five years of on-again, off-again, on-again work, in April 2024, they submitted their recommendation, which was unanimously endorsed by the Board. This was a significant milestone along the path toward making the CVUU building more accessible and usable for all.

- The **Building Security Task Force** was charged with developing a plan to increase the safety of the staff and improve building security. Their final report and recommendation, which includes installation of cameras and floodlights, was unanimously approved by the Board. Work toward implementation is ongoing.
- The **Engagement Committee** was a new, joint creation of the Shared Ministry and Congregational Life Councils, and was established to help new members integrate into the CVUU, listen to how the CVUU can become more welcoming to new members, and create social activities which help build a sense of community among all CVUU members. The work of this fledgling, ongoing committee has already made a noticeable, positive impact!
- The **Ad Hoc Committee on Supervision of Children & Youth** was organized to provide policy guidance for staff, parents, and those under 18 years old. Their work continues.

Additionally, a newly adopted **Lay Minister Policy** outlines the process to become a CVUU Lay Minister. A **Disruptive Behavior Policy**, which is expected to be approved in the near future, will guide staff and lay leaders in how to handle specific behaviors disruptive to congregational life.

**Short and Long-Term Financial Stability.** Our Finance Council does a great job each year preparing and monitoring our annual budget and various funds. The FY 2023 budget ended with a surplus, and the Board – in addition to using some of the surplus to replenish our Building Maintenance Reserve Fund – established and funded:

- An **Emergency Reserve Fund**, to be used for future unexpected or unplanned expenses.
- A **Minister Sabbatical/Search Fund**, to help cover expenses created during a minister sabbatical or minister search process.
- A **Stewardship Campaign Set-aside Fund**, to help cushion any future stewardship campaign shortfalls which may occur.

These measures are forward-looking examples of good stewardship, and set the CVUU up for continued financial stability.

**Increased Sunday Morning Attendance.** The combination of new members and the provision of consistent nursery and religious education programming resulted in increased attendance on Sunday mornings, and average attendance for each month increased significantly over the previous year.

**Minister Sabbatical May-July, 2024.** In February 2024, the CVUU Board unanimously approved Pastor Emma's request for a three-month sabbatical from May 1 – July 31, 2024. A six-member Sabbatical Planning Team was immediately created, with membership including the current president, the incoming president, and appropriate Council and committee

representatives. The Team spent several months preparing for Pastor Emma's absence, and shared regular communication about their work and "sabbatical plan" with the congregation. CVUU members are supportive of this sabbatical, and all three phases – planning, execution, and reentry – are anticipated to go smoothly.

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On a personal note, I want to thank all CVUU members for the opportunity to serve this wonderful congregation, and I will remain forever grateful for the incredible support and encouragement graciously extended to me over the past 12 months. It was a true joy to work closely with Pastor Emma during this past year, as well... we're very fortunate to have her as our minister. My hope is that many of this year's "new beginnings" help strengthen the CVUU for the long-term.

## Communications Report

Kat Beane Hanson, Office Administrator

This year, I have valued collaborations with Congregational Life, Shared Ministry, and the Engagement Committee as we continue thinking about the ways CVUU communicates, both internally and externally. And of course, I want to recognize how deeply indebted this congregation is to our newsletter editor, Gerry Chamberlin.

I am continually looking for ways to grow and enhance our online presence. Ways I'm hoping to do more of that this year include the following:

- Upgrades to the CVUU website.
- Highlighting in-person activities on our social media platforms, especially photos from our events.
- I have several ideas for fun social media campaigns, and I'll need volunteers for this! Let me know if you'd like to be involved in a social media video series. I promise to make it fun!

Watch our website and social media platforms for these updates – and more!

If CVUU folks are looking for an easy way to help support this work, the easiest way is to **take pictures!** Getting together with your small group? Take a picture! Love the décor on Sunday morning? Take a picture! See some pollinator garden plants in bloom? Take a picture! Volunteering in the community with other UUs? Take a picture! Send your pictures to me via



email or through Google Photos at [office@cedarvalleyuu.org](mailto:office@cedarvalleyuu.org) or however you can think to deliver them – Dropbox, other file sharing system, or if all else fails, bring me a flash drive. We all know a picture is worth a thousand words, and photos and videos get the best reach on social media. Let's be intentional this year about showing folks what fun, interesting, and meaningful time we spend together.

## Newsletter Report **Gerry Chamberlin**

The CVUU newsletter is published eleven times per year, with the summer months of June and July combined into one issue. The size ranges from eight to fourteen sides per issue; this variation reflects the time of year and the number of activities happening at the church in a given month.

We have several ways members/friends can choose to receive the newsletter/newsletter calendar. They can:

- 1) receive a paper copy via first class mail,
- 2) pick up a paper copy at the church, or
- 3) be notified by the Office Administrator via email when the files are available at the website; it's also available via a link at the end of the Weekly Updates.

For members opting to pick up their paper copy at the church, the copies are there a day or two prior to the last Sunday of the month.

Currently, thirty-five copies are printed at Copyworks each issue. The distribution is as follows: approximately ten are sent first class postage; one each goes to the Minister, Administrator and the DCRE; one is saved for the archives; the remainder are divided up at the CVUU between the acrylic holder on the north/entry wall, and a box on the table at the foot of the stairs in the Fellowship Hall. I monitor these two places weekly to be sure there are copies in each location.

*Members responsible for seeing to newsletter details and more –*

Editor: Gerry Chamberlin

Maintaining an on-time schedule remains a high priority for me so that each issue is ready promptly. I spend many hours with editing, formatting, layout, and seeing that the final copy is to the printer in a timely manner. After picking copies up from Copyworks, there is stapling and folding for those copies to be left at the church. The post office doesn't allow staples, so those being mailed are folded and taped (four pieces on the three open sides); mailing labels are

attached (provided by the CVUU office each issue), and stamps are added. Most months one first-class stamp is adequate, but weight is checked at the PO for issues that have six pages or more.

After the printing and prepping of the paper copies is complete, I make a PDF of that month's files (newsletter and calendar) to send to Kat for the website and to distribute via email to the membership.

Monthly deadlines are always established ahead of time and published in each issue – on the calendar page and in the Newsletter Deadline article. There are e-mail addresses on the calendar page for contacting the Editor (newsletter items) and Office Administrator (Calendar/Order of Service items). At deadline time each month, Kat and I are in communication often to be sure that, to the best of our knowledge, information being sent out is correct and current.

Assistant Editor: Steve Chamberlin

Steve is my invaluable computer guru. Since December 2004, we have done the entire newsletter on the computer. He assists with computer dilemmas, problems, and lends advice as the need arises with any computer issues. He is my second set of eyes for proofing, and often helps with the folding of the paper copies.

Calendar: Kat Beane Hanson

Each month, Kat sends me the calendar the day prior to the newsletter deadline. She collects Sunday service, committee meeting, and event information from committees/chairs and enters all of it into a computer calendar version that she emails to me (which becomes page two of the paper newsletter). This is no small task! Kat also updates the labels monthly and prints a copy for me at deadline time for mailing purposes.

First Class Postage (no Bulk Mail): Since August 2011 we have only used first class mail. Although it can vary a bit, most often we send ten copies each issue at the first-class rate.

Copyworks: Brock, and occasionally Kyle or Jon, see that the newsletter is printed and ready for me to pick up in a short turn-around time. They are very good to us in this respect, for which I am most grateful working on a deadline!

Contributors: Without contributors, we would have no newsletter! Articles are mostly sent to me via email which is preferred so that I can have all information in one place to produce the newsletters. For the most part, members are conscientious about making the deadlines so that we are able to keep this publication on schedule, and that is very much appreciated!

# Building & Grounds Council Report

Roger Hahn

During the past year, the Building & Grounds Council:

1. Rebuilt the exterior stairs on the east side of the building.
2. Hired a contractor to repair the east door of the sanctuary which had rotten casing.
3. Repaired damaged shingles from wind damage.
4. Repaired shingles and a hole in the wall from a raccoon “break-in”.
5. Installed web connected thermostats in the sanctuary, allowing better temperature to be controlled from either room and online.
6. Installed online and connected thermostats for Kat’s office and the balcony, allowing temperature to be controlled from either room and online.
7. Installed a fire sensor and a water leak sensor provided by our insurance company to allow automatic online notice of any problem.
8. Hired an electrician to fix some wiring problems, including why the sign was not working. Problems were fixed, including the sign which had an internal problem resolved by the sign company.
9. Maintained lawn mowers, recruited volunteers to mow, and coordinated the mowing schedule.
10. Coordinated snow removal and provided ice melt when needed.
11. Continued gradual switchover of lights to LED.
12. Cleaned out eaves and replace some screens to keep leaves etc. from clogging them.
13. Replaced furnace filters, changed smoke alarm batteries.
14. Worked with the pollinator garden volunteers to trim and clean up the area around the shed, and plan how to improve the area in this next year.

## Accessibility Task Force (ATF)

**Steve Chamberlin**

Since the 2023 Annual Meeting Report, many of the “next steps” outlined in that report for the Accessibility Task Force have been successfully completed. We have:

- Recruited new task force members to fill out the team. The current group consists of Steve Chamberlin, Chair, Roger Hahn, Co-chair, Floralyn Groff, Margie Miller, Steve Thom, and Jill Miller. This group, or parts of it, have met eleven times on various topics and with other parties since the last report.

- Conducted training sessions to bring the new members up to speed with the activities and decisions of the pre-pandemic task force.
- Affirmed unanimously that the new ATF members agreed with the direction of the previous work and desired to move it further forward in a similar direction.
- Identified improvements in the plan which would allow it to serve the congregation better over a longer future.
- Re-engaged with Mardy Holst, Architect and Principle of Align Architecture and Planning of Waterloo. Mardy and his staff have put our ideas into layouts and helped us refine them, and made significant contributions of advice relative to various potential changes.
- Received updated costs estimates from Mardy on a base “minimum” plan, and on the plan the ATF proposes.
- Presented the task force’s proposal to the Board to determine if the congregational leadership endorses the plan we are proposing, or has concerns that we should adjust our direction in any way.

The meeting with the Board was held April 2nd, 2024. The current ATF members as well as past members attended, and all Board members attended or their areas were represented. Steve Chamberlin made a presentation summarizing past activities of the team, and laying out the two basic plans and their estimated costs, concluding that the expanded “Accessibility PLUS” plan is the ATF’s recommendation for many reasons. ATF members offered statements of support for the plan. The ATF proposal accomplishes the minimum objectives for disabled access support by the installation of an elevator as well as providing a number of other benefits including: an expanded foyer area; a room next to the foyer which could be used for storage, meetings, or a library; a new larger kitchen with new appliances for improved food safety and a serving arrangement that will be easier for the disabled to navigate; a 65% increase in Fellowship Hall usable space; an office suite that brings our staff close together for improved collaboration and a more professional staff environment; a room dedicated to our music program; making the two upper level bathrooms disabled accessible; and improved overflow viewing of our sanctuary services and activities when attendance is high.

The Board unanimously endorsed moving forward with this plan, making a number of positive comments about the long-term value of the plan. At an estimated cost of over \$1.1 M, it will be a challenge to do this, but it was felt it is worth trying. One important factor is that the minimum plan, which does only the elevator, the expanded lobby, and the kitchen, would be about \$900 K, so it is not that much of a savings anyway.

Going forward, the following steps are envisioned:

- Continue working with Mardy Holst to generate more plan details and visualizations including elevation views and “walk-by” videos. Map out an estimated timeline for the project.

- Present the plan to the congregation through multiple channels and get feedback for further improvements.
- Plan and execute a staged capital fund drive and create a financial plan.
- Get approval of the full plan and financing by the Board and congregation.
- Construction!

The ATF “Accessibility PLUS: A Future for ALL” proposal is exciting and will carry the congregation into the future. The plan is being viewed as the kind of renewal that is undertaken maybe every 40 years, and since the last major project like this, when we added the Fellowship Hall/RE wing, was almost 40 years ago, it seems doubly appropriate to undertake this now.

## Building Security Task Force

### **Kat Beane Hanson**

In October, a Task Force was assembled and charged with researching security options for the CVUU building and forwarding to the CVUU Board a specific proposal which improves staff safety and building security. This Task Force is comprised of Kat Beane Hanson, Roger Hahn, Gary Kroeger, and Nate Smith. The initial proposal was presented to the Board and passed at their April meeting, but some problems with the plan were identified shortly thereafter. After consulting together, the Board and Task Force decided that progress on this plan should be halted until the potential impediments are addressed. The Task Force is delighted to welcome two additional members, Mandy Boody and Ken Taylor, and is optimistic about their ability to bring a comprehensive, successful, secure updated proposal to the Board soon.

## Congregational Life Council Report

Juanita Williams

The Congregational Life Council promotes activities that contribute to the general health and spiritual growth of the congregation, including greeting, hospitality, membership, marketing, caring, and small groups. *Juanita Williams* served as the chair of the Congregational Life Council for the 2023-2024 fiscal year.

- Greeting:** The Greeting system has adapted again this year as in-person attendance at Sunday services has grown and we also maintained a strong virtual option. Jill Miller took on leadership of the Greeting process for most of this year. She has helped recruit new greeters and set up multiple ways that Greeters can sign up to fill a spot in-person and/or virtually. She updated the Greeter Responsibilities document and trained new Greeters. She initiated and organized a Phone Bank in February where a small team called, then sent follow-up emails to all potential volunteers for Greeting (and/or Hospitality) to solicit them to sign up. Soon after this, she transitioned to other areas of volunteer work at CVUU to better align with her passions. Kathi Bower has been coordinating the recruitment and sign-up of Greeters since then, until we find a replacement. Due to growth in attendance and the challenge of recruiting Greeters, we transitioned to having the Zoom host do the Greeting role for virtual attendees. We increased the In-Person Greeter presence to 2 people each Sunday, in order to provide a better experience for visitors and returning attendees. All Greeters arrive 20-30 minutes early to greet and welcome everyone, with a special focus on newcomers and returning visitors. Again, the Zoom Host/Greeter identifies any visitors and communicates with them in the chat, requesting contact information so we can follow-up with an email. Follow-up with in-person and/or Zoom visitors the next week includes a personalized Welcome email including an electronic Visitor Information request form and CVUU brochure and also a postcard, sent via snail mail. (As a reminder, the Visitor Information form helps us learn a little about the attendee and also add them to our mailing lists so they get the Weekly Update and Newsletter emailed to them.) In addition to a warm “glad you visited” message, the postcard also now includes the next date that a returning visitor can attend a New to CVUU session to learn more about us. Kat has helped us update the CVUU documents given to visitors so they accurately reflect the current state at the CVUU. Documentation of Sunday attendance is recorded by the In-Person Greeters and the Zoom Host provides them with numbers of attendees on Zoom. Names of visitors and returning new people are written in the spreadsheet so we are aware of specifically who visited and who returned. We continue to try to stay aware of members (and friends) who have attended infrequently and let them know we’ve missed seeing them. A new role called “A Connector” has been developed to supplement the Greeting Team, based on feedback from newer members about their experience when they first attended the CVUU. We have made buttons that say “I’m a Connector! Ask me anything about the CVUU” to be worn by Connectors. They will pay special attention to newcomers each Sunday and help them learn the nuances of the CVUU, find their way around the building and be comfortable and connected during their visit. (More information about this is discussed in the Engagement Committee Report.)
- Hospitality:** This year, we successfully revived our Hospitality process, post-pandemic. Our team worked hard on this as we recognize it to be an important opportunity for

visitors and members to interact and build community. Linda Lechty led this effort for most of this church year, until preparation for surgery forced her to take a step back. Linda helped recruit volunteers and set-up multiple systems for people to sign-up to help. She oversaw the stocking of kitchen supplies and made sure snacks were available each Sunday. Nate Smith has assisted with coffee-making and many others supported Linda in reactivating this vital part of our Sunday mornings. In February, Linda stepped back and Heather Flory assisted in revising the system to simplify the sign-up system. A simplified system was implemented that was based on 4 roles each Sunday. Heather developed a spreadsheet to reflect those 4 roles and have each of those volunteers bring one snack for Hospitality. We are attempting to keep the process simple and expectations low so more people will be encouraged to help out. Nick Reans has agreed to lead this effort.

- **Membership:** The Membership team ensures that guests, visitors, and newcomers are welcomed at the CVUU. We also provide opportunities to learn more about the Unitarian Universalist faith, and specifically, the CVUU. Membership sessions were offered multiple times this year and personal sessions have been arranged when attendees request to join between scheduled sessions. We work closely with Shared Ministry Council to help new members get engaged and be offered meaningful volunteer opportunities. Membership team members this year included: Dan Bower, Mica Lorenz, Jill Miller, Juanita Williams, and Leigh Zeitz. Stacey Bartz has been our liaison to the Board. Stacey will resign from that role in July, and Jill will take over. Dan Bower has resigned and was replaced by Chelsea Toppin this spring. Kat and Pastor Emma have offered input and helped promote continuity with the work of other related committees (i.e. Shared Ministry, Religious Services, and Social Action) to help us promote social interaction and connection at the CVUU. **Projects and Activities of the Membership Team included:**
  - **New to CVUU** sessions were offered 3 times this past year. A total of 10 people attended these offerings. These sessions included new attendees, as well as a few seasoned members to share a fuller picture of the makeup of the CVUU. The focus of each session is to help people get to know us and also for us to learn what newcomers are looking for in a “spiritual home.”
  - **I Want to be a Member** sessions were offered 3 times this past year. 13 people attended these sessions and joined the CVUU. Welcome packets, a UU World magazine, a wooden name tag (made by Mica Lorenz) and a chalice (made by Pastor Emma) were given to new members when they signed the Membership Book. (Important note: several people wanted to join prior to the next session being offered. These people added to the ones who DID attend add up to 16 new members being added this fiscal year. All new members received the Welcome

packets, a name tag, and a chalice and are signed up to receive UU World at their home.)

- Juanita coordinated the “**Meet the New Members**” project. This project involves soliciting a brief bio and picture from new members to introduce them to the congregation. This was published in the monthly newsletter and also posted in the online CVUU Weekly Update. Kat helped enlarge and copy the New Member Bios and Pictures and create a (one time) bulletin board display so that the Congregation would have an additional exposure to our newer members. In March, Chelsea Toppin agreed to coordinate this project and is improving the follow-up process and also pursuing other ways to use these bios to highlight new members.
- Collaborated with Shared Ministry Council to implement the Engagement Committee and also helped host an inaugural New Member Connection Dinner. (See more about this in the Engagement Committee Report.)
- A **Children’s Name Tag Project** has been in development this past year. In order to help the adults of the CVUU get to know and support the children of our newer members, we have worked with Kate (DCRE) to create children’s name tags that are clearly readable to adults. Jamie Wilson offered an easily implemented idea and discussion is ongoing about name tags that are more sturdy. We hope to have this project rolled out by the beginning of the next church year.
- **Marketing:** The marketing efforts of the Membership and Marketing Committee help the congregation grow by promoting the CVUU to the larger community through the use of our website, social media, etc. Some of the accomplishments are listed below:
  - The **T-Shirt Project** has continued to evolve. About 40 people ordered T-shirts and wore them regularly at outreach events, like Food Bank volunteering, Community Meal serving, social action events, etc. The design was improved, based on feedback, to highlight our name better, and a second order was made.
  - A **button project** is in development with Moria Brown to make buttons that have our logo and brand and identify us when the T-shirts need a supplement. She plans to make about 100 so that every adult has one to wear when they attend community events.
  - We began discussions in February about our **Marketing plan for Pridefest**. Jill has an Intergenerational Bag Decorating Day planned where we will “Bling Up” canvas bags to give out at Pridefest. Jill has taken the lead on the ordering of brochures and rainbow bookmarks (popular in past years) to put in the bags.
  - Dan Bower and Kat worked on a comprehensive update for **the Icon system**, to explore additional opportunities to use that platform for communications.



- A Marketing subcommittee attempted to develop an annual **Strategic Plan** that includes a calendar of CVUU Dates to be aware of for outreach opportunities. This is a work in progress.
- We have cultivated a **relationship with ThreeHouse at UNI** in order to collaborate and ensure questioning students know about CVUU. We attended the ThreeHouse kick-off event in the fall and had a well-attended Adult Forum in April that informed the CVUU about ThreeHouse's mission and ways we can join their outreach to students. There are plans to have CVUU members volunteer at the May 2024 ThreeHouse Finals week breakfast event. A meeting will be scheduled with ThreeHouse and CVUU leaders in August 2024 (so Pastor Emma can participate) to discuss making our collaboration official.
- Kat continues duties as our Webmaster, as well as our social media administrator.
- **Small groups** continue to thrive and expand and offer people opportunities to engage with others in like-minded activities.
  - We have included the current small group document to newcomers at the **New to CVUU** and **I Want to be a Member** sessions to help make them aware of the opportunities for connecting with CVUU folks with similar interests.
  - Many small groups transitioned back to in-person or hybrid. All of the groups have offered valuable opportunities to build relationships and socialize with others around shared interests.
  - Anyone interested in participating in a small group should look for the "CVUU Open Groups" handout in the CVUU foyer or Fellowship Hall, or view it online at <https://cedarvalleyuu.org/adult-programs/small-group-ministry/>.

## Caring Connections Carollyn Hartsfield

This (committee) now renamed Team serves as a conduit from individuals that may be in need of support and service due to a sudden health crisis and CVUU. Our volunteers take turns being the Contact person one month at a time. We keep track and reach out to members and ask if they would like to be in the update to let our Beloved community know what kind of help they would need. We ask permission before putting in update. We have 9 members on our team who have been on our team for years. We ourselves do some of the service for those individuals that need it. However, we are mainly a connection to inform congregation and needs of recently in and of a little help. We appreciate members that help these members if it is possible. We have a few people come to our meeting to learn more about our team. We

welcome congregants to visit our meeting on the first Sunday of the month before second hour. We have recently distributed at CVUU that would be helpful to our members facing health problems. We invite you to fill out the paper list or go on line and fill out the form on our CVUU website.

Our group has been successful in serving some needs of individuals in hospital and home bound. We do not keep statistics of any kind for our work and we have had positive feedback from individuals that have been helped by this Caring Connection Team. The congregation has many who serve others without being on our committee and we want to acknowledge their service to others. There are things we can not do such as serving as nurses or other medical needs. Our work is crisis work not on going service. We try to provide information to connect people with community services.

## Finance Council Report

Mike Knapp

The 2023-2024 Finance Council is composed of Michael Knapp, Finance Director; Mary Kay Madsen, Endowments; Bill Brown, Collector; Jeanette Talbert, Treasurer; and David Steege and Rob Boody, At-Large Members/Fiscal Review.

### CVUU Fund Definitions

- **General Operating Funds:** General Operating funds are used to perform the usual and customary activities of the Society. Funding for the general operating budget comes primarily from the financial pledges obtained from the members and friends of the congregation during the annual Stewardship Campaign drive. Unspent general operational funds revert back to the general fund at the end of the fiscal year and are not carried over into the next unless encumbered for a specific purpose. The Board is required by CVUU bylaws to present a balanced budget to the congregation at each year's Annual Meeting for its approval and adoption.
- **Restricted Funds:** Restricted funds are those funds received and spent for a restricted purpose only (i.e., funds raised through donation for Pride Fest can only be spent for Pride Fest related expenses). Restricted funds are ongoing and do not revert back to the general fund if unspent at the end of the fiscal year. Restricted funds can only be released for general operational purposes upon release by the donor(s) or by its respective committee.

- **Capital Funds:** Capital funds are those funds designated for special projects, off budget purchases, or for costs associated with the maintenance or improvement of the property that do not fall within general operational funds or are not scheduled expenses within the Building Maintenance Reserve Fund. Funds available for such projects have been based upon donations or bequests received or through proceeds raised by special fundraising events for capital improvement projects.
- **Building Maintenance Reserve Fund (BMR):** The BMR contains those funds required for the scheduled purchase, repair or maintenance of the CVUU building, its equipment or grounds. Funding for the BMR is received from an annual allocation from the general operating budget to ensure its viability in meeting future facility related costs (furnace replacements, roof repair, parking lot repair, etc.) without holding special or emergency fundraising activities. This annual allocation is determined by direct allocation from the general fund. New facility expenses not presently a part of the Building Maintenance Reserve will be added to the schedule as those costs are incurred.

### **FY2023 Financial Report**

CVUU finances are tracked through IconCMO, a purchased church financial program. For the fiscal year ending June 30, 2023 (FY2023), the CVUU had total revenues of \$192,312.18 and expenditures of \$171,034.68, giving us a year end surplus of \$21,277.50 in the general operating fund. This surplus created by:

- Increased revenues from the Treats and Talents Auction
- Interest gained from our assets, including a money market account and assorted CD's
- Elimination of \$5,500 in budgeted Childcare staffing funds
- Carry over funds from FY22-23 pandemic revenues.

### **New Funds Created from FY23 Year-End Surplus**

As a result of the FY23 year-end surplus, the Finance Council's recommendations to create the following funds were approved at the Board's August 2023 meeting:

- \$6,000 Stewardship Campaign Set-Aside Fund: This fund provides funding to future Stewardship Campaigns to lower the impact or percentage in increased giving being asked of CVUU pledge campaigns going forward.
- \$5,000 Emergency Reserve Fund: This fund is available for the Board's use in addressing significant unforeseen increases to the operating budget in future years.
- \$5,000 CVUU Sabbatical/Search Fund: This fund can be used to offset church costs associated with minister's sabbatical leaves and/or initial search committee costs.
- \$5,000 Additional Funding to the Building Maintenance Reserve Fund: The BMR has not been fully funded at replacement costs incurred since Rod Debs served as our

minister. At the end of FY23, the BMR balance stood at \$44,000. The additional funding was added in anticipation of large expenditures anticipated in the first quarter of FY24 for furnace replacements and other costs, and to better prepare the BMR for parking lot repairs in the coming years.

### **FY23 Annual Fiscal Review**

Review of the FY23 financial income, expenditures, and investments for FY23 (July 1, 2022 – June 30, 2023) was conducted by Finance Council members David Steege and Rob Boody, and by Tom Hesse from the congregation and Kevin Sanders, treasurer of St. Luke’s Church. Mr. Sanders’ assistance was obtained through a reciprocal arrangement whereby Jeanette Talbert, our CVUU treasurer, provided similar assistance to St Luke’s annual fiscal review. The review took approximately 60 hours to complete, with all financial records found to be in order. Recommendations for changes to our fiscal monitoring and review process are currently being reviewed by the Finance Council.

### **FY2025 (July 2024-June 2025) Annual Stewardship Pledge Campaign**

The FY25 Annual Pledge Campaign team was composed of Karen Impola, Michaela Rich, and Amanda Boody, with assistance from Moria and Bill Brown and Steve and Gerry Chamberlin. This year’s theme was “Building Our Community,” with a goal of raising \$208,353 in pledges to support the coming fiscal/program year. This pledge goal was set to support both our normal annual operating expenses, plus maintain our support of our Minister, two staff positions receiving benefits (Office Administrator and Director of Children’s RE), and our Music Director, in line with the UUA Salary/Compensation guidelines. At the time the FY25 budget was submitted to the Board for its endorsement at the April Board Meeting, the FY25 budget was raised by \$217 due to a late budget request. This shortfall was then covered through funds from the Stewardship Set-Aside Fund created in August 2023. Should additional pledge contributions be received, the Set-Aside Fund will be made whole for future campaign use. An analysis of this year’s campaign will be conducted in the coming months and submitted to the Board and congregation for its review.

### **CVUU Endowment Fund**

The Endowment Fund Committee is composed of Council members Mary Kay Madsen, Jeanette Talbert, and new this year from the congregation at large, Dick Warhol and Gerry Chamberlin, who will now assist Mary Kay and Jeanette in monitoring and investing funds received. Endowment Funds are invested through the UUA Common Endowment Fund. The Endowment Fund has appreciated in value this fiscal year to date by \$9,286, which includes memorial additions of \$4,469 as of March 31, 2024. The net cost (principal) of the CVUU Fund is \$47,881. The market value as of March 31, 2024, is \$73,820.

### **Treasurer’s Report**

The following actions were taken by the Treasurer since July 1, 2023:

- Building Maintenance Reserve: \$7,253 was moved into the BMR in July for FY24 annual funding. Between BMR and capital expenditures we have spent over \$11,000 year to date.
- Investments: New CDs were purchased as old CDs matured or additional cash built up in the Money Market account. Currently there are six CDs laddered with various maturation dates. Included is a \$20K CD at Green State Bank to limit our failed bank exposure at Veridian when we are in excess of \$250,000. CD dividends are income to either the General Fund or the Accessibility Task Force (ATF) as appropriate. Higher market interest rates have really helped increase our investment income.
- ATF Fund: The ATF Fund has increased by \$2,716 to \$96,494 since the beginning of the fiscal year, of which \$2,445 is from interest income.
- Tax Information: Updated the pledge entry process into Icon to ensure calendar year 2024 tax statements are easier to read for those that pay their pledges before the fiscal year starts.
- Financial Position: We are currently in a fairly good position this year, with about a 6-month buffer in the General Fund (based on the proposed FY25 monthly budget expense of \$18,167 per month). Prior to COVID the historical finances of this church did not have this kind of buffer. We frequently could not fund our BMR. For example, in June of 2019 we had 64% smaller balance (\$102k vs \$283k) in our accounts than we do today. With our aging building, the BMR is more important than ever. With the significant decrease in spending during COVID, we have been able to build up this important buffer. We now appear to be back into normal spending patterns in the General Fund.

### **FY25 Proposed Budget**

The following budget is proposed for the coming fiscal year (July 1, 2024 – June 30, 2025). This budget was presented in detail to the congregation during the Second Hour adult forum on Sunday, May 5, 2024.

(see next page)

Budget Category	Amount	Percent of Budget
<b>Revenue</b>		
Pledge Income	208,353	96%
Pledge Shortfall	-4,167	-2%
Other Revenues	13,817	6%
<b>Total Revenues</b>	<b>\$218,003</b>	<b>100%</b>
<b>Expenditures</b>		
Minister	94,123	43.2%
Staff	61,727	28.3%
Child Care	500	.2%
Affiliation Dues	9,222	4.2%
Building	24,111	11.1%
Building Maintenance Reserve (BMR)	10,900	5%
Operations	4,375	2%
Board/Councils	13,045	6%
<b>Total Expenditures</b>	<b>\$218,003</b>	<b>100%</b>

## Religious Education & Programs (REAP) Council Report

Kate Flynn, Director of Children's Religious Education

The last year has been full of good, meaningful, and healthy growth for the Cedar Valley Unitarian Universalists' Children's Religious Education programs. We have developed a wonderful core of children, ranging mostly from nursery age to ten years old. Their parents are completely lovely and supportive, and I am looking forward to continuing to expand our programming in the years ahead.

The backbone of the CVUU RE program continues to be our Sunday programming, which usually consists of a lesson from Soul Matters taught by me (Kate) while assisted by at least one other adult. Most Sundays, we have between three and five children, who usually range in age between five and ten years old. Each lesson begins with everyone introducing themselves, followed by an overview of the lesson, a story component (almost always in video format), follow-up questions and discussion, and then a craft or activity. Soul Matters is worth its weight in gold, and always offers relevant, diverse, and thought-provoking topics for our children to learn about.

As with all things involving children, though, I always try to leave ample room to call an audible. If the weather is perfect, I have no problem scrapping the lesson to simply let them play outside. I prioritize facilitating analog play and creative cooperation above everything, and as a result I find that I frequently need to release my “plan” to just go with the flow of the group I have on a given Sunday. It keeps me on my toes, but in a holy way! Our children get enough digital screen time in every other part of their lives; I want this to be a place where it is safe to simply create with one’s hands and mind.

In October we did a teacher training for those who would be volunteering with RE, and new for this year, staffing the nursery. Staffing the nursery every Sunday has proven to be invaluable for attracting and retaining young families. Also in October, we put on a haunted house! Pastor Emma was a fortune teller, another congregant provided face painting, and Kate oversaw the craft making side of things. It was simple but lovely, which is in line with what we’re trying to do with CVUU RE.

In December the children put on a Winter Solstice pageant. It was magical and full of life, and with the help of our music director (Jess Lieb) and pastor (Pastor Emma), it was a smashing success. We are blessed with enormously talented children, and they made our small production shine brightly.

On Easter we put on our annual egg hunt, and it was a blast for everyone who participated. There is nothing quite as pure as watching a gaggle of children race around the church grounds collecting eggs, then coming back to the Fellowship Hall to crack open their hauls together.

This spring has seen the advent of an ad hoc committee that has been creating and refining a child supervision policy for the CVUU, and while it’s still a work in progress it’s nearing completion. As part of this, REAP will be repopulated by parents who currently have children in the religious education program, and I look forward to mining their talents to help grow and improve our program further.

We could not do this work without the generous help of our congregation, who kindly give of their time and energy every week to help tend and teach our community’s young ones. Without

our volunteers none of this would be possible, so please take this “thank you” from the bottom of my heart. I look forward to the divine sparks of magic we will continue to foster together.

# Religious Services Council Report

Mandy Boody

## Our Successes

- Clarified, updated, and documented current practice, responsibilities, and RSC deadlines in the course of updating the RSC section for the CVUU handbook.
- Welcomed a new Worship Associate, Callie Amiday.
- Established an RSC gmail for congregants to send announcements to the Worship Associates.
- Our Music Director re-established the Music Committee.
- Simplified and shortened the Thursday service rehearsals, renamed Worship Team coordination meetings, reducing stress and time spent on a weekday at church.
- Bringing the spirit of love and support we want in the service to the meetings where we plan the service.
- Continued helpful communication with Adult RE.
- Continued smooth experience with dual in-person and Zoom participation.
- A service was held every Sunday.

## Needs Improvement

- Closer communication and collaboration with Children’s RE.
- More congregants involved in the service.
- Continued improvement imbuing and unifying the separate components of the order of service with the theme of the service.
- Better understanding of the budget and use of it.
- Solidify awareness of deadlines and use of them to habitually plan ahead.

There were challenges this year with illnesses of Council members or in their families that sometimes extended for weeks or months, deaths of loved ones, and other crises. Almost everyone on the Council had at least one Sunday when someone else was needed to take their place with short notice because of an unexpected crisis or illness.



Those challenges also prevented or reduced the efforts to involve the children more. We restarted Festival Sundays, but had to suspend them again when challenges prevented meeting with children's RE to plan.

Challenges also prevented us from involving other congregants to a greater extent than we did. We have a longer list of people willing to participate in the service and we did have some new participants. We expect as we adjust to the new deadlines and plan farther ahead, we will have time to connect with more people and give them opportunities to participate.

Though we had challenges, our planning meetings were positive, productive and timely. We appreciated and encouraged each other. No one was made to feel bad if they couldn't do what they planned as all who could took care of what needed to be done. And every Sunday we had a service that reflected our principles and values.

I think the love and support we gave each other was reflected in our services, even the services that had unexpected last-minute substitutions.

Pastor Emma gave a series of sermons about the proposed values in the Article 2 revision that will be presented for a vote at the General Assembly. Her steady love and devotion shone through as she preached with inspiration and passion through every difficulty and challenge, missing only a couple of planned sermons.

Pastor Emma was inspiring and comforting with the funeral of beloved CVUU member Delburn Carpenter.

Karen Impola took over the responsibilities of the Chair when Mandy Boody had to step away for several weeks and continued to co-Chair unofficially when Mandy returned. She substituted as WA and preaching. She deserves special thanks.

Jess Lieb produced several special music experiences with the choir and band, as well as the frequent beautiful piano improvisations for our time of reflection in the service. A service would not be sacred without the weekly hymns and songs they sing and play so beautifully.

The RSC is thankful for Ken Taylor, his contributions to our planning meetings and with the maintenance of our technology.

Our Worship Associates personalities shine through in the pulpit and contribute insights at our meetings. All have been flexible and helpful with the challenges this year. Lynn Brant preached as well as acting as Worship Associate. Dick Warhol was our liaison to the Board and assisted Mandy in planning outside the regular RSC meetings.

The RSC is grateful for the Sanctuary Techs and Zoom hosts who smoothly operate the technology for sound and video and our interaction with those on Zoom.

All the greeters and hospitality, while not on RSC, contribute to the success of our services by providing welcome and warmth.

Kat Beane Hanson is key to communication and operation of our services. She has been exceptional, competent, generous, and kind in her work as administrator (and on occasion musician). Even more than usual this year with disrupted schedules and communications. We are very grateful.

The RSC thanks everyone who has been involved in our successful year of services!

**Members of Religious Services Council:** Mandy Boody, Chair; Karen Impola, Acting Co-Chair; Pastor Emma Peterson, Pastor; Kathi Bower, Worship Associate; Lynn Brant, Worship Associate; Jess Lieb, Music Director; Ken Taylor, Board Liaison and Tech Leader; Richard Warhol, Worship Associate; Callie Amiday, Worship Associate

## Music Committee Report **Jess Lieb, Music Director**

The Music Committee resumed meeting this year. Among the first projects this committee is undertaking, a proposal has been brought forth to contribute financially to reparative justice organizations when performing music with origins in the African American spiritual tradition. The details of these efforts are still in the works, but we strive to “walk our talk” in fighting for social justice through these contributions. We look forward to working collaboratively with the Religious Services Council and the Finance Council to explore the potential of such a project.

## Shared Ministry Council Report

Heather Flory

Shared ministry is the mutual responsibility that the congregation, the minister, and the professional staff share, committing them to work together to support and promote the growth and well-being of the CVUU congregation in all aspects of its community life.

The mission of the Shared Ministry Council (SMC) is to enhance the overall quality of the shared ministry of the CVUU by working with the minister and the Congregation to collaborate and support each other in shared leadership. This includes having regular meetings with the minister, assessing the health of the Congregation through surveys or other means, resolving conflicts for members who cannot do so on their own, and facilitating opportunities for members to develop the necessary skills to participate in shared leadership.

## **Council Members**

Members of the Shared Ministry Council this year included Heather Flory (chair), Floralyn Groff (Board liaison), Debra Kyler, Nancie Groszkruger, Del Carpenter (until Sept 2023), Steve Thom (Sept 2023 – Dec 2023), and Pastor Emma Peterson.

Thank you to all members of the Shared Ministry Council! A special thank you to Floralyn, who has been on the Council with me since its inception in July 2019. Also, special thanks to Debra, who took notes at our meetings, Floralyn for being the SMC Board liaison this year, and Nancie for being our SMC Board liaison next year.

## **Accomplishments**

Here are some highlights of what we accomplished this year:

- We supported our minister in a variety of ways.
  - We continued to support Pastor Emma through her Fellowshiping process, which included an in-depth evaluation process with the Ministerial Fellowship Committee in October 2023.
  - We continued to support Pastor Emma in other areas of her ministry as needed, serving as a sounding board for her to express personal ministerial challenges, concerns, and successes.
  - We followed the CVUU's updated annual Ministerial Review process in March – April 2024, following the new process outlined in the 2023 CVUU bylaws. According to the updated bylaws, each year, the SMC collaborates with the minister, with input from the current Board president and Religious Services Council chair, to review the minister's and the congregation's performance and discuss successes, challenges, goals, and areas for future improvement.
  - We helped keep track of Pastor Emma's vacation time, study leave, fellowshiping leave, bereavement leave, and sabbatical leave.
- We supported our congregation in a variety of ways.
  - We worked with Pastor Emma, CVUU members, and the UUA as needed to address conflict and attempt to resolve it.
  - To enhance our own knowledge of how to handle conflict situations at the CVUU, we started a common read discussion of the book: *Congregational Leadership in Anxious Times*, which was recommended to us by the UUA.
  - We had interesting conversations on a variety of topics related to the general well-being of our congregation and our role as a Council.
  - We wrote newsletter articles to help inform members about the role and accomplishments of the SMC, the minister, and the congregation.

- We developed an enhanced policy on disruptive behavior at the CVUU, which we hope to have added to the current policy on conflict resolution.
- We submitted in-depth CVUU Handbook updates, per the Board's request.
  - Note: We want to thank and commend the CVUU Board for their thorough work and extensive time spent on updating and enhancing the CVUU Handbook this year. We encourage all CVUU members to read the Handbook in full once the updates are completed this summer.
- We collaborated with the Board President and the Finance Council to prepare an addendum to Pastor Emma's ministerial agreement for FY25 to reflect minor changes to the ministerial agreement. An addendum is typically used during years when the entire ministerial agreement is not reviewed and updated.
- We participated in planning with Pastor Emma's Sabbatical Leave, May 1 – July 31, 2024, in conversations with Pastor Emma as part of our Shared Ministry Council meetings, and by the SMC chair's involvement in the Sabbatical Planning Team.
- We collaborated with the Congregational Life Council on areas where our councils connect or overlap, e.g., small groups, social activities, and the new member welcome process.
  - We formed the first-ever committee that falls under two Councils at the CVUU: the Engagement Committee is a combined effort of the Congregational Life Council and Shared Ministry Council. See the Engagement Committee Report for details.
  - On March 28, 2024, Juanita Williams (Congregational Life Council chair) and Heather Flory (Shared Ministry Council chair) hosted our first New Member Connection Dinner, providing a simple meal and connecting with new members who have joined in the last year. At the dinner, we asked new members to share their thoughts about how their integration to the CVUU has gone, what has been helpful, and what would help them get better connected. We hope to take the ideas we heard at this dinner and use them to improve the way we help new members feel true belonging at the CVUU. We also hope to have similar dinners again in the future.
  - See the Congregational Life Council report for additional information about new members.

### **What's next?**

It takes the shared ministry of everyone in the congregation to make the CVUU work. For continued information from the Shared Ministry Council, see our regular contributions to the CVUU newsletter!

# Social Action Council Report

Austin Evens

The CVUU Social Action Council has had an exciting year! This group has stepped up to support the latest 8<sup>th</sup> UU principle, which the CVUU Board used as one of the main goals for FY24. Our group has continued to bring strong energy to the Cedar Valley to encourage justice for many causes ranging from Climate to LGBTQIA+ to advocating for reproductive rights/abortion access.

First, I would like to say “Thank you!” to all our members that continue to show up and support worthy causes. This is the second year you have allowed Lizzy and me to lead the CVUU Social Action Council and I appreciate all the support from Council members, staff, and congregants. This year, we were able to transition back to all “in-person” meetings at our beloved CVUU building. Our current Council members include: Al Hays, Pam Hays, Lizzy O’Loughlin, Sally Browne, Carollyn Hartsfield, Kathi Bower, Priscilla Nieman, Byron Plumley, and Shirley Whiteside. Also, we have added Mollie Wallsteadt and Rosa Torres within the last couple months. Welcome, Mollie and Rosa!

Next, I would like to highlight a few projects this group was able to accomplish, with support from the congregation:

1. Social Action Plate Collection – For another year, Sally and Carollyn coordinated this effort to provide financial support for local causes. The congregation was able to vote on 8 organizations that the CVUU was able to raise funds for: Iowa Abortion Access Fund, Black Hawk Grundy Mental Health Fun, Cedar Valley Angels, 1619 Freedom School, Planned Parenthood of the Noth Central States, NE Iowa Food Bank, Iowa Safe Schools, and House of Hope. As always, we continued funding for Community Meals, the Little Food Pantry, and Guest at Your Table.
2. Cedar Valley PrideFest in downtown Waterloo – As expected, this event was a hit! Pridefest is special to our congregation and allows us to “Walk our Talk” as a Welcoming Congregation – open and supportive of the LGBTQIA+ community. The committee did a great job organizing this event but the members of the UU are who make it possible. Thank you to everyone who helped in any way!
3. The Mitten Tree – For another year, Moria Brown stepped up as a volunteer to oversee the mitten tree. Though you may not have noticed a physical tree this year, the giving spirit continued. We even made a connection with an individual from Colorado that felt a connection to our tree initiative, sending over a box of gloves. The mitten tree provide to be successful collecting socks, winter hats, and gloves for children in need in the Waterloo and Cedar Falls Community School districts. Thanks again, Moria!

4. Iowa Witness and Advocacy Network (a group that is dedicated to creating strong cooperative relationships among Iowa's 14 UU congregations as a basis for education and action) – Byron and Shirley have stepped up and decided to sit on the board of this organization, representing CVUU. Byron and Shirley were able to work with IUUWAN to help raise money on Faithify to support social action initiatives in Iowa. They were able to get a \$500 donation made to the UnityPoint LGBTQ+ clinic to help with a Binder Project, which provides binders to those wanting to align their physical appearance with their gender identity.
5. The Little Food Pantry – Priscilla continues to keep our beloved CVUU food pantry stocked day in and day out. Last summer, Andrew Hughes completed a newly constructed Little Food Pantry. This new food pantry has helped to improve our initiative to help provide some extra food to our neighbors in need. Many members of our congregation have stepped up this year to support the LFP during some periods when Priscilla was busy ensuring she stays healthy. Thank you to all who have stepped in to help. Lastly a huge “Thank You!” to Priscilla and Andrew for their efforts this year!
6. Pam has continued to support the CVUU on the Cedar Valley Interfaith Alliance. The CVUU was able to set up a booth at a few of these events. Our own Pastor Emma even gave a talk at one event, speaking about churches providing a place for mental health support for those in need.
7. The Pollinator garden has continued to be a success and will continue to be an important project for the CVUU. We even had an exciting visitor this spring. As our team started preparing the garden for the summer, a mother duck was observed to have built a nest and laid some eggs behind our building. The decision was made to leave the duck where it was and prevent any work near the nest until the eggs were hatched. This is exciting to see nature play its course in our own backyard.
8. The CVUU members continue to show presence at local community events and organizations. This year, members were present at the NAACP dinner, MLK Banquet, Voters' Rights March in Lincoln Park, Waterloo City Council meetings, Cedar Falls City Council meetings, Planned Parenthood Day on the Hill, local school board meetings, North End Culture Fest, Cedar Falls Human Rights Campaign meetings, and NE Iowa Food Bank.

This list certainly isn't all-encompassing of the work the Social Action Council has completed, but it is a small glimpse into the great things that are happening at the CVUU. It has been a great year but the need for Social Action will never end. This coming year is going to be a big year for social justice initiatives in the United States. This upcoming voting cycle could weigh heavily and negatively on many policies around climate reform, LGBTQ+, abortion access/reproductive justice, and public education. The need to encourage voter turnout is

important at every level. We won't let up anytime soon. The state of Iowa has a lot to fight for, and together, we've got this!

# Engagement Committee Report

Heather Flory

In January, a new committee formed at the CVUU called the "Engagement Committee". This committee was developed in collaboration between the Congregational Life Council (led by Juanita Williams) and the Shared Ministry Council (led by Heather Flory) to address areas where there is overlap between these two Councils.

The initial vision for the Engagement Committee is to:

- Plan social events/parties at the CVUU.
- Help figure out how to get members (especially newer members) more involved in connecting with others and helping out at the CVUU, ideally by helping members find their passions and seeing if there is a way that CVUU can participate in helping them express their passions and become their best selves.
- Help figure out what kind of training would be helpful to transition members (especially newer members) into leadership roles.
- Ultimately, we would like to build a culture of community at the CVUU where everyone serves and helps out. Many hands make light work!

So far, the Engagement Committee has organized and held several family friendly "First Friday" potluck dinners, on Friday, March 1, Friday, April 5, and Friday, May 3. We hope to continue these dinners as long as we find help each time.

Based on comments and suggestions from new members, we have created a new role that we're calling "CVUU Connectors". In this role, our first CVUU Connectors, Mollie Wallsteadt and Rosa Torres, proactively reach out to visitors on Sunday mornings during coffee hour to help them feel welcomed, answer their questions, and help connect them with other CVUUs who may share common interests. We have also discussed future plans to develop "CVUU 101" training for new members. In the coming year, we hope to focus on how to have fun doing the work of the CVUU.

We'd like to thank all of the current members of the Engagement Committee: Heather Flory, Juanita Williams, Rita Waggoner, Mollie Wallsteadt, Rosa Torres, and Michael Jamosky. If

you'd like to join the committee to help plan for future events and involvement opportunities, please let one of us know! We'd also like to thank Jill Miller and Pam Hays, who helped kick off this new committee by joining us for our first few meetings.

## Nominating Committee Report

Michaela Rich

The following Board positions are up for election for the 2024-2025 year. Each individual is eligible and willing to serve.

### Officers – one-year terms (3 terms maximum)

President – Carolyn Hildebrandt (1<sup>st</sup> term)

Vice President – Karen Impola (3<sup>rd</sup> term)

Finance – Mike Knapp (2<sup>nd</sup> term)

Secretary – Rob Boody (3<sup>rd</sup> term)

The following Board positions are up for election for the 2024-2025 year. Each individual is eligible and willing to serve.

### Trustees – two-year terms (2 terms max)

Building and Grounds – Steve Chamberlin (1<sup>st</sup> term, 1<sup>st</sup> year)

Social Action – Lizzy O'Loughlin (2<sup>nd</sup> term, 1<sup>st</sup> year)

Religious Education and Programs – Seth Chadwick (1<sup>st</sup> term, 1<sup>st</sup> year)

The following Board positions are not up for election in 2024-2025. However, each individual is completing a term begun by another person, so needs to be approved by the Board. Each individual is eligible and willing to serve.

### Trustees – two-year terms (2 terms max)

Congregational Life – Jill Miller (completing a term) – completing Stacey Bartz's term

Religious Services – Lynn Brant (completing a term) – completing Dick Warhol's term

Shared Ministry – Nancie Groszkruger (completing a term) – completing Floralyn Groff's term

The following Nominating Committee position is up for election this year.

### Advisory: Nominating Committee – three-year terms (2 terms max)

Al Hays (1<sup>st</sup> term, 1<sup>st</sup> year)



The following Nominating Committee positions are not on the election cycle for the 2024-2025 year.

Advisory: Nominating Committee – three-year terms (2 terms max)

Margie Miller (1<sup>st</sup> term, 2<sup>nd</sup> year)

Michaela Rich (2<sup>nd</sup> term, 3<sup>rd</sup> year)

Thank you to all who serve as CVUU Board Members and Officers.

## Personnel Committee Report

Karen Impola, Vice President

The Personnel Committee met more or less monthly. Early in the church year, we identified a company that could run background checks for any volunteers working with children. With assistance from CVUU Administrator Kat Beane Hanson, we were able to get all the current volunteers approved. We are looking into using a different company going forward, as there were some problems with unexpected charges.

We identified people to do the annual evaluations for CVUU's three part-time staff members, and made sure the evaluations were done during March and April, before Pastor Emma's sabbatical. Two of the evaluations were done exclusively in writing, and the feedback from staff was that this is less stressful than having an in-person meeting, so our plan is to continue doing this going forward. As part of the evaluations, we decided to take some of the routine duties off of Kat's plate and assign them to Music Director Jess Lieb, so that Kat can focus on long-range planning.

## Sabbatical Planning Team Report

Dennis Harbaugh, President

It's common practice among Unitarian Universalist ministers to take a sabbatical leave after a certain number of years of service. At the CVUU we encourage our minister to take a

sabbatical, and the process is clearly articulated in the Ministerial Agreement which our minister and congregation sign together. On February 8, 2024, the CVUU Board approved Pastor Emma's request to utilize three months of her earned sabbatical time, beginning May 1, 2024, and ending July 31, 2024.

A CVUU Sabbatical Planning Team was immediately organized and began working to make sure the sabbatical time would be as smooth and productive as possible – for both Pastor Emma and the congregation.

The Sabbatical Team and congregation approached the sabbatical in three phases: the Planning Phase involved planning for Pastor Emma's absence, identifying needs, assigning responsibilities, and sharing relevant info with the congregation; during the Execution Phase plans will be put into motion, and the Sabbatical Team will meet regularly to respond to any needs, check-in with staff, and be in "react & respond" mode if necessary; the Reentry Phase will focus on facilitating a smooth transition back to Pastor Emma's ministry among us.

The Sabbatical Team publicized who CVUU members should contact if they have specific needs during the sabbatical, established extensive internal communication protocols, and prepared for various scenarios which may occur.

There is strong Board and congregation support for Pastor Emma's sabbatical, and due to our strong "shared ministry" structure, we expect an excellent sabbatical experience!

Sabbatical Team Members:

Dennis Harbaugh

Heather Flory (Shared Ministry)

Betsy Brant (Caring Connections)

Karen Impola (Religious Services)

Carolyn Hildebrandt

Mike Knapp (Personnel)