

ANNUAL REPORT

2024-2025



*Love is the spirit of this church, and service is its law.
To dwell together in peace, to seek the truth in love,
and to help one another: this is our Covenant.*

May 18, 2025

FIRST UNITARIAN CHURCH

801 East Washington Street
South Bend, Indiana 46617
office@firstunitarian.us
574-234-6588
firstunitarian.us

Board of Trustees 2024-2025

Chuck Leone, *President*
Gail deSomer, *Vice President*
Fern Hamlin, *Secretary*
David Mayfield, *Treasurer*
Eli Williams, *Trustee*
Jeremiah Cox, *Trustee*
Dan Holm, *Trustee*
Francisco Gomez-Dossi, *Trustee*

CHURCH STAFF

Office Manager: Dr. Louise Williams
Bookkeeper: Finda Kamanda
Pianists: Ian Bunker
Nursery Care Provider: Max Castenada

Committee Chairs

Administrative	Florence Klečka
Adult Religious Education	Gail deSomer
Aesthetics	Melanie Smith-Guillaume
Building	Kathy Vetter
Building Use	Gary Metzler
Care	Karen Heffernan
Children and Youth	Gail deSomer, Megan Sulok, Kaely
Religious Education	Barwick
Committee on Ministry	Francisco Gomez-Dossi
Endowment	Barbara Williams
Events	Kathy Platt
Finance	David Mayfield
Grounds	Francisco Gomez-Dossi
Marketing	Dr. Louise
Membership	Gail deSomer
Nominating	Bill Stevens
Peace & Justice	Lois and Dan Holm
Social	Kathy Platt
Stewardship	Gail deSomer
Sunday Service	Anne Mannix
Technology Committee	Jeremiah Cox

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Agenda

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|--|------------------|
| 1. Call to Order | Chuck Leone |
| 2. Verification of Quorum | Fern Hamlin |
| 3. Opening Words | Eli Williams |
| 4. Approval of 2024 Congregational Meetings Minutes | Chuck Leone |
| 5. Update on Minister Search | Chuck Leone |
| 6. Treasurer's Report & Operating Budget | David Mayfield |
| 7. Endowment Grants | Barbara Williams |
| 8. Elections for Board Officers and Nominating Committee | Chuck Leone |
| 9. Update on Church Name Change Process | Chuck Leone |
| 10. Review of Committee Reports | Chuck Leone |
| 11. Volunteer of the Year Award | Chuck Leone |
| 12. Adjournment | |

Draft Congregational Meeting Minutes

First Unitarian Church, South Bend

Special Congregational Meeting

January 21, 2024

Draft Minutes

There were 53 members present, 5 via Zoom, and 3 assigned proxies.

I. **Call to Order** at 12:05 by Bill Stevens, who stressed that this meeting was meant to be a starting point for discussion, due to the number of agenda items.

II. **Name changes for church and religious education program:** Barbara Williams summarized a handout and encouraged the formation of a group to study the pros and cons of changing the church name to Unitarian Universalists of South Bend (or something else not including the word “church”), as well as removing the word “religious” from Religious Education, as “church” and “religious” sometimes have negative connotations. Discussion included:

- Cost and ease of changing the church name
- Importance of adding Universalist to name
- Whether these words are truly a barrier to visitors, rather than an annoyance
- Connotation of DBA (doing business as) as shady, vs. strengthening brand recognition
- Dictionary definition of “church” as a gathering place, with a pulpit, albeit with Christianity implied

III. **Ministerial Evaluation:** Bill Stevens summarized the evaluation process as follows: The Board sent the poll out to the congregation, summarized the results, sent a letter of interpretation and evaluation to Rev. Chip. Overall, the majority approved of his performance, while a noteworthy minority did not. Noted strengths included sermon quality; being active in national and regional groups, which brought more status to the church; some members praised the pastoral care. Noted areas for improvement included troubled interactions with some members, and better communication and coordination with the Care Committee.

Rev. Chip then thanked everyone for their input, whether via survey or in person, promised to work on those areas needed improvement, and asked for help in doing so.

Comments included:

- There is a perception that the minority is actually bigger than implied by the Board. On the other hand, is this a case of squeaky wheels?
- Need for both raw data from survey results being sent to everyone, as well as the charted/collated results. This will be done by the end of the month.
- The Board received 63 completed surveys.

- There is a feeling that those with complaints are demonized; we need a process for transparency in conflict resolution, and a safe place to bring concerns.
- The survey was very flawed, and contained irrelevant questions, implying that the minister's duties are far more than would be reasonable to expect. This was because it was directly from the UUA, and was not edited sufficiently.
- All ministers, UU and otherwise, have suffered from the pandemic's effects.
- Ministerial turnover is costly and painful, and to be avoided.
- To some extent, opinions on Rev. Chip tend to fall into demographic categories, such as age and length of time in the church.
- Conflict resolution is being planned. It may include a mediator, small groups, one-on-one, large groups. A policy would be very useful.

IV. Stewardship Committee Report: Chuck Leone summarized the handout (see attached, from the meeting announcement), and added that the official stewardship campaign will begin with a brunch on March 3. He also noted that those giving smaller contributions have reduced their giving even more. Discussion included:

- The perception by younger people that the Stewardship Committee does not consider them to be as important as older people, because of their lesser pledges.
- Chuck apologized for this perception, and offered to come to the next Gen XMZ meeting to discuss it.
- Planned giving would be helpful.
- Finishing the basement would also help with finances.
- Hiring a fundraising consultant could be very helpful and pay for itself.

V. Defeat the Deficit Task Force Report: Lynn Liston went over the November Defeat the Deficit Task Force Report (see attached, from Board packet). Comments included:

- A suggestion for online concerts
- Keeping Zoom-based members and friends in mind
- Thanks for the report, as it gives one hope for the future, even though goals have fallen far short of eliminating the budget deficit
- There is a need for long-term plans for raising the church's income level.

VI. Finance Committee Report: David Mayfield reported that the total budgeted pledge amount has been reached, although not all pledges have been paid yet; this is a good sign. Also, our total assets, including the building, have risen considerably in the last ten years. The mortgage has been paid down to about \$90,000 left. He showed a pie chart of the tentative 2024 expenses, including three items not currently included: janitorial pay, a paid DRE, and a Rainy Day Fund. (See attached slides.) Discussion included the following points:

- The Finance Committee suggests that future budgets have no deficits more than 2% of the total budget, or more than 25% of unrestricted savings.
- This past year has had the largest deficit in the church's history.
- Ministerial expense has risen, partly because of the cost of insurance.
- Part-time ministry should be studied by a Board-appointed task force as an option.
- Again, finishing the basement might help in the long term.
- Committees need to coordinate efforts to act on these ideas before the May meeting.

- Consultants from Notre Dame (students) might help.
- It is still unknown whether we can break even by the end of June.
- Elena Wake explained why she resigned as Treasurer several months ago: There were problems with Rev. Chip's record-keeping for the Ministerial Discretionary Fund, leading to conflict with Rev. Chip, and she felt she could no longer perform the auditing duties.
- Because of these concerns, new procedures have been written up for Rev. Chip to follow. David, Bill and others thanked Elena for bringing this to the Board's attention.

XIII. Adjourned at 2:48 p.m.

Minutes respectfully submitted by:

Florence Klecka

Secretary, Board of Trustees

Attachments: What's in a Name? handout; DTD TF report; Leone handout; Treasurer slides

First Unitarian Church, South Bend

Annual Congregational Meeting

May 19, 2024

Draft Minutes

I. Call to Order at 12:30 p.m. by Bill Stevens.

II. Quorum Verification attested to by secretary Florence Klečka.

There were 54 members present, 5 via Zoom, and 8 assigned proxies, for a total of 67.

III. Opening Words by Rev. Chip Roush

IV. Approval of May 2023 Annual Meeting Minutes by Bill Stevens.

A motion was made to approve the minutes of the May 2023 meeting by Chuck Leone, seconded by Jim Curlee. Motion carried. The January congregational meeting minutes were omitted from the annual report, and will be approved at the next congregational meeting. The draft version of the January minutes are on the website for review.

V. Minister's Report: No comments or questions were presented.

VI. Update on Transition: Bill Stevens reported that the transition from having a full-time minister to hiring a contract minister has begun, and will be a long process. The church will need to define its characteristics, needs, and goals to determine what to do next. The Board has gathered information from the UUA, and will begin asking for input from the congregation this summer. Those interested in serving on a search committee should talk to a Board member. David Wistreich asked for the difference between a settled minister and contract minister. A contract minister is hired by contract for a predetermined, finite period of time, vs. a settled

minister, who is called to a congregation indefinitely. The UUA recommends that smaller congregations (120 members or fewer) use contract ministers. Karen Heffernan suggested we ask for guidance from Meadville.

VII. Treasurer's Report and Operating Budget David Mayfield

David Mayfield noted that the main change from last year's budget is due to the transition from a full-time minister. We expect to have no minister from August 2024 to at least January 2025, if not much longer. He also reiterated that the Ministerial Discretionary Fund will need to be addressed by the Board, as it is currently administered by the minister. It is outside the operating budget funds.

Pat Littlejohn moved to approve the budget. Byrd Tetzlaff seconded.

Discussion included the following points:

- R/E will need a paid coordinator in the next year or so; Gail deSomer commits to volunteering in this unofficial capacity until she becomes Board President in 2025.
- Budget preparation is difficult, and the Finance Committee and Board should be commended for the work in preparing it.
- Rev. Chip has received notice from an anonymous donor that they pledge up to \$5,000 to reduce this year's deficit. Much rejoicing and thanks ensued.

Motion to approve the budget passed.

VIII. Endowment Grants

Chuck Leone

See p. 25 of Annual Report for details. The Endowment Committee recommended three requests for funding:

Worship Arts asked for \$2,000 for maintenance on the sanctuary grand piano

Building Committee asked for \$3,700 to insulate the attic above the sanctuary

The Board asked for \$2,500 in planning/consultation expenses for our transition period

These amounts are less than the total amount allowed for this year, \$15,868.85, and recommends that the balance of \$7,668.85 be used to seed the "Burn the Mortgage" campaign. Francisco Gomez-Dossi moved to approve requests, David Wistreich seconded. Motion carried.

Discussion included the following points:

- More people should be aware of the application process for endowment funds.
- More frequent applications would be more flexible, rather than needing to apply by March 1 for funds that become available in July, only once a year.
- Leadership training is a possible use of future funds.
- There is a group at IU South Bend that might help with fundraising.
- An anonymous donor has agreed to match funds toward paying off the mortgage.

IX. Elections

The Nominating Committee presented the following slate of officers for the Board:

Gail deSomer, Vice President
David Mayfield, Treasurer
Fern Hamlin, Secretary
Francisco Gomez-Dossi, Trustee
Eli Williams, Trustee

The following members will remain on the Board next year: Chuck Leone, President; Dan Holm, Trustee; Jeremiah Cox, Trustee.

The motion was made to accept slate as presented. Motion carried.

The Nominating Committee presented the following slate for the Endowment Committee:

Barbara Williams (exp. 2027)
Vicki Stevens (exp. 2026)
Janet Bogar (exp. 2025)

The motion was made to accept slate as presented. Motion carried.

The Board of Trustees recommended the following slate for the Nominating Committee:

Bill Stevens as past Board president (exp. 2025)
Megan Sulok (exp. 2026)
Karen Dickson (exp. 2025)
Melanie Smith-Guillaume as alternate.

No opposition or nominations from the floor. Slate approved as presented.

X. Church Name Change

Barbara Williams

Barbara Williams summarized the steps taken to determine the congregation's readiness to change the church's name (see p. 18 in Annual Report). At its last meeting, the Board determined that if 2/3 of the eligible members voted to change our name, then a ranked ballot would be distributed. Francisco Gomez-Dossi so moved.

Discussion included the following points:

- The D/B/A (doing business as) designation is a simpler way to rebrand an organization.
- Market research should be conducted first to determine if a name change is necessary, and also what name would be agreed on.
- The main agreed-upon changes would be to remove the word "First" and to add the word "Universalist."
- The issue should not be rushed, and can be brought up again.

A show of hands was counted, including proxies and Zoom attendees. Out of 67 eligible voters, 45 were needed for a 2/3 majority. The total was 44. Motion failed. Much discussion followed, making it very likely that this issue will indeed be brought up again.

XI. Review of Committee Reports

Bill Stevens

No questions at this time.

XII. Volunteer of the Year Award

Bill Stevens

Bill read the following: This year has been a roller-coaster ride in many ways, sometimes terrifying and dangerous – and sometimes lots of fun. We are exceedingly grateful for the participation of everyone who has given of their time, enthusiasm and gifts to make this a welcoming and enjoyable place to be, where people can make connections and grow as spiritual human beings. We see people wearing T-shirts advertising UUism and what this congregation stands for. We have tied the previous record for the number of new members in one year. The current deficit is considerably less than predicted a year ago. We have brought back or introduced several new events for members and the general public, which have gotten good reviews and requests that they continue.

Our Volunteer of the Year has gone above and beyond the call, spending many, many hours in meetings, fundraising, marketing, being part of the tech crew at the back of the sanctuary, and countless events. So thank you, Dr. Louise Williams, for all you do for this church.

XIII. Adjournment. Bill Stevens invited a motion from the floor to adjourn. Motion carried.

Minutes respectfully submitted by:

Florence Klecka

Secretary, Board of Trustees

President's Report, Chuck Leone

The 2024-25 Church year at First Unitarian Church, South Bend Indiana was a year of change marked by the departure of our long-serving minister Rev. Chip Roush, but also imbued with a renewed sense of who we are as a congregation and a willingness to accept and meet the challenges, and experience the joys, of living in an intentional community of those we love.

Although we have been in search this year for a minister to serve the congregation, we have not yet met the goal of finding someone who would be a good fit for the congregation. Nonetheless, the Sunday Service Committee, with the congregation's active participation and great musicians, has created a series of inspiring, challenging and memorable Sunday services as the center of our experience of each other and of the community.

Our accomplishments over the church year to date are significant:

- The successful conclusion of the Burn the Mortgage campaign which raised over \$92,000 to pay off the Church's mortgage at 1st Source Bank and to seed the Rainy Day Fund;
- The successful completion of the Stewardship Pledge Drive for the coming Church year with pledges in excess of \$142,000;
- The review and revision of 8 Committee descriptions for church committees as well as 11 policy and procedure documents, under the skillful and persistent leadership of the Administrative Committee;
- The active engagement of the congregation in a) Covenant and Congregational Conversations to get to know each other better, b) a comprehensive Church survey to describe ourselves to prospective ministerial candidates, and c) meetings and exercises exploring a change of the church's name;
- An increase in Church membership (114 to 116) and in Sunday Service attendance over the course of the year
- A year of robust and enjoyable programming by Gen XMZ, our concert team and social committee.

There is an illuminating energy here, a willingness to engage with each other, together with a commitment to the Church as the center of our focus to make ourselves and this institution our best selves. As we renew our commitment to the upcoming church year, we can't forget where we have been and our collective capacity to build on the work we have already accomplished.

Chuck Leone, president 2024-25

Treasurer's Report, David Mayfield

This year has been my first full year as treasurer. The church has seen several positive monthly balances due to the lack of spending from line items 900-945 (minister-related costs). The current year's budget assumed a part-time minister and half-time office administrator, both with insurance. Without the minister-related costs, we are enjoying a surplus of just under \$53,000.

The Sunday Service Committee lines have of course increased. The bookkeeper and office manager have both earned pay raises that have reduced our positive monthly balances slightly, but I predict we will see our fiscal year-end surplus at about 20% positive as compared to just breaking even.

In August, two assistant treasurers were officially appointed, Fern Hamlin and Kathy Vetter. They and the other committee members, Janet Bogar, Karen Dickson and Barbara Williams, and our excellent bookkeeper Finda Kamanda, have made your church's financial business run smoothly. We owe them all great thanks.

Over the last year:

The Finance Committee has created a list of Authorized Signatures for Budget Line Items, to name who is responsible for approving spending for what.

A Point-of-Sale Policy was proposed and evolved into the Collection of Payment Policy. This sets standards for taking in payments, handling money and training operators of our credit card reader and cash box.

We continued to utilize UU Org Retirement plan. This allows us to offer a 5% base and no matching % for all 1,000+ hrs/year employees.

With BOT approval, we moved a portion of our assets from checking into CDs, which have started to earn interest. By February 2025, we had rolled over two CDs. In April, we took out two more CDs. As of now, we will have a total of \$60,000, earning over 4%.

The Niyongabo Family Fund was used in October.

The 2025-2026 proposed budget reflects our current levels of spending, assumed for the entire upcoming fiscal year. If the congregation hires a minister, the budget will need to be addressed at that time.

Note: Limits on BOT spending remain maximum 3% over the total budget on any one item and no more than 5% over the total budget without congregational approval. And any contract with a minister requires congregational approval.

If you are interested and have considered joining the Finance Committee, please contact me.

Sincerely,

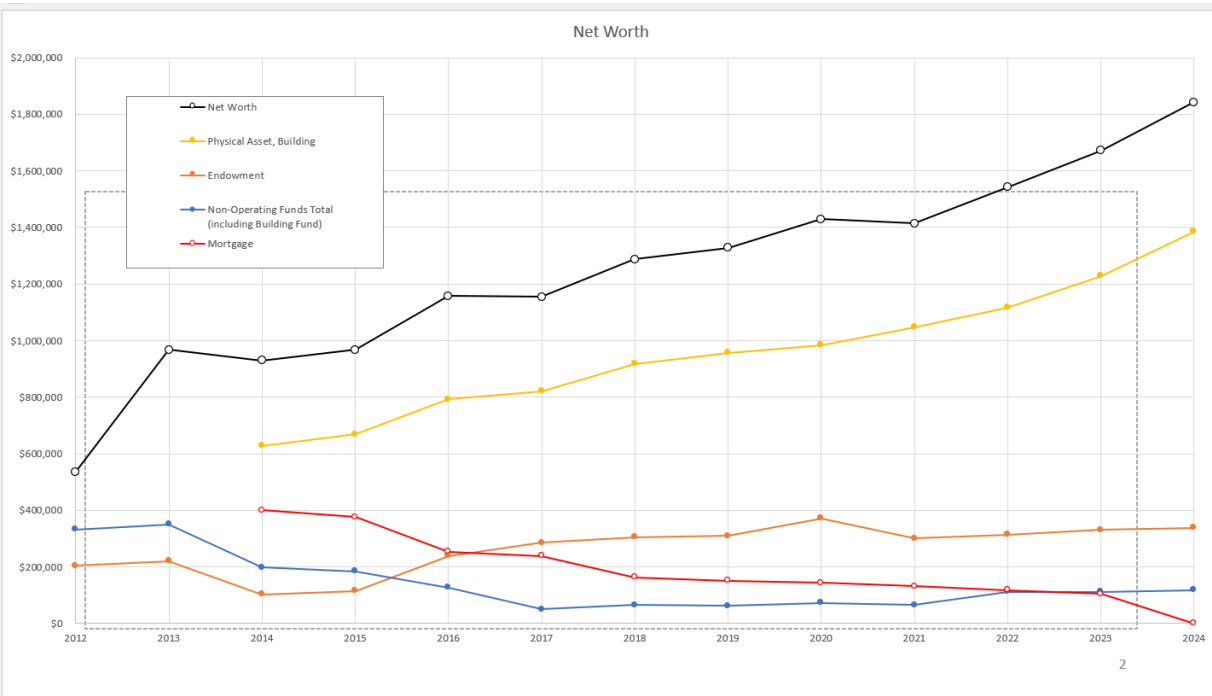
David Mayfield

Slides used in the Treasurer's Presentation to the Congregation

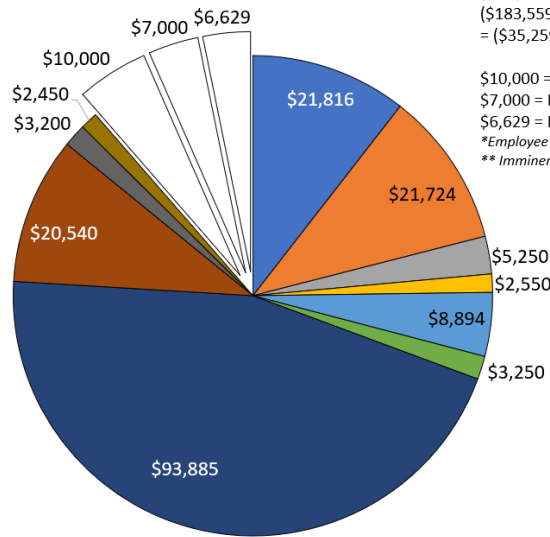
Church Financial Update

5/18/2025
Historic Trends
A Pie Chart
Considerations

1



- Mortgage/Rent
- Building
- Sunday Service
- Committee Expenses
- Denominational Dues
- Religious Education
- Ministerial Expenses
- Employee Expenses Non-Ministerial
- Office
- Other
- DRE
- Cleaning



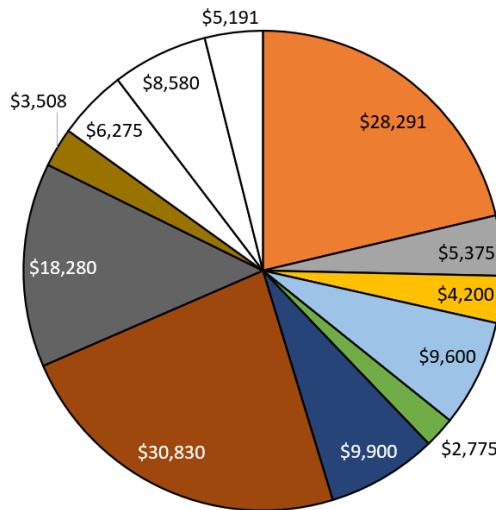
\$148,300 2023 Income Budgeted
 (\$183,559) 2023 Expenses & 9% Mortgage
 = (\$35,259) Deficit*

\$10,000 = Excluded DRE
 \$7,000 = Excluded Paid Cleaning
 \$6,629 = Excluded Rainy Day Fund**
 *Employee pay based on 2023 wages/salary.
 ** Imminent parking lot repair cost not in fund calculation.

Estimated 2024 Expenses

3

- Mortgage/Rent
- Building
- Sunday Service
- Committee Expenses
- Denominational Dues
- Religious Education
- Ministerial Expenses
- Employee Expenses Non-Ministerial
- Office
- Other
- DRE
- Cleaning



\$165,790 = 2025 Income

\$132,805 = 2025 Expenses + 9% Mortgage

\$32,985 = Surplus

\$6,275 = Included DRE
 \$8,580 = Included Paid Cleaning
 \$5,191 = Included Rainy Day Fund

Ministerial expenses include the ministerial search budget and the cost for the current speaker contract. This contract supplies about the same number of Sunday services as a half-time minister.

Parking lot repair cost is not in the operating budget.

Estimated 25-26 Expenses

4

Future Actions and Considerations

- We will be moving available assets into short-term investments.
 - Tools such as CDs are anticipated to realize \$2,000 – \$2,500 annually.
- The parking lot may become a special project this year.
- The search may require the congregation to reconsider this budget because hiring a minister or spending more than 5% over the operating budgeted requires congregational approval.

5

Finance Documents Compiled by Finda Kamanda, Bookkeeper

❖ Proposed 2025-26 Operating Budget

For the Congregation's review and approval, the Board of Trustees offers the *Proposed Fiscal Year 2025-26 Operating Budget*, as shown in Table 1 below.

**Table 1: Fiscal Year Operating Budgets: Final Prior Year (2023-24),
Current Year (2024-25) Status as of 4-30-2025, and Proposed 2025-26 Budget**

Line Item	Final 2023-24		2024-25 YTD		Proposed 2025-26	Notes
	Budget	Actual	Budget	Thru 4-30		
<u>Income/Revenue Sources</u>						
110 - Pledges	130,000	134,876	141,796	103,204	138,440	
115 - Pledges – Additional	0	7,315	0	600	1,500	
120 - Loose Offering	3,500	6,163	2,000	5,531	5,000	
130 - Building Use Fees	0	1,130	200	680	600	
140 - Fundraisers				0		

**Table 1: Fiscal Year Operating Budgets: Final Prior Year (2023-24),
Current Year (2024-25) Status as of 4-30-2025, and Proposed 2025-26 Budget**

Line Item	Final 2023-24		2024-25 YTD		Proposed 2025-26	Notes
	Budget	Actual	Budget	Thru 4-30		
142 - Holiday	700	957.00	750	627	750	1
143 - Service Auction	12,000	11,660	12,000	12,868	12,000	
144 - Concerts	0	607	500	1,135	1,800	2
145 - Other Fundraisers	100	3,095	1,000	4,114	2,000	
150 - Other Contributions	1,000	3,753	1,000	3,665	1,500	
198 – Interest Income	0	0	500	904	1,200	3
199 - Misc/Other Revenue	1,000	2,301	980	1,281	1,000	
Total Income/Revenue	148,300	171,856	160,726	134,608	165,790	
<u>Expenses</u>						
205 - Mortgage Payments	13,000	11,690	12,673	0	0	
210 - Church Insurance	5,800	4,883	5,500	5,891	6,000	
220 - Cleaning Services	0	0	6,000	2,373	8,580	4
230 - Building Supplies	700	0	700	68	700	
240 - Building	1,500	529	1,500	1,466	1,500	
241 - Rainy Day Fund	-	-	5,730	0	5,191	5
242 - HVAC Preventive	400	0	600	0	600	
243 - HVAC & Other Major Repairs	400	630	800	0	800	
250 - Grounds	1,500	650	1,500	550	1,500	
300 - Utilities						
310 - Gas	2,500	1,831	2,500	2,058	2,500	
320 - Electric	1,500	1,703	1,600	1,945	1,700	
330 - Telephone & Internet	2,624	6,955	3,260	3,135	3,500	
340 - Water & Trash	1,700	1,901	1,600	1,332	1,800	

**Table 1: Fiscal Year Operating Budgets: Final Prior Year (2023-24),
Current Year (2024-25) Status as of 4-30-2025, and Proposed 2025-26 Budget**

Line Item	Final 2023-24		2024-25 YTD		Proposed 2025-26	Notes
	Budget	Actual	Budget	Thru 4-30		
351 - Endowment Repayment	1,000	1,000	1,000	0	1,000	
355 - Snow Removal	1,000	750	1,000	1,200	1,000	
360 - Security	500	692	500	485	600	
363 - Security Personnel	-	-	-	-	675	6
365 - Alarm Fees	0	100	100	0	100	
370 - Elevator & Sprinkler	1,600	1,738	1,600	1,508	1,600	
410 - Admin & Office (Non-payroll)	1,100	1,989	1,200	2,101	1,800	7
415 - Copier	2,000	1,087	2,000	2,199	2,000	8
420 - Postage	100	210	100	88	200	
430 - Payroll Taxes & Expenses	1,440	1,374	1,893	1,665	1,899	
435 - Payroll Processing	1,300	1,302	1,300	1,068	1,300	
500 - Sunday Services				0		
510 - Sunday Service Committee	1,000	0	5,000	5,680	16,580	9
511 - Sunday Service Supplies	50	0	50	0	300	
520 – Music	4,200	3,700	4,000	2,925	6,050	
620 - Service Charges	400	630	500	674	250	
700 - Committee Expenses						
705 - Board of Trustees	200	0	200	10	200	
710 - Membership Committee	100	217	250	232	400	
720 - Social Committee	300	233	200	32	500	10
725 - Coffee & Tea	300	202	200	226	300	
730 - Events Committee	500	129	500	305	500	

**Table 1: Fiscal Year Operating Budgets: Final Prior Year (2023-24),
Current Year (2024-25) Status as of 4-30-2025, and Proposed 2025-26 Budget**

Line Item	Final 2023-24		2024-25 YTD		Proposed 2025-26	Notes
	Budget	Actual	Budget	Thru 4-30		
735 - Aesthetics Committee	50	0	50	50	50	
740 - Care Committee	100	116	200	82	200	
744 - Committee on Ministry	0	0	0	0	300	
745 - Peace and Justice Com	1,000	1,000	1,000	0	1,000	
746 - Marketing Committee	0	0	300	325	500	
747 - Finance Committee	0	0	0	0	0	
748 - Endowment Committee	0	0	0	0	250	
749 - Inter-generational Choir	0	0	0	0	0	
750 - Denominational Dues	8,894	8,894	9,500	7,077	9,600	
760 - Fundraising Expense						
761 - Stewardship Campaign	400	79	300	190	400	
765 - Holiday	50	0	50	0	50	11
766 - Service Auction	500	594	500	693	750	
767 - Concerts	0	0	0	0	1,300	12
769 - Other Fundraisers	0	1,128	300	677	500	
770 – Leadership Development	0	0	1,000	820	1,200	
800 - Religious Education						
808 - CRE Professional Exp.	1,000	949	275	65	1,275	13
809 - CRE Salary	0		0	0	5,000	13
810 - Religious Ed supplies	500	420	500	240	500	
812 - Background Checks	50	44	75	23	75	
814 - Adult RE	200	430	500	805	700	
815 - Child Care	1,500	918	1,500	1,016	1,500	
900 - Ministerial Expenses						14
910 - M's Salary & Housing	58,470	58,470	34,088	4,873	0	

**Table 1: Fiscal Year Operating Budgets: Final Prior Year (2023-24),
Current Year (2024-25) Status as of 4-30-2025, and Proposed 2025-26 Budget**

Line Item	Final 2023-24		2024-25 YTD		Proposed 2025-26	Notes
	Budget	Actual	Budget	Thru 4-30		
915 - in lieu of FICA	4,473	4,473	2,608	373	0	
920 - Sabbatical Funding	0	0	0	0	0	
930 - Minister's Expense	5,847	6,194	3,409	584	0	
940 - Minister's Pension	5,847	5,847	3,409	487	0	
945 - Minister's Insurance	19,248	19,749	11,325	1,767	0	
960 - Office Personnel						
960 - Office Salaries	17,800	18,989	24,830	21,271	24,830	
965 – Office Pensions	0	0	0	0		
966 – Office Insurance	-	0	5,000	500	6,000	
990 – Search Comm Expense	-	0	5,000	0	5,000	
999 - Miscellaneous Expense	100	80	200	0	200	
Total Expenses:	174,743	174,498	171,475	81,134	132,805	
Surplus/Deficit:	-26,443	-2,642	-10,748	53,474	32,985	

Notes:

- 1) This line was renamed “Holiday” as its previous name (Holiday Bazaar) was a misnomer because our only holiday fundraisers are a Cookie Walk and a Dessert Auction.
- 2) This line was increased because the Board approved a change in concert fundraising. All income will now be routed through the church along with all expenses. The additional \$1500 in income is offset by the new \$1500 in expenses (see line 767).
- 3) This year’s interest income came from earnings on the \$20,000 in CDs that were renewed in January 2025. With an additional \$20,000 invested in CDs, we anticipate additional income in FY 2025-26.
- 4) For FY 2025-26, the Cleaning Services budget has been increased to cover weekly cleaning services provided by Molly Maid at \$165/week. Services started in February 2025.
- 5) If not needed for emergencies during the year, and we end the fiscal year with a budget surplus, at the end of the year the balance on this line will be transferred into the Building/Rainy Day fund.
- 6) This new expense line has been added to fund on-site security during events, as needed.

- 7) In addition to office supplies not covered on other lines, we use this line for ongoing expenses related to administrative work (accounting and office software) and technical services (website hosting as well as Google & Zoom accounts).
- 8) This budget line will now cover a monthly service contract (for toner, regular maintenance & repairs) for the new, office quality printer/copier that the Board authorized immediate purchase of, at its April 2025 meeting.
- 9) For FY 2025-26, the Sunday Service budget was increased to cover additional expenses related to the absence of a minister.
- 10) The Board increased this line to cover the cost of receptions for member Memorial services.
- 11) As with the Income line 142, the name of this line was change to the generic “Holiday” to reflect that our Holiday fundraising no longer includes a Bazaar.
- 12) The new \$1300 budget for concerts reflects the Board’s approval of changes to concert fundraising that require all income and expenses to be handled by the church.
- 13) The DREAM Team requested the 2025-26 increase in the CRE Professional Expenses line for additional training opportunities and the \$5000 CRE Salary to be ready, if the opportunity presents itself (good candidate and right time), to hire a part-time CRE.
- 14) In anticipation of remaining without a minister for the entire 2025-26 fiscal year, we have not budgeted for any ministerial related expenses. Were we to find a minister before the end of the year, with congregational approval our anticipated surplus could be re-budgeted for this purpose.

❖ Non-Operating Funds Reports

The following six tables document activity and balances in the Non-Operating Funds.

Table 2: Non-Operating Funds Balances and Activity: July 1, 2024 – April 30, 2025

First Unitarian Church, South Bend

Fund	Ending Balance 6-30-2024	Fiscal Year to Date 4-30-2025		Current Balance 4-30-2025	Notes
		In	Out		
Building/ Rainy Day	708.87	21,787.86	0.00	22,496.73	1,2
Burn the Mortgage	39,246.71	59,670.29	98,917.00	0.00	3
Congregational Discretionary	584.39	560.00	421.00	723.39	4
Endowment Disbursements	4,989.49	15,868.85	11,739.26	9,119.08	5
Endowment Set-aside	1,075.00	2,580.00	2,400.00	1,255.00	6
Invisible Church	4,592.57	0.00	0.00	4,592.57	
Prepaid Pledges	16,550.00	16,085.00	16,550.00	16,085.00	7
Sabbatical Fund	728.95	0.00	0.00	728.95	
Special Collections	0.00	1,911.06	1,911.06	0.00	8
Special Projects	16,456.48	0.00	15,030.31	1,426.17	9
Teen Service Project	157.98	0.00	150.64	7.34	10
Unrestricted Savings	27,546.54	0.00	0.00	27,546.54	11
Fund Totals	112,636.98	118,463.06	147,119.27	83,980.77	

Notes:

- 1) With congregational authorization of a *Rainy Day Fund* line in the 2024-25 Operating Budget (at May 2024 Annual Meeting), we renamed this fund *Building/Rainy Day*.
- 2) We transferred into this fund the residual amount (\$7,924.01) in the *Burn the Mortgage* fund after paying off our Mortgage, the unused *Mortgage Principal Endowment Grant* (\$7,388.85), and the unused *UUA GA Endowment Grant* (\$280).
- 3) The July Mortgage payment (\$1,677.92) and the August Mortgage final payoff (\$89,315.07) were made from this fund. The residual (\$7,924.01) was transferred to the *Building/Rainy Day* fund.
- 4) In August, with the departure of Rev Roush, the Board approved a name change (from *Minister Discretionary* to *Congregational Discretionary* fund) and a revised use policy for this fund.
- 5) For details of the Endowment Disbursements fund see Table 6 below. The additional \$5.20 in the balance here compared to the total in Table 6 is due to a residual balance in a 2017-18 grant completed in its first year and not shown in Table 6.
- 6) In August 2024, we transferred \$2,400 to our UUA Endowment account. See also Table 5.
- 7) We transferred \$16,550 in Prepaid Pledges for FY 2024-25 to the General Fund on 7-1-2024. The current balance (\$16,085) is being held for the 2025-26 Operating Budget.
- 8) The Special Collections paid into and out of this fund include CROP Walk (\$1300) and TREES (\$611.06). From donations given electronically, we subtracted the service charges (\$9.62).
- 9) See Table 7 for Special Projects activity.
- 10) To close out this old fund, the Board authorized the DREAM Team to use the residual amount (\$157.98).

- 11) On June 30, 2024, we transferred \$2,641.73 from Unrestricted Savings to the General Fund to cover the FY 2023-24 Operating Budget deficit (see Table 1). This transfer is reflected in the 6/30/2024 Unrestricted Savings balance.

Table 3: First Source Mortgage* Balance and Activity, July 1, 2024 – April 30, 2025

First Unitarian Church, South Bend

Activity	Amount	Notes
Balance as of 6-30-2024	\$90,438.60	
Principal Payments	90,438.60	All payments were paid from the <i>Burn the Mortgage</i> fund
Interest Payments & Fees	552.92	All interest payments and fees were paid from the <i>Burn the Mortgage</i> fund
Balance 4-30-2025	\$0.00	1 st Source Mortgage was paid off 8/1/2024

Table 4: Non-Endowment Investments: First Source Certificates of Deposit* Balances and Activity, July 1, 2024 – April 30, 2025

First Unitarian Church, South Bend

	Original Amount	Invested Amount	Interest Rate	Annual % Yield	Maturity Date
Certificate of Deposit - 1510	10,000.00	10,452.21	4.94%	4.95%	12/15/2025
Certificate of Deposit - 1511	10,000.00	10,452.21	4.94%	4.95%	12/15/2025
Certificate of Deposit - 1514	10,000.00	10,000.00	4.17%	4.20%	12/4/2025
Certificate of Deposit - 1515	10,000.00	10,000.00	4%	4%	5/4/2026

Note: All other non-Endowment funds are kept in a First Source checking account that does not earn interest.

Table 5: Endowment Fund* Balance and Activity, July 1, 2024 – March 31, 2025

First Unitarian Church, South Bend

Activity	Amount	Notes
Balance as of 6-30-2024	\$ 335,394.19	
Deposit (Loan Repayment & Contributions)	\$ 2,400.00	We made one deposit (in August) to our UUCEF account from the Endowment Set-Aside fund.
Withdrawal (for Disbursements)	\$ 15,868.85	Funds put in the <i>Endowment Disbursements</i> fund to cover 2024-25 grants (see Table 2 above and Table 6 below).
Market Gain (or Loss)	\$ 9,357.62	Fund gain during this nine-month period.
Balance 3-31-2025	\$ 331,282.96	

* All of these funds are held in the Unitarian Universalist Common Endowment Fund (UUCEF) and are professionally managed using approved [socially-responsible](#) investing guidelines. Some of this fund (\$75,000) is permanently restricted to prohibit principal use.

Table 6: Endowment Grants - Payments by Grant, July 1, 2024 – April 30, 2025
First Unitarian Church, South Bend

	Approved Amount	Prior FY Balance* 6-30-2024	Total FY Payments thru 4-30-25	Balance Remaining	Notes
<u>2024-2025 Grants</u>					
Piano Maintenance	\$2,000.00	-	\$2,000.00	\$0.00	
Attic Insulation Upgrade	\$3,700.00	-	\$1,774.91	\$1,925.09	
UUA GA - Tetzlaff	\$280.00	-	\$280.00	\$0.00	1
Planning Expenses	\$2,500.00	-	\$175.00	\$2,325.00	
Mortgage Principal	\$7,388.85	-	\$7,388.85	\$0.00	2
<u>2023-2024 Grants</u>					
RE Exterior Door Addition	\$12,550.00	\$177.93	\$120.50	\$57.43	
Exterior Security Upgrades	\$2,500.00	\$2,288.04	0.00	\$2,288.04	
<u>2019-2020 Grants</u>					
Mobile Ecology Center	\$282.00	\$33.00	0.00	\$33.00	
Natural Playground	\$2,000.00	\$2,000.00	0.00	\$2,000.00	
<u>2017-2018 Grants</u>					
Mobile Ecology Center	\$1,550.00	\$243.78	0.00	\$243.78	
<u>2013-2014 Grant</u>					
Website Upgrade	\$3,000.00	\$241.54	0.00	\$241.54	
Totals		\$4,984.29	\$11,739.26	\$9,113.88	3

* **Prior FY Balance:** For grants from prior fiscal years (FY), the 6/30 balance is calculated based on the approved amount less expenditures in the prior FY(s). For new grants, because the funding begins at the start of the FY (7/1), the balance on 6/30, the end of the prior FY, is zero.

Notes:

- 1) Per the Board's decision at its 12/11/24 meeting, we transferred the total amount of the *UUA GA - Tetzlaff* grant (\$280.00) to the *Building/Rainy Day* fund (see Table 2).
- 2) Per the Board's decision at its 11/13/24 meeting, we transferred the total amount of the *Mortgage Principal* grant (\$7,388.85) to the *Building/Rainy Day* fund (see Table 2).
- 3) The Total Balance Remaining is \$5.20 less than Table 2 (*Endowment Disbursements*) due to a \$5.20 residual in a 2017-18 grant not shown here.

Grants Completed this Year

Piano Maintenance – August 2024

Mortgage Principal – November 2024

UUA GA – Tetzlaff - December 2024

Table 7: Special Projects Fund Activity by Project, July 1, 2024 – April 30, 2025
First Unitarian Church, South Bend

Special Project	Prior FY Balance 6-30-2024	Year to Date (4-30-2025)		Balance 4-30-2025	Notes
		In	Out		
Memorial Garden	\$926.17	0.00	0.00	\$926.17	
Niyongabo Family Fund	\$15,030.31	0.00	15,030.31	\$0.00	1
UW COVID-19 Relief	\$500.00	0.00	0.00	\$500.00	2
Totals	\$ 16,456.48	\$0.00	\$15,030.31	\$1,426.17	

Notes:

- 1) With the arrival of the Niyongabo Family, all funds were provided to Ambroise to cover expenses related to his family's travel and settlement here in South Bend.
- 2) We received these fund as a grant from the United Way of St. Joseph County in 2020.

Nominations

From the Nominating Committee

The Nominating Committee is pleased to present the following slate of nominations for the 2025-2026 Board of Trustees and the Endowment Committee:

Board of Trustees

Vice President: Karen Dickson
Treasurer: David Mayfield
Trustee: Justine Backus
Trustee: Ann Hoewing

These terms expire in 2027.

For information purposes only, the continuing members of the Board are: Gail deSomer (President), Fern Hamlin (Secretary), Eli Williams (Trustee) and Francisco Gomez-Dossi (Trustee) with terms to expire in 2027.

Endowment Committee

Linwood Bailey – term to expire in 2028.

For information purposes only, the continuing members of the committee are Barbara Williams with a term to expire in 2027 and Vicki Stevens with a term to expire in 2026.

Submitted by the Nominating Committee

Bill Stevens, Karen Dickson, Megan Sulok

From the Board of Trustees

The Board of Trustees is pleased to nominate the following members to serve on the 2024-2025 Nominating Committee:

Chair	Chuck Leone (outgoing Board President)	1 year
Member	Eli Williams	2 years

For information purposes only, Megan Sulok is a continuing member of the committee with a term to expire in 2026.

Alternate: Melanie Smith-Guillaume

Ministry Search Task Force Report

The Search Task Force was formed in July 2024 by the Board of Trustees to conduct a search for a new minister for the Church and was charged with the following responsibilities:

- To work with the Board of Trustees on the parameters of the Search, including half-time status
- To prepare a Search Packet to describe and present our Church to prospective ministerial candidates through the UUA website and other media
- To engage in a discernment and selection process to choose a candidate
- To arrange communications and visits, if appropriate, for any recommended candidate

Church members Chuck Leone, Gail deSomer, Jeremiah Cox, Jim Ward, Abby Joiner and Dawn Nye were selected by the Board to serve on the Task Force.

As part of the search process, the Task Force designed and conducted a Congregational Conversations exercise conducted in September and October 2024 asking participants why they first came to the Church, why they stayed, and why the Church was important. The responses were compiled and used as the basis for our congregational description in the Search Packet.

The Packet was completed and uploaded to the UUA Ministerial Search website in December, 2024 and in January we received one expression of interest through that website and one other expression of interest through informal channels. The Task Force reviewed both candidates but decided in March 2025 that neither was a good fit for the congregation at that point.

In April, 2025, the UUA released the names of additional ministers who were still available, and the Search Committee has begun conversations with one of them. Stay tuned for further developments as the process continues.

May 5, 2025

Chuck Leone, on behalf of the Task Force

Committee Reports

Administrative Committee

Chair: Florence Klečka | Members: Kyle Jaros, Barbara Williams

The Administrative Committee was reintroduced after a hiatus of several years to update and review the Church's various policies, procedures, and committee descriptions.

To start with, the Committee made a list of all committees and policies, then assigned people to review them for clarity and uniformity, sending them out to the relevant committees for input and approval, then to the Board for final approval. The final documents can be found on the Church website.

Between July and May, the committee has updated the following committee descriptions:

Administrative, Care, Endowment, Finance, Marketing, Membership, Ministry, Sunday Service, and Technology. Others are awaiting committee or Board input/approval.

The Administrative Committee has updated the following policies/procedures:

Alcohol Use, Child Abuse Reporting, Collection of Payment, Congregational Discretionary Fund, COVID, Disruptive or Inappropriate Behavior, Executive Sessions for BOT, Performance/Wage/Salary Review, Use of Children's Photos and Videos, and Weather Notification. Others are awaiting committee or Board input/approval.

We plan to review the remaining policies and committee descriptions next year. Once these are all approved, we can come up with a schedule of how often they should be reviewed in the future.

We also plan to organize and assign tasks in the various perpetual calendars for various committees and officers of the church, so that no one is caught unawares. There are also many procedures which should be written out.

Adult Religious Education Committee

Chair: Gail deSomer | Members: Barbara Williams, Jim Curlee, Karen Heffernan, Lois & Dan Holm, Anne Mannix, Chuck Leone, Mary Alice Lundergan, Byrd Tetzlaff, Dr. Louise, Emily Wetherall, Jeremiah Cox

Organized by the Adult Forum

- Adult Forums- met generally three out of four Sundays per month at 9 am in the church Conference room. The topics were planned quarterly by those attending. Attendance was generally around 8-12 people per forum. The topics were on a wide range of subjects including : Banned Children's Books, UU History, Importance of Gathering Spaces in our Communities, Life after Death, Your Favorite Piece of Clothing, Social Services in our Community, Chair Yoga, The History of Manufactured Vintage Christmas Ornaments, Unitarian Universalist and Indian Schools, Inner Talk, Islam, What Languages do we Speak, Generational Labels, Aging, Church Survey Breakdown, Lyme Disease, Book - Calling in, Podcast - Freedom from Inner and Outer Tyranny, How

Trees are like People, Article - The End of Children, The language of Gemstones, Book - The Hero: The Enduring Myth that Makes us Human, Environmental Working Group, Famous UU's, Embroidery and Linens.

- facilitators and planners include Dan Holm, Lois Holm, Jane Ash, Emily Wetheral, Church Leone, Kevin Warren, John Mitchell, Jim Curlee, Barbara Williams, Gail deSomer, Anne Mannix, Tamara Ciszczon

There were no offerings by a minister this year

Organized and led by Barbara Williams

- *Great Decisions*, an eight-session program prepared by the Foreign Policy Association, was held in February, March and April this year. The program was very well attended including both members and friends of our church. We read articles, watched videos and discussed 8 topics of foreign policy that are most timely. Ideas and viewpoints were shared in lively discussions. All participants agreed that the program provided a context for understanding news reports. The *Great Decisions* program represents our congregation's commitment to living our 2nd, 4th, 6th and 7th principles as we work for justice, equity, compassion, search for truth and meaning, support the goal of peace, liberty and justice for all, respecting and learning about interdependence throughout the world.

Common Read

- The Book Authentic Selves: Celebrating Trans and Nonbinary People and Their Families. This four-part book discussion was offered March through June and led by Dr. Louise Williams, Kelly Faust, Eli Williams and Francisco Gomez-Dossi. Attendance was 18-20 people per session.

Other Activities

- G.O.S.H, Group of Open-Source Happiness, a small group ministry continues to meet twice per month.

Aesthetics Committee

Chair: Melanie Smith-Guillaume | Members: Barb Carmichael, Gail deSomer, Susan Van Fleit

Building Committee

Chair: Kathy Vetter | Members: Gail & Allen deSomer, David Mayfield

As they have done since we started using our building after the pandemic, Gail & Allen deSomer faithfully cleaned the building every week through early spring. This year Karen Heffernan occasionally helped Gail and Allen with the cleaning, while Tom Platt washed our many windows, as he has done regularly since we moved into the building. Many thanks to Allen, Gail, Karen and Tom for keeping our building looking so good! Gail also spent many hours searching for an individual or agency that was a good fit for our cleaning needs. After many in-person contacts and much follow up, Gail identified Molly Maids as our best source of weekly cleaning.

They have been doing most of the cleaning since early spring. As to our other ongoing responsibilities, we have continued to monitor the building's mechanical systems and assure all required testing and certification is up to date, as well as take care of minor issues that crop up.

With the help of many, we recovered from a major sewer backup (due to weed growth in the line) in mid-December and a minor backup at the end of January. Special thanks to Kyle Hulse for getting Tyler's Plumbing in on a Sunday and to Alan Hamlet and Gail deSomer for all their clean-up work that day and on into the next. As a result of the second backup, we opted into the city's sewer insurance program (\$500) so they covered the second clean out and will cover any additional costs if we determine we need to repair or replace our main sewer pipe. We continue to closely monitor outflow for any signs of another problem.

Using funds from the "Attic Insulation Upgrade" Endowment grant, David Mayfield spent many weekend hours last fall adding polystyrene board insulation to the sanctuary's attic area. This was the last easily accessible area of the attic where he had not already added board insulation on top of the roll insulation. Thank you to David for his many hours of tedious work! We requested the additional funds in this grant for other improvements that will further "freeze proof" our building, including installing an excess-flow valve (strongly encouraged to avoid water problems by our insurer, Church Mutual) and adding a more extensive monitoring system of our attic temperatures. We will continue to work on this project over the summer and fall.

Francisco Gomez-Dossi wrote and submitted an Endowment grant to install an ADA-approved automatic door opener on the exterior East Door. If approved, this will be our major summer project. Other items on our agenda include continuing to work with the Board on assuring we have the proper resources for our long-term building needs in the Rainy Day/Building Fund and working with other committees on the development of emergency procedures.

Our thanks to Francisco for serving as both Board Liaison and Committee Chair for the Building Committee for the past nine months as he also did for the Grounds Committee. Lastly, thanks to those not named here who have jumped in when needed to help with various building needs.

Committee Members: Gail deSomer, David Mayfield and Kathy Vetter

Building Use Committee

Chair: Gary Metzler | Members: Gail deSomer, Kathy Platt, Kathy Vetter, Jim Ward

Care Committee

Chairs: Karen Heffernan & Gail deSomer | Members: Tosha Rowe, Jim Curlee, Karen Dickson, John Mitchell

The Care Committee strives to match those who have a need with those who can help. Throughout the year, the Care Committee and its helpers assist whenever they hear of a need from church members. We send meals or soup to families or individuals who are sick or have surgery and provide rides to appointments or physical therapy. The Care Committee records

weekly Joys and Concern and shares this with the Care Committee and its helpers. Individuals can then follow up with cards, emails, phone calls or visits.

In December, Care Committee members and helpers delivered 20 poinsettias to church members and friends who are unable to attend church or who had a difficult year

Special thanks to Lois Holm who continues to send out Birthday cards to church members and friends throughout the year.

The Care Committee maintains a “loan closet” in the church basement near the elevator with medical equipment such as walkers, wheelchairs, canes, commodes and wedge pillows. In addition, there is baby equipment such as strollers, bed rails and pack ‘n plays for church members and friends to borrow. Items can be checked out by signing your name on the clipboard hanging on the wall, and checking the item back in upon return. There is a wheelchair near the front door of the church for anyone who needs it while visiting the church.

The Care Committee has end of life forms church members can fill out and maintains these forms in a confidential file.

Thanks to Dawn Nye who served on the committee for part of the year.

Children & Youth Religious Education Committee

Chairs: Gail deSomer, Megan Sulok, Kaely Barwick

For our youngest children, four and under, childcare was available in the nursery provided by Max Castaneda.

Over the summer we used a play-based curriculum called "Can Do Summer" that focused on curiosity and imagination for all ages. In the fall we completed our LEGO ValUUes curriculum where we explored our UU values through stories, activities and play. For winter and spring, we are using a curriculum called "Sitting Together". It is curriculum where we explore meditation, kindness, ethics, character, service and nature/earth through stories, meditation exercises, crafts, games and song.

Twice per month we offered options for the older children. Once per month they watched and discussed an episode from a curriculum on the Twilight Zone television show and once per month they played Dungeons and Dragons.

We were unable to offer a high school Our Whole Lives class because the curriculum had not yet been updated and was not available.

Attendance on Sunday morning varied between two and 17 children each week.

In addition to Sunday morning activities, we had social activities once per month in order to help the children develop a sense of belonging to a larger community. Activities included bi-monthly Intergenerational Games nights, a Halloween party at Potowatami Park, an Easter Egg Hunt in April and a playground meet up in May. In November, we collected donations for the children who receive services through the CASIE Center.

We are waiting for a quote for a balance beam which will section off a garden area in our natural playground.

The DREAM Team developed a Code of Ethics for Teachers, updated the DREAM Team description, and updated the Use of Photos and Videos for Children Policy.

We continue to use a Facebook Messenger group to communicate with parents and grandparents of children participating in Religious Education. This group serves to announce activities in addition to the *Chirp*. The group also allows parents to communicate with each other and build community.

We used a team approach to planning and executing activities, calling ourselves the D.R.E.A.M Team to signify Directors of Religious Education and Mindfulness. The team consists of: Kaely Barwick, Gail deSomer, Megan Sulok and Christina Tolomei who plan activities and also teach. In addition, Jim Curlee taught our Twilight Zone curriculum monthly and Christopher Peters led Dungeons and Dragons monthly. Thank you to Mary Beth Dickey who continues to help with our CASIE Center service project each fall.

Committee on Ministry

Chair: Francisco Gomez-Dossi | Members: Ann Hoewing, Cat Rambo

Endowment Committee

Chair: Barbara Williams | Members: Janet Bogar, Vicki Stevens

The Church's Endowment Fund was created as a separate fund in 2007 by a Board of Trustees Resolution. Money is held and managed by the UU Common Endowment Fund. Distributions from the Fund to support non-operating fund projects/activities that enhance the mission and programs of the congregation. Proposals for activities and programs are solicited in March, evaluated by the Committee based on the amount that is permitted each year based on a formula in the Resolution of 2007.

Current balance in the Endowment Fund is \$331,283. This year (2025-26), the formula allows us to disburse \$16,725. (5% of the average balance for the past four quarters). In March, we received several proposals. The committee recommended the approval of all the proposals with a few decisions to be made.

In addition, the Committee recommended that 3 proposals granted during 2017-2020 (2 for mobile ecology center, one for the natural playground be given extensions to complete the projects and turn in receipts for the expenditures. Another grant made over 10 years ago has a balance of \$241.54. That is the proposal for website upgrade granted in 2013-14. The committee recommends returning this sum to this year's available disbursement sum bringing the total to \$16,966.

The committee is aware that the proposal estimates for purchasing equipment/services are probably a bit low as the tariffs are being imposed and inflation continues.

1. Archivist to continue the collecting, labeling and organizing Church files/information \$2000.
2. All Church Retreat at the Res in Mishawaka on the weekend of August 23-24--includes the rental of the main lodge, a cabin that sleeps 24, a site for tent camping, as well as supplies and food for the gathering. \$1000
3. Sound System Upgrade (to purchase equipment that will enhance speaking and music) for the Sanctuary. \$3500
4. Technical Improvements for the Conference Room. (Mounting large screen TV with improved DVD quality, cables and mounting materials.) \$1800
5. ADA Compliance Improvement by adding handicapped door opening devices to at least one entryway/egress from the building. \$3800
6. Sun covering device for the patio to make the patio more usable during hot sunny days. \$5000+ It may be necessary to do a targeted fund raiser to be able to pay for the entire project depending on what is needed for a more permanent structure should that be preferred.

Other projects that the Committee is working on include--the development of a LEGACY BOOK for the Church to record all donors to the Endowment Fund made since its inception with the names of the person (s) to be memorialized or honored.

The Committee recommended some amendments to the Original Fund Resolution which would allow for a possible mid year distribution in order to fund projects/proposals that are unforeseen and time sensitive. Such a possibility was raised at the 2024 Annual meeting. The proposal to amend the resolution to form the Endowment Fund was tabled by the Board. Finally, the Committee presented a document to the Board (which was passed at the April meeting) to describe the Committee's charge, its procedures and policy. That document was approved and appears on the Church Website under the Documents and Forms.

Events Committee

Chair: Kathy Platt | Members: Jim Ward, Gail deSomer, Anne Mannix

Anyone who wants to help with events is welcome on this committee. Different people head up different events that help us have fun and develop community.

We had our annual Activity Fair on Oct. 8. This provides information on church committees and groups.

Lois and Dan Holm organize the Art on the Walls, which we are so fortunate to have. Please read their Art on the Walls report.

Jim Ward brings in fabulous musicians for us to enjoy! This year we had Francis Luke Accord on Oct. 4 and Caroline Cotter on April 13.

We had our 47th annual Service Auction Nov. 2 and raised over \$12,000 due to our generous donors and bidders! Jim Ward, auctioneer, Justine Backus, joke seller, Florence Klecka Dessert Competition organizer. Gail & Allen deSomer and Florence kept track of the bids. SO many

helped, including Jane Ash, Alice & John Bentley, Jeremiah Cox, Pat Davis, Lois & Dan Holm, Kathie Carr, David & Stuart Mayfield, Ilene Crutchfield, Susan Siemers, Pat Davis, Janet Bogar, Kaely Barwick, Diana Mendelsohn, Vicki Stevens, Kelly Faust, Dawn Nye, Rich Wallace, Emily Wetherall, Ann Hoewing, Pat Taplick, Mary Alice Lundergan, Jim Curlee and Dr. Louise. SO MANY others helped with clean-up, etc. Thank you all!

Our annual Cookie Walk Sunday Dec. 8 raised \$429. The Holiday Dessert ‘Auction’ raised \$190 and was online on our Auction website from Dec. 1-15. www.peoplecomingtogether.net Thanks to all our wonderful bakers. We may try the Dessert Auction in February for Valentine’s Day next time.

Anne Mannix again hosted our Holiday Potluck on Dec. 14. We had our annual Holiday luncheon at the Tippecanoe Place restaurant on Sat. Dec. 21.

Our church’s founding was Feb. 22, 1952. We celebrated with cake on Sunday Feb. 23.

There were several Family Game Nights, sponsored by RE. And monthly Sunday afternoon Game Days. The Love is Love Dinner was Feb. 14 and Trivia Night April 25. Bad Movie Nights were organized by David Mayfield.

We had our annual Family Potluck Supper/Picnic in August at Dan and Lois Holm’s lake house.

We will have an Ice Cream Social following the Service on Sunday July 20, which is National Ice Cream Day. It will again include some home-made ice cream made by our children in RE!

[Art on the Wall](#)

We have had a good variety of organizations and individual artists enjoy our gallery for their art shows this past year. The 15% of funds raised through the art sales, goes to our general budget.

Allen deSomer and Dan Holm do an amazing job hanging the art. Lois Holm organizes and schedules the shows. Let us know if you have suggestions or are interested in joining the work of this committee.

Finance Committee

Chair: David Mayfield | Members: Janet Bogar, Fern Hamlin, Karen Dickson, Barbara Williams, Kathy Vetter

Grounds Committee

Chair: Francisco Gomez-Dossi | Members: Alice Bentley, Allen deSomer, Alan Hamlet, Kathy Platt, Garry Roberson, John Bentley, Gail deSomer

Marketing Committee

Chair: Dr. Louise | Members: Kelly Faust, Justine Backus, Abby Joiner, Cat Rambo, Grace Ruiz

[Name Change Survey](#)

In the first half of the year, the Marketing Committee was focused on collecting information about how local folks outside of our community would respond to possible name changes. We

created a survey and distributed it widely to the larger Michiana region. We had 57 folks respond. **The vast majority (77.2%) reported that the word church causes them to avoid our activities or makes them feel hesitant to participate**, and more than half (59.6%) said that removing the word “church” in our name would make it more likely for them to participate in our activities.

An overwhelming 82.5% of the respondents said that the word “community” draws them in and makes them feel comfortable participating in our activities. **The majority of respondents at 56.1% found that a change to “Unitarian Universalist Community of South Bend” is most appealing** and second place at 22.8% of respondents was the name “Unitarian Universalist of South Bend.” This data is consistent with the anecdotal experiences the marketing committee has had at various summer festivals and tabling opportunities.

Our work in growing our community is currently being inhibited by the word “church” in our name. As a community with a long-standing commitment to reason and data driven thinking, it is the recommendation of the marketing committee that we utilize these results in our decision-making process regarding the name change. You can see the full report from the survey in the “Additional Reports” portion of this document.

Events

In the second half of the year the marketing committee has largely focused on expanding the church offerings that we can advertise widely to the community. This has meant that the marketing committee has engaged in program development. To this end, our committee played an instrumental role in the creation and execution of multiple events including:

- Jammies and Cereal Bar Party Event Series
- The Trans Day of Visibility
- Board Game Social Event Series

All of these events were created in part to address specific challenges the marketing committee identified with bringing new folks into our community. All three of these categories proved effective in bringing in new folks. Just at our most recent Jammies and Cereal Bar Party we had 29 folks attending including some new families. The Trans Day of Visibility brought in 60 people, the majority of which were from outside of our community. And the Board Game Socials have been happening monthly with a robust demand for our Dungeons and Dragons offerings as well as a consistent group of folks who enjoy playing card and board games.

Highlights

In addition to these events, the marketing committee has continued to use our social media to promote church activities. This year we experimented with using paid ads. This proved an effective strategy especially for both our Trans Day of Visibility Event as well as our Trivia Night. The committee intends to continue utilizing this strategy for key events in our community.

This year the committee also explored doing press releases. For the Love is Love Dinner Date the committee succeeded in getting the attention of a local news station and Dr. Louise did a segment on Hometown Living as a result.

Our efforts on social media have continued to expand. Now in addition to our Facebook page we also have Instagram and Tik Tok accounts. These are still in the early stages, but we are expanding our online presence to help our community be seen more widely.

Within the congregation we hosted a Media day where we had congregants do video testimonials for us. Those will be posted soon on our website and social media channels. We also did a T-shirt Shop opening this past Fall. We had new T-shirt designs and sold UU themed stickers to the congregation.

Membership Committee

Chair: Gail deSomer | Members: Jim Curlee Kathy Platt, Jim Ward, Dr. Louise

The Membership Committee offered the Newcomers' Class both in the fall 2024 and spring 2025 followed by an Ingathering. The classes were offered in person with the option to join on Zoom.

- joining summer 2024 was Abby Joiner
- joining in December 2024 were Justine Backus, John Mitchell, Grace and Cody Ruiz, H. Dane, Brigitte Gray
- joining in April 2025 were Bill Henke and Allison Mynsberge

In Memoriam

- Dan Groteke, member
- Barbara Boyd, member
- Rita Prangle, friend

Thank you to:

- Jim Ward and Dr. Louise for making name badges. Thank you to Dr. Louise for adding pronouns to name badges
- Our Greeters and subs - John and Alice Bentley, Karen Heffernan, Mary Alice Lundergan, Kathy Platt and Tom Platt, Melanie Smith-Guillaume, Linwood Bailey, Jim Curlee, Peg Carmen, and Janet Bogar

Peace & Social Justice Committee

Chairs: Dan & Lois Holm

There are monthly donation drives to support the work of **Broadway Christian Parish** with the marginalized in our community. We have loyal drivers and generous donations each month.

Thank you.

Our partnership with **We Make Indiana** has been reenergized with new name and commitment in our Michiana area.

Thank you, Barbra Carmichael, for your leadership.

Let's continue the commitment!

Rebuilding Together is a once-a-year, in April, commitment to help elders in our community remain safely in their homes, with decluttering, minor repairs, cleaning and/or painting. Let's build an even larger team next year.

Dale Gibson Memorial Crop Walk raised \$1000 to help feed the needy in our community.

Thank you, walkers and donors.

Social Committee

Chair: Kathy Platt | Committee: Sharon Barrett, John & Alice Bentley, Ilene Crutchfield, Gail deSomer, Jane Ash, Kaely & Ben Barwick, Vicki Stevens, Susan Siemers, Karen Heffernan, Jeremiah Coc, Cat Rambo, Brigitte Gray, John Mitchell, Carol Rybak

We are mostly about providing food and beverages at the church when people get together. Plus the Women's Potluck, which meets in different homes every third Friday, Sept.-May. And Feasters, who go out for dinner at a different restaurant each month, organized by Ann Hoewing.

Our big job is organizing Coffee/Social Hour each Sunday and the Sunday Potlucks. We are always looking for volunteers to help make Coffee or to help with Potlucks. There is a sign-up sheet in the kitchen by the refrigerator. Thanks to regulars John and Alice Bentley, John Mitchell, Karen Huffernan, and Gen XMZ.

We also take care of the Reception following the Christmas Eve Service. And provide lunch for the Annual Meeting in May and any other congregational meetings.

Stewardship Committee

Chair: Gail deSomer | Members: Gary Metzler, Eli Williams

The Stewardship Committee wrapped up the Burn the Mortgage Campaign in July 2024 with the assistance of Chuck Leone and Anne Mannix. We were able to pay off our entire mortgage with the \$98,900 that was raised in the *Burn the Mortgage Campaign*. The excess of \$6,100 was put in the Building/Rainy Day Fund, to offset any future unexpected building expenses. The donors to this campaign were celebrated at a taco bar dinner hosted by Chuck Leone and Mary Alice Hardy.

We are pleased to report we raised \$141,120 in pledging to support the operational budget of the church for fiscal year 2025-2026 with 86 pledging units. This is very similar to last year's amount raised. It is a positive that we maintained pledging at a similar amount to last year, considering we lost several thousand in pledges due to resignations and deaths in 2023-2024

Sunday Service Committee

Chair: Anne Mannix | Members: Neal Austin, Ian Bunker, Francisco Gomez-Dossi, Lois Holm, Anne Mannix, Cat Rambo, Megan Sulok, Jim Ward, Barbara Williams.

This has been quite a year without a minister. So we needed to produce a weekly service which can be a little intimidating.

Fortunately, we had strong committee members and others who provided a major lift.

- Byrd Tetzlaff has one provided one inspiring service per month.
- Karen Dickson organized a Google calendar document and which made keeping everything straight easier.
- Florence Klecka gave us clear instructions for the details of service production.
- The Unitarian Universalist Association (UUA) has online services, which are a boost. These fill out the schedule and keep us in touch with the national UUA and other Unitarians.
- Megan Sulok came through with service ideas and delivered services with aplomb. Megan has pulled more than her weight and proves that the younger generation of the church is making major contributions to the church.
- Neal Austin is a rising star and another hard-working member of the rising younger generation.
- Lois Holm advocated for Unitarian values and contributed an impactful service on plastics.
- Barbara Williams is a knowledgeable well-informed resource who can be counted on to deliver well organized services.
- Joel Gomez-Dossi has coordinated the checks and the media production, no small task.
- Jim Ward and Ian Bunker managed the musicians and produced memorable music.
- Cat Rambo is the newest committee member and we expect great things from her.

And several church members have filled in with services.

There have been more than a few snafus that are inevitable when you have a group of people doing something complex together. I hope were resolved without major damage and were generally handled with good grace by those involved.

Our experience has proved the Chuck Leone saying “Members of the Unitarian Church are some of the most interesting people I know.” Thank you to everyone who has helped out. We can’t do this forever but so far we are hanging in there.

Anne Mannix

Chair

Technology Committee

Chair: Jeremiah Cox | Members: David Mayfield, Alan Hamlet

The Technology Committee main goal this year was working through the church transitioning away from having digital resources related to the church and committee work being hosted by people's personal accounts and moving these resources digital platforms controlled by church accounts. The easiest way to think about is the equivalent of a file cabinet with church resources in your home, versus a file cabinet with church resources at the church. Digital files should be stored in the same way (on church accounts) to allow for continuity as members enter and leave the church and committee chairs change, and not have them stored in someone's personal files. The main way this goal was accomplished was by assisting the Office Manager to create shared Google Drives for committees and other church groups to store and collaborate their files in a space owned by the church instead of over personal emails or in cloud-based storage drives controlled by individual church members. The benefit of Google Drive is that anyone who is a member of a shared drive can save and look at files on this drive creating a digital file cabinet so all committee members with access can look at the drive, and who has access to the drive can easily be changed by the office manager as members come and go from various committees and groups.

Early in the church year, the committee successfully transitioned away from a Zoom account owned by Rev. Chip, our former minister, to a church owned Zoom account for Sunday services and other meetings. This transition happened surprisingly seamlessly.

The technology committee assisted with the purchase of a new printer/photo copier for the office. It should be installed in the office very soon. This new, larger printer is better suited for the amount of printing the church currently does. The printing needs of the church have grown as we return to the physical word post-pandemic and keep expanding the number of events the church does. We have purchased this new printer with a monthly service contract that covers all toner, maintenance, and printing costs except for paper and staples. The service also includes trainings from our new service contractor so everyone in the congregation can learn to use this new resource. Overall, the new printer should reduce costs in the long term at the church, both in cost per page of printing, and in staff/volunteer time wasted troubleshooting the current printer (this is currently a frequent pain point).

Goals for the next year include situating a dedicated computer for the Zoom hosts, so Zoom hosts no longer have to provide their own computes. This should be happening very soon as two useable computers have already been donated to the congregation and should work for this purpose. The installation for a TV screen in the conference room (assuming this project is funded by the endowment). Evaluating with the Building Committee replacing the current church alarm and security system, plus security camera needs of the church. Finally, the technology committee will also be assisting in the purchase of installation of more suitable speakers for concerts, if this endowment fund item is also funded.

The technology committee commits to helping other committees make sure that as many church meetings and events as practical are hosted in a hybrid format using Zoom in order to keep our church accessible to everyone regardless of persons ability to come to events in person.

Additional Reports

First Unitarian Church Name Change Survey Results

Summary

This survey was created in order to get market research data on the possibility of changing our church name. We distributed the survey through posters, online, and emailed several organizations requesting they pass the survey along to their constituents. A total of 57 people responded to the survey. The majority of the respondents do not currently have a community like First Unitarian and would be interested in having one.

Of those folks 77.2% said that the word “church” either causes them to avoid activities or makes them feel hesitant to participate. 59.6% of respondents said that removing the word “church” in our name would make it more likely for them to participate in our activities.

An overwhelming 82.5% of the respondents said that the word “community” draws them in and makes them feel comfortable participating in our activities. An additional 14% reported feeling neutral about the word “community” when it comes to participating in our activities.

Only 10.5% of respondents found changing our name to “Unitarian Universalist Church of South Bend” most appealing, while **the majority at 56.1% found “Unitarian Universalist Community of South Bend” most appealing.** Second place was at 22.8% with Unitarian Universalists of South Bend.

Based on a market research perspective, it seems that removing the word “church” from our name at a minimum would have a significant impact on attracting new folks to our spaces. Of the alternatives proposed at the last all congregational meeting, it appears that “Unitarian Universalist Community of South Bend” would help us in attracting the sorts of folks we wish to have in our spaces.

It is important to note that market research is just one component of making any significant decision, including something as important as changing our name. The marketing committee recommends that the results of this survey be shared with the congregation prior to any vote on changing our name. This can help us ensure that whatever decision we collectively make is data informed.

Detailed information on the survey

A breakdown of how we distributed the survey

Printed 15 posters

- Starbucks on McKinley
- Chicory Cafe downtown
- Cloud Walking Cafe
- Brain Lair
- The Local Cup

- Peggs
- The Well

Posted about the survey

- South Bend subreddit on 10/16/2024

Emailed a request to share the survey

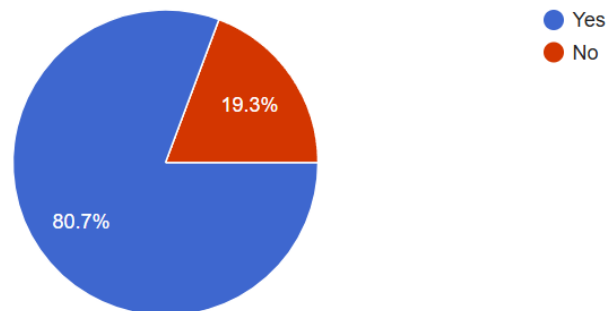
- Northern Indiana Atheists Contact@northernindianaatheists.com on 10/17/2024
- Humanist Forum for South Bend humanistforumsouthbend@gmail.com on 10/17/2024
- Music Village Community Engagement Manager Kevin Scott (in our directory) on 10/17/2024
- Forever Learning Institute Office Assistant Toni toni@foreverlearninginstitute.org on 10/17/2024

The Demographics of the folks who participated:

Do you currently or have you ever participated in a spiritual or faith tradition?

 Copy chart

57 responses



We asked respondents to free respond to “If you are a part of a spiritual or faith tradition or part of a philosophical tradition like atheism and agnosticism, please share the name of that tradition.” The key trends in this data were:

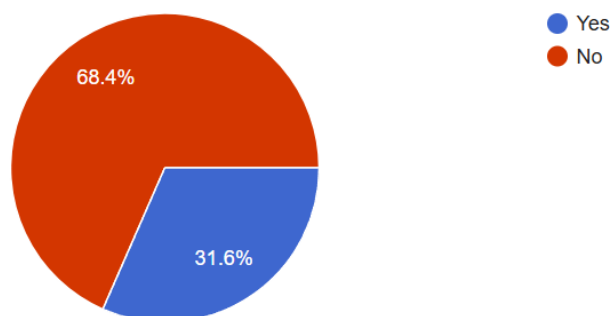
1. **Agnosticism:** A significant number of individuals identify as agnostic or have an agnostic viewpoint. Some describe themselves as agnostic with an interest in nature-based spiritual practices or mysticism.
2. **Atheism:** Many individuals identify as atheists, with some specifying humanism or hard incompatibilism (a philosophical view regarding free will). A few also describe themselves as nontheists or apathetic toward religion.

3. **Christianity (Catholicism, Protestantism):** Several people were raised Catholic or Christian but no longer adhere to these beliefs, transitioning to agnosticism, atheism, or other philosophical systems. A few still identify as Christian or describe themselves as former Christians.
4. **Other Spiritual or Philosophical Views:** Some individuals report unique combinations of spiritual beliefs, such as:
 - **Satanism** (focused on nature worship and self-empowerment)
 - **Buddhism** and **Taoism** (often combined with other belief systems like humanism)
 - **Paganism** (e.g., witchcraft)
 - **Pantheism**
 - **Yogic Philosophy**
 - **Pastafarianism** (a satirical belief system)
5. **Mixed or Evolving Views:** Some people mention evolving spiritual journeys, from being raised in specific traditions (e.g., evangelical fundamentalism or Mennonitism) to exploring new spiritual or philosophical perspectives like mysticism or humanism.

If you don't have this sort of tradition do you have another supportive group that you are a part of?

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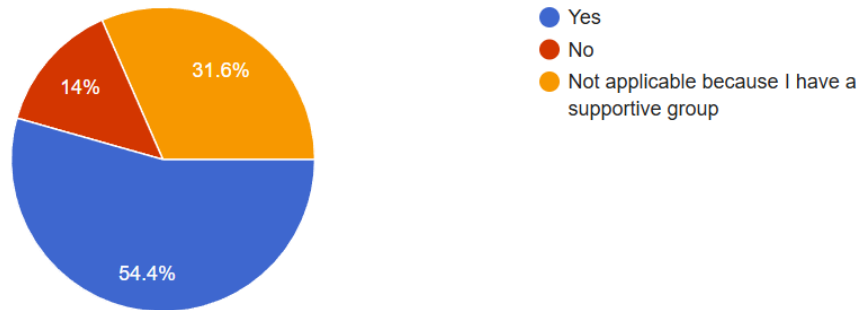
57 responses



If you do not have a supportive group, is that something you are interested in?

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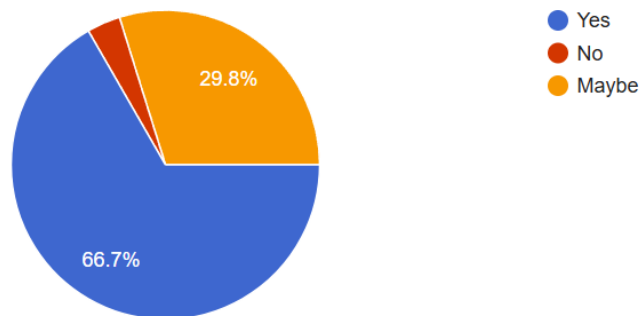
57 responses



Would you be open to participating in a nondogmatic group where atheists, agnostics, Buddhists, Pagans, Christians and more all come together?

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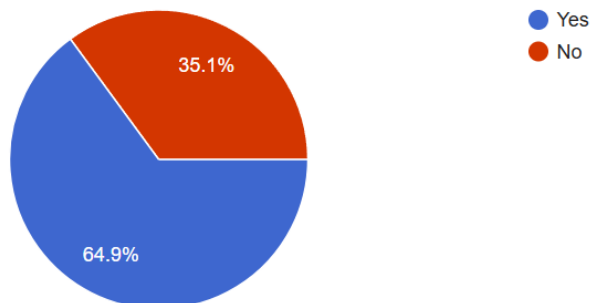
57 responses



Have you ever heard of Unitarian Universalism?

 [Copy chart](#)

57 responses



Questions about the name change

We asked respondents to free respond to “When you hear the word "church" what do you associate with that organization?” Here are the main themes of the responses:

1. **Negative Associations:**

- **Dogma and Control:** Many people associate "church" with dogmatic practices, hierarchy, and rigid protocols.
- **Exclusion and Judgment:** There are common references to feelings of exclusion, judgment, and suppression, often linked to experiences of shame, fear, and hate within church environments.
- **Negative Cultural and Social Connotations:** Some people associate church with negative aspects of society, such as anti-LGBTQIA+ sentiment, conservative views, hypocrisy, abuse, and colonialism.
- **Personal Trauma:** Several individuals recall negative childhood experiences, including indoctrination, emotional harm, and a sense of confusion.

2. **Religious and Spiritual Associations:**

- **Place of Worship:** For others, church is seen as a place where people gather to worship, pray, or practice their religion.
- **Community and Support:** Some associate church with positive elements like community, stability, and support, though often acknowledging these aspects alongside other negative experiences.
- **Christianity:** The majority associate "church" with Christianity, but there are varying opinions about whether this is a positive or negative association.

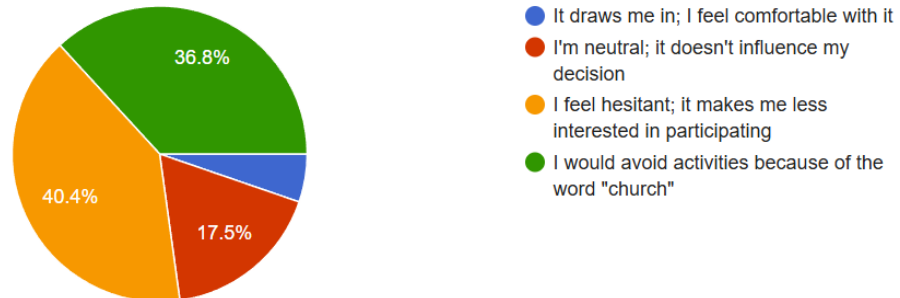
3. **Varied Perspectives:**

- **Varied Personal Experiences:** Some individuals have mixed feelings, balancing memories of church as a supportive community or a loving environment (such as experiences with family or shared rituals) alongside negative or judgmental experiences.
- **Indifference or Distance:** A few people mention distancing themselves from the concept of church, either due to personal beliefs or experiences of conflict with traditional religious views.

When you hear the word "church," how does it make you feel about participating in our activities?

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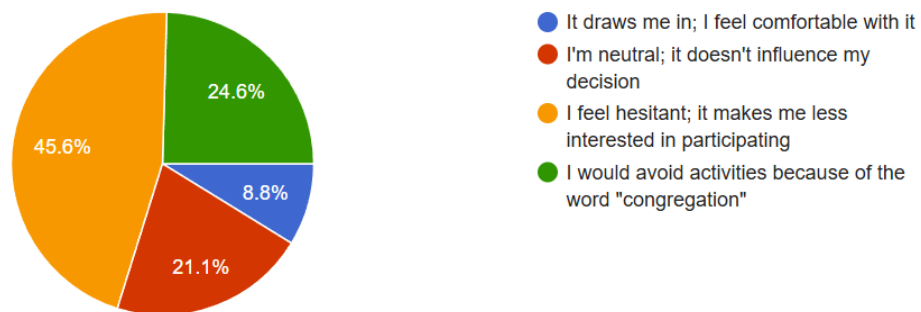
57 responses



When you hear the word "congregation," how does it make you feel about participating in our activities?

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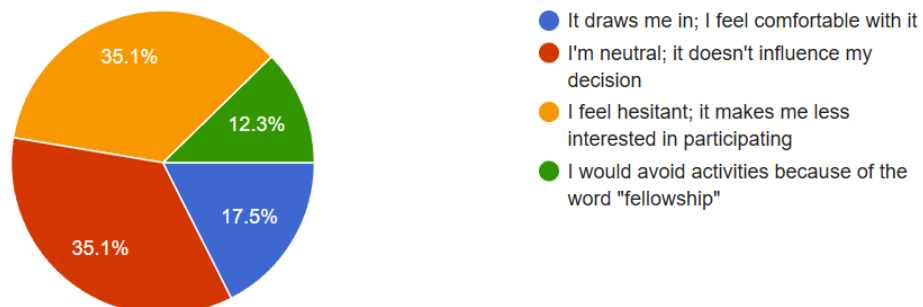
57 responses



When you hear the word "fellowship," how does it make you feel about participating in our activities?

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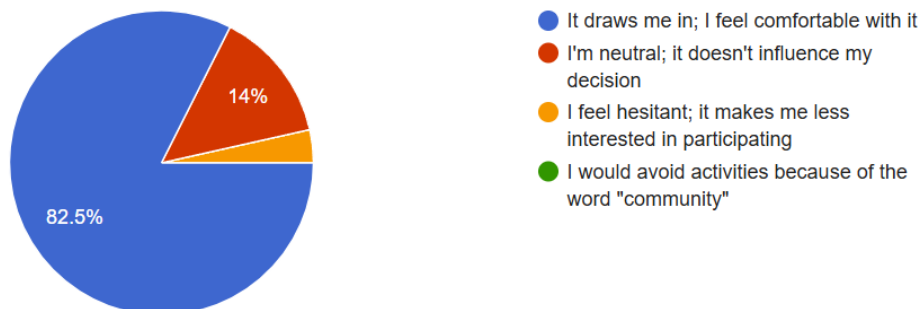
57 responses



When you hear the word "community," how does it make you feel about participating in our activities?

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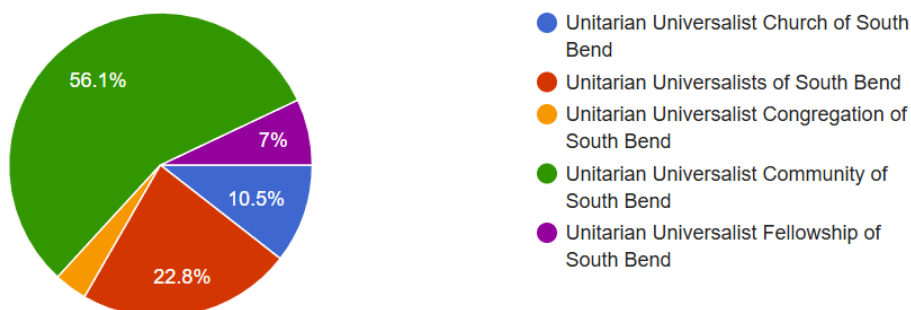
57 responses



If we were to change our name, which of the following options would you find most appealing?

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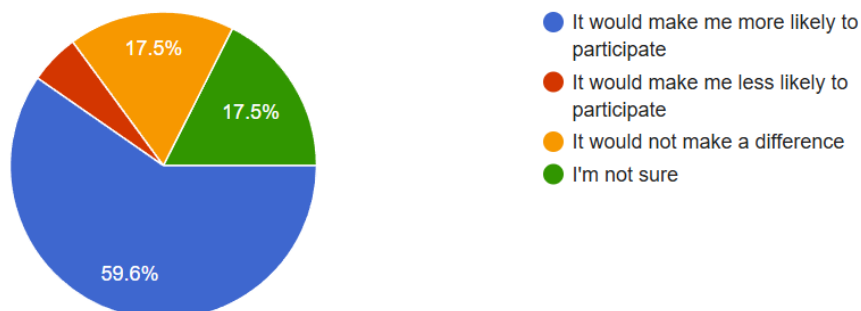
57 responses



How would removing the word "church" in our name affect your willingness to participate in our activities?

[Copy chart](#)

57 responses



You can see every individual response to this survey here:

https://docs.google.com/spreadsheets/d/1D3LKXUjxJkEoxoG4q6H1OIA3I_O6FLUOT-MNEIN8e_E/edit?usp=sharing

NOTE: The trend analysis data for the free response sections of the survey were generated with the help of Chat GPT.

Love is Love Dinner Date Report

Gross Income before expenses

We sold 32 tickets digitally using Square and 9 with cash or check. The tickets were \$25 each so we brought in roughly \$1,025.00. Even though this totaled to 41 tickets, we set up for 40 spots and had one open seat the night of. We sold alcohol for the first time at this event and brought in \$110. This brings the total money brought in to roughly \$1,135.00

Expenses

- \$180 for the rigatoni
- \$50 for the alcohol permit
- \$30 for the vegetarian lasagna
- \$30 for tiramisu, salad, brownies (DONATED)
- \$20 for the Gluten Free Vegan option (DONATED)
- \$250 for the premade meat and cheese platters (DONATED)
- \$50 for the two shrimp plates (DONATED)
- \$50 for wine (DONATED)
- \$225 for security (DONATED)

If no one had donated anything the total expenses would be \$885 including security which wasn't factored into finances of the event originally. Thanks to the generosity of the folks supporting this event, **the actual amount being requested from the church is \$260.**

Profit

For the 2025 Love is Love Dinner Date we raised roughly \$875.00

Marketing the event

Thanks to our marketing efforts we had a total of four folks from outside our church community attend (compared to last year's 1). They were also the target audience of the event being both same sex couples (or at least that is what I perceived - I didn't get to chat with them enough to know for sure!) Things we did for marketing this year included

- Putting up posters around queer friendly venues around town

- Boosting our facebook event for about \$75
- Posted the event on r/SouthBend on reddit.
- Submitted to several community calendars
- Sent press releases to several media outlets. Did a TV spot on Hometown Living <https://wsbt.com/community/hometown-living/a-celebration-for-love-for-all#>

Successes From This Event

Things that went particularly well this year included

- having a table in the great hall for folks who wanted a little more space
- named mocktail options to give folks more structure
- Allen playing right in front of the conference room
- having a gluten-free/Vegan option for all of our courses
- the especially luscious appetizer spread which included veggies that helped supplement our salad.

Notes for Next Year

- Plan on a gluten-free vegan option from the beginning to be more inclusive
- Keep closer track of ticket sales to know when to close down the online sales link
- double check our fine china plans, enhancing the salad plan, and lasagna heating plans the week before the event
- put someone in charge of change for the cash box

Report on the Trans Day of Visibility

On March 31st at 6pm the marketing committee hosted the Trans Day of Visibility in the sanctuary. The marketing committee identified that this event was one that was not being pursued by any other organization in the Michiana area and thought that it was a robust way to simultaneously embody our values while actively supporting the folks who are most vulnerable in our community.

To market the event, we created a Facebook event and spent \$40 promoting the event. This ad received 4,216 views and contributed to us receiving 246 responses to the event. 222 of those responses marked that they were interested in the event which further boosted its visibility. The ad also led to the event being promoted in the Michiana Social Justice Coalition weekly email. The event was also submitted via press release and community calendar announcements to all local news stations. At least one person on-site reported learning about the event from the South Bend Tribune website.

We recruited a team of 12 volunteers. The event was streamed via Zoom, but we did not promote this fact widely. We prepared for the possibility that bad actors may try to get involved in our

Zoom space, and our strategy was effective - Zoom was used primarily by folks in our church community. For our on-site folks we had refreshments, cake, cookies and other snacks after the service. We also had a paid babysitter on-site. We prepared to have a police officer doing security for us for the event, but due to the storm that came through the area the day before, the police officer was not able to attend.

Approximately 60 people attended the event in total, the vast majority of which were outside of our church community. Not counting the volunteers, combined between Zoom and on-site, we had about 20 church members and friends in attendance. It was a point of frustration of the event organizers that only 4 of the church folks who participated on-site were long term members of the church. At least one friend of the church had not been in our church space since the pandemic and was grateful to have this event to help him return to the space. We also had in attendance Rev. Carl Hetler who recently preached for us. The storm that passed through South Bend the day before the event probably impacted our attendance numbers. Several folks within the larger community still did not have power at the time of the event and many were actively working on tree removal.

The content of the service included pulling on resources from Rev. Dr. Sofia Bentacourt and the UUA common read both of which Syd Troyer shared from the pulpit. We had remarks from Justine Backus and Dr. Louise. Dr. Kelly Faust also spoke on behalf of TREES.

The team tested doing some small group work within the structure of the service. This involved our on-site folks turning to their neighbors and our zoom attendees going into breakout rooms. We asked folks to discuss how to be better allies in this particular moment in history, or for our Trans participants to share what they need most from allies right now. We received positive feedback from the group on this experience. It contributed greatly to having a positive energy and community connection focus for the event.

At the time of writing this report, we do not have final numbers on funds raised for TREES because we have not accounted for the digital donations. However, **in cash and checks we have collected \$367.00 for the organization.**

We received feedback that several Trans folks appreciated the service. Additionally, a member of the board of the LGBTQ center has communicated to one of our board members that she has received a lot of positive feedback from her community about the event.

Decisions that were made for this event that seemed to work particularly well included:

- Making programing choices while being mindful of the fact that many of the target audience for this event may have religious trauma.
- Having Trans folks speak from the podium and supporting them in that process so that they are not having to disproportionately do the work of the event.
- Getting a Costco sheet cake which can be cut to accommodate a wide range of people since this event had so many folks say they might come.

If we choose to do this event again some things we might consider exploring are:

- Having a stronger direct message to Trans folks. Much of the remarks from the pulpit were aimed primarily at allies. That should remain, but we should increase the parts that speak directly to Trans people.
- We only did one round of small group work, and the event would have benefited from one more activity like that.
- Incorporating live music possibly from Trans musicians would be an excellent addition
- Incorporate having some tables with Trans folks who run businesses or would otherwise appreciate safe visibility after the service.
- Make a targeted effort to get long term members of the church invested in the well-being of Trans people as well as the importance of supporting their fellow congregants so that they are willing to put in the effort to attend in-person.