

2023 Church Conference

Welcome

Election of Secretary for Church Conference

Opening Prayer

Message from Bishop Jung <https://youtu.be/mb78k3gZfas>

Missional Reflections from District Superintendent Rev. Ebenezer Insor
Being United Methodist and looking towards our future

Review

Safe Sanctuaries

Boy Scouts of America Settlement

Ministry Plan (annual highlights and celebrations)

Membership Audit

Actions Requiring a Vote

- Approval of Lay Leadership Report (Pastor)
- Approval of Pastoral Compensation (Don Behrens)
- Approval of Accountable Reimbursements (Don Behrens)
- Approval of Resolution on Housing or Furnishings Allowance (Don Behrens)
- Approval of Lay Servants and/or candidates for ministry (Pastor)
- Removal of Membership (twice listed) (Nell Nash)
- Finance Report (Nancy Anderson or Pam Vaughan)

Benediction

Adjournment

Pastor Don Francis Interim Year Report

While a third of a pastor's time is spent in worship related events in the life of the congregation and its members, and I have loved worshipping with UMCWFB, my unique emphasis this interim year has been on positioning the church to grow and serve.

Leadership Development

- 7 Certified Lay Servants
- 3 classes in Lay Servant program
- 2 participants in the Institute of Congregational Development (Tom Van Cleave and Beth Groble)
- 6 new members of the Accountable Leadership Board, 2 new board chairs
- 3 new lay leaders and 2 lay members of Annual Conference
- "Post Covid" book study with ALB

Leadership Alignment

- Job descriptions and staffing holes re-examined
- 2 Ministry Leader seminars with WAC Director of Congregational Development, DCD Rev. Scott Carlson
- Ministry Leaders' Congregational Assessment with Rev. Gary Holmes (organized by Tom Van Cleave)
- Marketing and Communication Committee (organized by Kathy Schluter)

Congregational Support

- Revived post-covid Wednesday Night Live (thanks to Jenny Fisher)
- Advocate with D.S. and DCD for a top level clergy appointment
- Stewardship Campaign (chaired by Craig Walker)

Mission Network

- Circuit relations re-established (thanks to Dick Steinmetz)
- Summerfield UMC building assessment
- Missions reevaluation, from service to discipleship

The service and eventfulness of this year is due to the extraordinary work of the staff and lay leadership, and financial gifting of the congregation. The numerous events and accomplishments, including the Believe Again: Christmas Extravaganza, the Noah's Ark musical, the Advent and Lent devotionals, study classes, Bible studies, camp, VBS, ASP, Sunday school, confirmation, worship services, Feed My Starving Children, food and tutoring programs, landscaping, compassionate visiting, Rally Day, Mission at Home, pie feast, quilting, newsletters, signs, etc. fill a church year with a lot of good for assisting people as they become disciples of Christ. Thank you to everyone for a fantastic year.

Charge Conference Clergy Report 2023

Andrew Jones, Deacon in full connection

As a Deacon in full connection, I am called to be a bridge between the church and world through the ministries of Word, Service, Compassion, and Justice. As the Pastor of Youth, Children, and Families, my specific call is to bridge the gap between generations and create connections between various ministries.

In ministry through the **Word**, I have worked to lead the church to disciple kids, students, and families in our midst through Sunday School, Camp, Vacation Bible School, youth meetings, children's sermons, a missions book study, and preaching. This year, we have seen an increase in Sunday School volunteers. In addition, I have helped our students plan meaningful experiences during Good Friday and Confirmation. Often, I share the word with our friends in the Carpenter's Shop Daycare. To help train families in their role as disciple-makers, I offered online Lent resources and solicited bringing Love and Logic classes to our midweek programming.

I encourage **Service** through the leadership I offer our mission team. We are working to make our missions efforts more relational to put our actions to work with our giving. I also connect students to specific opportunities for engagement in ministry by serving the church as a volunteer in the tech booth, video children's moments, Sunday School, and music ministry. Youth serve in mission through our Appalachia Service Project, trunk or treat at United Methodist Children's Services, making sandwiches for Bay Bridge, and packing meals with Feed My Starving Children. I also serve to help North Shore School for Seniors with technology troubleshooting.

I can offer **Compassion** in our congregation through many different avenues. Reaching out with pastoral care calls and visits helps me to connect with those who might be hurting or grieving. Our students were able to encourage homebound members by delivering Christmas cookies and Advent devotionals.

In the area of **Justice**, I work to advocate for the marginalized in this ministry appointment. Often, I attend trainings to help understand the justice issues that face the Milwaukee area. In youth group and during mission trips, we talk with our students to create sensitivity, develop awareness, and promote equity. I have helped the church and society use technology to increase their reach and make their meetings more accessible. I work to train and screen volunteers who work with youth and children to ensure their protection. I have worked extensively with outside groups like the Boy Scouts to help protect kids attending programs at our church through a building use policy. By prioritizing children and youth programming, I bring light to a group of people that does not have a membership voice in our church.

As a Deacon, it is a joy to serve the congregation and help connect them to other generations, between ministries, and to the greater community. I am excited to help more people experience hope as we love God, care for each other, and serve in the world!

Rev. Andrew Jones
Full-Time Deacon in Full Connection

COMPENSATION PACKAGE	
Cash Salary (Base Pay)	\$59,000
Furnishing Allowance	\$6,000
Amount of Clergy Portion of Insurance Charge/Church Pays	\$0
Personal Expenses Paid By Charge/ Church	\$1200
Total Salary Amount	\$66,200
Charge/Church Required Portion of The Clergy Health Insurance Premium	\$8007
Housing Allowance	Parsonage
Clergy Retirement Security Program (CRSP)	\$9795
Comprehensive Protection Plan (CPP)	\$1632
Book Expenses	\$500
Travel Expenses	\$0
Education Expenses	\$900
Total Of Accountable Reimbursements	\$2600
Total Compensation Package	\$87,109

UMCWFB Key Actions and Next Steps

Tom Van Cleave

A. UMCWFB

- a. Mission Statement: To assist people to become deeply committed followers of Jesus Christ who Love God, Care for Each Other, and Serve in the World.
- b. Core Values: Welcoming, Servant's Heart, Passionate, Prayerful and Missional.
- c. Discipleship Objectives: Invitation, Hospitality, Ministry, Faith Formation, Mission and Fellowship.

B. Key Actions: The following are actions that were agreed too based on assessment exercise / discussions that require focus over the next 3 - 6 months centered on **Invitational, Relational and Missional.**

- a. Be in a Relational Church by revitalizing small groups fellowship to build relationships, encourage deeper spiritual growth and connect people to a ministry based on spiritual gifts.
 - i. First Friends Program.
 - ii. Spiritual gift assessment tool.
 - iii. Ministry led chatrooms.
- b. Develop a spiritual community discipleship framework that holds ourselves accountable to our Mission Statement through synergistic ministry leadership.
 - i. Measurement tools.
 - ii. Discipleship pathway.
- c. Be courageous in moving towards a Reconciling Church that confirms our current orientation and welcomes everyone.
Table
 - i. Develop a process to educate & prepare for Congregational decision.
 - ii. Pastoral Sermon series.
- d. Ensure effective Marketing strategies are in place and a TRIAD framework approach is used in partnership with all ministries and staff.
 - i. Identify Mission field and market niches.
 - ii. Reach the lost and broken in the various population groups.

C. Next workshop – Focus on Visioning

- a. As Sue Stanley mentioned – God needs to be a key part of our vision or What is God calling us to be? God plants an idea that swirls around long enough that turns into a compelling vision through prayer.
- b. Liaison with Karina Henderson's work on our identity.
- c. See example template that focuses on four elements (Mission Statement, Value, Strategies & Measurements/Outcome) leading to a vision statement that is compelling with both qualitative and quantitative statements.

Membership Audit for Charge/Church Conference 247.5 and 231

Names of persons received into membership since last charge/church conference with **method of reception.**

First Name	Last Name	Record Type	Record Status	How Received	Date Received
Karen	Andeen	Member	Active	Transfer from non-UMC	3/5/2023
Jill	Dittrich	Member	Active	Profession of Faith	3/5/2023
Matthew	Fisher	Member	Active	Profession of Faith	5/22/2022
Jenny	Fisher	Member	Active	Profession of Faith	5/22/2022
Zacchaeus	Freeman	Member	Inactive	Profession of Faith	9/11/2022
Joshua	Guarisco	Member	Active	Transfer from non-UMC	3/5/2023
Elizabeth	Guarisco	Member	Active	Transfer from UMC	3/5/2023
Jason	Janczak	Member	Active	Profession of Faith	12/25/2022
Chris	Kitchen	Member	Active	Reinstated/Restored	5/22/2022
Nicole	Kitchen	Member	Active	Reinstated/Restored	5/22/2022
Pamela	LaPorte	Member	Active	Profession of Faith	5/21/2022
Sarah	Laszewski	Member	Active	Profession of Faith	5/21/2022
Nancy	Lizdas	Member	Active	Profession of Faith	5/22/2022
Hannah	Lybeck-Smoak	Member	Active	Confirmation	
Barbara	Margenau	Member	Active	Reinstated/Restored	5/22/2022
Annemarie	Melbye	Member	Active	Confirmation	
David	Melbye	Member	Active	Profession of Faith	5/22/2022
Kristal	Melbye	Member	Active	Profession of Faith	5/22/2022
Kathryn	Melbye	Member	Active	Profession of Faith	5/22/2022
Dane	Miller	Member	Active	Profession of Faith	5/22/2022
Tracy	Miller	Member	Active	Profession of Faith	5/22/2022
Neffretiti	Moore	Member	Inactive	Profession of Faith	9/11/2022

Membership Audit for Charge/Church Conference 247.5 and 231

*Names of persons received into membership since last charge/church conference with **method of reception.***

Continued

First Name	Last Name	Record Type	Record Status	How Received	Date Received
Ann	Pier	Member	Active	Transfer from UMC	12/25/2022
Judith	Pier Lybeck	Member	Active	Transfer from UMC	3/5/2023
Mary	Scheuber	Member	Active		9/11/2022
Gregory	Schimanski	Member	Active	Profession of Faith	3/5/2023
Sydney	Smullen	Member	Active	Confirmation	
Tabetha	Steege	Member	Active	Profession of Faith	3/5/2023
Nishanth (Juju)	Suthan	Member	Active	Confirmation	
Timothy	Tharp	Member	Active	Transfer from non-UMC	3/5/2023
Sophia	Veierstahler	Member	Active	Confirmation	
Patricia	Wisialowski	Member	Active	Profession of Faith	5/22/2022
Hui	Zhang	Member	Active	Transfer from non-UMC	9/11/2022
Kristen	Zhang	Member	Active	Transfer from non-UMC	9/11/2022

Membership Audit for Charge/Church Conference 247.5 and 231

Names of persons removed from membership since last charge/church conference with **method of removal.**

First Name	Last Name	Record Type	Record Status	How Removed	Date Received	Removal Date
Catherine	Borman	Member	Removed	UMC Transfer	9/29/1991	8/8/2022
Laurie	Geisel	Member	Removed	UMC Transfer	2/4/2001	10/20/2022

Remembering Those Who Died This Year

First Name	Last Name	Died On
Elinore	Lean	7/20/2022
Jake	Jacobson	2/1/2023
Josh	Patrick	2/3/2023
Robert	Thomas	2/20/2023
David	Mike	4/18/2023

LAY LEADERSHIP

Those in **bold** are new in their position since 2022 church conference.

ACCOUNTABLE LEADERSHIP BOARD

We thank this year the following for the past service on the ALB.

- John Frunceck, completed two, 3-year terms
- Mike Stoeck, completed two, 3-year terms
- Kathy Schluter, chair, completed her service to the board at the end of December 22 when Brady Henderson was elected by the board.
- Brady Henderson, leaving to serve as lay minister of Bethany-Calvary UMC. Brady served as chair from January, 2023 to present.

We thank the following for their willingness to serve on ALB in 2023-2024.

- **Tom Van Cleave**, chair, Trustees
- Lori Aeschbacher, secretary
- Nancy Anderson, Finance
- Craig Walker, Trustees
- Don Behrens, Staff Parish Relations, Lay Leadership
- **Jenny Fisher**, Staff Parish Relations, Lay Leadership
- **Chelsea Montague**
- **Samantha Gundrum**
- **Jeff McClellan**
- **Hui Zhang**

Members of the ALB designated for Finance, Trustees, Staff Parish Relations and Lay Development will continue to be responsible for organizing their teams.

LAY MEMBERS

- Jeff McClellan
- Beth Groble
- Jenny Fisher

LAY MEMBERS OF ANNUAL CONFERENCE

- Kathy Schluter
- Tony Mortellaro



Wisconsin Conference
of The United Methodist Church



March 6, 2023

Don Behrens
2417 W. Acacia Road
Glendale, WI 53209

Dear Don,

Thank you for your leadership and coordinating the introductory meeting.

This letter confirms that Bishop Hee-Soo Jung intends to appoint Rev. Gary Holmes, an Elder in the Wisconsin Conference, full-time (100%) to the community of Whitefish Bay, to the Whitefish Bay United Methodist Church, and to Circuit SE#04 effective July 1, 2023. Rev. Gary Holmes's first Sunday of responsibility will be Sunday, July 9, 2023. The first Sunday of a new appointment is a Sabbatical Sunday, and the SPRC will need to provide pulpit supply for Sunday, July 2, 2023.

Rev. Gary Holmes will be appointed Whitefish Bay United Methodist Church to fulfill these missional priorities:

- Leading, preaching and teaching members of Whitefish Bay to grow as faithful disciples of Christ.
- Build on the revitalization of WFB through its strategic vision for the next decade.
- Develop multi- generational and people worship experiences that is diverse in nature.
- Coordinate the many facets of ministries at Whitefish Bay working with staff to ensure harmony and great working environment.
- Work with the circuit congregations in connection on various ministerial opportunities.
- Collaborate with other organizations through various missional opportunities in meeting and addressing the needs of the Milwaukee area.
- Provide connections to and with United Methodist health and welfare ministries of the Wisconsin Annual Conference.
- Oversee the continued development and implementation of the ministry plan for the church.
- Model and promote faithful, financial stewardship and encourage giving as a spiritual discipline, in accord with ¶340.2.c)(2)(d) of the 2016 Discipline of The United Methodist Church.
- Lead the congregation in fulfillment of its mission through full and faithful payment of all apportioned ministerial support, administrative, and benevolent funds, in accord with ¶340.2.c)(2)(e) of The 2016 Discipline of The United Methodist Church.
- Carry out the responsibilities and duties of a pastor in accord with ¶340 of the 2016 Discipline of The United Methodist Church.

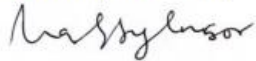
Rev. Gary Holmes will acquire his own housing. The Conference Moving Fund pays the cost of moving, subject to Conference standards and limits.

Don Behrens
March 6, 2023
Page 2

Please plan for the Staff-Parish Relations Committee to meet every month for the first year to strategize and implement an effective plan for introducing and immersing your new pastor in the relationships and culture of your congregation. If there are ways in which I might help during this transition, please let me know.

I am grateful for your leadership during this transition.

Sincerely in Christ,



Rev. Dr. Ebenezer K. Insor
District Superintendent

EKI: ky

Encl: 2

pc: Bishop Hee-Soo Jung
Rev. Jean Ehnert Nicholas, Conference Benefits Officer
Rev. Ty Hines, Coordinator of Clergy Credentialing and Vocational Discernment
Rev. Kevin Rice Myers, Conference Secretary
Pam Vaughan, Church Treasurer
Rev. Gary Holmes, Pastor

The annualized compensation we discussed and agreed upon is:

<u>COMPENSATION PACKAGE</u>		
Cash Salary (Base Pay)		\$87,000
Amount Of Clergy Portion Of Insurance Charge/Church Pays		\$5,844
Personal Expenses Paid By Charge/Church		\$0
Total Salary Amount (Line 26)		\$92,844
Charge/Church Required Portion Of The Clergy Health Insurance Premium		\$16,020
Housing Allowance		\$30,000
Clergy Retirement Security Program (CRSP)		\$14,741
Comprehensive Protection Plan (CPP)		\$2,457
UMPIP		\$0
Professional Expenses		\$3,000
Book Expenses		\$0
Travel Expenses	Estimated	
Education Expenses		\$900
Total Of Accountable Reimbursements		\$3,900
Housing/Utility Exclusion (Parsonage Utilities Paid By Charge)	Estimated	\$0
Total Compensation Package		\$159,962

Don Behrens
March 6, 2023
Page 3

We covenant to work together to fulfill the missional reasons for the appointment and the financial commitment.

Important information & dates:

Sabbatical Sunday: July 2, 2023

First Sunday in worship: July 9, 2023

Vacation: 4 weeks (*Annual Conference Policy 40.1.8*)

Weekly: 2 days off – one sabbath and regular day off

Transition Workshop for clergy and SPRC members: APRIL 22nd & MAY 6th (More info TBA)

New to Wisconsin Orientation: Date and Place TBA

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal



Report for year ending 2023

SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ☒ Ms. ☐ Mr. ☐) Elizabeth Casciato Guarisco

Address 5170 N. Idlewild Ave. Apt 4 City/State/Zip Whitefish Bay, WI 53217

Telephone 414-550-2165 E-mail elizabeth.casciato@gmail.com

Name of District South East Wisconsin

Name of Church United Methodist Church of Whitefish Bay

Church Address 819 E. Silver Spring Dr. City/State/Zip Whitefish Bay, WI 53217

Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022

2. What year did you complete your Advanced Course? 2019

3. What was the title of your Advanced Course? Preaching

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____

2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/20/2023 Lay Servant Elizabeth Casciato Guarisco

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2023 Pastor Dr. R. Francis

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge) recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 3-27-23 Church Council Chair or District Superintendent [Signature]

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal

Report for year ending 2023



SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ___ Ms. ___ Mr. ☒) Thomas Mark Van Cleave

Address 5353 N Berkeley Blvd City/State/Zip Whitefish Bay WI 53217

Telephone 847-341-2282 E-mail tvancleave@ameritech.net

Name of District South East

Name of Church United Methodist Church of Whitefish Bay

Church Address 819 E Silver Spring Ave City/State/Zip Whitefish Bay WI 53217

Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022

2. What year did you complete your Advanced Course? 2023

3. What was the title of your Advanced Course? United Methodist Heritage: United Methodists Beliefs

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____

2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Lay Servant Thomas Van Cleave

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Pastor Mike Morris

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge) recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 2-21-23 Church Council Chair or District Superintendent [Signature]

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal

Report for year ending 2023



SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ___ Ms. ___ Mr. ☒) Tom Groble
Address 5326 N. Berkeley Blvd City/State/Zip Whitefish Bay, WI 53217
Telephone 414-916-9404 E-mail tom.groble@gmail.com
Name of District Wisconsin
Name of Church United Methodist Church of Whitefish Bay
Church Address 819 E. Silver Spring City/State/Zip Whitefish Bay, WI 53217
Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022
2. What year did you complete your Advanced Course? 2023
3. What was the title of your Advanced Course? United Methodist Heritage: United Methodists Beliefs

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____
2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Lay Servant Tom Groble

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Pastor Don R. Francis

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge)
recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 2-21-23 Church Council Chair or District Superintendent [Signature]

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal

Report for year ending 2023



SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ☒ Ms. ☐ Mr. ☐) Barb Armstrong
Address 6203 N. Bay Ridge Avenue City/State/Zip Whitefish Bay, WI, 53217
Telephone 414-248-1884 E-mail pbw.barbara@gmail.com
Name of District Southeast
Name of Church United Methodist Church of Whitefish Bay
Church Address 819 E. Silver Spring Avenue City/State/Zip Whitefish Bay, WI 53217
Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022
2. What year did you complete your Advanced Course? 2023
3. What was the title of your Advanced Course? United Methodist Heritage: United Methodists Beliefs

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____
2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2.20.2023 Lay Servant Barb Armstrong

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Pastor Don R. Francis

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge)
recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 2-21-23 Church Council Chair or District Superintendent [Signature]

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal



Report for year ending 2022-2023

SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ☐ Ms. ☐ Mr. ☒) William K Crise

Address 500 W. Bradley Rd. Apt 226C City/State/Zip Fox Point, WI 53217

Telephone 414-758-6635 E-mail billcrise@gmail.com

Name of District Sounth East

Name of Church United Methodist Church of Whitefish Bay

Church Address 819 East Silver Spring Drive City/State/Zip Whitefish Bay, WI 53217

Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022

2. What year did you complete your Advanced Course? 2023

3. What was the title of your Advanced Course? United Methodist Heritage: United Methodists Beliefs

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____

2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Lay Servant William K Crise

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Pastor [Signature]

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge)
recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 2-23-23 Church Council Chair or District Superintendent [Signature]

**CERTIFIED LAY SERVANT
ANNUAL REPORT TO THE CHARGE CONFERENCE**

Initial Application or Request for Renewal



Report for year ending 2023

SECTION I: DATA ON THE LAY SERVANT

Name (Mrs. ☒ Ms. ☐ Mr. ☐) Beth Groble

Address 5326 N. Berkeley Blvd City/State/Zip Whitefish Bay, WI 53217

Telephone 414-916-9405 E-mail bgroble@gmail.com

Name of District Wisconsin

Name of Church United Methodist Church of Whitefish Bay

Church Address 819 E. Silver Spring City/State/Zip Whitefish Bay, WI 53217

Church Telephone 414-964-2424

SECTION II: STATUS OF THE LAY SERVANT

☒ **For initial application** as a Certified Lay Servant

1. What year did you complete your Basic Course? 2022

2. What year did you complete your Advanced Course? 2023

3. What was the title of your Advanced Course? United Methodist Heritage: United Methodist Beliefs

☐ **For renewal** as a Certified Lay Servant

1. What year did you complete your last Advanced Course? _____

2. What was the title of your last Advanced Course? _____

SECTION III: REQUEST OF THE LAY SERVANT

I request recommendation of my pastor and my church council/charge conference to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Lay Servant Beth Groble

SECTION IV: RECOMMENDATION OF THE PASTOR

I recommend concurrence with the request of this person to begin/renew as a Certified Lay Servant for the ensuing year.

Date 2/21/2023 Pastor Rev R Francis

SECTION V: RECOMMENDATION OF THE CHURCH COUNCIL/CHARGE CONFERENCE

The church council/charge conference of United Methodist Church of Whitefish Bay (church/charge) recommends the above person begin/renew as a Certified Lay Servant for the ensuing year.

Date 2-21-23 Church Council Chair or District Superintendent [Signature]

Clergy Report
Meg Lybeck-Smoak

Elder in Full Connection – Appointed to Extension Ministry

Extension Appointment: Director of Pastoral Care and ACPE Certified Educator,
VMP Healthcare and Community Living

Local Church Affiliation – United Methodist Church of Whitefish Bay

Please provide a brief narrative of your ministry during the past year, including a description of your annual evaluation.

I am blessed to serve as the Pastoral Care Director (supervising a staff of 2 other full-time Board Certified Chaplains) and the primary CPE Certified Educator at VMP. In addition to coordinating the spiritual care of the community (residents, families, staff, and volunteers) I share responsibility with the other staff chaplains for on-call services evenings and weekends, planning/ preaching/ leading ecumenical worship services, officiating Communion services, and coordinating end-of-life pastoral care. I also direct the CPE program, which supports three units of CPE within a 12-month period, two of them extended/ part-time programs, and one full-time each summer. Each program has 5-7 students in it. I recruit, admit, and retain students for the ongoing CPE programs and plan and lead the CPE educational requirements as well as supervise clinical ministry hours for each student. One unit of CPE for one student is 400-combined hours of education for ministry and clinical ministry. My annual evaluation rated in the top 5 percent score. I have served in this full-time extension ministry appointment at VMP since July 2006.

What continuing education and spiritual growth programs have you participated in during the last year?

Monthly webinars through ACPE regarding the theory and practice of CPE Education in areas of adult education, cultural competence, ethical standards for chaplains and chaplain educators, and relational-cultural theory. I also participate in 2 different ACPE Communities of Practice each month, for collegial support and accountability in our shared ministry of CPE. I lead worship at least 2 Sundays each month, and worship other Sundays with my family at UMCWFB. I also attended two short-term Bible studies, and 4 spiritual-book group studies in the past year through the church. I see a Spiritual Director once each quarter, and took one 5-day spiritual retreat last fall.

What are your continuing education plans?

Continuing to do ongoing webinars through ACPE and the UMC, as time and opportunities allow. Also plans to meet with a small women's clergy group beginning in the New Year, to support and learn with each other.

Care of Members and Removal of Names 228.2.b

1. First time to be listed: List the name of each member who is “negligent of the vows or is regularly absent from the worship of the church without valid reason” and who the church council has attempted to re-enlist in active participation without success.

First Name	Last Name	Record Type	Record Status	Date Received	Last Attended Date
Francine	Buor	Member	Active		3/1/2020
Alex	Chou	Member	Active	12/2/1990	12/24/2019
Jenny	Chou	Member	Active	6/22/1997	12/24/2019
Emily	Chou	Member	Active	5/19/2013	12/24/2019
Kristen	Chou	Member	Active	5/3/2015	12/24/2019
Gerry	Harrison	Member	Active		7/28/2019
Christopher	Hastings	Member	Active	5/3/2015	5/19/2019
Madeleine	Hastings	Member	Active	5/7/2017	5/19/2019
Joan	Miller	Member	Active		10/21/2018
Eric	Thompson	Member	Active	5/23/2010	12/24/2018
Bonnie	Adams	Member	Inactive	11/11/2001	8/19/2018
Christine	Novak	Member	Inactive		11/3/2019
Michael Vladimir	Novak	Member	Inactive		12/24/2016
Alexander William	Novak	Member	Inactive	5/23/2010	12/24/2016
Mary Rachel Rebecca	Novak	Member	Inactive	5/20/2012	12/24/2016
Austin Robert	Novak	Member	Inactive	5/22/2005	12/24/2016
Scout	Stackhouse	Member	Inactive	5/3/2015	6/18/2022

Care of Members and Removal of Names. 228.2.b

2. Second time to be listed: If the Church/Charge Conference deems it appropriate, it may vote to authorize the removal of these names from the full membership role. The record of names so removed shall be kept so that, if appropriate, the person whose name has been removed may be restored to membership.

First Name	Last Name	Record Type	Record Status	Date Received	Last Attended Date
James	Abram	Member	Active	5/23/2010	4/9/2023
Clare	Aeschbacher	Member	Active	5/22/2011	7/10/2022
David	Anderson	Member	Active	5/17/2009	1/12/2020
Tyler	Ballentine	Member	Active	5/22/2005	5/14/2017
Ryan	Ballentine	Member	Active	5/18/2008	12/24/2022
Erika	Ballentine	Member	Active	5/23/2010	12/24/2022
Cameron	Blegen	Member	Active	5/23/2004	12/24/2019
Alana	Blegen	Member	Active	5/23/2010	12/24/2019
Jennifer	Breese	Member	Active	5/22/2011	7/22/2018
Elizabeth	Carey	Member	Active		3/4/2020
Craig	Carey	Member	Active		12/24/2016
Carly M.	Chiappetta	Member	Active	5/19/2013	11/28/2021
Alexander	Dettinger	Member	Active	5/22/2011	12/24/2017
Emily	Dettinger	Member	Active	5/18/2014	12/24/2018
Max	Dodge	Member	Active	5/21/2006	2/16/2020
Jonathan	Ebert	Member	Active	5/23/2010	12/24/2019
Allison	Ebert	Member	Active	5/22/2011	12/24/2019
Annalise	Ebert	Member	Active	5/18/2014	12/24/2019
Carl	Fruncek	Member	Active	5/22/2011	1/15/2023
Samuel	Fruncek	Member	Active	5/18/2014	1/15/2023
Alex	Hentzen	Member	Active		12/24/2017
Samantha	Hentzen	Member	Active		6/7/2014
Griffin	Hentzen	Member	Active	5/15/2016	12/24/2019
William R.	Hentzen	Member	Active	5/23/2010	6/30/2013

Care of Members and Removal of Names. 228.2.b

2. Continued

First Name	Last Name	Record Type	Record Status	Date Received	Last Attended Date
Katelyn	Hoylman	Member	Active	5/18/2003	4/16/2017
Emily	Hoylman	Member	Active	5/21/2006	4/9/2023
Kelly	Huber	Member	Active	5/20/2007	12/24/2017
Megan	Huber	Member	Active	5/23/2010	12/24/2016
Maureen	Kailhofer	Member	Active		12/21/2014
Maxwell Xavier	Kailhofer	Member	Active		12/21/2014
Ania	Kotecki	Member	Active	5/20/2012	4/4/2021
Nathan Grey	Kurtz	Member	Active	11/22/2009	4/21/2019
Nathan	LaFrombois	Member	Active	5/18/2008	5/13/2018
Karina	Lathrop	Member	Active	5/21/2000	4/2/2023
William	Matt	Member	Active	2/15/2016	1/5/2020
Joseph M	McMahon	Member	Active	5/22/2011	5/13/2018
Michael J	McMahon	Member	Active	5/19/2013	4/21/2019
Austin	Middleton	Member	Active	5/18/2008	12/24/2018
Jack	Middleton	Member	Active	5/17/2009	5/7/2017
Camille	Middleton	Member	Active	5/22/2011	12/24/2016
Margo	Middleton	Member	Active	5/7/2017	12/24/2019
Cole	Miller	Member	Active	5/20/2012	12/24/2016
Grace	Modrinski	Member	Active	5/20/2007	12/24/2019
Jacob	Patrick	Member	Active		12/24/2019
Michael	Perry	Member	Active	5/20/2012	12/24/2022
Timothy	Perry	Member	Active	5/17/2009	12/24/2022
Sarah	Potter	Member	Active	5/23/2010	12/24/2019
David	Potter	Member	Active	5/18/2014	12/24/2019
Hallie	Sanders	Member	Active	5/21/2006	12/24/2019
Henry	Sanders	Member	Active	6/8/2008	12/24/2016

Care of Members and Removal of Names. 228.2.b

2. Continued

First Name	Last Name	Record Type	Record Status	Date Received	Last Attended Date
Amelia	Schaetzke	Member	Active	5/20/2012	7/25/2021
Dylan	Scheu	Member	Active	5/19/2013	4/21/2019
Kristin S.	Seidler	Member	Active		3/20/2016
Natassja	Sook	Member	Active	5/22/2011	6/27/2021
Ellie	Strelow	Member	Active	10/21/2018	7/21/2019
Frances	Stuebe	Member	Active	5/23/2010	4/21/2019
Alison	Stuebe	Member	Active	5/19/2013	4/21/2019
Alex	Trebatoski	Member	Active	5/20/2007	4/1/2018
Luke	Trebatoski	Member	Active	5/23/2010	4/1/2018
Laura Whitney	Whitney	Member	Active	5/19/2013	4/4/2021
Caroline	Wright	Member	Active	5/20/2012	1/14/2018
Mitchell	Yurkowitz	Member	Active	5/18/2008	7/14/2013
Spencer Lee	Yurkowitz	Member	Active	5/20/2012	7/19/2015
Martha	Bagley	Member	Inactive		4/16/2017
Susan	Cattle	Member	Inactive		4/16/2017
Lori	Ebbott	Member	Inactive		6/20/2021
Sean	Peterson	Member	Inactive	10/15/2014	3/3/2019
Shao-Cheng	Sun	Member	Inactive		

Care of Members and Removal of Names. 228.2.b

2. Continued

First Name	Last Name	Record Type	Record Status	Date Received	Last Attended Date
Ron	Tipton	Member	Inactive	9/28/2008	5/20/2012
Donna	Tipton	Member	Inactive	9/28/2008	6/9/2019
Tristan	Tipton	Member	Inactive	9/28/2008	7/17/2016
Raanan	Tipton	Member	Inactive	5/18/2014	7/17/2016
Kayin	Tipton	Member	Inactive	9/28/2008	7/17/2016
Caitlin	Arterburn	Member	Removed	9/28/2008	7/31/2022
Max	Arterburn	Member	Removed	9/28/2008	12/24/2019
Declan Robert	Arterburn	Member	Removed	5/22/2011	9/22/2019
Keegan	Arterburn	Member	Removed		8/11/2019
Rowan L.	Arterburn	Member	Removed		3/8/2020
Angela	Crise	Member	Removed		4/9/2023
Timothy	Karth	Member	Removed	10/17/2017	7/25/2021
Joelle	Karth	Member	Removed	10/16/2016	7/4/2021
Benjamin	Sincoular	Member	Removed	9/17/2017	1/26/2020
Jacky	Sincoular	Member	Removed	9/17/2017	1/26/2020
Sawyer	Sincoular	Member	Removed		2/23/2020
Grant	Sincoular	Member	Removed		2/23/2020
James	Bartlett	Member	Inactive 2 yrs	5/18/2014	7/22/2018
Gary	Strothmann	Member	Inactive 1 yr	10/16/2016	8/30/2020

Budgeted Financial Statement for Period 10 - April
Finance Committee Financial Reports
Company#: 1 Name: United Methodist Church Of WFB
Fiscal Year Beginning 7/1/2022

<u>Description</u>	<u>Actual for Period</u>	<u>Actual YTD</u>	<u>Budget Annual</u>	<u>Var. Actual to Annual Budget %</u>	<u>YTD Last Year</u>
Income From All Sources					
Member Pledge Contributi	\$66,544.65	\$550,198.96	\$726,659.00	76%	\$630,357.31
Non-Pledge Contributions	\$11,421.25	\$129,622.91	\$87,000.00	149%	\$72,905.35
PPP Support	\$1,425.00	\$14,250.00	\$17,100.00	83%	\$0.00
Alternative Income Fundri	\$0.00	\$0.00	\$3,000.00	0%	\$0.00
Easter Offering	\$5,638.00	\$5,648.00	\$6,000.00	94%	\$5,465.00
Christmas Offering	\$0.00	\$6,406.00	\$8,000.00	80%	\$7,935.00
Carpenter's Shop/TOL Rev	\$8,608.00	\$84,580.00	\$101,756.00	83%	\$84,920.00
School for Seniors Use Rev	\$0.00	\$500.00	\$500.00	100%	\$0.00
Miscellaneous Income	\$2,463.08	\$15,514.74	\$6,000.00	259%	\$4,984.49
Total Income From All Sour	\$96,099.98	\$806,720.61	\$956,015.00	84%	\$806,567.15
General Operating Expenses					
Total Staff Parish Expenses	\$45,268.93	\$440,090.55	\$525,243.00	84%	\$439,558.04
Total Conference Apportio	\$10,000.00	\$118,672.00	\$138,672.00	86%	\$117,652.00
Total Facility/Properties E	\$16,844.34	\$164,375.02	\$184,000.00	89%	\$150,296.93
Total Office Expenses	\$3,059.25	\$31,214.32	\$38,000.00	82%	\$29,143.20
Total Kitchen Expenses	(\$814.21)	(\$7,130.00)	\$3,000.00	-238%	\$0.00
Total Adult Education	(\$1.00)	\$62.40	\$1,100.00	6%	\$395.87
Total Family Ministries	\$168.15	\$932.98	\$7,000.00	13%	\$1,017.05
Total Music Department Ex	\$2,559.81	\$11,331.16	\$10,000.00	113%	\$9,452.68
Total Technology Expenses	\$1,850.75	\$17,474.63	\$26,000.00	67%	\$24,429.06
Total Assimilation Expense	\$0.00	\$45.00	\$500.00	9%	\$0.00
Total Worship/ Altar Guild	\$1,620.54	\$6,197.98	\$7,500.00	83%	\$7,169.30
Total Outreach Expenses	\$0.00	\$1,829.83	\$2,000.00	91%	\$262.96
Total Small Group Expense	\$0.00	\$192.33	\$1,500.00	13%	\$228.55
Total Prime Time/Homebo	\$175.00	\$417.40	\$800.00	52%	\$55.96
Total Stewardship Expense	\$434.58	\$840.05	\$500.00	168%	\$528.82
Church and Society	\$0.00	\$1,902.18	\$4,000.00	48%	\$1,600.00
Missions	\$0.00	\$3,310.53	\$6,200.00	53%	\$4,204.00
Total General Operating Ex	\$81,166.14	\$791,758.36	\$956,015.00	83%	\$785,994.42
Net Income/Expense	\$14,933.84	\$14,962.25	\$0.00	0%	\$20,572.73