

PALM VALLEY LUTHERAN CHURCH COUNCIL MEETING AGENDA

March 18, 2026, 5:30 pm

G.R.A.C.E.

Grow in Faith
Reach the Community
provide **A**we-inspiring Worship
Connect in Small Groups
Exceptional Serving

Call to Order

Approve Agenda

Devotion – Susan Ames

Consent Agenda

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Continuing Business

1. Celebrations
2. Personnel Updates | Associate Pastor, Piano Accompanist
3. Campus Project Updates | Steeple, Phase 1 (AVL), Phase 2 - Sanctuary, Eagle Scout Projects
4. Campus Security
5. Alternate Income Team
6. Audit Team | Approval of Benevolence Policy for Members/Staff – Page 50

New Business

1. Governance re. Financial Approvals | Operating Fund vs. Special/Restricted/Endowed Funds
2. Request from Property Team | Council approval for \$15,860 to replace Parsonage roof
3. Requests from Cemetery Team
 - a. Approve Cemetery Operations document | Pages 29-31
 - b. Approve repair of water well | Up to \$15,000 to cover updated bid plus overage
4. Recommendations for Financial transactions | Council approval needed to:
 - a. Withdraw \$20,000.00 from the Unrestricted fund to deposit into Operating – Major Maintenance to pay for the Parsonage roof repair plus overage; any balance would hold there for future Major Maintenance items.
 - b. Move \$130,000.00 from the Unrestricted fund to the Capital Maintenance Reserve fund.
 - c. Withdraw \$192,000.00 from the Unrestricted fund to deposit into the Church Money Market account. This will cover approved income account lines 41298 and 41299 (See Budget report pg. 42). In the MM account, funds will earn interest while being allocated/moved monthly into the budget income during the reconciliation process.
5. Audit 2025 – Internal vs External
6. Staff Support Request: Cemetery Operations – Page 54
7. Discussion topic – Providing local outreach gifts from the Unrestricted fund

Other Business

1.

Information

Next Month’s Sunday CIC:

April Volunteers	
April 5 - Easter	Early - JB Getz (+Sunrise)
	Late - Jayne Baxter
April 12 - OneVoice	Carolyn Koehn
April 19 -	Early - Anita Hulsman
	Late - Susan Ames
April 26 -	Early - David Beck
	Late - Linda Reed

Next Month’s Council Member for Devotions – Vince Brunssen

Adjourn

COUNCIL MINUTES

Palm Valley Lutheran Church Annual Congregational Meeting Minutes February 8, 2026

1. Opening Prayer and Agenda Approval

Constitutional Requirements

Chapter 10. CONGREGATION MEETING

“C10.01. The annual meeting of this congregation shall be held at a time specified in the bylaws.

BYLAWS SECTION 4. The Annual Meeting of the congregation shall be held in January. Additional meetings may be called as designated by the Congregation Council. The annual meeting agenda will include election of Congregation Council members, annual staff reports, the Proposed Program of Ministry, financial reports, and final approval of the budget.

“C10.04. 10% voting members shall constitute a quorum.

C10.05. Voting by proxy or by absentee ballot shall not be permitted.

C10.06. All actions by the congregation shall be by majority vote”

Votes of members present were counted as stated in the Congregational Constitution.

Carolyn Koehn called the meeting to order at 10:25 am. A quorum was confirmed.

Pastor Dave Koppel led the congregation in prayer.

Dave Smith motioned and Sue Rue seconded to accept the agenda, and it was approved by voice vote.

2. Council Member Recognition and Election

- Outgoing council members Susan Ames, David Beck, Tom Dove, Anita Holsman, and Steven Lloyd were recognized and thanked for their faithful service.
- The congregation was reminded that the church council consists of 15 members serving staggered three-year terms, with five members rotating off and five elected each year.
- The Nominating Committee, led by Becky Reichert, presented the following six nominees for 2026 council positions:
 - Susan Ames, Scott Donovan, Anita Hulsma, David Beck, Carol Dove, Mary Wallin
- Nominations were opened from the floor. No additional nominations were made. Ballots were distributed and collected.

The following individuals were elected and recognized as new council members:

Susan Ames, Scott Donovan, Anita Hulsman, David Beck, Mary Wallin

3. Financial Reports and 2025 Review

Key financial highlights for 2025 were presented by the executive administrator Jen Kendrick.

- 84% of operational income came from member giving.
- 16% came from other sources (facility rentals, events, etc.).
- Actual income was \$69,000 under budget.
- Expenses were \$39,000 over budget.
- The net variance resulted in an approximately \$108,000 deficit.
- The deficit is to be covered by working capital/general funds.

Congregational Questions and Discussion

Several questions and concerns were raised:

- Differences between QuickBooks reports and distributed financial packets were clarified. Final figures are derived from QuickBooks, with adjustments following the January council meeting.

- Concerns were expressed regarding two consecutive years of budget overage without congregational approval. It was explained that many variances were due to uncontrollable cost increases, such as utilities.
- The congregation referenced the constitutional provision stating that council cannot approve new obligations exceeding 0.5% of the budget without congregational approval.
- Members requested improved monthly financial reporting, greater transparency, and adherence to constitutional requirements.
- Benevolence payments were discussed. It was clarified that benevolence has been funded through the endowment rather than the operating budget, with an intention to return to budgeted operating allocations when possible.
- Questions were raised about shared ministry support expenses (staff, facilities, administrative costs), high printing expenses, and the use of special funds.
- The endowment fund was reported at approximately \$5 million, with \$1.3 million currently available for use (prior to deduction of current-year spending).

Mildred Krienke called the question, Paul Kirstin made the motion and Sue Rue seconded to accept the 2025 financial report. The motion carried by ballot vote.

4. Memorials and Mission Statement

Memorials were read by Dave Smith for members who passed away in 2025. Rose Lee Stratton, George Warriner, Karl Wolf, Nancy Lawson, Roy Krienke, Jose Flores, Barb Williams, Ilse Newton, Marvin Schneider, Robert Behrens, Loren Christensen, Hannah (Curran) Hagg, Betty Hodde, Norma Deck, Pat Steiger, David Bennett, Carol Pimpler

As part of strategic planning, the congregation reviewed the church's mission statement. A motion was made to update the wording to include "invite all people" and to emphasize being an "intergenerational community of faith."

Discussion included differing perspectives regarding the explicit use of inclusive language. Some questioned whether specifying "all people" was necessary, while others affirmed the importance of clearly stating inclusivity. Rick Salvo motioned and Tammy Oetken seconded to approve changing the mission statement include "invite all people" and to emphasize being an "intergenerational community of faith." The motion carried by a two-thirds majority on a ballot vote.

5. 2026 Strategic Ministry & Financial Plan

The 2026 strategic plan was presented, emphasizing alignment of the budget with ministry initiatives.

Key components of the 2026 financial plan:

- 75–76% of income projected from member giving.
- Additional income from investments and special funds (legacy gifts, building use, etc.).
- \$126,000 in net investment gains and \$66,000 from unrestricted funds proposed to balance the budget.
- Special funds (Fall Fair, youth and memorials, office IT, etc.) designated to support ministry priorities.
- Continued efforts by the Alternative Income Team to develop additional revenue sources.

The 2026 expense budget totals \$1,234,761. Operational increases (e.g., utilities) were anticipated. Staff compensation remains stable, supported in part by ERC funds.

Discussion included:

- Ongoing income variances and sustainability concerns.
- Reliance on unrestricted funds and investment gains for operations.
- Requests for more detailed itemization of expenses, special funds, and audit findings.
- Concerns that budget projections should more closely reflect actual pledge levels.

Dave Smith motioned and JB Getz seconded to accept the 2026 Strategic Ministry & Financial Plan. The motion passed by ballot vote with 47 yes votes and 40 no votes.

6. Funding Resolution: Associate Pastor

A resolution was presented to fund an associate pastor position for three years using up to \$450,000 from unrestricted investment funds.

Discussion included:

- Long-term sustainability beyond three years.
- Salary benchmarks.
- Reliance on unrestricted funds for operating expenses.
- Requests for regular fund balance reporting and a formal mid-year budget amendment process.

Rick Salvo motioned and Tammy Oetken seconded to fund an associate pastor position for three years using up to \$450,000 from unrestricted investment funds. The motion passed by ballot vote with 65 yes votes and 18 no votes.

7. Funding Resolution: Sanctuary and Facility Renovations

A resolution was presented to allocate up to \$800,000 from unrestricted funds for sanctuary and facility renovations.

Discussion addressed:

- Appropriate spending cap.
- Uncertainty about contractor bids.
- Scope of renovations and aesthetic considerations.

Amendments were proposed and voted on:

1. Amendment to set the cap at \$509,000 (Phase One only). Amendment failed by ballot vote.
2. Amendment to raise the cap to \$700,000 to include electrical work, potential overages, and sanctuary aesthetics. Amendment passed by ballot vote.

John Reed motioned and Gus Reinhardt seconded to approve a cap of \$700,000 from unrestricted funds for Sanctuary and Christian Life Center renovations. The motion carried by ballot vote with 44 yes votes and 20 no votes.

8. Suggested Action Items

The following action items were identified:

- Implement regular, transparent monthly financial reporting and include reports in council minutes.
 - Increase itemization and clarity in budget and expense reports, including special funds and audit findings.
 - Develop and communicate a formal mid-year budget amendment process.
 - Transition benevolence funding back to operating budget allocations where feasible.
 - Continue pursuing alternative income sources for long-term sustainability.
 - Provide regular updates to the congregation regarding facility improvement progress and plans.
-

9. Closing and Adjournment

With no further business, a motion to adjourn was approved at 12:43 pm. Pastor Koppel closed the meeting with prayer. A council meeting was scheduled to immediately follow in the conference room.

Respectfully submitted,
Susan Ames, Council Secretary
Palm Valley Lutheran Church

Church Council Meeting Minutes

February 8, 2026

Date: February 8, 2026

Time: 12:50 - 1:24 pm.

Location: Church Conference. Room

Attendees: Carolyn Koehn, Dave Smith, Sue Rue, Kathy Erwin, Anita Hulsman, JB Getz, David Beck, Rick Salvo, Linda Reed, Jayne Baxter, Susan Ames, Barry Hamilton, Mary Wallin, Vince Brunssen, Pastor Dave Koppel

Staff: Jen Kendrick

Absent: Scot Donovan

1. Call to Order

The meeting was called to order by Carolyn Koehn at 12:50 pm. An opening prayer was offered by Pastor Koppel.

2. Agenda Approval and Amendments

There was initial discussion regarding the proper procedure for approving and amending the agenda, with references made to *Robert's Rules of Order* for clarification.

Sue Rue proposed an amendment to limit the evening's business to:

- Election of officers
- Scheduling of a follow-up council meeting

Her motion cited the late hour and lack of a meal as reasons to defer additional business.

After discussion, the council agreed to:

- Add the following specific items to the agenda:
 - Election of officers
 - Approval of a personnel team member
 - Review of the employee handbook
- Postpone all other business to a later meeting

Rick Salvo motioned and David Beck seconded to approve the amended agenda. **The motion carried.**

3. Officer Elections

Nominations were opened for council officers.

- **President:** Dave Smith was nominated and accepted the nomination. Elected by acclamation/unanimous consent.
- **Vice President:** Sue Rue was nominated and accepted the nomination. Elected by acclamation/unanimous consent.
- **Secretary:** Susan Ames was nominated and accepted the nomination. Elected by acclamation/unanimous consent.

All officer positions were filled.

4. Personnel Team and Handbook Review

Personnel Team

The Personnel Team recommended Dan Johnson as a new member of the Personnel Team. His appointment was motioned by Carolyn Koehn and seconded by Dave Smith. **The appointment was approved.**

Employee Handbook

The council discussed the employee handbook, focusing particularly on a proposed \$250 annual personal equipment/clothing allowance.

After clarification and discussion, an amendment was made by Dave Smith and seconded by Rick Salvo to remove the \$250 allowance from the handbook. **The amendment was approved.**
Dave Smith motioned and JB Getz seconded to approve the revised employee handbook, as amended. **The motion carried.**

5. Scheduling and Procedural Matters

The next council meeting was scheduled for:

Wednesday, February 11th at 6:30 PM

It was noted that some members may have scheduling conflicts (including Pastor Koppel traveling to Connecticut), but the time was agreed upon.

An updated meeting packet will be distributed on Tuesday prior to the next meeting. Members requested improved direct communication regarding the distribution of meeting materials.

6. Acknowledgements and Closing

Council members expressed appreciation for the service of both new and returning officers.

Procedural reminders were shared, and members were advised to expect updated materials before the next meeting.

Action Items

- Distribute updated meeting packets to all members by Tuesday prior to the February 11th meeting.
- Ensure direct communication to all members regarding meeting materials.
- Confirm participation and details for the February 11th meeting at 6:30 PM.
- Remove the \$250 personal equipment/clothing allowance from the finalized employee handbook.
- Prepare devotion for the February meeting as previously committed.

The meeting adjourned 1:23 pm with the Lord's Prayer.

Respectfully submitted,
Susan Ames, Council Secretary

Church Council Meeting Minutes

February 11, 2026

Members Present: Dave Smith (President), Sue Rue (Vice President), Susan Ames (Secretary), Kathy Erwin, Anita Hulsman, Vince Brunssen, JB Getz, Mary Wallin, Rick Salvo, David Beck, Barry Hamilton, Linda Reed, Jayne Baxter, Scot Donovan.

Members Excused: Carolyn Koehn, Pastor Dave Koppel

Staff: Jen Kendrick

Meeting Opening

The Council President, Dave Smith opened the meeting with prayer at 6:29 pm, emphasizing service, unity, and seeking understanding when answers are not immediately clear.

Introductions and Opening Remarks

Council members introduced themselves, sharing years of membership and prior council experience. The newly elected Council President acknowledged the strong leadership of Carolyn Koehn and noted the significant responsibility of stepping into the role.

Agenda and Procedures

The process for approving and amending the agenda was clarified. Any amendments to the agenda require pastoral approval and must first be reviewed at the executive level before inclusion. A proposed amendment to hold a vote by email regarding cemetery expenditures was deferred to the next meeting pending pastoral input.

The consent agenda, primarily consisting of prior minutes, was reviewed and approved with minor corrections (including spelling updates). The Leadership Covenant was also reviewed and affirmed.

Reflections on Recent Congregational Meeting and Council Service

Rick Salvo led a devotion reflecting on recent congregational votes acknowledged visible divisions within the congregation while emphasizing continued commitment and engagement. Voting results for the mission statement, budget, associate pastor call, sanctuary matter, and alcohol policy were reviewed.

Council members discussed the importance of serving with joy and unity despite differing perspectives. The Council committed to modeling positive engagement, transparency, and responsiveness. Continued improvement in communication with the congregation was identified as a priority.

Committee Assignments and Team Organization

Endowment, Finance, and Personnel committee assignments were confirmed by motion and second.

- Finance - Dave Smith nominated and JB Getz seconded Sue Rue to the finance team.
The appointment carried.
- Endowment - Kathy Erwin nominated Jayne Baxter and Anita Hulsman seconded to be appointed to the Endowment team. **The appointment carried**
- Personnel - Dave Smith nominated and Kathy Erwin seconded to appoint JB Getz to the personnel team.
The appointment carried.

Council and GRACE Team assignments were revisited. Members expressed general satisfaction with current placements, and new members were guided into appropriate teams. Jen Kendrick will post the assignment.

The GRACE Team meeting schedule was clarified as the first Monday of even-numbered months at 7:00 PM. Broad council participation was encouraged.

Expectations for the Council Member in Charge role were reiterated, including:

- Building oversight
- Preparation for worship services
- Emergency protocols

Monthly Council Member in Charge and devotion assignments were determined through random draw and volunteer sign-up.

Council installation was scheduled for March 1, with contingencies discussed should adjustments become necessary.

Financial and Facility Updates

Audit Team

Two continuing positions remain open and must be filled by non-council members. Recommendations are requested.

External Audit

An external audit was discussed. While recognized as beneficial, the estimated first-year cost of \$20,000–\$25,000 makes it cost-prohibitive at this time. The matter may be revisited in future budgets.

2025 Financial Variance

A \$108,000 variance for 2025 was covered by existing reserves; no immediate corrective action is required.

Benevolence Policy

Council discussed the need for written guidelines addressing internal benevolence requests from staff and members. This will be an action item for the next meeting.

Steeple Project Update

Additional necessary steeple repairs were identified, totaling \$15,860 above the previously approved budget. In anticipation of potential unforeseen costs, Council approved up to a 10% overage up to \$35,000 total project flexibility to be drawn from unrestricted funds.

Discussion included:

- Appropriate funding sources
- Transparency with the congregation
- Constitutional spending guidelines

Constitutional Spending Clause

c. Church Budget: The Congregation Council shall prepare the annual Church Budget for adoption by this congregation, shall supervise the expenditure of funds in accordance therewith following its adoption, and may not incur additional obligations more than 0.5% (one-half of one percent) of the total Church Budget without approval by a Congregational Meeting.

The .5% budget overage clause was reviewed and its intent clarified. Council acknowledged tension between budgeted and special funds and recognized the need for clearer constitutional language in the future regarding emergency and special fund expenditures.

Suggested Action Items

1. Update and distribute finalized committee and council assignments, including devotion schedule.
2. Recruit and recommend two new non-council audit team members.
3. Develop or locate written policy guidelines for member and staff benevolence requests.
4. Clarify and communicate Council's interpretation of constitutional spending limits to the congregation.

5. Continue transparent monitoring and reporting of steeple repair expenses.
6. Consider future constitutional amendments to clarify spending authority and emergency procedures.

The meeting concluded with prayer at 7:29 pm.

Respectfully submitted,

Susan Ames
Council Secretary
Palm Valley Lutheran Church

REPORT OF THE SENIOR PASTOR

Report of the Senior Pastor March 2026

February and March have been active times in the life of Palm Valley. Inclement weather moved our annual meeting into February, we passed a financial plan for ministry and elected council members and, before we knew it, Ash Wednesday was upon us the season of Lent had begun.

In addition to all the regular events here, we now have Lenten Suppers and Evening Worship services on Wednesdays, and both our personnel and call committees have been actively working, as well as bringing back our AI team to look at additional income sources. In addition, we have been actively interviewing choir accompanists. Also, work was done on a personnel manual, and on employee job descriptions.

At the same time, I have met with a number of our employees about their concerns with cutting overtime and revised job descriptions and the updated personnel manual.

We had one baptism, Jefferson Blacha (16 years old), and we are working with two more teenagers to prepare them for baptism. We also have one infant (C J Simonsen) who will be baptized soon.

Our regular teaching session for confirmation concluded this past Sunday, with individual conferences scheduled for Palm Sunday, and confirmation set for April 12, the Sunday after Easter.

We continue to have too many funerals:

- Stuart Benson “Ben” Thomas-- February 21,
- Pastor Peggy Adams-- March 5,
- Harvey Mueller -- March 9.

We added something new: A Shrove Tuesday Pancake Supper – a wonderful time was had by all.

In addition, I took part in the Annual Mayor’s Prayer Breakfast, attended the Ribbon Cutting for the Serving Center’s new store, met with our own members on issues of grief and loss, employment issues, starting new business ventures, the health and finances of our congregation and more. Additionally, I am providing premarital counseling to two couples.

Our Spanish service moved into the Parish Hall on March 8th, and the Korean Service moved into the CLC. Adela McMillan is looking into livestreaming the Spanish service.

Another large gift to our congregation was received, nearly \$1M.

Important dates:

- March 11 Exec. Cmte. at 5 p.m.
- March 11 Lenten supper and service
- March 13 Young Adult meet up at Salt Lick
- March 14, Adopt a Street from 1 to 3
- March 15 Antioch Church 4th anniversary
- *March 16-20 RRISD spring break*
- March 18 Lenten supper and service
- March 18 Church Council – 5:30 to 6:30
- March 19 Women’s forum
- March 25 Lenten supper and service
- March 28 Palm Sunday at the Farm
- March 29 Palm Sunday – video gospel

- April 2 Maundy Thursday 7 p.m. service
- April 3 Good Friday service at noon and 7, Chipotle Bowl dinner at 6
- April 5 Easter Day 7:08 a.m.
- April 6 Grace night?
- April 10 Young Adults game night
- April 12 Confirmation - one service at 9 a.m.
- April 15 Church Council
- April 16 Women’s forum
- April 16 Our Community Salutes 6 or 7 p.m.
- April 18 Widows and Widowers lunch
- April 19 New Member Class – Discipleship 101
- April 21 LuMin Tailgate Tuesday
- April 25 National Faith and Climate Forum
- [TBD Journey through Jeremiah with Pastor Haverlah, 6 weeks](#)

- May 1 young adults karaoke night
- May 1-2 Synod Assembly at Triumphant Love Lutheran Church in Austin
- May 2 Adopt a Street, 1-3
- May 3 High School Senior Luncheon – Pastor Brad Fuerst is guest speaker
- May 3 youth Sunday at 9:30 & 11:15
- May 9 Ladies’ Tea
- *May 10 Mothers’ Day*
- May 14th – last day of preschool & preschool graduation at 1 or 1:30
- May 20 Church Council
- May 21 Women’s forum
- May 24 Pentecost
- May 31 Trinity Sunday
- [TBD Water for Africa Night at Dell Diamond](#)

- June 1 GRACE night
- June 8 Early Father’s Day BBQ in Oak Grove / Sundays on Mondays

- June 8 – 12 Leader Trek at PVLC
- June 14–19: Camp @ Camp Chrysalis
- June 17 Church Council
- June 18 women’s forum
- *June 19 Juneteenth*
- June 21 Fathers’ Day

- June 21 Leader Training for VBS
- June 28 VBS set-up
- June 29, 30, July 1, 2, 9-noon VBS and Day Camp for Preschool

- *July 4 Independence Day* – Round Rock July 4th parade
- July 6-10 Leader Trek at PVLC
- July 6-10 (tentatively) Day Camp here at Palm Valley
- July 15 VBS decorating at Back Porch
- July 15 Church Council
- July 16 women’s forum
- July 18–25: High School Mission Trip to Nashville
- July 26 Celebrate Marvin – 30 years at PVLC
- July 27-31 Leader Trek at PVLC
- July 27-30 Middle School Experience Days, All day long M- Th.

- Generosity month August – September? TBD
- August 3 GRACE night
- August 6-7 Global Leadership Summit – location TBD (off- site)
- *August 18 RRISD begins*
- August 19 church council
- August 20 women’s forum
- ALPHA – Date TBD

- *September 7 Labor Day*
- September 12(?) God’s Work our Hands
- Sept 13(?) Kickoff Sunday, 10 a.m. combined service, lunch
- September 20 (?) Confirmation Classes begin
- September 16 Church Council
- September 17 Women’s forum
- Fall Fair TBD

- October 5 GRACE Night
- *October 12 Indigenous People’s Day*
- Oktoberfest TBD
- October 15 Women’s forum
- Oct 21 First Communion class
- October 21 Church Council
- October 25 Reformation Sunday
- October 25 Trunk or Treat 5-7 p.m.

- Nov 1 All Saints' Day – First Communion
- *November 11 Veteran's Day*
- November 18 Church Council
- November 19 Women's forum
- November 22 Christ the King Sunday
- November 22 Round Rock Community Thanksgiving Service
- *November 26 Thanksgiving Day*
- November 29 First Sunday of Advent
- [Advent Event TBD](#)
- [Deck the halls TBD](#)

- December 7 GRACE night
- December 16 Church council
- December 17 Women's forum
- [Christmas Pageant TBD](#)
- [Gift wrapping TBD](#)
- [Sip 'n' Stroll TBD](#)
- [Las Posadas TBD](#)
- [Christmas Caroling TBD](#)
- December 24 Christmas Eve

2027

- TBD Financial Peace University
- [January 21 Church Council](#)
- [January 24 Forums](#)
- [January 31 Combined Service / Annual meeting](#)
- [February 10 Ash Wednesday](#)
- [February 14 Super Bowl and Valentine's Day - who planned that!?](#)
- [Council Retreat TBD](#)
- [March 18 Church Council](#)
- [March 21 Palm Sunday](#)
- [March 25 Maundy Thursday](#)
- [March 26 Good Friday](#)
- [March 28 Easter](#)
- [April 4 Confirmation](#)
- [April 15 Church Council](#)
- [May 9 Mothers' Day](#)
- [May 16 Pentecost](#)
- [May 20 Church council](#)
- [May 23 Trinity Sunday](#)
- [June 17 Church Council](#)
- [June 19 Juneteenth](#)
- [June 28 – July 2 ELCA youth gathering in Minneapolis](#)
- [July 4 Independence Day](#)
- [July 15 Church Council](#)
- [August 19 Church Council](#)
- [September 6 Labor Day](#)

- September 12 Kickoff Sunday
- September 16 Church council
- September 19 (?) Confirmation classes begin)
- *October 11 Indigenous People's Day*
- October 20 & 27 First Communion Classes
- October 21 Church council
- October 31 Reformation Sunday
- November 7 All Saints' Sunday
- November 18 Church Council
- November 21 Round Rock Community Thanksgiving Service
- *November 25 Thanksgiving*
- November 28 Advent begins
- December 16 Church Council
- December 24 Christmas Eve
- *December 31 New Years' Eve*



Bishop Sue Briner Visit in February



ELCA Rostered Leader's Retreat



Shrove Tuesday Pancake Supper



Ash Wednesday



Mayor's Prayer Breakfast





Palm Valley Lutheran Church Steeple Project



Serving Center New Store Ribbon Cutting



Lila Pecht's Birthday Celebration

CHILDREN AND YOUNG FAMILY MINISTRIES

Helen Pelkey
February 2026

We began the year with a new fellowship activity for Children's Ministry – monthly Mom's/Ladies Nights Out. Our January event did not take but our February gathering was a success and accomplished what it was intended to do; create more community among the moms/young women of the church. We are planning to meet monthly and will be gathering in March to learn how to play Mahjong and in April to make freezer meals.

Children's Church during the Rejoice! Service continues to go well. We started the month talking about the Beatitudes and ended the month making rocks to illustrate Jesus' temptation in the desert. Helen continues to write Spanish lessons on the lectionary readings and provides supplies for the craft activities and games for the Spanish speaking Children's Sunday School. If you get a chance, check out their classroom (room 21)! It is decorated with all of the crafts the kids have been making related to the weekly Bible stories.

Sunday School began in January in fits and starts but has found its footing again. We learned about the Magi and Jesus' baptism in January and Fishers of Men in February. We broke from our normal weekly routine to have a Snow Day on February 8th during the Annual Meeting. We combined forces with the Antioch Church and the Hispanic Ministry to do all things snow related. We had a snow machine blowing snow out on the preschool playground, played with snow inside the parish hall, made snowmen out of clay, had a snowball fight and enjoyed a pizza lunch, complete with snowflake cookies made by Susan Ames. Nicole Castro is leading a Lenten study for parents and other interested adults, starting February 22nd.

Preschool chapel continues to be a lovely time with our preschoolers learning more about God. We hear a story from the Bible and sing a song. It's short and simple.

We had an awesome church wide Pancake supper on Shrove Tuesday! Close to 50 people came! Our incredible team of cooks and decorators (Susan, Gus, Reece, Deborah, and Molly) made an event to remember. We had a parade, made masks, and flipped pancakes. It definitely felt like it should be an annual event.

Upcoming events:

- 3/4 Kid's Lenten Lesson on Feeding the 5000
- 3/11 Kid's Lenten Lesson on Jesus Walks on Water
- 3/15-3/20 Helen is at her Leadership Conference in NC
- 3/25 Kid's Lenten Lesson on Raising Lazarus from the Dead
- 3/28 Palm Sunday on the Farm at Down Home Ranch
- 3/29 Return Rice Bowls to count money to give to Ricebowls.org
- 3/30 Mom's/Ladies Night Out – Mahjong – 6-8:30pm

YOUTH MINISTRY

Name: Jordana M. Gutierrez

Reporting on Month: February 2026

Youth Group

Youth group attendance has remained consistent, with an average of **six to ten youth attending weekly gatherings**. Over the past month, there has been a noticeable increase in **middle school participation**, which is encouraging for the continued growth of the ministry. While this increase is positive, high school attendance has been more limited. Moving forward, additional strategies will be explored to better **re-engage high school students** and ensure the programming continues to meet their interests and schedules.

Looking for additional committee members

Youth ministry is currently seeking additional committee members who feel called to support and help shape the future of the program. As new initiatives, events, and opportunities for youth continue to grow, there is a greater need for individuals who are willing to share their time, ideas, and leadership.

Serving on the youth ministry committee provides an opportunity to help plan events, support youth programming, assist with service projects, and help guide the vision of the ministry. This involvement also allows members of the congregation to play a meaningful role in the faith formation and development of the next generation within our church community.

Those interested do not need prior experience in youth ministry, only a willingness to serve, collaborate with others, and support the youth of the congregation. Anyone who feels called to be part of this work is encouraged to reach out and learn more about how they can become involved.

Hat Creek Fellowship Gathering

This month the youth gathered for a fellowship outing at Hat Creek Burger Company, where twelve youth attended. The evening provided an opportunity for the group to spend time together outside of the regular Wednesday night setting, strengthening relationships and building community among the youth.

Moments like these are important for the ministry because they allow youth to connect with one another in a relaxed environment while continuing to foster a sense of belonging within the church community. The strong turnout from the youth made the evening a meaningful time of fellowship, conversation, and shared laughter.

Events such as this continue to show the importance of creating spaces where youth can grow not only in their faith, but also in their friendships with one another. The hope is to continue offering similar fellowship opportunities throughout the year to further strengthen the relationships within the group.

Meal Volunteers for Wednesday Nights

Sincere appreciation is extended to members of the congregation who have volunteered to **provide meals for Wednesday Night Youth Group**. This initiative has been warmly received by both the youth and their families. Sharing a meal together has helped create a welcoming environment that encourages fellowship and strengthens relationships before programming begins.

It is hoped that this initiative will continue to receive support from the congregation, as it has become a meaningful way for the church community to participate in youth ministry.

Upcoming Easter Breakfast Taco Fundraiser

The youth ministry will soon host an **Easter Breakfast Taco Fundraiser**, which will serve as an opportunity to raise funds to support youth ministry programming, including mission experiences and summer opportunities for the youth.

This fundraiser will take place on **Easter morning**, where the youth will prepare and serve breakfast tacos for the congregation. This event not only helps raise financial support for youth activities but also provides the youth with an opportunity to serve the congregation and actively participate in the life of the church.

Support from the congregation is greatly appreciated, and events like this help strengthen the partnership between the church and its youth.

Glow-in-the-Dark Easter Egg Hunt

In addition to the Easter fundraiser, the youth ministry is preparing to host a Glow-in-the-Dark Easter Egg Hunt for children and families within the church community. This event is intended to create a fun and welcoming environment for families while also offering an opportunity for youth to serve in leadership roles by helping organize and facilitate the event.

The goal of this event is to create a meaningful community gathering that celebrates the joy of the Easter season while also encouraging greater engagement between families and the youth ministry program.

PRESCHOOL MINISTRY

Director's Report – March 2026

Enrollment

Current enrollment is 21 students. Registration for the 2026–2027 school year is now open, and families have begun inquiring about the next school year. Families registering will have the opportunity to enroll their child in the 3-day program or the new 5-day program. Tours are ongoing as prospective families explore enrollment opportunities, and early interest for next year is encouraging.

Staffing & Preparation for Next Year

Planning for the upcoming school year is already underway. We have begun hiring and identifying teachers for next year in preparation for continued growth and the addition of the five-day program option.

Operations & Systems

The preschool is preparing to transition to a new school management system next school year. This platform will provide families with more user-friendly experiences, photo sharing, and additional communication tools, while also strengthening the school's operational systems for enrollment, records, and overall program management.

Marketing & Outreach

New marketing materials are being developed, along with a summer marketing plan to support increased visibility in the community and encourage enrollment for next school year.

School Life

In February, the students enjoyed a special Ice Cream Social during the school day.

Looking ahead, the students are excited for upcoming celebrations including Cowboy Day. The preschool will be closed next week for Spring Break, and we look forward to welcoming everyone back afterward.

Palm Valley Preschool remains committed to nurturing children and supporting families while continuing to grow the program and its presence in the community.

Thank you!
Becky Simpson

SMALL GROUPS AND VOLUNTEERS MINISTRY

Volunteer and Small Groups Report Submitted by Kelley Adams 3/11/2026

Small Group Steering Team: Manny Castro, Deborah Franke, Lisa Marengo, Garlon Oetken, Joy Kovar, Vince Brunssen

Council Rep: Susan Ames

Strategic Initiative: Shared Ministry and Active Discipleship

Work has begun on our strategic initiative to foster a cultural shift toward shared ministry and active discipleship. This effort focuses on developing a strategic plan that emphasizes teamwork and encourages all members of the congregation to serve, lead, and participate in small groups.

To support this initiative, the Small Group Steering Team has begun meeting monthly to continue building out plans and strategies to achieve our goals. Our primary focus during the upcoming program year will be advancing the first goal of our strategic initiative of cultivating a culture of shared ministry and deeper discipleship through small group engagement.

The team has established a regular meeting schedule on the fourth Tuesday of each month. The group met in November to begin this work; please see the February meeting notes compiled by Susan Ames for additional details. Our next meeting is scheduled for March 24th.

A Few Volunteer Highlights:

(If I missed anyone please let me know and I will reflect their participation in the next report)

Church Office Front Desk Volunteers: We couldn't do it without you! Thanks to the faithful volunteers who serve at the church office front desk. Their warm presence, helpful spirit, and willingness to serve help keep the office running smoothly each week. Whether greeting visitors, answering the phones, questions, or assisting the staff, their dedication makes a meaningful difference in the daily life of our church and has helped keep the church office running smoothly. The church staff are deeply grateful for their time and invaluable service. Susan Ames, Kathy Erwin, Marvin Goad, Tom Dove, Mary Wallin, Chris Terry, Usha Daniel, and Jayne Baxter.

Adopt-a-Street: On January 10th, our dedicated Adopt-a-Street volunteers helped care for our community and the environment by cleaning our designated street and collecting 10 pounds of trash. Their efforts help keep our neighborhood beautiful while demonstrating faithful stewardship of God's creation. Thanks to Manny and Nicole Castro, Deborah Franke, and Lisa Marengo for giving their time and energy to this important work.

Valentine's Dinner and Dance: On Valentine's Day, the V.O.L.T. Team did an outstanding job transforming the Parish Hall into a four-star Valentine's wonderland. Their creativity, hard work, and attention to detail created a warm and festive atmosphere that made the evening truly special for everyone who attended. With more than 70 guests in attendance, it was a joyful celebration filled with great food, laughter, and a little dancing. A special thank-you to Carole Dove and her team including Susan Ames, Susan Outlaw, Carlton Sands, Cindy Hailes, Linda Dufner, Denis Zerbst, Pam Mawdsley, and Andria Giovanellio, Tiffany Stevens along with the many supportive husbands and family who pitched in to help plan, decorate, and bring the evening to life. We also want to recognize our wonderful young servers—Kash W. Stephens, Carsyn Goslowsky, Emma Maul, Ian Hailes, and Keren Vardhanapu—whose cheerful and attentive service made the night even more memorable.

Community Care Team: Thank you to our Community Care Team members who gathered on February 1st to assemble 30 hygiene kits for the RRISD FIT Program. Their generosity and teamwork help provide essential support for students in our community. Carlton Sands, Peggy Elwain, Brian Wickman, Andrea Parker, Nancy and Paul Kersten, and Linda and Jim Dufner worked like a well-oiled machine, completing the kits in record time!

And if that wasn't enough From December 3, 2025, through February 2, 2026, a total of 23 pairs of eyeglasses and 18 eyeglass cases were donated to the Lions Club. During the same time period, 172 pounds of food were donated to the Round Rock Serving Center.

Lenten Bible Study – He Chose the Nails

Thank you to Helen Pelkey for organizing this group and to Nicole Castro for leading this meaningful five-week Lenten Bible study, He Chose the Nails. Your thoughtful preparation, guidance, and willingness to lead helped create a welcoming space for reflection, discussion, and spiritual growth during this Lenten season. We are grateful for the time and heart you invested in helping us deepen our understanding of Christ's sacrifice and love.

New Small Groups:

Game Night Small Group – Manny Castro
Church Garden Vision Group – Manny Castro
Live Music Group – Manny Castro

What's Coming Up in 2026?

March 14 – WELCA Gathering Immanuel Lutheran
March 21 – Adopt-a-Street
April 21 – LuMin Tailgate Tuesday
April/May– Pastor Haverlah, Jeremiah Bible Study (TBD)
April 25 – National Faith & Climate Forum
May 2 – Adopt a Street
May 4 – Backpack Friends Packing Party August- Alpha (TBD)
September 12 – God's Work, Our Hands
September – Kick-off Sunday, Fall Focus Begins (Dates TBD)

What's Coming Up in 2027

January 11th – 22nd - Financial Peace University

Small Group Steering Team February 2026 Meeting Minutes

Logistics & attendance notes

Attendees: Kelley Adams, Manny Castro, Deborah Franke, Lisa Marengo, Joy Kovar, Susan Ames
Susan is the new council representative for the group.

2026 calendar highlights & outreach events

- Nicole's Castro's Lenten Bible study started Feb 22; attendance was 11, seen as a strong sign.
- March 4: Lenten meal (details finalized later in meeting).
- March 14: WELCA Gathering at Immanuel Lutheran.
- March 21: Adopt-A-Street cleanup; discussion focused on low/variable attendance and whether to renew the contract in August.
- April 24: Lumen Tailgate (UT college ministry); 6 volunteers help feed ~ 400 students with a BBQ-style outreach.
- April 25: National Faith and Climate Forum; Deborah leading, with plans to reach out to other churches.
- May 4: Backpack for Friends packing party (Monday evening event; starts 6 PM and typically ends by 6:45).
- Alpha: Laura and Kelley want to run Alpha again (better attendance expected if started earlier with stronger advertising); goal includes drawing non-members.
- Sept 13: Kickoff Sunday; Fall Focus runs Sept 13–Oct 18 (Tentative based on date of Kick-Off Sunday)
- Sept 26: Fall Fair (tentative; awaiting confirmation/details).
- Sept 27 (on radar): Financial Peace University (no commitment yet; noted as something Pastor is interested in).
- Love the Rock / Rock the Block (community service with other churches) was raised as missing from the list; clarified it's every other year and not happening this year, but is on Kelley's radar.

Adopt-A-Street: keep/adjust/cancel?

- Attendance has ranged from a low of 3 to 5+; one cleanup tied to VBS had strong energy. Feedback: events need more advance notice for some participants (one month requested). If low attendance continues, suggestion was to not renew the contract to avoid failing obligations.
- May 2 cleanup may still proceed even if Kelley is away; Deborah offered to cover logistics (pickup/return supplies), and Manny knows where supplies are obtained/dropped off.
- Longer-term desire: publish a shared small groups calendar (on CCB and/or the website) to improve planning visibility.

New/active small groups & ideas

- Game night led by the Castros: 15–17 people signed up; plan to meet every 4–6 weeks, plus periodic church-wide game nights (e.g., quarterly).
- Church garden “vision group”: ~7 interested; three concepts (prayer garden, communion garden, community garden). Community garden flagged as high effort/cost; prayer garden seen as most feasible first step.
- Live music group: ~5 signed up; outing to see Third Day at the Moody Center on March 26; also considering local live music options (bars/restaurants) and free alternatives like Round Rock's Wednesday music events or Kalahari's free concerts.

- Jeremiah Bible study with Pastor Haverlah: being scheduled (likely Sundays after Easter through Pentecost, around the 10:45 window); clarified it's a Jeremiah study, not about Pastor's book.
- Church-wide emphasis: shift from a "consumer congregation" toward participation, service, and discipleship beyond Sunday mornings.

Survey insights, strategy focus, and communication ideas

- Reviewed AI-aggregated results from 3 open-ended questions on the annual giving statement (about 86–90 responses; primarily core/actively involved members).
- Interests/skills themes: creative arts, music/painting, cooking/gardening, reading, family/people/leading.
- Passion/engagement themes: volunteering/service roles, Bible studies/small groups, Stephen Ministry, choir/music, community outreach.
- Growth desires: spiritual growth/discipleship, understanding spiritual gifts, deeper Bible study, serving more effectively, stronger community engagement.
- Strategic takeaway agreed in discussion: expand both Bible-centered discipleship opportunities and relational/community-building groups ("walk and chew gum at the same time").
- Kelley shared first strategic plan goal draft: fostering a cultural shift toward shared ministry and active discipleship; emphasized teaching theology of serving and choosing a discipleship-focused Fall Focus study.
- Proposed "Discovering Your Spiritual Gifts" workshop (timing flexible; later clarified as more likely spring 2027 due to fall workload). Suggestions included a Saturday multi-session format with lunch and parallel kid activities.
- Resource lead: Gary Thomas "spiritual pathways" material suggested; can be done as a one-hour session or expanded to a 6-week study; link to be shared/texted.
- Promotion/engagement ideas:
 - Small group Sunday forums (between services, similar to council forums) where leaders/participants share what groups are like and how they support discipleship.
 - "Temple Talk"-style short testimonies/announcements from passionate leaders (with creative elements) if/when Pastor approves; Kelley noted Pastor expressed openness.
- Sundays on Mondays visibility: feedback that front-of-building placement/signage and accessible locations increase turnout; June 8 was named as the date.

Meeting cadence

- Decision: 4th Tuesday of each month at 3:30 PM.
- Next meeting: March 24 at 3:30 PM.
- April target: April 28 at 3:30 PM

Suggested Action Items

- Kelley to email meeting documents (calendar + survey/strategy materials) to the group.
- Kelley to send SignupGenius for the March 4 Lenten meal with quantities needed (lettuce, bread, salad, etc.).
- Joy to bring ~5 lbs hamburger meat to church (coordination with Kelley; Joy will be on-site Wednesday).
- Confirm Lenten meal logistics: utensils inventory and final supply check with Molly.
- Adopt-A-Street: improve advance notice; confirm May 2 coverage plan (Deborah offered to cover) and decide later whether to renew the August contract based on attendance.

- Deborah to continue leading coordination for the April 25 National Faith and Climate Forum outreach to other churches.
- Manny to share next steps/dates for game night and schedule a first meeting for the garden vision group.
- Share/distribute Gary Thomas spiritual pathways resource link to support discipleship/spiritual gifts planning.
- Kelley to confirm April 28 meeting against the church calendar and notify the group of any conflicts.

CEMETERY TEAM

The Cemetery team met on February 10, 2026, and discussed a number of items that will benefit the Cemetery grounds, access roads, and operational processes.

Roadwork surveys:

- The Cemetery recommended to Council for approval by email discussion and vote to work with Terry Hagood of Hagood Engineering to provide surveys and land studies to determine the best course of action for Cemetery road repairs.
- The expected cost of these assessments is \$24,000.00 and will be covered by the Cemetery fund.
- The motion was made by Mary Wallin, seconded by Rick Salvo to approve the \$24,000.00 for the survey work. The motion carried.
- Linda Reed and Jen Kendrick are working with Terry Hagood to get contracts signed for the work to proceed.

The Cemetery team recommends to Council for approval:

1. Adoption of the Cemetery Operations guide - included as follows for your review.
2. Approval to spend up to \$15,000.00 to repair the water well, paid from the Cemetery fund.
 - a. Estimate for \$12,280.00 is from 2025 and expected to increase when refreshed. (Estimate included)
 - b. Accounts for approx. 10% overage if there are additional expenses at time of project execution.

PALM VALLEY CEMETERY OPERATIONS

March 4, 2026

Palm Valley Cemetery is a perpetual ministry of Palm Valley Lutheran Church. The church is dedicated to caring for the burial and inurnment of those beloveds who pass on before us. Operations of the Palm Valley Cemetery are a collaboration between the Palm Valley Cemetery Team and Palm Valley Church Administration, with the Palm Valley Church Council being the ultimate authority regarding its management.

The Cemetery Team is authorized to make decisions regarding policy and management of the cemetery while Church Administration executes those policies on a day-to-day basis. This document will outline the responsibilities for the Cemetery Team and the Church Administration of the cemetery.

Purpose and Mission of the Palm Valley Cemetery

Palm Valley Lutheran Church is highly committed to the cemetery's preservation and eternal care. Generations of Palm Valley members have been laid to rest in this special place of remembrance, with the first burial being in 1863.

RESPONSIBILITIES OF THE CEMETERY TEAM

The Cemetery Team was created to oversee operations of the Palm Valley Cemetery. This includes:

- Keeping informed of cemetery investment accounts through reporting from the Executive Administrator and approving any needed changes to the management of those accounts.
- Monitoring the maintenance and overall care of the cemetery.
- Approving Plot Sectioning and Expansions, along with the Church Council. Monitoring Curb and Headstone Conditions and Straightening.
- Monitoring Sales.
- Projecting future cemetery needs.
- Approving Capital Investment Projects, ex. fencing or columbarium expansion, along with Church Council.
- Annual financial review and reporting for the annual meeting. Monitoring finances throughout the year.
- Approving expenditures for the upkeep and maintenance of the cemetery. Expenditures within a \$5,000 threshold for each expense and up to a \$30,000 per year limit do not need Church Council approval. Any expense over the threshold or limit must go before the Church Council for approval.
- Setting prices for cemetery plots and columbarium niches, reviewing the prices every 5 years. Plots are available to members and non-members alike.
- Providing guidelines for qualification to serve on the Cemetery Team. Currently, in order to serve, an individual must either own a cemetery plot, or a columbarium niche or have a family member interred in the cemetery.
- Developing and revising policies for the cemetery.
- Setting rules for burials, headstones, and grave decorations, such as flowers, flags, or statues.

PVLC will not approve sale of a large number of plots to an Investor, Funeral Home, or other Commercial Entity for control or personal gain.

Composition of the Cemetery Team -

The team shall ideally be comprised of at least 12 members, including a church council representative. The PVLC Executive Administrator will attend all meetings but will not be a team member. Membership qualifications require that each member owns a plot in the cemetery, or owns a niche in the columbarium, or has a family member interred in the cemetery.

Appointment and Election of the Cemetery Team and its leadership -

The team will elect a Team Lead and Secretary from its members, given that there are team members willing to serve. If no one is willing to serve, candidates may be recruited from outside the team. Term Limits have not been defined for membership or leadership. There is no established schedule for elections.

Responsibility of the Team Lead –

- The team lead will conduct cemetery team meetings, following Robert’s Rules of Order.
- The team lead will write the annual report, submitting it to the Executive Administrator, to be published in the Annual Report for the Congregational Annual Meeting in January. The Executive Administrator will provide cemetery data for the annual report.
- The Team Lead will keep the team informed on cemetery issues.

Responsibility of the Team Secretary -

- The Team Secretary will take notes at each meeting.
- Frequency of Cemetery Team meetings and quorum requirements –
- The Team Lead shall call and schedule meetings as business requires, with at least one meeting per year. Meeting attendance quorums must be met in order to vote on business decisions. Quorums are defined as a 60% team attendance.

RESPONSIBILITIES OF CHURCH ADMINISTRATION

Church staff will be responsible for:

- The maintenance and upkeep of cemetery grounds.
- Record-keeping and plot mapping. Historical requests for cemetery information will be charged as per open record request of \$50 per 30 minute and copies at \$1.00 per page.
- Upkeep of data entry into the cemetery online application, ‘Grave Discover’. Managing finances (investment accounts, sales payments, expenses paid). Liaising with funeral homes and families.
- The Executive Administrator will handle disputes and complaints, for example, regarding plot ownership or maintenance complaints. Complaints regarding the PVLC cemetery will be handled by the Executive Administrator and reported to the team.
- Handles all aspects of cemetery sales, such as identifying available plots, showing plots, and sharing information on pricing and policies.
- Collects payments from sales. Documentation and issuance of plot ownership certificates.
- Enforcing state and local burial regulations. Follow all appropriate guidelines for concrete liners and vaults, caskets, cremations, plot mapping as defined by the Texas Funeral Service Commission.
- Enforces approval process for headstones and monuments.
- Manage the scheduling of funeral services and burials. Monitoring the church schedule and activities around funerals and burials.
- Manages the excavation of graves with an excavation company.
- Seasonal cleanup schedules and notices.

- Enforcing standards for mowing, tree planting, and grave maintenance.
- Enforcing rules for burials, headstones, and grave decorations, such as flowers, flags, or statues.
- The Executive Administrator will supervise the employees who are assigned to the cemetery management.
- Providing support for funerals, along with the Church Council's CIC volunteers.
- Managing the financial accounts for the cemetery. There currently are two accounts: one is used for deposits and payments and is held at a local bank. The other is the investment account, and is managed by the same investment company as the rest of the church's investment accounts.
- Maintain ownership records.
- Maintain burial records and contact information for families. Assist with the storage and retention for team records.
- Maintain updated maps of available plots.
- As of 2024, the Church Administration charges the cemetery fund for their time spent on the cemetery.

Responsibility of the Staff Cemetery Groundskeeper –

Half of the salary for the staff cemetery groundskeeper is currently paid from the cemetery fund.

- Upkeep of the grounds. Maintenance of the irrigation system.
- Either the staff groundskeeper or the funeral home will assist with the inurnment burials by opening and closing the burials of urns (digging and closing) or opening and closing the niche in the columbarium.
- If the staff groundskeeper does the opening and closing at burial, the current practice is for the staff groundskeeper to be compensated for this assistance with a fee charged to the funeral family. This fee is currently \$450 for burials of urns and less for opening/closing the niche in the columbarium.
- The fee is processed through the payroll system.

Summary:

This document is intended to address the tasks involved in the management of the cemetery. It clarifies who is responsible for each task. Changes in these policies can be made at any time, with notification to Church Council and the Church Administration. Some changes may require the approval of the Church Council.

03.04.26 Note:

This document was approved by the Cemetery Team on 02.10.26 at their meeting. The document will be submitted to the Church Council for review and approval soon. However, since that time, a new position for a Cemetery Coordinator has been proposed. The new position has not been approved yet by either the Cemetery Team or the Church Council.

Also, there has been a request to review the policy of payment to the groundskeeper for opening and closing the inurnments.

Tom Lovelace Water Well Service

4997 Elm Grove Road
Belton, TX. 76513

Phone: (254) 939-5073
Fax: (254) 939-3513
Email: lovelacewaterwell@att.net

BID #	Date
1525	5/29/2025

BID SHEET

Billing Address:	Phone #
Palm Valley Lutheran Church 2500 E. Palm Valley Blvd. Round Rock, TX 78665	512-468-5097
E-mail	Alt. Phone #
compliant.relo@gmail.com	

Physical Address / Directions:

Qty	Description	Total
1	3hp 18GS-30 Goulds Pump System w/ Franklin Control Box (21 to 23gpm @ predicted head)	3,285.00
1	Sym-Com 233 Pump Saver w/ Enclosure	329.00
280	feet 1-1/4" SCH 120 PVC Drop Pipe w/ Stainless Steel couplings	784.00
300	feet # 10 Double Jacketed Submersible Pump Wire w/ Ground	660.00
1	PC-266 Flexon Challenger Pressure Tank	1,106.00
1	pvc pipe and fittings, stainless steel fittings, check valves, ball valves, pressure switch, gauge, well plate, relief valve, splicing kit, miscellaneous accessories	604.00
1	breaker box, breakers, UF wire, conduit, electrical accessories	252.00
1	Labor to install system	1,800.00
$ \begin{array}{r} 3460 \\ 8820 \\ \hline 12,280 \end{array} $		
Subtotal		\$8,820.00

Mail
 Fax
 Email
 Job Site

Sales Tax (6.75%)	\$0.00
Total	\$8,820.00

ESTIMATE



Prepared For

Palm Valley Lutheran Church
 2500 E Palm Valley Blvd
 Round Rock, Texas 78665
 (512) 550-4022

JNS LANDSCAPES INC.
DBA JNS IRRIGATION & BACKFLOW

322 Lakemont Dr
 Hutto, Tx 78634
 Phone: (512) 876-9621
 Email: Jnslandscapesinc@gmail.com
 Web: JNSLANDSCAPES.COM

Estimate # 1293
 Date 05/26/2025
 Business / Tax LICENSE # LI19956,
 # BP19842

Description	Rate	Quantity	Total
IRRIGATION SYSTEM REPAIRS	\$1,910.00	1	\$1,910.00
Estimate consists of tapping in to customer provided pvc tap in from well water Add 2" double check assembly Run aprox 100' feet of 2" pvc to connect to nearby irrigation mainline There may be a chance that we might have to trench thru the pavement road to access nearby mainline We backfill but do not repair road 60 psi required for system to operate properly			
2" Backflow Preventer	\$1,550.00	1	\$1,550.00
Installation Material			
Subtotal			\$3,460.00
Total			\$3,460.00

PERSONNEL TEAM

Staff Appreciation Meeting

March 5, 2026

Attendance: Deborah Franke, Jen Kendrick, Susan Ames

Monthly staff gratitude gifts

- Deborah shared a three-part staff appreciation approach: monthly devotional-style gifts, birthday cards, and service-anniversary recognition.
- The monthly gifts are mid-month “joyful surprises” with a devotional theme and a handwritten note; examples mentioned included January (“everybody needs a little Jesus”), February (health and wellness devotional), Advent (covers two months), April/Easter, and March (St. Patrick meditation with an Irish blessing card).
- Deborah emphasized equity and inclusion: the gifts are intended for everyone on staff (currently 21 paid staff; expected to be 23 after hiring an associate pastor and a cemetery role) so no one is missed.
- Deborah is considering a gratitude-practices book for a future month and is waiting to hear from the publisher about bulk pricing.
- Deborah clarified there is no church budget request for these monthly items; they are paid out-of-pocket as part of her personal tithing, with costs tracked to keep the scope manageable.

Birthdays and service anniversaries

- For birthdays, staff receive a personalized birthday card plus a Holy Spirit prayer card.
- For service anniversaries, Deborah proposed a consistent gift set (small bag, thank-you note/card, “Faithful Servant” bookmarks, and pens with a few design options).
- Deborah read a draft service-anniversary message (example for John, belated January 10 anniversary) highlighting gratitude, the staff member’s presence as a gift, and that the Personnel Committee is available for support.
- Deborah asked for feedback on wording and any potential “red flags” before distributing the service-anniversary cards.

Coordination with council/staff appreciation efforts

- Susan described recent staff appreciation efforts: collecting funds and coordinating with Jen on how to use them.
- Monthly meals concept did not gain traction; instead, meals have been provided occasionally (e.g., Cindy and Susan provided chicken tortilla soup recently; taco salad proposed for summer; Schlotzsky’s was done during staff appreciation week).
- Staff appreciation week timing varies year to year based on when most staff are in-office; it has typically been fall (September/October-ish), but has shifted when needed.
- The group intentionally reduced “food every day” during appreciation week to avoid excess; they mixed in non-food appreciation (e.g., notes/prayers of thanksgiving for each person).
- A targeted Friday lunch was used to better include admin staff who are working Fridays (while many ministry staff take Fridays off).

Communication ideas (Echoes, email, and congregation awareness)

- The group discussed building momentum through simple, “free” recognition (emails, kind words, Echoes/Echoes Light shout-outs).
- Idea: a first-of-the-month message to congregation/groups listing upcoming staff birthdays and service anniversaries, framed as prayer prompts (e.g., “please include them in your prayers”).
- Clarification: “anniversaries” discussed here are staff service anniversaries (not personal/relationship anniversaries).

- Concern raised about public Sunday recognition/receptions: not all staff attend church services, so asking staff to come on Sundays could be awkward.
- Susan suggested using photos in Echoes to help put faces to names
- Deborah offered to handle communications (they have access to Echoes/Echoes Light) but noted limited bandwidth to lead meal coordination.

Budget/process context and visibility

- Staff appreciation is now intended to be covered by the existing staff appreciation budget line item (rather than staff contributing via payroll deduction).
- Past budget pressure was noted due to multiple new hires and related welcome/interview lunches drawing from staff appreciation funds.

Suggested Action Items

- Deborah to proceed with March mid-month staff distribution plan (around Sunday the 15th) for the St. Patrick-themed appreciation item.
- Deborah to share the draft service-anniversary card language with the group (and/or Personnel Committee) and confirm there are no concerns before distributing.
- Deborah to follow up with the gratitude book publisher on bulk pricing to ensure affordability for all staff.
- Team to consider adding a recurring Echoes/Echoes Light or monthly email feature listing staff birthdays/service anniversaries with prayer prompts (and optionally photos) to increase congregation awareness.
- Jen to decide whether to keep staff appreciation giving active/visible in the app as an option for congregational donations.
- Council to consider a simple milestone practice (e.g., passing a card around the council table for work anniversaries) as an additional low-lift recognition method.
- Group to continue planning for Marvin's 30-year milestone recognition during the summer.

PROPERTY TEAM

The Property team met on Monday, February 2nd. One time-sensitive item identified that needs to be addressed is to replace the roof of the Parsonage. The roof is of unknown age, estimated at least 25 years old, and is showing significant wear and tear.

In order to protect the investment in the Parsonage property, and that of our tenants, the Property team reviewed two bids (included) and makes the recommendation to Council to approve **\$17,750.00** for the roof replacement. The funding source is the Capital Reserve fund.



NextGen Roofing and Construction
 6881 FM-2325,
 Wimberley, TX 78676
 Phone: (512) 430-7141

Company Representative
 Ashley Hale
 Phone: (830) 330-1123
 Ashley@eliteroofingtx.com

John Reed
 2500 East Palm Valley Boulevard
 Round Rock, TX 78665
 (512) 468-5097

Roofing Section

- Remove existing shingles down to deck.
- Remail any loose wood. If bad or rotten wood is discovered, it will be replaced at a price of \$75 per sheet.
- Install 3' of ice and water shield at all penetrations and valleys.
- Install Synthetic underlayment to keep roof dry.
- Install GAF ProStart Starter Shingles along all gutter lines and rake edges.
- Install GAF Timberline Natural Shadow Shingles per specifications using 1 1/4" roofing nails.
- Install GAF Seal-A-Ridge Hip & Ridge Shingles.
- Install new ridge vent.
- Install new pipe and chimney flashings.
- Clean up all job related debris
- 3 year Workmanship Warranty

- Our Crews are licensed and insured.
- Crews will maintain safety requirement at all times during the construction process

Additional Charges if incurred:
 \$15 per square for additional felt layer
 \$25 per square for additional layer of shingles
 \$75 Per sheet of OSB installed
 \$85 Per sheet of Radiant Barrier OSB installed
 \$115 Per Sheet of 5/8" Plywood installed

Materials

- GAF ProStart Starter Shingle Strip (120')
- Continental SecureGrip 30 Synthetic Underlayment (10 sq)
- GAF StormGuard Ice & Water Shield (2 SQ)
- GAF Timberline Natural Shadow AR (Metric) (3 BD/SQ) - Charcoal
- GAF Z-Ridge (33')
- Lomanco 750 Aluminum Slant Back Static Roof Vent
- Galvanized Steel Base Pipe Flashing - 1 1/2"-3" - Mill Finish
- ABC Plastic Cap Nails - 1" (2000 Cnt)
- Roofing Coil Nails - 1 1/4" - Distributor Specific (7200 Cnt)
- Geocel 2300 Construction TriPolymer Sealant (10.3 oz)
- Generic Touch Up Spray Paint (12 oz)
- ACM Galvanized Steel Drip Edge - 2"x2" (10')
- GAF Cobra Rigid Vent 3 Exhaust Ridge Vent w/ Nails - 9" (4')

Labor

- Tear off and Install Laminated Shingles

\$17,737.10

TOTAL

\$17,737.10



ROOFING CONTRACT & ESTIMATE

Estimate Number: 26004

Date: 01/30/2026

Customer Information

Name: John Reed
Address: 2500 E Palm Valley Blvd, Round Rock, TX 78665
Email: compliant.relo@gmail.com
Phone: (512) 468-5097

Property Information

Address: 2500 E Palm Valley Blvd, Round Rock, TX 78665
Material: 30 Year Architectural Shingles
Roof Size: 51.66 Squares

Description of Work

Tear Off Existing Roof & Accessories	✓	Replace Drip Edge	✓
Install 30 Year Architectural Shingles	✓	Replace Roofing Nails	✓
Install Synthetic Underlayment	✓	Replace Damaged Chimney Flashing	✓
Replace Starter Shingles	✓	Replace Damaged Wall Flashings	✓
Replace Hip & Ridge Cap Shingles	✓	Paint All Accessories	✓
Install Valley Metal/Ice & Water Shield	✓	Detach & Reinstall or Discard Satellite Dish	✓
Replace ¹ Sheet(s) of Decking	✓	Protect Plants & Shrubbery	✓
Replace Pipe Flashing(s)	✓	Thoroughly Clean Property When Finished	✓
Replace Roof Ventilation	✓	Haul Off All Job Related Debris	✓

New Shingle Brand & Color Brand: GAF Color: TBD

Total Estimate Amount

\$17,250.00

Line Items Outside of Scope

Extra Layers of Felt _____
 Boards of Rotten Decking _____
 Other: _____

Payment Terms w Insurance

First Check Upon Completion Second Check
 When Received By Insurance Provider
 Check 1 Amount: N/A
 Check 2 Amount: N/A

Payment Terms w/o Insurance

Entire Agreed Upon Amount Issued to
 TurnKey Roofing Upon Completion
 Check Amount: \$17,250.00

Insurance Supplement Agreement

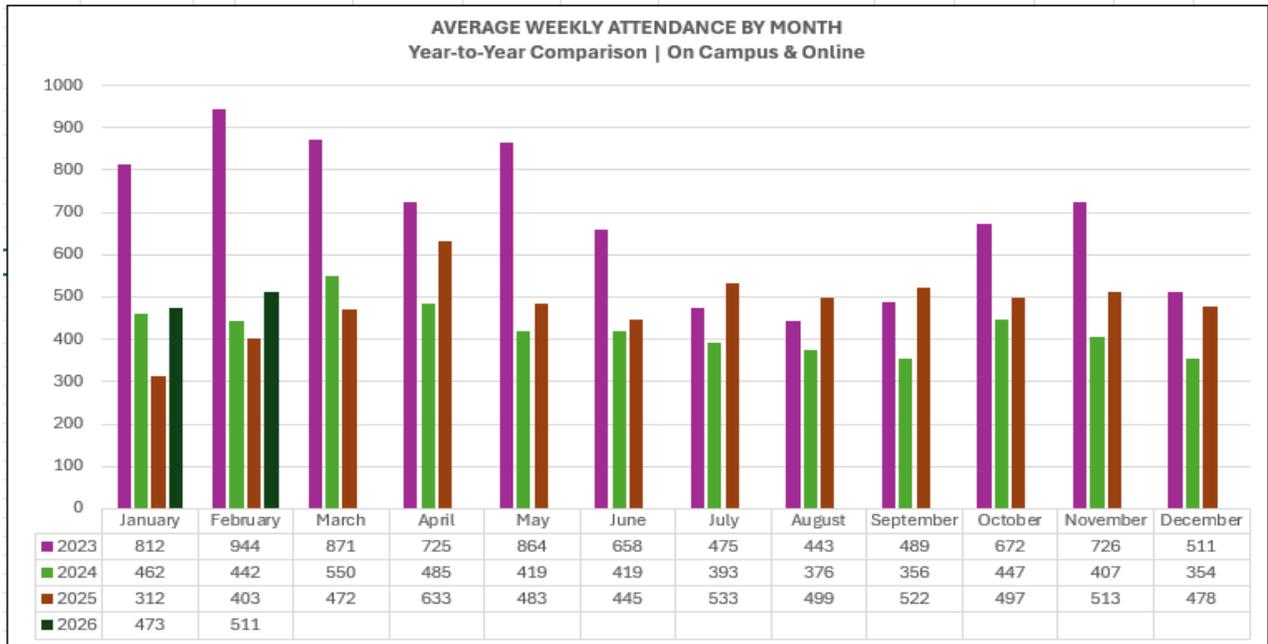
The homeowner authorizes TurnKey Roofing to handle any necessary supplements, and all approved supplemental insurance funds shall be paid to TurnKey Roofing.

OUR PROMISE

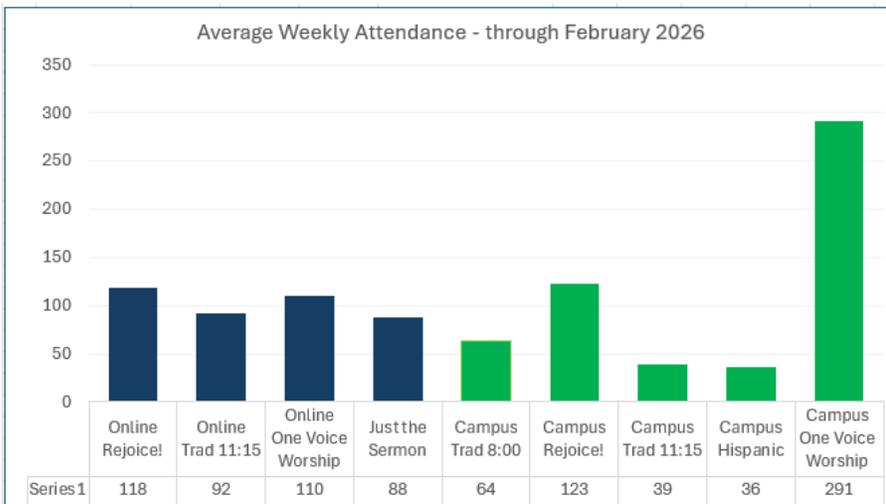
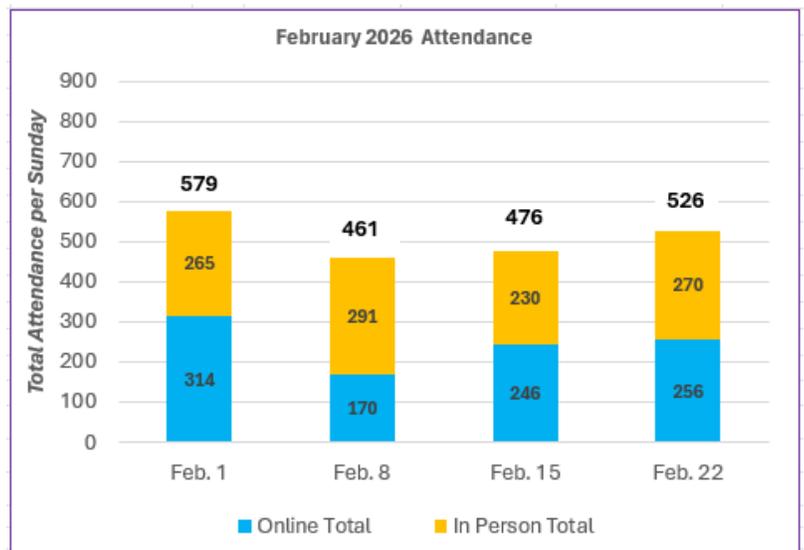
We treat every roof as if it were our own, communicate honestly, and don't ask for final payment until the job is complete and you're happy with the work.

Homeowner Signature (Owner or Authorized Representative): _____
 Turnkey Roofing Representative Signature: Todd Whitte

EXECUTIVE ADMINISTRATOR

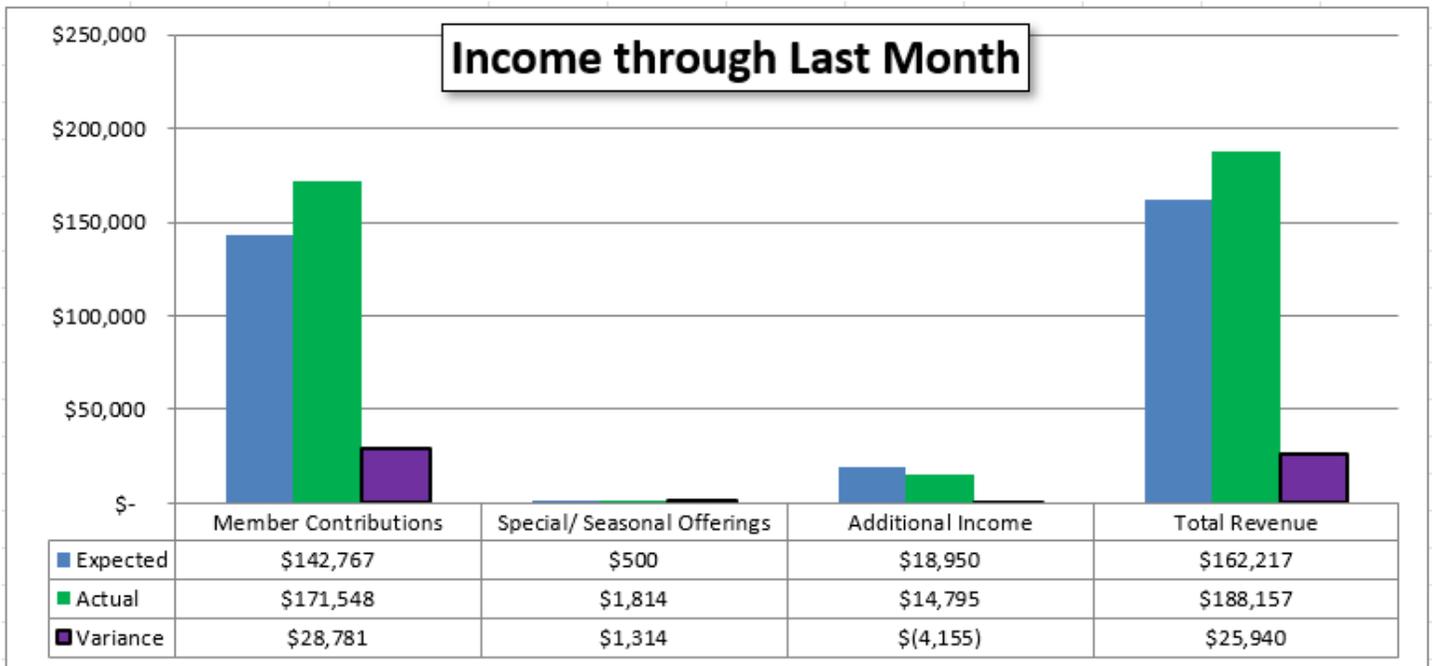


Our Average Attendance for January and February was higher than in 2023 and 2024.

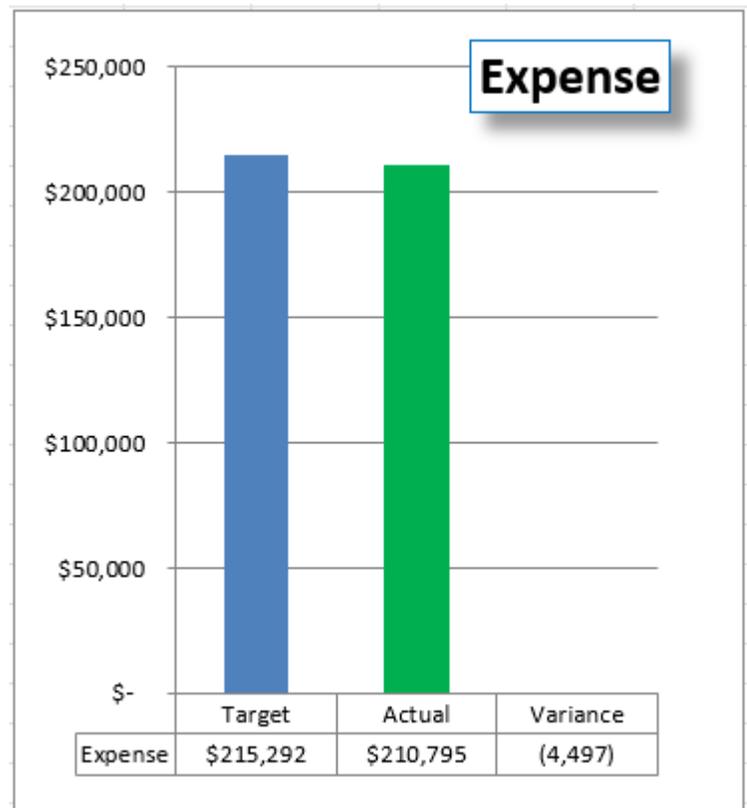


Worshipping together – 291 people attended the One Voice worship service on February 8th!

Financial Reports for January - February 2026



Generous giving – our Member gifts through February were OVER Budget!



Careful stewardship – our Expenses through February were UNDER budget!



Financial Highlights

Church Operating Account – “Church Budget”:

- Member Giving for the first two months of 2026 came in ABOVE budget – thank you for your generosity!
- Expenses through February were UNDER budget.
- Personnel budget lines and their contra accounts will be caught up in March/April with the allocation of staff raises (from the ERC fund).
- Allocations from special funds to offset Children and Youth will be tried up in March.
- Expenses are over Income as of February due to the pending request of funds from the surplus/unrestricted fund as budgeted. The timeline for this process is a request before Council.

Preschool Operating Fund

- The Preschool fund account balance went negative for the first time in late February.
- This was expected at some point in the school year after the changes made in 2025.
- Funds were moved from the Preschool Savings account to cover expenses.
- Preschool accounts will continue to be closely monitored to evaluate if additional financial support is needed.

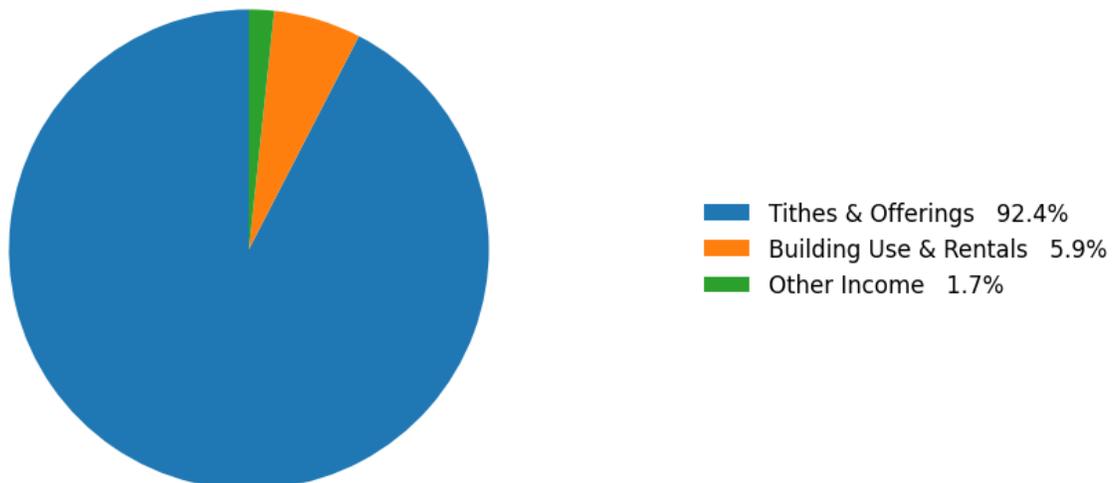
Surplus/Unrestricted Investments Fund

- The Mayfield/Forsman Trust gift was received in February, ahead of schedule.
- The gift was originally estimated at about \$650,000.00
- The amount received was \$987,913.00 – what a blessing!
- The first request to withdraw funds for the Campus Upgrade projects is in progress, and will be reflected in March’s financial reports.

Endowment Money Market Account (at Regions)

- PVLC has received recent gifts for the Endowment fund, which will be sent to the Endowment account (at Davidson) in March.
- Additionally, a transaction review is in progress for 2023 and 2024 allocations, to determine if the balance of funds in the Money Market account needs to be sent back to Davidson or to the Church Operating account.

Sources of Income Received through February 2026



**Palm Valley Lutheran Church of Round Rock Texas
Budget v Actual FY26**

	Jan - Feb 2026			2026 Annual Budget
	Actual	Budget	Variance	
Income				
40000 Revenue				
41000 Church Revenue				
41100 Tithes & Offerings				
41110 Regular Offering				
41111 Member Contributions	\$169,234.49	\$140,000.00	\$29,234.49	\$900,000.00
41112 Loose Plate Offering	\$2,054.00	\$2,500.00	(\$446.00)	\$15,000.00
41113 Hospitality (donuts, coffee, etc)	\$259.75	\$266.66	(\$6.91)	\$1,600.00
Total 41110 Regular Offering	\$171,548.24	\$142,766.66	\$28,781.58	\$916,600.00
41120 Holiday Offering				
41121 Lenten Offering	\$1,814.00	\$500.00	\$1,314.00	\$1,500.00
41122 Easter Offering		\$0.00	\$0.00	\$5,000.00
41123 Thanksgiving Offering		\$0.00	\$0.00	\$1,200.00
41124 Christmas Offering		\$0.00	\$0.00	\$10,000.00
Total 41120 Holiday Offering	\$1,814.00	\$500.00	\$1,314.00	\$17,700.00
Total 41100 Tithes & Offerings	\$173,362.24	\$143,266.66	\$30,095.58	\$934,300.00
41200 Additional Revenue				
41210 Rental / Building Use Accounts				
41211 PV Preschool Rent	\$5,842.44	\$6,000.00	(\$157.56)	\$30,000.00
41212 Senior Access Rental	\$200.00	\$1,900.00	(\$1,700.00)	\$11,400.00
41213 SVC Center Rental	\$928.59	\$716.66	\$211.93	\$4,300.00
41214 Rental / Building Use	\$2,090.00	\$5,000.00	(\$2,910.00)	\$30,000.00
41215 Church of Antioch Building Use	\$2,000.00	\$3,000.00	(\$1,000.00)	\$18,000.00
Total 41210 Rental / Building Use Accounts	\$11,061.03	\$16,616.66	(\$5,555.63)	\$93,700.00
41240 Events			\$0.00	
41241 Lenten Suppers	\$259.00	\$0.00	\$259.00	\$800.00
Total 41240 Events	\$259.00	\$0.00	\$259.00	\$800.00
41260 Altar Flower	\$320.00	\$666.66	(\$346.66)	\$4,000.00
41270 Other Income	\$3,155.33	\$1,666.66	\$1,488.67	\$10,000.00
41298 Net Investment Gain - Unrestricted Fund 2025		\$0.00	\$0.00	\$126,060.00
41299 Additional Income - Unrestricted Fund		\$0.00	\$0.00	\$65,900.87
Total 41200 Additional Revenue	\$14,795.36	\$18,949.98	(\$4,154.62)	\$300,460.87
Total 41000 Church Revenue	\$188,157.60	\$162,216.64	\$25,940.96	\$1,234,760.87
Total 40000 Revenue	\$188,157.60	\$162,216.64	\$25,940.96	\$1,234,760.87
Total Income	\$188,157.60	\$162,216.64	\$25,940.96	\$1,234,760.87
Gross Profit	\$188,157.60	\$162,216.64	\$25,940.96	\$1,234,760.87
Expenses				
50000 Expenses				
51000 Children				
51120 Special Events	\$379.78	\$416.66	(\$36.88)	\$2,500.00
51130 Sunday School	\$212.80	\$300.00	(\$87.20)	\$1,800.00
51140 Children's Church		\$200.00	(\$200.00)	\$1,200.00
51150 Worship		\$0.00	\$0.00	\$0.00
51160 Vacation Bible School	\$217.54	\$300.00	(\$82.46)	\$6,000.00
51170 Day Camp		\$0.00	\$0.00	\$1,250.00
51180 First Communion		\$33.34	(\$33.34)	\$200.00
51220 Nursery Care Supplies		\$20.84	(\$20.84)	\$125.00
51300 Curriculum for Parents & Children		\$83.34	(\$83.34)	\$500.00
51310 Classroom Decor/Physical Supplies		\$83.34	(\$83.34)	\$500.00
51320 Volunteer Appreciation Gifts		\$33.34	(\$33.34)	\$200.00
51999 Contra Children - Reallocate Special Funds		(\$1,170.86)	\$1,170.86	(\$14,275.00)
Total 51000 Children	\$810.12	\$300.00	\$510.12	\$0.00

	Jan - Feb 2026			2026 Annual Budget
	Actual	Budget	Variance	
52000 Youth				
52100 Jr. High				
52110 Jr Retreat / Gathering		\$200.00	(\$200.00)	\$1,200.00
52120 Jr Mission Trip		\$0.00	\$0.00	\$0.00
Total 52100 Jr. High	\$0.00	\$200.00	(\$200.00)	\$1,200.00
52200 Sr. High				
52210 Sr High Retreat / Gathering		\$0.00	\$0.00	\$0.00
52220 Sr High Mission Trip		\$0.00	\$0.00	\$4,000.00
Total 52200 Sr. High	\$0.00	\$0.00	\$0.00	\$4,000.00
52300 Confirmation	\$288.86	\$400.00	(\$111.14)	\$800.00
52310 Youth Van Rental		\$416.66	(\$416.66)	\$2,500.00
52400 Youth Activities / Projects	\$238.18	\$583.34	(\$345.16)	\$3,500.00
52500 Youth Education / Training	\$114.25	\$250.00	(\$135.75)	\$1,500.00
52600 Youth Sunday School		\$90.00	(\$90.00)	\$540.00
52610 Youth Mission and Outreach Local Programs		\$91.66	(\$91.66)	\$550.00
52620 Youth Volunteer Gifts		\$16.66	(\$16.66)	\$100.00
52630 Youth Group Supplies		\$50.00	(\$50.00)	\$300.00
52999 Contra Youth - Reallocate Special Funds		(\$1,831.66)	\$1,831.66	(\$14,990.00)
Total 52000 Youth	\$641.29	\$266.66	\$374.63	\$0.00
53000 Worship / Music				
53100 Worship				
53120 Communion Supplies	\$302.08	\$283.34	\$18.74	\$1,700.00
53130 Supplies / Kitchen items / hospitality	\$2,949.86	\$2,500.00	\$449.86	\$5,000.00
53140 Altar Flower	\$400.00	\$666.66	(\$266.66)	\$4,000.00
Total 53100 Worship	\$3,651.94	\$3,450.00	\$201.94	\$10,700.00
53200 Music				
53210 Adult Choir	\$79.49	\$116.66	(\$37.17)	\$700.00
53220 Handbell Choir		\$32.50	(\$32.50)	\$195.00
53230 Rejoice Team		\$200.00	(\$200.00)	\$1,200.00
53240 Instruments		\$116.66	(\$116.66)	\$700.00
53250 Robe Cleaning & Repair		\$25.00	(\$25.00)	\$150.00
Total 53200 Music	\$79.49	\$490.82	(\$411.33)	\$2,945.00
Total 53000 Worship / Music	\$3,731.43	\$3,940.82	(\$209.39)	\$13,645.00
54000 Education / Outreach / Evangelism				
54100 Christian Education				
54110 Curriculum		\$416.66	(\$416.66)	\$2,500.00
54120 Adult Education		\$100.00	(\$100.00)	\$600.00
Total 54100 Christian Education	\$0.00	\$516.66	(\$516.66)	\$3,100.00
54200 Evangelism				
54210 Supplies		\$58.34	(\$58.34)	\$350.00
54220 New Member / Projects		\$83.34	(\$83.34)	\$500.00
54230 Sundaes on Mondays		\$0.00	\$0.00	\$500.00
54240 Fall Fair		\$0.00	\$0.00	\$2,000.00
54250 1st Time Guest		\$83.34	(\$83.34)	\$500.00
Total 54200 Evangelism	\$0.00	\$225.02	(\$225.02)	\$3,850.00
54300 Spiritual Life				
54310 Home Devotional	\$173.60	\$175.00	(\$1.40)	\$800.00
54320 Misc. Expense	\$80.26	\$0.00	\$80.26	\$0.00
54330 Small Groups		\$133.34	(\$133.34)	\$800.00
54340 Events		\$0.00	\$0.00	\$0.00
Total 54300 Spiritual Life	\$253.86	\$308.34	(\$54.48)	\$1,600.00
54400 Generosity Team				
54410 General		\$0.00	\$0.00	\$250.00
Total 54400 Generosity Team	\$0.00	\$0.00	\$0.00	\$250.00
Total 54000 Education / Outreach / Evangelism	\$253.86	\$1,050.02	(\$796.16)	\$8,800.00

	Jan - Feb 2026			2026 Annual
	Actual	Budget	Variance	Budget
55000 Missions / Care				
55200 Hispanic Ministry				
55210 Worship		\$0.00	\$0.00	\$0.00
55220 Christian Education		\$250.00	(\$250.00)	\$1,500.00
55230 Projects	\$651.32	\$400.00	\$251.32	\$1,000.00
Total 55200 Hispanic Ministry	\$651.32	\$650.00	\$1.32	\$2,500.00
55400 Stephen Ministries				
55410 Supplies		\$66.66	(\$66.66)	\$400.00
Total 55400 Stephen Ministries	\$0.00	\$66.66	(\$66.66)	\$400.00
Total 55000 Missions / Care	\$651.32	\$716.66	(\$65.34)	\$2,900.00
56000 Ministry / Program Personnel			\$0.00	
56100 Ministers / Program Staff	\$73,084.11	\$83,842.70	(\$10,758.59)	\$578,056.21
56105 Contra Ministry / Personnel Staff	\$0.00	(\$6,922.80)	\$6,922.80	(\$116,536.75)
Total 56100 Ministers / Program Staff	\$73,084.11	\$76,919.90	(\$3,835.79)	\$461,519.46
Total 56000 Ministry / Program Personnel	\$73,084.11	\$76,919.90	(\$3,835.79)	\$461,519.46
57000 Operations				
57100 Administration				
57110 Bank Fees	\$1,582.81	\$1,333.34	\$249.47	\$8,000.00
57120 Office Expenses	\$670.47	\$1,600.00	(\$929.53)	\$9,600.00
57130 Accounting Services	\$6,000.00	\$6,000.00	\$0.00	\$39,500.00
57140 Janitorial				
57141 Janitorial Services	\$12,360.00	\$13,103.34	(\$743.34)	\$78,620.00
57142 Janitorial Supplies	\$281.84	\$1,000.00	(\$718.16)	\$6,000.00
Total 57140 Janitorial	\$12,641.84	\$14,103.34	(\$1,461.50)	\$84,620.00
57150 Synod Convention	\$275.00	\$383.34	(\$108.34)	\$2,300.00
57160 Worker's Comp Insurance	\$833.16	\$1,000.00	(\$166.84)	\$6,000.00
57170 Dues and Subscriptions	\$2,196.30	\$2,240.00	(\$43.70)	\$8,000.00
57180 Background Checks	\$25.35	\$91.66	(\$66.31)	\$550.00
57190 Council Support	\$246.04	\$83.34	\$162.70	\$500.00
57191 Staff Development	\$69.00	\$583.34	(\$514.34)	\$3,500.00
57195 Operations Mileage Reimbursement		\$666.66	(\$666.66)	\$4,000.00
57199 Other Expenses	\$724.52	\$666.66	\$57.86	\$4,000.00
Total 57100 Administration	\$25,264.49	\$28,751.68	(\$3,487.19)	\$170,570.00
57200 Information Technology				
57210 General IT	\$2,628.50	\$4,225.34	(\$1,596.84)	\$25,352.00
57219 Contra IT - Reallocation of Funds to Ops		(\$2,392.00)	\$2,392.00	(\$14,352.00)
57220 Copier Expense	\$1,663.62	\$3,166.66	(\$1,503.04)	\$19,000.00
Total 57200 Information Technology	\$4,292.12	\$5,000.00	(\$707.88)	\$30,000.00
57400 Property				
57410 Maintenance Repair / Equipment	\$2,887.38	\$5,833.34	(\$2,945.96)	\$35,000.00
57411 Contra Regular (budgeted) Maintenance		(\$4,833.34)	\$4,833.34	(\$29,000.00)
57412 Major Maintenance				
57413 Contra Major Maintenance				
Total 57410 Maintenance Repair / Equipment	\$2,887.38	\$1,000.00	\$1,887.38	\$6,000.00
57415 Building Service Contracts		\$1,670.00	(\$1,670.00)	\$10,020.00
57420 Fuel	\$265.14	\$700.00	(\$434.86)	\$4,200.00
57430 Property Insurance	\$9,694.18	\$11,333.34	(\$1,639.16)	\$68,000.00
57435 Contra Property Insurance		\$0.00	\$0.00	(\$9,400.00)
Total 57430 Property Insurance	\$9,694.18	\$11,333.34	(\$1,639.16)	\$58,600.00
57440 Utilities				
57441 Gas	\$1,738.59	\$1,725.00	\$13.59	\$5,200.00
57442 Electricity	\$6,028.32	\$10,100.00	(\$4,071.68)	\$48,000.00
57443 Water / Sewer	\$3,077.11	\$2,700.00	\$377.11	\$14,000.00
57499 Contra Utilities		\$0.00	\$0.00	(\$5,500.00)
Total 57440 Utilities	\$10,844.02	\$14,525.00	(\$3,680.98)	\$61,700.00
57450 Trash	\$368.20	\$500.00	(\$131.80)	\$3,000.00
Total 57400 Property	\$24,058.92	\$29,728.34	(\$5,669.42)	\$143,520.00

	Jan - Feb 2026			2026 Annual Budget
	Actual	Budget	Variance	
57500 Operations Personnel				
57510 Operations Salary and Benefits	\$84,271.03	\$82,916.46	\$1,354.57	\$497,498.75
57511 Contra Ops Salary and Benefits	(\$8,830.87)	(\$16,248.72)	\$7,417.85	(\$97,492.34)
57513 Sunday Bus Drivers	\$794.47		\$794.47	
Total 57510 Operations Salary and Benefits	\$76,234.63	\$66,667.74	\$9,566.89	\$400,006.41
57515 Payroll Fees	\$1,152.47	\$650.00	\$502.47	\$1,800.00
57525 Nursery School Contractors/1099	\$620.00	\$700.00	(\$80.00)	\$2,000.00
Total 57500 Operations Personnel	\$78,007.10	\$68,017.74	\$9,989.36	\$403,806.41
Total 57000 Operations	\$131,622.63	\$131,497.76	\$124.87	\$747,896.41
Total 50000 Expenses	\$210,794.76	\$214,691.82	(\$3,897.06)	\$1,234,760.87
Total Expenses	\$210,794.76	\$214,691.82	(\$3,897.06)	\$1,234,760.87
Net Operating Income	(\$22,637.16)	(\$52,475.18)	\$29,838.02	\$0.00
Net Income	(\$22,637.16)	(\$52,475.18)	\$29,838.02	\$0.00

Davidson Capital Management Funds– Current Value as of March 4, 2026

Endowment	\$5,319,343.22
<i>Restricted – funds are allocated annually by the Endowment Committee</i>	
Total available for withdrawal as of December 31, 2025	\$1,339,957.09
Church Capital Expansion	\$155,439.16
<i>Restricted use – Future Building Needs</i>	
Church Capital Reserve (Maintenance)	\$31,581.82
<i>Restricted use – Major repairs and renovations</i>	
Cemetery	\$1,048,566.18
<i>Restricted use – day-to-day upkeep of Cemetery, and major improvements</i>	
Isedor & Pauline Wallin (Maintenance Fund)	\$389,052.86
<i>Restricted use – income only; Major repairs and renovations</i>	
Total available for withdrawal as of December 31, 2025	\$4,697.90
Iver Wallin (Capital Expansion/Improvement)	\$183,004.35
<i>Restricted use – income only: Future building needs</i>	
Total available for withdrawal as of December 31, 2025	\$289.92
Telander Fund	\$138,000.41
<i>Benevolence funds and to meet special needs of congregation not covered by Budget</i>	
Trinity Place Senior Care	\$644,525.43
<i>Restricted use – for programs and ministries to support Seniors (income only)</i>	
Total available for withdrawal as of December 31, 2025	\$87,366.28
Designated funds for PTO liability	\$109,248.27
Surplus Fund - Unrestricted Investments	\$2,196,784.41
TOTAL CURRENT VALUE	\$10,215,546.11
Total Net Investment Gains Year to Date	\$427,737.00

Note: Davidson provides a detailed quarterly report on all funds. Download available upon request, please let Jen know if you would like to review.

Balance Sheet - Jan to last month FY26
Palm Valley Lutheran Church of Round Rock Texas

As of February 28, 2026

Distribution account	Total
Assets	
Current Assets	
Bank Accounts	
Cemetery Savings (6454)	80,797.72
Church MM 2023 (5153) - 1	130,486.97
Church Operating (1246) - 1	189,581.51
Endowment MM 2023 (5161) - 1	144,035.57
Old Project Checking (0995)	253.73
Total for Bank Accounts	\$545,155.50
Total for Current Assets	\$545,155.50
Total for Assets	\$545,155.50
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	680.86
Total for Accounts Payable	\$680.86
Credit Cards	
Bill / Divvy Credit Card	625.40
Total for Credit Cards	\$625.40
Total for Current Liabilities	\$1,306.26
Total for Liabilities	\$1,306.26
Equity	
30000 Funds	
31000 Designated Funds	
31100 Memorial Funds	
31101 Memorial Gifts	21,166.41
31103 Adult Choir Memorial Fund	1,233.33
Total for 31100 Memorial Funds	\$22,399.74
31200 Youth Ministry	
31210 Youth Fundraising	405.00
31211 Youth National Gathering	2,075.00
31211 Youth National Gathering	4,974.48
31212 Youth Scholarship	3,596.89
31213 Youth Summer Camp	-2,902.56
Total for 31200 Youth Ministry	\$8,148.81
31300 Capital Improvement Funds	
31303 Steeple Repair Fund	515.00
Total for 31300 Capital Improvement Funds	\$515.00

Distribution account	Total
31400 General Designated Funds	
31401 Columbarium Niche Engraving	8,246.72
31402 Fall Fair Fund	15,534.69
31403 Grounds Beautification Fund	5,724.96
31404 Hispanic Service	120.00
31405 Office Equipment - Pecht Zinke Fund	36,834.25
31406 Computer Equipment Fund	33,999.84
31408 El Salvador Love	5,085.07
31409 World Hunger	1,000.00
31410 Round Rock Serving Center	1,175.00
31411 July 4th Parade	473.57
31414 Water for Africa	1,913.40
31415 Day Camp	471.54
31416 God's Work. Our Hands.	2,794.27
31417 Community Care	9,659.76
31418 Women's Retreat Fund	1,177.80
31419 VOLT Ladies Fund (Val, Oktob, Ladies Tea)	1,007.90
31420 Grief Sharing Group Fund	-268.56
31421 Counseling Construction	9,864.00
31423 Disaster Relief Fund	4,165.70
31425 Young Adult Ministry Fund	5,000.00
Total for 31400 General Designated Funds	\$143,979.91
31500 WELCA Funds	-35.00
31501 WELCA Bereavement Fund	1,166.77
31502 WELCA Rebecca Quilters	2,299.78
31503 WELCA Convention	174.44
31504 WELCA Kitchen Fund	140.67
31505 WELCA Lutheran World Relief	4,199.38
31506 WELCA General Fund	1,153.54
Total for 31500 WELCA Funds	\$9,099.58
31600 Cemetery Fund	108,570.47
31700 ERC	130,858.93
31701 Trust Gifts	101,348.27
Total for 31000 Designated Funds	\$524,920.71
Total for 30000 Funds	\$524,920.71
Retained Earnings	-7,255.84
Net Income	26,184.37
Total for Equity	\$543,849.24
Total for Liabilities and Equity	\$545,155.50

Palm Valley Lutheran Preschool
Budget v Actual Fiscal year to last Month

August 2025 - February 2026

	Actual	Budget	Variance
Income			
40000 Revenue			
40100 Tuition & Fees			
41105 Registration	1,040.00		1,040.00
41110 Tuition	50,190.00	41,400.00	8,790.00
Total 40100 Tuition & Fees	51,230.00	41,400.00	9,830.00
41150 Other Income			
41115 Scholarship Fund	3,800.00		3,800.00
41155 Interest	461.23		461.23
41190 ERC Funds	29,893.73		29,893.73
Total 41150 Other Income	34,154.96	0.00	34,154.96
Total 40000 Revenue	85,384.96	41,400.00	43,984.96
Total Income	85,384.96	41,400.00	43,984.96
Expenses			
50000 Expenses			
52000 Administration			
52700 Bank Charges/Fees	72.00	0.00	72.00
52705 Postage		0.00	0.00
52710 Office Supplies	78.00		78.00
52725 Dues - Subscriptions	556.68		556.68
52730 Advertising	751.51	400.00	351.51
52740 Workers Comp Insurance		0.00	0.00
52750 Licensing Fees	351.09	0.00	351.09
Total 52000 Administration	1,809.28	400.00	1,409.28
52005 Operations			0.00
52811 Copier Lease Pmt	532.00	532.00	0.00
52820 Telephone/Internet	731.50	735.00	(3.50)
52821 Building Rent	7,000.00	7,000.00	0.00
52825 Utilities	8,333.29	8,333.29	0.00
52827 Custodial		0.00	0.00
52828 Church Support Staff	3,851.75	3,851.75	0.00
52830 Insurance Property	4,700.00	0.00	4,700.00
52860 School Software & Security	1,045.22	623.00	422.22
Total 52005 Operations	26,193.76	21,075.04	5,118.72
52009 Personnel			0.00
52900 Teacher Salaries/Hourly	26,843.32	37,190.51	(10,347.19)
52905 Teachers- FICA/Med	4,433.50		4,433.50
Total 52900 Teacher Salaries/Hourly	31,276.82	37,190.51	(5,913.69)
52930 Administrative Salaries	35,015.96	37,912.00	(2,896.04)
52935 Administrative FICA/Med	5,801.32		5,801.32
Total 52930 Administrative Salaries	40,817.28	37,912.00	2,905.28
52945 Continue Educ Staff	144.00		144.00
52950 Payroll Fees	1,293.65	637.00	656.65

	Actual	Budget	Variance
52955 Staff Background Checks	4.35	50.00	(45.65)
52960 Contract Substitute Services	6,648.21		6,648.21
Total 52009 Personnel	80,184.31	75,789.51	4,394.80
53000 Program Needs			
53300 18 mos Classroom Supplies	20.43	0.00	20.43
53301 2's Classroom Supplies		0.00	0.00
53305 3's Classroom Supplies		0.00	0.00
53310 4's Classroom Supplies		0.00	0.00
53325 Shared Classroom Supplies	796.47	0.00	796.47
53326 Film Development		0.00	0.00
53327 Snacks	220.79		220.79
53335 Basic Classroom Supplies		0.00	0.00
Total 53000 Program Needs	1,037.69	0.00	1,037.69
54000 Activities Cost			
54130 Small Activity Cost	71.30	0.00	71.30
54205 Staff Food	83.55	0.00	83.55
54215 Staff Incentives	164.85		164.85
Total 54000 Activities Cost	319.70	0.00	319.70
Total 50000 Expenses	109,544.74	97,264.55	12,280.19
Total Expenses	109,544.74	97,264.55	12,280.19
Net Operating Income	(24,159.78)	(55,864.55)	31,704.77
Net Income	(24,159.78)	(55,864.55)	31,704.77

PVPS Balance Sheet FY to last month

Palm Valley Lutheran Preschool

As of February 28, 2026

Distribution account	Total
Assets	
Current Assets	
Bank Accounts	
10011 Operating PS Regions 1415	(3,161.14)
10025 MM Preschool - Regions	135,724.91
Total for Bank Accounts	132,563.77
Total for Current Assets	132,563.77
Total for Assets	132,563.77
Liabilities and Equity	
Liabilities	
Current Liabilities	
Credit Cards	
Divy Credit Card	1,428.66
Total for Credit Cards	1,428.66
Total for Current Liabilities	1,428.66
Total for Liabilities	1,428.66
Equity	
Opening Balance Equity	173,441.98
Retained Earnings	(18,147.09)
Net Income	(24,159.78)
Total for Equity	131,135.11
Total for Liabilities and Equity	132,563.77

Benevolence Assistance Policy – Members, Active Participants, and Staff

Purpose

The purpose of the Benevolence Assistance Policy is to provide a structured and compassionate process for offering financial assistance to individuals experiencing temporary hardship. The church seeks to respond faithfully to urgent needs while ensuring benevolence funds are administered responsibly, consistently, and in compliance with applicable financial and tax regulations. Benevolence assistance is intended to address short-term financial emergencies, not ongoing financial support.

1. Funding Source

Benevolence assistance distributed under this policy is funded through the Telander Fund unless otherwise designated. Disbursements must remain within the available balance of this fund.

2. Eligible Recipients

Church Members or Participants:

Individuals who are members of the congregation or active participants in the church community experiencing financial hardship.

Church Staff:

Staff members experiencing financial hardship may request assistance. Due to IRS regulations, direct payments to staff members must be treated as taxable income and processed through the church's HRIS/payroll system.

3. Types of Assistance

Assistance may include help with urgent essential needs such as:

- Housing or rent
- Utility payments
- Medical expenses
- Essential transportation repairs
- Food assistance
- Emergency travel related to family or medical needs

Assistance is evaluated on a case-by-case basis.

4. Documentation Requirements

All requests must include documentation verifying the financial need such as past due invoices or bills, lease agreements, utility statements, medical bills, repair estimates, eviction notices, or other proof of hardship. Incomplete requests may delay consideration.

5. Approval Authority and Decision Process

All benevolence requests are reviewed by the Senior Pastor and the Executive Administrator.

Requests up to \$5,000:

The Senior Pastor and Executive Administrator may jointly approve benevolence assistance up to \$5,000.

Requests exceeding \$5,000:

Requests exceeding \$5,000 require approval from the Executive Team and/or Church Council depending on the nature and urgency of the request.

Treasurer Notification:

The Treasurer must be informed of all benevolence requests and approvals at the earliest possible convenience to ensure proper financial oversight and accounting.

6. Confidentiality and Privacy

The church will maintain strict confidentiality regarding individuals receiving benevolence assistance. Names and identifying details will be removed or redacted in reports shared with Finance Committee, Executive Team, or Church Council. Only the Senior Pastor, Executive Administrator, Treasurer, and necessary finance staff responsible for payments will have access to identifying information. All documentation will be securely stored.

7. Payment Procedures

Preferred Method: Third-Party Payment

Whenever possible, benevolence funds will be paid directly to a third-party provider such as landlords, utility providers, medical providers, or repair vendors. Documentation must be provided prior to issuing payment.

Direct Payment to Individuals (Non-Staff)

Direct payments to individuals may occur when third-party payment is not feasible and may require additional verification.

Direct Payment to Staff

Direct benevolence payments to staff must be processed through the church HRIS/payroll system and treated as taxable income in accordance with IRS regulations. Direct checks issued outside of payroll may not be used for staff benevolence payments.

8. Recordkeeping

For each request the church will maintain the completed request form, supporting documentation, approval records, and payment documentation. Reports shared with governing bodies will summarize the number of requests, total assistance distributed, and general assistance categories without identifying information.

9. Frequency of Assistance

Benevolence assistance is intended for temporary crisis situations. Repeated requests may require additional review and may be limited based on available funds.

Church Benevolence Assistance Request Form

Applicant Information

Date of Request

Name

Address

City / State / Zip

Phone / Email

Status: Member Regular Attendee Staff

Description of Need

Briefly describe the financial hardship and reason assistance is requested:

Assistance Requested

Type:

Rent/Housing

Repair

Utilities

Food

Medical

Emergency Travel

Transportation

Other: _____

Amount Requested: \$ _____

Payment Information

Payment Method: Pay vendor/third party Payment to individual

Vendor / Payee Name: _____

Vendor Address: _____

Invoice / Account Number (if applicable): _____

Documentation

Attached documentation:

Bill/Invoice

Medical Bill

Lease

Repair Estimate

Utility Statement

Other: _____

Certification

I certify the information provided is accurate and reflects a genuine financial hardship.

Signature: _____ Date: _____

Church Use Only

Date Received

Pastor Review

Executive Administrator Review

Amount Approved

Treasurer Notified (Date)

Payment Method: Third-party payment Direct payment Payroll (staff)

Fund Charged: Telander Fund Other: _____

Staff Support Request – Cemetery Coordination

Rationale – Cemetery Activity

In 2025, PVLC sold 37 new plots/columbarium niches (33/4), produced 21 funeral bulletins, coordinated several burial-only events each month, and worked with multiple families who needed to make changes to their existing plots. That doesn't include inquiries about space/sales/pricing that took up time but did not result in a sale. Each of these tasks represents significant time - talking/meeting with families, coordinating with Pastor, funeral homes, CIC, bereavement team, producing bulletins, etc.

Just comparing sales alone to the prior three combined, 2022-2024 (40/12) - this was a *significant* increase in activity. Three times as many sales compared to 2024 (8/4). And we already have had several sales, research projects, and funerals in 2026.

Clarity – Receptionist Role

The vacancy in the Receptionist position provided clarity for that role, and also brought up an option for the overall church and its operations. Cemetery coordination is not a small task. A solution is a person who could also support the church, giving that person stable work and schedule — some weeks are more cemetery-heavy than others — with primary focus of cemetery operations.

Budgetary Concerns – Shared Support

This position would be shared 50/50 with the Operating budget and the Cemetery fund. The 2026 budget already includes 15 hours per week for the Operating piece, so is not a new/additional expense for the Church Budget.

Staff Health – Taking Care of our People

Cemetery operations have become a growing service to our members, as well as the community. While this is a blessing to serve, it is unsustainable. Not just through the lens of overtime dollars, but in the interest of creating a healthy workload distribution.

The draft of a proposed job description is included below for your consideration and discussion of this and/or other alternative solutions.

Respectfully submitted,

Jen Kendrick
Executive Administrator

Position Title: Cemetery Coordinator

Work Location: Round Rock, Texas

FLSA Status: Non-exempt, Part Time

Schedule: Monday-Friday, weekends as needed (30 hours per week)

Benefits Eligibility: Prorated PTO and Holidays

Staff Supervisor: Executive Administrator

Position Summary: Palm Valley Lutheran Church is a vibrant, multi-generational church located in northeast Round Rock. We have traditional and contemporary services in English and Spanish; Sunday and mid-week programs, small groups, and studies for all ages; and a growing Preschool program.

The Operations team is called to work in the spirit of Acts 6 – we do the “necessary tasks” so that our ministers and volunteers are free to do the work of preaching, teaching, and service. The Cemetery Coordinator provides a vital hybrid role, both as the first impression of PVLC to callers, volunteers, and guests; and also working with people at a difficult stage. The ideal candidate will be enthusiastic, patient, compassionate, and adaptable – this position requires the ability to remain calm and positive in an environment of high traffic, interruptions, and shifting priorities as needed.

Knowledge, Skills, and Abilities:

- Two years of administrative/office experience. Cemetery operations and/or Church office experience are strongly preferred.
- Excellent communication skills and friendly disposition.
- Empathetic nature, able to work kindly and confidentially with families, pastor(s), volunteer teams, and other organizations.
- Ability to work with a degree of independence in completing tasks.
- Highly proficient computer skills and Microsoft office applications.
- Strong proofreading skills.
- Bilingual (English and Spanish) a plus.

Job Responsibilities:

Cemetery Coordination

- Record-keeping, data entry, and plot mapping. PVLC utilizes both software and physical records, current and historical.
- Handle all aspects of cemetery sales, including identifying and showing available plots/niches, providing policies and pricing, processing sales, and providing required forms for purchases.
- Work with families needing to make changes to their purchased spaces.
- Assist the Pastor(s) in funeral preparations, including meeting with families and producing bulletins.

- Manage the scheduling of funeral services and burials, including coordinating the church calendar, working with funeral homes, lining up volunteers as needed to assist with services and receptions.
- Communicate with families about necessary fees required for funeral services (i.e. Pastor, pianist, media, janitorial).
- Submit payment requests for checks or payroll stipends as applicable.
- Coordinate the shipping and engraving of columbarium niche covers.
- Work with the Executive Administrator to resolve issues/concerns, and confirm budgetary requests if applicable.
- Provide data for Cemetery team meetings upon request.
- For deceased members, process database updates in church software – including member status updates, email/text lists, etc.

Office Assistant

- Greet visitors and announce them to the appropriate staff.
- Assist team and volunteers to answer phone calls and direct callers to appropriate staff.
- Provide general information for members and/or visitors when possible.
- Update and Maintain Member Connect profiles, event calendars, and serving schedules.
- Record worship and class attendance weekly.
- Send info to church volunteer for first, second, and third-time guests, and prospects.
- Order supplies as requested/approved.
- Mail handling:
 - Go to Post Office twice a week and as needed to check the PO box and take outgoing mail
 - Check the onsite mailbox daily
 - Open and process mail, distribute to the appropriate staff
 - Receive packages and distribute them to the appropriate staff
 - Prepare and mail items for homebound members.
- Work with Executive Administrator to keep track of staff birthdays and special occasions, and coordinate cards as needed.
- Assist Publications Coordinator when possible with printing and distributing Sunday worship bulletins, Connection Cards, and Echoes Lite.
- Assist with the counting of weekly offerings and special deposits.
- Attend weekly staff meetings.
- All other duties as assigned.