

# First Universalist Church Annual Report 2009-2010



ILLUMINATE THE PAST,  
CELEBRATE THE PRESENT,  
INSPIRE THE FUTURE



**First Universalist Church of Minneapolis**

3400 Dupont Ave. S

[www.firstuniv.org](http://www.firstuniv.org)

612.825.1701

## VISION STATEMENT

*Adopted by the Congregation March 9, 2008*

### **FIRST UNIVERSALIST CHURCH OF MINNEAPOLIS,**

founded in 1859, is a large, dynamic religious community where congregants, including members and friends of all ages, draw spiritual inspiration from the principles of Unitarian Universalism to work together to make our world a better place.

Congregants of all ages joyously learn and work together to understand and live the values and principles of our faith. **Children and youth** are guided and mentored by spiritually grounded adults.

We seek lifelong spiritual growth. Individually, with others, and in community, we participate in religious education, spiritual practice and self-reflection. We join in inspirational **worship** that interweaves the intellect, the spirit and the arts to create an experience of the sacred, including rituals of blessing and celebration.

We warmly welcome newcomers into our community. We are enriched by the diverse identities and perspectives of all who join their personal spiritual journeys with our common vision. We offer **meaningful opportunities for participation** to all and invite deep interpersonal connections. We care for one another in times of need.

Our ministers' and congregants' prophetic voices inspire courageous transformational actions to further **peace, justice, and environmental stewardship**. As leaders and participants, we join in this work and in service to others with other Unitarian Universalists, with those of other faiths, and with secular organizations.

Our distinctive history, our Universalist heritage, and our hopes for the future inspire us to give generously of our time, our talents and our resources to further our common congregational mission and vision.

We are a well-governed congregation whose democratically empowered leaders earn the trust of members by being responsible **stewards of our facility and our human and financial resources** so that we may, together, realize the congregation's vision for today, and for times we shall never see.

## First Universalist Church

3400 Dupont Ave S. Minneapolis, MN 55408

612-825-1701 612-825-8879 (fax)

firstuniversalist@firstuniv.org

www.firstuniv.org

### Board of Trustees

Barry Johnson, President  
 Doug Smalley, Vice President  
 Nancy Gaschott, Treasurer  
 Judy Goebel, Secretary  
 Jill Andersen  
 Tim Balke  
 Dan Berg  
 Kathy Coskran  
 Jane Johnson  
 Candace McClenahan  
 Jim Santelli  
 Kimon Swarts

### Church Staff

Senior Minister: Rev. Justin Schroeder  
 Associate Minister: Rev. Kate Tucker  
 Minister Emeritus: Rev. John Cummins  
 Director of Administration: Patti Frazee  
 Director of Faith in Action: Debra Rodgers  
 Director of Congregational Life: Heidi Mastrud  
 Youth and Young Adult Ministries Coordinator: Katie Heaton  
 Children's Program Coordinator: Marsha Partington  
 Programming Assistant & Childcare Provider: Lily Franz  
 Membership Support: Sandy DiNanni  
 Facility Coordinator and Financial Assistant: Chrystal Teachout  
 Communications Coordinator: Kevin Watson  
 Music Director: John Jensen  
 Choral Director: Janice Hunton  
 Interim Children's Music Coordinator: Maureen Hunt  
 Sound Operator: Ben Burger  
 Alternate Sound Operator: Jose Meras  
 Cleaning Custodian: Mike Higgins  
 Custodian: Chris Azar

## Table of Contents

Agenda for Annual Meeting.....	1
Minutes of 150th Annual Meeting.....	2-6
Recommendations from the Nominating Committee.....	7-11
Report of the President.....	12
Report of the Treasurer.....	13-14

### Worship

Report of the Senior Minister.....	15-16	Report of the Music Director.....	18
Report of the Associate Minister.....	16	Worship Associates .....	18
Minister's Statistical Report.....	17		

### Programming

Report of Lifespan Faith Development & Congregational Life.....	23
Report of Faith in Action.....	20-21
Foundation Report.....	22
Pastoral Care.....	23
Association of Universalist Women.....	29-31

### Facility, Human, and Financial Resources

Report of the Director of Administration.....	25-26	Statement of Condition.....	29
Communications.....	27	Statement of Activities.....	30
SPIFF Committee.....	28	Recommended Budget.....	31-36
Visual Arts.....	28		

# 151st Annual Meeting of the Members

First Universalist Church of Minneapolis

Sunday, June 6, 2010

11:15 a.m. to 12:30 p.m.

## Agenda

Call to Order.....Barry Johnson, President  
Chalice Lighting and Opening Words.....Rev. Justin Schroeder, Senior Minister  
Appointment of Parliamentarian  
Adoption of Agenda  
Authorization of Board of Trustees to Approve Minutes of this Meeting  
Senior Minister's Report.....Rev. Justin Schroeder  
Treasurer's Report.....Nancy Gaschott, Treasurer  
Presentation of Recommended Budget for 2010-2011.....Rev. Justin Schroeder &  
Patti Frazee, Director of Administration  
Vote to Approve Budget  
Report of the Nominating Committee.....Cindy Marsh, Chair  
Election of Trustees, First Universalist Church  
Election of Officers, First Universalist Church  
Election of Directors, First Universalist Foundation  
Election of Members, Nominating Committee  
Election of Delegates to the 2010 General Assembly of the UUA  
President's Report.....Barry Johnson  
Special Recognition.....Barry Johnson, Eric Cooperstein, Cindy Marsh  
Outgoing Church Trustees  
Outgoing Foundation Directors  
Outgoing Nominating Committee Members  
Closing Words.....Rev. Kate Tucker, Associate Minister  
Adjournment

**First Universalist Church of Minneapolis 150<sup>th</sup> Annual Meeting of Members**

**Sunday, June 7 2009, 11:15 AM**

<b>Agenda Item</b>	<b>Presenter</b>	<b>Discussion</b>	<b>Action, if any</b>
Call to Order	Sue Schiess		12:18
Chalice Lighting/Opening Words	Rev. Charlotte Cowtan		
Appointment of Parliamentarian		Carol Johnson	Appointed
Adoption of Agenda	Sue Schiess		Adopted
Authorization of Board of Trustees to Approve Annual Meeting Minutes	Sue Schiess		Approved
Senior Minister's Report	Rev. Charlotte Cowtan	Rev. Cowtan's remarks reiterated her written report in the Annual Report, In addition, she called First Universalist the healthiest, most fun, most resilient congregation she has worked in. When she came to us, we were faced with incredible challenges: the departure of Frank Rivas, and a shortage of financial resources. The congregation kept its community together and found what it needed. The congregation has stayed in touch with who we are and who we are called to be and has made a good choice in the new Senior Minister we have called.	
Treasurer's Report	Jill Andersen	We have a healthy financial outlook even in these trying economic times. Although our portfolio has suffered substantial unrealized losses, unless we need to tap into our reserves, they remain unrealized. Because this congregation gives freely of their time, talent, and treasures we have successfully navigated the economic downturn. Our staff has managed to trim <del>\$75k-75,000</del> from the 2008-2009 budget through prudent management and without having to cut staff or eliminate or reduce any programming. We expect to finish the current fiscal year in the black.	
Presentation of Recommended Budget for 09-10 Vote to Approve Budget	Rev. Charlotte Cowtan	Rev. Cowtan presented a brief PowerPoint summary of the proposed budget for 2009-2010. More detailed review of the budget has been offered in three previous sessions for congregants. The proposed budget is printed in the Annual Report.	Approved
Vote to Ordain Justin Schroeder	Sue Schiess	Because our new Senior Minister has not yet been ordained, he would like to combine his Ordination ceremony with his Installation as Senior Minister in the fall. This requires a vote of the congregation.	Approved

**First Universalist Church of Minneapolis 150<sup>th</sup> Annual Meeting of Members**

Presentation of Proposed Changes to Bylaws Vote to Approve Bylaw Changes	Sue Schiess (substituting for Barry Johnson)	The proposed changes to First Universalist Bylaws were published in the Annual Report. The proposed changes were addressed by topic and the congregation voted for each topic separately. <ol style="list-style-type: none"> <li>1. Lifetime membership can be conferred by the Board.</li> <li>2. Budgeting authority remains with the membership, even though this is not the normal practice under Policy Governance.</li> <li>3. The principal place of worship cannot be sold without a vote of the members.</li> <li>4. Changes to Bylaws related to Trustees, nominations, in Section III.</li> <li>5. Changes to the roles of the officers of the Board.</li> <li>6. Miscellaneous changes in formatting of the document.</li> </ol>	All proposed changes approved.
Report of Nominating Committee	Judy Goebel (standing in for Barry Johnson, Eric Cooperstein, Narissa Bach.	Judy thanked Bill Elwood and Sue Schiess, who are leaving the Board of Trustees for their service as Trustees and as Presidents of the Congregation. Eric thanked Victoria Schannen for her service a Foundation Director. Narissa thanked David Lauth for his service on the Nominating Committee.	
Election of Trustees		Kathy Coskran and Nancy Gaschott were nominated by the Nominating Committee. Jerry Machalek nominated himself from the floor. A vote by secret ballot was taken.	Kathy Coskran and Nancy Gaschott elected.
Election of Officers		The following candidates were recommended by the Nominating Committee: <ul style="list-style-type: none"> <li>• Barry Johnson – President</li> <li>• Doug Smalley – Vice President</li> <li>• Nancy Gaschott – Treasurer</li> <li>• Judy Goebel - Secretary</li> </ul>	All candidates elected
Election of Directors of the Foundation		The following candidates were recommended by the Nominating Committee: <ul style="list-style-type: none"> <li>• Eric Cooperstein – Chair</li> <li>• Gary Melom - Director</li> <li>• Joe Gabrielson - Director</li> </ul>	All candidates elected
Election of Nominating Committee		The following candidates were recommended by the Nominating Committee: <ul style="list-style-type: none"> <li>• Cindy Marsh</li> <li>• Ginny McAninch</li> </ul>	Both candidates elected
Election of Delegates to the 2009 General Assembly of the Unitarian Universalist Association		The slate of delegates is published in the Annual Report. This slate includes church members who are attending General Assembly, and unused delegate spots were assigned to Trustees who will be able to cast absentee ballots.	Approved

**First Universalist Church of Minneapolis 150<sup>th</sup> Annual Meeting of Members**

President's Report	Sue Schiess	Sue noted that few churches celebrate a 150 <sup>th</sup> anniversary. While we are still in the midst of our anniversary year, the events and activities thus far have been outstanding. Sue led the members in extending special thanks to the Sesquicentennial committee and to the Ministerial Search Committee. Additional comments can be found in the President's Report in the Annual Report.	
GO GREEN Raffle Drawing	Patti Frazee with Sue Schiess drawing tickets	Patti extended thanks to volunteers who sold 2400 raffle tickets and made it possible for First Universalist to balance its budget for 2009-10. Below are the winners and their prizes:  2009 Prius: Carol Johnson Honda Scooter: David Kremer Valencia Bicycle: Richard Jaeger Marathon Sports Gift Certificate: Doug Hicks State Fair Gift Basket: Renee Milstein	
Closing Words	Rev. Kate		
Adjourn			12:27

Respectfully Submitted,  
*Judy Goebel*  
 Secretary

## First Universalist Church of Minneapolis 150<sup>th</sup> Annual Meeting of Members

### Members Attending

John Addington	Judith Goebel	Richard Olson
Sofia Ali	Ray Goebel	Nora Page
Betsy Allis	Julie Gottesleben	Betsy Peregoy
Christa Anders	Larry Gottschalk	Elizabeth Permar
Jill Andersen	Pat Gottschalk	Jean Peterson
Cheryl Anderson	Jane Hallas	Steven Protzman
Janice Anderson	Laura Harpestad	Cheryl Reiswig
Lawrence Anderson	Dan Hasty	Paul Reiswig
Catherine Apostle	Kenneth Heidelberg	Gratia Reynolds
Dave Arnold	Ruth Heidelberg	Byron Richard
Ruth Arnold	Douglas Hicks	Paul Riedesel
Nancy Atchison	Patrick Higgins	Mark Ritchie
Thomas Atchison	Carol Hiniker	Allan Roadfeldt
Roberta Avidor	Ann Hobbs	Sylvia Rudolph
David Bach	Howard Hobbs	Jim Santelli
Narissa Strong Bach	Julie Howard	Sherry Saterstrom
Timothy Balke	Janice Hunton	Tom Saterstrom
Pamela Barry	Heidi Jaeger	Victoria Schannen
Umesh Berry	Richard Jaeger	Sue Schiess
Marion Bauer	Welcome Jerde	Theresa Schroer
Robert Benjamin	Carol Johnson	Dale Schwie
Daniel Berg	Corky Johnson	Craig Schultz
Martha Bird	Jane Johnson	Jennifer Schuster
George Boody	Karen Johnson	Gerald Semmler
Nancy Browne	Lyle Johnson	Rebecca Shockley
Chris Burda	Nancy Johnston	Lisa Sinclair
Philip Burke	David Juncker	Doug Smalley
David Caccamo	Gertrude Juncker	Sara Smalley
Elsa Carpenter	Dimitra Karras	Sheri Smith
Joyce Case	Paul Kloth	Mary Sorensen
Karen Chandler	Jeni Klotz	Scott Sponheim
Doug Christiano	Heather Koser	Allen Steinhauer
Kelli Clement	Donna Kurimay	Kathy Steinhauer
Ben Cooper	David Lauth	Jim Sutherland
Laura Cooper	Jeff Lee	Joyce Sutherland
Eric Cooperstein	Betty Lia-Hoagberg	Jeff Sylvestre
Charles Coskran	Harlan Limpert	Deborah Talen
Kathleen Coskran	Kim Lund	Polly Talen
Kathy Coult	Tom MacLeod	Tami Tapani
Carol Lynn Courtney	Cynthia Marsh	Jennifer J. Thomas
Lauren Culbert	Jerry Machalek	Lindsey Thomas
John Cummins	Candace McClenahan	Terri Thompson-Havig
Lois Dean	Beetsy McMillan	Joy Throm
Connie Diercks	Sara McMullen	Shelley Thron
Catherine Dorr	Peg Meier	Bill Turek
Sydney Dunitz	Barb Melom	Charles Turner
Helen Ellenbecker	Gary Melom	Barbara VanNorman
William Elwood	Caroline Mills	Pamela Vincent
Nancy Erickson	Dennis Mills	Velma Wagner-Adams
Robert Estes	Hannah Mitchell	Marcia Wattson
Meredith Falley	Carolyn Moe	Kathy Wasson
Paul Falley	Jo Montie	Mary Weeks
Rita Franchette	Lisa Nadeau	Paige Weinbarger
Bob Friedman	Cecelia Newton	Robbie Weisel
Nancy Gaschott	Marie Nordberg	Lark Weller
Carol Gilbert	Mary Novak	Tali Weller

**First Universalist Church of Minneapolis 150<sup>th</sup> Annual Meeting of Members**

Barbara Whipple  
Jessica Wicks  
Jason Wiley  
Jean Bay Wiley  
Karen Wills  
Judith Wright  
Ralph Wyman

## Recommendations from the Nominating Committee for 2010-2011

*(Boldface type indicates those who require a vote by the congregation.)*

Position	Name	Term Expires
<b><u>BOARD of TRUSTEES</u></b>		
<b>Executive Committee:</b>	<i>Terms are one year</i>	
<b>President</b>	<b>Barry Johnson</b>	
<b>Vice President</b>	<b>Kathy Coskran</b>	
<b>Treasurer</b>	<b>Nancy Gaschott</b>	
<b>Secretary</b>	<b>Judy Goebel</b>	
 <b>New trustees:</b>	 <i>Terms are three years</i>	
	<b>Craig Bierbaum</b>	<b>2013 (first term)</b>
	<b>David Leppik</b>	<b>2013 (first term)</b>
	<b>Paige Winebarger</b>	<b>2013 (first term)</b>
	<b>Faith Woodman</b>	<b>2013 (first term)</b>
 <b>Continuing trustees:</b>		
	Tim Balke	2012 (first term)
	Dan Berg	2011 (first term)
	Kathy Coskran	2012 (first term)
	Nancy Gaschott	2012 (first term)
	Judy Goebel	2011 (second term)
	Barry Johnson	2011 (first term)
	Jane Johnson	2012 (first term)
	Candace McClenahan	2011 (first term)

### **FOUNDATION BOARD**

<b>Chair (One year)</b>	<b>Eric Cooperstein</b>	
 <b>New members:</b>	 <i>Terms are three years</i>	
	<b>John Borden</b>	<b>2013 (first term)</b>
	<b>Patrick Higgins</b>	<b>2013 (first term)</b>
 <b>Continuing members:</b>		
	Eric Cooperstein	2011 (second term)
	Chuck Coskran	2011 (first term)
	Joe Gabrielsen	2012 (first term)
	Pat Gottschalk	2012 (second term)
	Gary Melom	2012 (first term)
	Emily Wallace-Jackson	2012 (second term)
	Ralph Wyman	2013 (second term)

### NOMINATING COMMITTEE

The Chair(s) from among the at-large members, along with a Representative from the Board of Trustees, are appointed by the President with the approval of the Board of Trustees at their July meeting each year.

**New Members:**

***Terms are three years***

**Ann Kay**

**2013**

Continuing at large members:

Cindy Marsh	2012 (first term)
Ginny McAninch	2012 (first term)
Paul Riedesel	2011 (first term)
Jeff Sylvestre	2011 (second term)
Pam Vincent	2012 (second term)

### Delegates to the 2010 General Assembly of the Unitarian Universalist Association

Nancy Atchison

Tom Atchison

Ben Cooper (Alternate)

Laura Cooper (Alternate)

Erin Dajka

Carol Gilbert

Pat Gottschalk

Carol Hiniker

Julie Howard

Barry Johnson

Karen Johnson

Cindy Marsh (Alternate)

Ginny McAninch

Steven Mosborg

Sara Smalley

Deborah Talen

Jenny Thomas

Pam Vincent

Karen Wills

Faith Woodman

## Biographical Data for Candidates

### BOARD OF TRUSTEES

#### *Executive Committee nominees for one-year terms:*

Current (2009/10) Executive Committee Members, re-nominated for one year terms:

President: Barry Johnson

Treasurer: Nancy Gaschott

Secretary: Judy Goebel

#### **New Executive Committee Member:**

**Vice President: Kathy Coskran**, with her husband Chuck, has been a member of First Universalist Church since 1977. She has served on many committees of the church including the Board of Trustees (in the late 80s and early 90s). Kathy rejoined the Board in 2009. She co-chaired a successful Stewardship Campaign two years ago. She retired as Principal of Lake Country School in 2004. She has published a collection of short stories, edited two collections of travel writing, published stories and articles in numerous other publications, and currently teaches occasionally at the Loft Literary Center. She and Chuck live in south Minneapolis and enjoy walking, biking, playing with their grandchildren, and being active at First Universalist.

Treasurer: Nancy Gaschott has been a member of First Universalist Church since 1988; she's served as a member of the All Church Council, taught in the religious education program, sung in the choir, and helped with fundraising. Most recently she chaired our Settled Ministerial Search Committee. Nancy has a law degree from the University of Minnesota. She has worked at the Loft Literary Center for 17 years as its Finance Director where she manages a 2 million dollar budget and the Loft's endowment. She also served as the project manager for the creation of Open Book, and as the treasurer of her husband Mark Ritchie's successful campaign for Secretary of State. Nancy recently left the Loft and started a consulting business. She has finished her first year on the Board as our Treasurer.

#### ***Nominees for Board of Trustees***

**Craig Bierbaum**, has been a member of First Universalist for five years, along with his wife, Shannon, and two daughters, Madeline (8), and Nadia (5). He was initially drawn to First Universalist because of how well it spoke to both his head, his heart, and his spirit. His connection to First Universalist continued to develop as he and Shannon started teaching their children's Religious Education classes. As the children became a little older, the family started to branch out further by participating in family and adult programs like Circle Suppers, the UU Parenting group and trips to Camp UniStar. Craig cherishes the fact that his family feels a strong connection to the extended family of this church.

Craig bikes year-round to his job as a technology manager at Target's downtown headquarters. At Target, Craig has held a variety of positions involving leading a mixture of onsite and remote teams; managing expense budgets; developing three year strategies, goals, and objectives road maps; and addressing a variety of talent management challenges. He gets great satisfaction out of helping individuals and teams fulfill their goals.

**David Leppik** is a lifelong UU with two children, Ian (3) and Sylvia (6), who are frequently seen with his wife, Jordan Wood, at the 11:00 coffee hour while he is still teaching the 8th grade OWL class. Prior to teaching OWL, he has been a senior high youth advisor since joining First Universalist in 2000. He has served on countless UU committees over the years, including the Prairie Star District Board of Directors, the Continental UU Young Adult Network (C\*UUYAN) Steering Committee, and First Universalist's Denominational Connections committee. In 1993 he wrote C\*UUYAN's first website.

David is the software developer for Vocal Laboratories ([www.vocalabs.com](http://www.vocalabs.com)). He has a MS in Computer Science from the U of MN and a BA from Grinnell College. He will gladly talk your ear off about math, computers, science, science fiction, UUism, the environment, his kids, and bicycle commuting.

**Faith Woodman** is a third-generation Universalist and has attended First Universalist Church for 21 years. Her activities at First Universalist include: All Church Council, AUW Board, MUUSJA, Sunday School teacher, pastoral care, co-teacher of a class on Jesus with Kate Tucker, Mostly Silence participant, AUW Friendship Group and Sermon-Based Small Group member and facilitator. She has worked as a VISTA Volunteer, a newspaper reporter, editor, writer and director of a small-state agency. Faith is married to Hugh Maynard and has two daughters, Emily, 27, and Katharine, 25. She has been moved by inspiring sermons and exquisite, powerful language from the pulpit, and witnessed the collective love of the church and its members. Faith has long believed that our church and our denomination have tremendous potential to grow, do good and spread the message of love, hope, and inclusivity beyond our church and into the community and nation-at-large. She believes that under Justin and Kate's leadership, First Universalist can be the church it is meant to be. She would be honored to serve on the board and help our church reach its potential.

**Paige Winebarger** has been a member of the church since 1985. She is on the Finance Monitoring Committee and has served on the Policy Governance Committee and the Interim Minister Transition Team. She also was on the Board of Trustees from 2003 until 2005. An attorney, she had a career in banking that spanned 33 years during which she was a banking regulator with the Federal Reserve System, as well as deputy commissioner of banking in Minnesota. She also served as senior vice president and general counsel for a privately held banking group. Now retired, she devotes significant volunteer time to environmental conservation causes. She currently is Vice Chair of the Minnesota Pollution Control Agency Citizen Board; a member of the Guardianship Council of the Freshwater Society; President of Minnesota Valley Lands; and a founding director and former chair of the board of the Wildlife Rehabilitation Center in Roseville.

Paige lives in Bloomington where her favorite activities include birding and playing on a women's doubles tennis team. She and her late husband, Bob Teetshorn, were frequent judges for the Minnesota State Fair's Annual Rooster-Crowing Contest.

## ***Nominees for Foundation Board***

Chair: Eric Cooperstein is reappointed for a one-year term.

**John Borden** currently serves as the Executive Director of The International Institute of Minnesota (IIM) – a non-profit multi-faceted social service agency and home to the annual Festival of Nations. John has been at the IIM since 1979. Prior to becoming Executive Director in 2005, he developed the agency's resettlement program which annually brings 1000 refugees from around the world. He graduated from Grinnell College with a degree in anthropology and holds a Master of Arts in Religious Studies from the Chicago Theological Seminary. John is a board member of the MACC Alliance of Connected Communities, avid cyclist, reader, traveler, and Licensed Independent Social Worker.

Both John and his wife Betsy Long are members of First Universalist Church and reside in Roseville. John will be retiring this summer and plans to become more involved in volunteer commitments to First Universalist as well as his community. John has spent considerable involvement with Foundations – from writing numerous grant requests, advising the Bush Foundation, St. Paul Foundation, Phillips Foundation and others about grant making to diverse populations, to reviewing grant requests for foundations and the State of Minnesota

**Patrick Higgins** joined First Universalist in (about) 1991 when he returned to the Twin Cities. Before that he was a member of First Unitarian in Dallas and First Unitarian in Tucson. Patrick earned a master's degree in Architecture at Washington University in St. Louis, and worked as an architect for 25 years in the health care field. In 1994 he left architecture to study counseling psychology, earning a master's degree in counseling at the University of Minnesota, along with a certification in alcohol and chemical dependency counseling. From 1996 until his retirement in 2002 he worked in CD counseling and community mental health, and continues volunteer work with mental illness and homelessness.

Patrick's spouse, Barbara Ziegenhagen, is a member of the Minneapolis Friends Meeting (Quaker). They have a total of five adult children, seventeen grandchildren and three (soon to be four) great grandchildren. Patrick has served as an usher, past chair of the building and planning committee, COA mentor, and is a frequent volunteer serving meals at Simpson. He is committed to the tenets of liberal religion and progressive political action as expressed at First Universalist. Because he has received so much at First Universalist he wants to give back and become more deeply involved.

**Ann Kay** attended First Universalist as a child with her parents Elsa and Walter Carpenter, and returned in 1999. She sings in the choir, facilitates a sermon-based small group, and participates in circle suppers, Women Who Read and AUW. Ann co-chaired the Stewardship Campaign (2007), and currently chairs the Membership Committee. She created and oversees the Visitor Greeter program that staffs visitor tables and a Welcome Table in the Social Hall.

Ann directs the Center for Lifelong Music Making, offering classes and programs to foster a musically able and active population. She has been a music teacher, associate director of graduate music education, director of a music teacher certification program, and president of a national music teachers association.

Ann loves to greet, connect and engage people, and would welcome the opportunity to match people's passions and strengths with church leadership needs by serving on the Nominations Committee.

## ***Report from the President*** ***Barry Johnson***

---

---

The past, present, and future of First Universalist Church came together this year in an extraordinary way.

The formal celebration of our 150<sup>th</sup> anniversary in October culminated a year of powerful reflection on the inspiring history of this church. We are very grateful to all those who made that year-long celebration such a tremendous success.

The power felt in the recalling of our history was heightened as we entered a new era with the installation of the Reverend Justin Schroeder as our new Senior Minister. Throughout this year Justin's enthusiasm, vision, and engaging sermons have helped us to a new level of excitement for our church's future.

Another feature of this new phase of our church life is that we are completing our first full year operating under the policy governance model. While it is a change that is relatively invisible to most of the congregation, it has been challenging to learn new board, staff, and volunteer roles. It has required much thought and discussion, and some false starts, but the board continues to develop greater clarity as we attempt to live out our three-part role of communicating with the congregation, crystallizing our congregation's goals, and monitoring our success in achieving those goals.

The board began a process of considering our mission and how it is reflected in our current mission statement and in the ends policy that was adopted as part of our transition to policy governance. We have concluded that we need a deeper and broader involvement of the congregation to assure that our mission statement and goals truly reflect our aspirations. We expect to undertake that process next year and to use the result as the basis for a strategic planning process which we will also carry out next year.

The board also devoted considerable effort this year to exploring new ways to communicate with the congregation. Using questions about our building and about our efforts to be welcoming as the foci, individual board members met with church committees and also received feedback from members and friends via email. This information has been, and will continue to be, helpful in our planning. Also, we have just conducted the first annual survey of congregational attitudes about how well we are doing in meeting our church goals and we will be reporting the results to the congregation later this year. These survey results will be a significant input into the board's formal monitoring and evaluation of the year that will be done in June.

The governing processes we have put in place are oriented to creating a better future. The energy and hopefulness in the church this year are palpable. Our hugely successful pledge campaign is evidence of that, as well as evidence of the great work of the Pledge Team to whom we are truly grateful. That success and our significant financial reserves have positioned us well to respond to the unexpected challenge of the Emily Grey School's request to end their lease and the loss of revenue it represents. Yet, even that loss, is a positive for our future. Sharing our school space has been a severe limitation for our religious education program. Freed from that limitation we now have the opportunity to enhance our own programming and to reconsider how best to use our space in the future.

For the church as a whole this has been a year of excitement and progress. For the board it has been a year of experimenting and learning that has positioned us to move forward strongly in helping the congregation set its future direction.

Finally, I want to thank the outgoing members of the board, Jill Andersen, Jim Santelli, Doug Smalley, and Kimon Swarts for their service. They have put in many hours on church business and have each made unique and important contributions to our work.

Thank you for allowing me to serve you during this past year,

Barry Johnson,  
President of the Congregation

## **Report from the Treasurer**

### **Nancy Gaschott**

---

*“30 minutes – walk through balance sheet – be sure I understand.”* This was a note I’d made to myself as I prepared for my first meeting of the Financial Monitoring Committee last fall. I laughed when I found this little note last week—because the committee spent, not 30 minutes, but just about the entire year “walking through” the church’s balance sheet.

There are two different reports that we analyze to understand the financial well-being of the church. One is the Statement of Activities (aka the Profit and Loss). This lists our income and expenses in a particular period of time. The other is the Balance Sheet, or Statement of Financial Position. This one provides a picture of what the church owns (assets) and owes (liabilities). (In our households we have the same activities. We bring in money as income, and we spend it. If we kept careful track of all that, we could create a Statement of Activities each month, or each year. And most of us also own and owe. A list of the value of our assets – for instance our car and our savings; and then our debts, perhaps the amount we owe on our school loans and car payments – would make up our household’s balance sheet.)

I was especially interested in the Balance Sheet because, from my initial reading, it seemed that the church was blessed with a moderately healthy level of assets. But I’d understood from years of hallway comments that the church was constantly struggling financially.

I quickly learned that our talented and hard-working church administrator, Patti Frazee, and volunteer extraordinaire, Paige Winebarger, had undertaken a two-year study of what makes up the church’s Balance Sheet. They had researched committee meeting notes, donors’ letters accompanying special gifts, plus many years of accounting statements from past church administrators. The results of their work became the main agenda items for our committee this year as they introduced us to each one of 28 different “funds” on the church’s record books.

We learned that the bottom line is that the church has, indeed, been blessed by generous donors, strong stewardship, and good investment returns as well. The value of the Legacy Funds, (defined in the by-laws as money not normally intended to be spent but rather from which to draw a percentage each year to contribute to the annual budget), is over \$140,000. You’ll be hearing from a new Planned Giving Team this fall as they begin to build that important asset. And the church’s level of cash-on-hand is over \$400,000 – pretty healthy.

Lucky for us! Because, just a few weeks ago we learned that the church’s major tenant, Emily Grey Charter School, wants to terminate its lease agreement with the church. Income from Emily Grey would have been nearly \$200,000 in the 2010/11 church year. On the other hand, the departure of the school provides the church many longed-for benefits: more space for programming, ministers, and staff; control over the look, feel, arrangement, and furnishings for our own religious education classrooms; reduced maintenance and repair expense; and elimination of staff hours needed to interface with the school. And, since the church has sufficient cash available, we’re confident we can manage the loss of income.

Which brings us to a discussion of next year’s budget. A budget is the best estimate of what our expenses and our income will be in the next church year. Once a budget has been approved it can be laid alongside a Statement of Activities to let us see, as the new year goes forward, how good our estimates were, and where we might be running into trouble – or enjoying new opportunities.

Ideally a budget has slightly more income than expenses – so, at the year end, the extra money is put into savings. But this isn’t always possible, and this year, with the sudden change from Emily Grey’s departure, it is certainly not possible for the church. Mature and well-managed institutions know that some years they will need to dip into reserve savings in order to go forward with growth and other mission-related initiatives. This is the responsible decision the church leadership (staff and board) has made: to respond to the change in income by cutting expenses where prudent – and Justin and Patti accomplished a large amount of cutting, but to also plan to spend from reserve savings to take advantage of the opportunities presented by the school’s departure and the current excitement and growth in the church.

The church is running very efficiently. One analysis that evaluators employ when they assess the effectiveness of organizations is the ratio between program services and administration. Councils on

charities vary in this standard but, in general, they like administration to be limited to no more than 30% - 40% of an organization's expenditures. Ours is at around 23%.

I can't promise that the budget for the year 2011/12 will be balanced, but I will promise that this upcoming year will be, in Justin's words, one of "discernment" — financial discernment: should we find another tenant? What other kinds of revenue might be possible for the church? Are there ways we haven't considered to cut expenses? In addition, the board plans to develop, with your participation, a multi-year strategic plan including, of course, a multi-year financial plan.

Your questions and suggestions are a gift to the beloved community.

## *Report of the Senior Minister* *Rev. Justin Schroeder*

---

It has been an incredible privilege to serve this vibrant and vital congregation this past year. And what a remarkable year it has been! I think two words, “spirit-filled” and “proactive,” best describe this year.

From my first day last August, there has been a “buzz” in the church, a “spirit” moving, a sense of possibility and excitement about our faith and how we might live it out with one another and in the world. This spirit was alive in the work of the Sesquicentennial Committee as we celebrated our 150<sup>th</sup> Anniversary on October 25, 2009, and I was ordained and installed by this congregation. It was a day I will never forget. Our Sesquicentennial celebration ended with a “Weekend of Human Rights,” featuring Rev. Bill Schulz, and other local human rights organizations that partnered with First Universalist.

The programming life of the church has felt “spirit-filled” as well. Sunday morning worship has been invigorating and lively, as we have dived into monthly themes such as “God,” “Forgiveness,” and “Friendship.” Our Sermon Based Small Group program had over 100 participants last semester and we’re planning to launch 20 groups in the fall. We’re continuing to focus on moving people from “rows to circles,” (from Sunday worship to small groups) because we know that it is in small groups that deep connections and meaningful life changes take place.

I am deeply grateful to the “spirit-filled” staff of First Universalist. It has been a joy to collaborate and dream with Rev. Kate Tucker and the rest of our fine staff. We continue to build a dynamic and powerful team, committed to the vision of sharing the “Universalist message of love and hope” in all that we do. To name just a few successes from this past year: we updated our website and electronic newsletter, and re-imagined how our Pledge Team and Planned Giving Team might best serve the church.

I am equally grateful for the hundreds of people who have served as Religious Education teachers, ushers, greeters, coffee servers, front desk volunteers, *Liberal* assemblers, behind the scenes helpers, choir members, office renovators, sanctuary decorators, flower arrangers, small groups leaders, care givers, and all the dozens and dozens of other ways you have blessed us with your time, passion, and energy. This, too, has contributed to the spirit-filled buzz!

The other word to describe this year is “proactive.” I am proud of the “proactive” work that the staff has done, recognizing that the 11 a.m. worship service and Religious Education classes had reached capacity; after much brainstorming and two congregational forums, we determined that in the fall, we’ll worship at 9:30 a.m. and 11:15 a.m. to better balance worship attendance, and to open up space in our religious education program.

I am incredibly proud of the way that the staff and Board of Trustees, led by Barry Johnson, have proactively responded to the various challenges and opportunities that have emerged this year. Because of the outstanding work of our Pledge Team, and the successful pledge drive we had (a 15% overall increase), when the Emily Grey Charter School approached us about buying out of their lease three years early, we were able to take advantage of this opportunity, despite the loss of rental income. We’re in a strong financial position, and can cover the budget deficit from reserves. The Board and staff are clear that our top priority is to reclaim the classroom space for our children, youth, and adults. With Emily Grey’s departure, we have reclaimed two classrooms, and will be able to accommodate much of the growth we’re anticipating in the Religious Education Program. In the 2010-2011 budget year, the Board and I will explore options for renting out some of the Church space in a manner that truly works for us.

Speaking of “proactive,” the Board has deliberately and intentionally moved more deeply into Policy Governance, focusing on the big picture Ends (goals) of the church, allowing the staff to manage the day to day details and programming decisions of the church. In the fall, the Board, along with the staff, will engage the congregation in a strategic planning process as we seek to create the future we dream of.

Outside of these walls, I have represented First Universalist at the Senior Ministers of Large Unitarian Universalist Churches conference in Santa Barbara, California, in the Minneapolis Downtown Clergy Group, and in Dreaming Big, a Unitarian Universalist study group for ministers of mid-size and large UU churches.

As I look back over the year, “spirit-filled” and “proactive” are indeed the two words that most deeply resonate.

And there's one more: "Potential." After this year, I believe that we're only beginning to tap into our potential as a congregation, only beginning to understand what is possible. As the poet Denise Levertov says, "So much is in bud," and that's exactly how I feel every time I enter this building. I hope you feel it, too. I can't wait to see what will unfold in this coming year.

In gratitude,  
Rev. Justin Schroeder



## ***Report of the Associate Minister*** ***Rev. Kate Tucker***

---

It has been a breakthrough year. Our new Senior Minister is calling forth the best in us. We (minister and congregation) are moving toward a vision we mutually hold—one that feels both fresh and inherent. With the leadership of Justin Schroeder, Board, and staff, we have learned and discerned till we see ourselves more clearly and know ourselves better.

The church staff has wrestled with mission and roles and achieved a deeper teamwork. Staff and congregation are increasingly sensitive to the hopes and needs of the guest who enters our doors looking for that elusive essential thing: a beloved community of liberal faith.

Pastoral Care continues to be a major component of my ministry. This year co-chairs Margit Berg and Julie Howard—together with TRUST Parish Nurse Pat McLaughlin—were again my heroes, as were the dozens of congregants who supported one another through times of transition. Julie and Margit and Pat were creative, responsive, thorough, and wise. In March, Sue Schiess rejoined our pastoral leadership team to help us think through future strategies. In June, Julie Howard completed six years of service as co-chair. Her presence grounded us, enriched us, delighted us. Our gratitude to Julie is enduring.

This year in memorial services we said sacred goodbyes to people who were close to our hearts and crucial in our church's story, among them John Addington and Dru Cummins.

Our worship life has been enhanced by introducing monthly themes that serve as avenues for community conversations. It has been a true adventure, exploring these themes with Justin and Heidi and congregants. We believe that Sermon-Based Small Groups (as we now call them) are the key to building our beloved community. This year I worked with Heidi Mastrud to create the session plans and shape the process.

I've served First Universalist Church as Associate Minister for thirteen years. My ministry includes a wide range of responsibilities: pastoral care in all its dimensions, rites of passage, worship, small group endeavors, linkage with AUW, serving on the staff Management Team, serving as official mentor to two local ministers in preliminary fellowship, occasional Prairie Star District and UUA projects, and endless miscellaneous. Next year I'll supervise our intern minister. Chiefly, as Associate Minister, I am here to support the Senior Minister—to share the responsibilities of ministry in ways that enhance the church's mission/vision and best use our particular gifts. This is my chosen work. In this way, the year has been one of meaning and joy. I expect next year to be likewise and more so.

It is always an honor to serve you,  
Rev. Kate Tucker



## **Minister's Statistical Report May 1, 2009–April 30, 2010**

Average Weekly Adult Attendance:	9 a.m. 171	11 a.m. 363	Total 534
Average Weekly R.E. Attendance	9 a.m. 85	11 a.m. 209	Total 294
Average Weekly Adult Attendance:	Summer Total 198		
Average Weekly R.E. Attendance	Summer Total 22		

---

MEMBERS ADDED	74
MEMBERS REMOVED	69
<b>Total membership as of April 30, 2010:</b>	<b>828</b>

### **New Members: 74**

Maren Ahlberg	Rae Hoelsing	Jim Olson
Nate Ahlberg	Sally Hoover	Kate Olson
Jen Beldon	Janet Houck	Ron Parker
Michael Beldon	Nancy H. Jones	Jill Pearson
Dianne Berg	Bruce Karstadt	Elaine Pedersen
Justin Bernacki	Peter Kimball	Penny Pergament
Jeremy Burke	Tom Kinn	Cal Peterson
Michael Butler	Susan Kundel	Haydee Peterson
Charmagne Campbell- Patton	Carolyn Laine	Lee Peterson
Debbie Cash	Marisa LaMarca	Nona Peterson
Colleen Cavell	Katey Leck	James Riccardo
Teddy Copley	Hilary Lindell	David Richards
Jennifer Crandall	Jennifer Livingston	Marian Santucci
Patricia Crowns	Marylee Lyndall	Tony Santucci
Elaine Davis	Ward Lyndall	Dennis Sherwood
Susanna Drake	Ann Lyons	Jacalyn Sherwood
Meg Forney	Candace Mainville	Mary Sorensen
Jim Foti	Jeremy Maynor	Kristin Sweet
Lena Gardner	Megan Maynor	Denis Tierney
Kate Gehrman	Suzy Messerole	Salvador Valdovinos
Jennifer Gregornik	Daniel Moriarty	Chuck Vavrus
Dan Gremillion	Kathleen Moriarty	Kathie Wasson
Judith Grittner	Martha Moriarty	Jennifer Wiseman
Sharon Haire	Elizabeth Myers	
Anne Herwig	J. Michael Neal	
	Clareyse Nelson	

### **Deaths/Memorials: 6**

John Addington  
Dru Cummins  
Will Hartfeldt  
Jeanne Irish  
Larry LaVercombe  
Mae Warner

### **Marriages and Commitments: 4**

Mary Jane Higgins and Brian Jay MacDonnell  
Daniel Bishop and Margaret Feil  
Katrina Joanne Mitchell and Judson Gregory  
Kilgore  
David Chandler and Nancy Jane Moline

### **Child Dedications: 15**

Eleanor Wiseman Kundel  
William Monroe Vaught Sullivan  
Tadhg T. Robert Becher-Ingwalson  
Amelia Lucille Novak-Nadeau  
Julian Wellstone Burns  
Vanya Vonnegut Burns  
Elizabeth Boyer-Conway

Xavier Steven Butler  
Lamont James Schanen  
Tucker Robert Keen Schroeder  
Catherine Ann Johnson-Fry  
Alexander David Johnson-Fry  
Megan Alexa Markle  
Solvei Berg Messerole  
Alexander Holt Kimball

## **Report of the Music Director**

### **John Jensen**

With new ministry has come a re-vitalized look at our music. Input from Justin has been more forthcoming than any other senior ministry in my eighteen years here. The newness has invigorated, I think, both Janice and myself and has certainly moved my rudder from a stuck place. No time for complacency when change is a-brewin'. Initially, a host of thank-you's: beginning with Janice Hunton, whose choral direction has rendered the choir a proud place to participate. Indeed, the membership has grown significantly this recent year. Kudos to them.

I would like to recognize the efforts of our instrumental combinations: both Universal Folk and Universal Jazz bring disparate but complementary musical commentary to an occasional service. Both organizations have also seen membership growth. No one is ever turned away from any of our musical groups, ergo, if you have a leaning in whatever direction you choose, please seek out myself or Janice for more probing and deep information.

Recognition also goes to the fairly recently-formed Rock Band and its artistic and successful efforts adding to the eclecticism of the music program. I really do not know of another church in the area which boasts such variety and scope in its potentiality for service music serving such a wide range of possibilities.

I would like to mention our little jazz trio, The Usual Suspects: usually a trio but occasionally augmented by a lead instrument. Thanks to Harry Pontiff and Jim Sutherland for their efforts. Others who merit attention and recognition: our in-house violinist, Jim Riccardo, my piano colleague, Becky Shockley, Joey Babay for his summer vocalism. I think that Jill Oliveri will be helping out with vocal support as time goes on. Mention is to be made of those who make our annual Valentine's Dance possible: Heather Koser, George Dow, Kelli Clement, Paul Riedesel, Allan Steinhauer and numerous others in the volunteer orbit who makes this a go-to event in the depth of winter.

Our past Five at First Concert Series is still off the table-however, I am willing to consider backing an occasional artist of distinction, when possible.

In partnership with Justin, Kate, Janice, Maureen Hunt, Heidi Mastrud, and other staff

we will endeavor to make this coming year the finest ever for the music program. A final huge shout out to Sandy DiNanni who provides invaluable service in the pragmatics of making many things possible from her post in the office. Last, the sound operators for their creative efforts in dealing with the acoustic anomalies of what can often be a recalcitrant environment.

Grace to all who have made our music possible,  
John (JJ) Jensen

## **Worship Associates**

### **Submitted by Ginny McAninch**

This was an especially rewarding year for the Worship Associates. Collaboration with the Ministers increased as Justin has great enthusiasm for the WA program. We had a retreat early in the church year with Justin, Kate, Heidi, John Jensen and Janice Hunton to explore how, together, as a Worship Team, we could enhance the Sunday morning experience. We then had quarterly retreats with Justin during which we explored the current role of the Worship Associate and ways it could be expanded. With the introduction of themes, brainstorming sessions are being scheduled with Justin and Kate and the Worship Associates who will serve on the Sundays that include that theme. The Worship Associates continued to create and deliver occasional Sunday services at the request of the Ministers. We look forward to continuing this deeply meaningful service to the congregation in 2010-2011 with renewed energy. Worship Associates for 2009-2010: Michael Dotson, Bill Howard, Erin Dajka, James Schanen, Heather Koser, Mary Guzowski, Steve Mosborg, Pamela Vincent, Ben Cooper, and (Chair) Ginny McAninch.

## **First Universalist Mission Statement**

We join together at First Universalist Church in a welcoming, spiritual community that affirms our liberal religious heritage. Our ministry is to bring the Universalist message of love and hope to one another, to our children and to the work of social justice.

## *Report of Lifespan Faith Development & Congregational Life* *Heidi Mastrud, Director of Congregational Life*

---

This year, the Lifespan Faith Development Program served 387 registered children and youth, as well as numerous visitors to our Religious Education programming. In our children's program, we continued to use strong Sunday morning programming to attract and retain new families. We continued to embrace all of our UU Sources, while maintaining our grounding in the Rainbow Path. For our middle and upper elementary school kids, we examined the practices and stories of the World's Religions to understand their relevance to modern UU life. Our youth program continues to strengthen. In addition to Neighboring Faiths, Our Whole Lives, Coming of Age, and the Senior High Youth Group, we offered a small group ministry for graduating seniors to look at issues relevant to their unique time of life. We are committed to finding ways to help our seniors bridge into young adulthood. Twenty-five 10th-12th graders traveled to Boston to connect with UU history, heritage, and modern identity.

Adult education is an active arm of the Lifespan Faith Development program. This year's offerings included an ongoing Buddhist meditation and study group, contemplative prayer, and Chi Gung, as well as programming specific to new members: Pathways to Membership, for those considering membership at our church, and Foundations of Our Faith, a monthly class designed to deepen new members' understanding of and commitment to Unitarian Universalism and First Universalist Church.

We are excited about the congregation's ongoing participation with Sermon-Based Small Groups. This year twenty small groups met, including a group specifically for men who have lost their fathers recently, and a group for parents of Coming of Age kids. These small group experiences offer 8-12 group members time for theological exploration, community connection, the spiritual practice of deep listening, and an opportunity to engage together in service to the community.

We continued to provide dynamic worship experiences for congregants of all ages with Sharing Sundays, Children's Chapels, Water and Flower Communion, the Christmas Pageant, the Lake Harriet Service, Easter Sunday, and Youth Sunday. Many thanks go to our inspiring and talented staff, Marsha Partington, Children's Program Coordinator, Katie Heaton, Youth and Young Adult Ministries Coordinator, Lily Franz, Childcare Provider and Program Assistant, and Maureen Hunt, Interim Children's Music Coordinator. Special recognition goes to the approximately 200 volunteer adults who make our Lifespan Faith Development and Congregational Life programming so successful. The work of our church could not be done without them.

It is a joy to serve this congregation.  
Heidi Mastrud

## **Report of Faith in Action** **Debra Rodgers, Director of Faith in Action**

---

*The noblest worship is to make yourself as good and as just as you can.*

*- Isocrates*

This past year has been part of an ongoing, intentional effort to integrate justice with faith and spirituality. As a justice seeking community we are encouraged by the creativeness of our own leaders and in the opportunity that emerges out of new relationships with communities outside these doors. We are also encouraged by the leadership and vision that Reverend Schroeder brings, knowing full well that transformative love is the love needed to change the world.

Changing the world little by little is what we have accomplished this year. We have done this by inspiring new leaders, building new relationships, learning new ways of addressing problems and through our service.

Simpson Housing and Project Homeless Connect have been part of a housing ministry of the church for the last several years. This year First Universalist members volunteered over 300 hours serving meals at Simpson Shelter and nearly 50 congregants volunteered at the Project Homeless Connect events. In addition, we provide a space for training volunteers for the program each year which brings more than 100 people through our doors each time. Our relationships with both these organizations and the people they serve have been deepened this year.

Native American Connections continues to connect us with the Native American community though the annual Thanksgiving Dinner and the sale of Native Harvest Products at the Global Gift Fair.

Speaking of the Global Gift Fair, this year 24 nonprofit organizations filled the Social Hall and Chalice Room with goods from every corner of the globe! Most of them participate each year in the Fair as they count on our eagerness to contribute to their worthy missions (and purchase some unique gifts!)

Several members of First Universalist are building and deepening relationships with the Latino community at La Conexion. Members sponsored and participated in 12 lunches w/ the Latino community; one member was asked to join the board of La Conexion and is now actively involved there. In addition, we raised \$350 for La Conexion through our Re-Gifting event.

Green Sanctuary is a congregation-wide initiative to promote environmental change at the personal, congregational and community level. Last year congregants voted on twelve activities and we have been busy implementing many of those activities! You may have already come into contact with our *new and improved* recycling and composting system or attended one of the Ethical Eating classes. Green Sanctuary is also involved in Wheel of the Year celebrations, in Earth Day and with the Green Jobs initiative of HIRE. A big project that we are just getting started on is the development of church wide Green Purchasing Policies and Guidelines.

EcoMinds presented three very successful events. Last November we held our second annual First Universalist Recycles Day which included a "bring something/take something" gift exchange. A Re-Gifting Sale was held the week before Earth Day raising \$900 for two church Social Action groups and two Social Justice groups outside of church. On April 25th the 7th Earth Day Celebration was held, honoring 40 years of Earth Days and highlighting the scope of our new Green Sanctuary Initiative. A Bur Oak tree was planted by EcoMinds on church grounds to honor 150 years of earth stewardship. EcoMinds also sponsors sign-up to the Minnesota Energy Challenge and this year surpassed our goal of 200. Our new goal of 275 households taking the Challenge would move us up to second place in the congregation team category in the State. EcoMinds supports state and national environmental legislation by participating in the MUUSJA H.I.R.E. initiative, letter writing, etc.

*(Continued from page 20)*

Earth Day once again was a huge success! It takes the efforts of over 20 dedicated congregants, plus numerous sons, daughters and friends, to make this day happen. This year's theme celebrated 40 years of Earth Day (B'earth'day) as well as the journey of the church to be a certified Green Sanctuary. Congregants learned about 40 years of progress toward sustainability, about Ethical Eating, Green Jobs, took the MN Energy Challenge and sang folk songs. Sixty people pledged to action for the 40/40/40 Action Program on Earth Day. Of course, the banjo player, Earth Ball, and animals were a huge hit!

Members of First Universalist partnered with Greater Friendship Missionary Baptist church in learning about and impacting the juvenile detention and juvenile correction system in Hennepin County. Highlights of this effort are new relationships between the churches, congregants and ministers, as well as a deeper understanding of the impact of race on juvenile justice. The churches co-sponsored a day long training conducted by the Organizing Apprenticeship Project – one of the organizations supported by the church through the First Universalist Foundation and a recipient of the Split the Plate collection. Over 65 people attended the training including nearly a dozen from First Universalist.

Unity Summer/Unity Leadership continues to inspire and create new generations of change agents. Celebrating its 18<sup>th</sup> year and more than 300 youth participants, Unity Leadership is entering a new phase of development. Last summer, the First Universalist Board appointed a task force to explore options and opportunities for the continued health, growth, and expansion of the program. The task force's recommendation was to create Unity Leadership as 501(c)(3) organization affiliated with the church. The upcoming church year will be one where this transition happens and systems are set up to ensure the continued success of this program – the living legacy of our Unity Settlement House. Twelve youth from First Universalist participated in at least one of the Unity Leadership activities, and 6 were interns with the Unity Summer program. Unity Leadership counts as partners nearly 30 nonprofit organizations and schools around the metro area.

Youth Cultural Exchange (YCE) provides an early opportunity for youth from our church to gain a deep understanding of how to make a difference in the world by taking the first step of learning how to be friends with youth from another culture. The primary goal for this year was to recruit for and begin a new cohort of YCE youth and families. By the spring, YCE had successfully recruited a group of 8 youth, with hopes to recruit a couple more girls. Youth and families began their FAMOUS fundraising efforts (selling eggrolls and coffee) and spearheaded a show of photography done by the last cohort in April. YCE families also participated in the ReUse sale connected with Earth Day.

## *Foundation Report* *Eric Cooperstein, Chair*

---

### HISTORY

The First Universalist Foundation was initially funded in 1983, when the Unity Settlement Association was dissolved and the proceeds from the 1968 sale of the Unity Settlement House were set aside as an endowment to further the church's long history of supporting justice work in our community. The Foundation principal at this writing totals roughly \$1.2 million. The Foundation's principal has recovered somewhat from the economic crisis that began in 2008. With the recent recovery in the stock market, the impact on future giving may not be great over the long term. The funds are managed by the generous donation of time by Ross Levin, church member and financial advisor.

### MISSION AND VALUES

The Foundation has worked this year on determining how to best live into its mission and values. The Foundation's mission was amended in 2009 to read:

First Universalist Foundation acts as a catalyst for social change by promoting and supporting the development of emerging leaders among youth, young adults, and disenfranchised communities through monetary grants to and partnerships with nonprofits working in those communities.

The values which drive our mission are too lengthy to reproduce in this annual report, but they are available on the Church's website at [www.firstuniv.org/programs/faith-in-action/foundation](http://www.firstuniv.org/programs/faith-in-action/foundation).

### GRANTS

As part of our refocused mission and values, the Foundation is transitioning to making fewer but larger grants. In recent years we have renewed and deepened our commitment to the Unity Leadership Institute (formerly Unity Summer). During this past year, the Board of Trustees appointed a task force to determine what the relationship of First Universalist Church should be to the Unity Leadership program. Upon the completion of that discernment process, Rev. Justin Schroeder determined that Unity Leadership should be an affiliated program of First Universalist Church. Over the past several months, the Foundation has been working with Rev. Justin Schroeder and Deb Rodgers to develop a plan for Unity Leadership to make this transition, including incorporation as a 501(c)(3) nonprofit. This process is ongoing and will likely consume a significant portion of the Foundation's available giving for the 2009-10 fiscal year as well as next year.

### MEMBERS

The church members serving on the Foundation board for the 09-10 year were: Eric Cooperstein (chair), Emily Wallace-Jackson (treasurer), Joe Gabrielsen (secretary), Pat Gottschalk, Sharon Ramirez, Martha Bird, Ralph Wyman, Chuck Coskran, Gary Melom, and Staff Liaison Debra Rodgers.

## *Pastoral Care*

*Margit Berg and Julie Howard, Co-Chairs*

---

The mission of the Pastoral Care Council is to bring the message of love and hope by engendering congregational practices of mutual caring and to help members who are going through life transitions access the presence of love of the congregation and when appropriate, guide them to relevant community resources. Specifics include:

### ***Communications***

Informed the congregation of significant pastoral care issues by maintaining the Caring Corner desk and posting on Cyber Coffeehour as appropriate

### ***Meeting Short Term Individual Needs***

Coordinated the preparation and delivery of meals for numerous families or individuals with serious illness. Occasionally (with advance notice) arranged rides to medical appointments and church services. Provided facilitation and support for two support groups: cancer and career transition.

### ***Maintaining Connection***

Delivered over 80 poinsettias at Christmas time and later, 14 spring hyacinth plants to members encountering difficult times. Arranged pastoral visitors for many who live in long term care facilities or who find it difficult to attend regular services. Continued a comfort shawl ministry of knitters who create shawls for others. Delivered caring baskets. Made quilted pillows with a rainbow design to present to the 14 high school graduates as a symbol of their church school Rainbow Path experience. In concert with the Visual Arts Committee, established a process for delivering Sunday morning flowers to parishioners who could benefit from a day-brightener.

Provided group training and support for pastoral care visitors. Formally commissioned 22 of them during a November church service to recognize the work that they do on behalf of the church.

### ***Memorial Services***

Provided greeters and ushers and hosted receptions for memorial services.

### ***Community Pastoral Care and Education***

Hosted a seasonal flu shot clinic in the fall and a blood donation drive in the winter.

Held a one-hour session about Alzheimer's Disease after church on a Sunday morning in January. About two dozen people attended.

Sponsored two successive workshops, led by Rev. Suzanne Owens-Pike, that helped people complete their personal Health Care Directives. About 20 people participated.

### ***TRUST Faith Community Nurse***

Pat McLaughlin continued her invaluable service to our congregation. Her activities included: visits to numerous members in their homes and on the phone to provide health-related and community resource information, and participation in pastoral care leadership.

The culture of caring at First Universalist extends far beyond the confines of the Pastoral Care Council in countless acts of kindness and compassion among participants in various interest groups and other individuals within the congregation.

## *Association of Universalist Women*

*Liz Permar, President*

---

The Association of Universalist Women (AUW) had a paid membership of 147 women this year. Our board of nine consisted of four returning members and five new. Our focus on programming to promote our primary goals of building community, spiritual ground, and addressing social justice issues continued this year, along with a reexamination of how AUW can continue to remain relevant in the lives of women at First Universalist.

Our year included many traditional events:

- Fall Membership Kick-off: Not Your Mother's Church Ladies. 60 attended
- Holiday Tea in December. 90 attended
- Spring Retreat: The Journey...Together with keynote speaker Ann Reed. By adding Saturday only participants we were able to up the attendance to 105.
- Annual meeting in May to approve the budget, elect new board members, honor new Clara Barton Sisters and volunteers; with a potluck and entertainment by Spices.

New or re-imagined events:

- Afternoon Mini-Retreat with the Rev. Karen Hering as keynote speaker with three workshops: drumming, journaling, and belly dancing. 37 attended.
- Mother-Daughter May Day celebration with snacks, crafts, songs, and a Maypole dance. 50 attended.

New Friendship groups formed in October and February and many original groups are still going strong after four years.

Friday Get-Connected events brought women together around a variety of topics: journaling, using Facebook, Labyrinth walk, Strands of Hope necklaces, an introduction to the Spiritual Progressive movement. AUW Sacred Choices Reproductive Justice Committee partnered with MUUSJA for a viewing of the film *I Had an Abortion* and a lively discussion.

AUW was honored to receive a 2009 Faith and Freedom Award from the Minnesota Religious Coalition for Reproductive Choice for our faith-based dedication to reproductive freedom.

AUW Voting Rights Campaign Committee co-chair Jenny Thomas spoke to the UU General Assembly in June 2009 to pass an Action of Immediate Witness in support of election and finance reform.

# Facility, Human, and Financial Resources

## Report of the Director of Administration Patti Frazee

---

### Personnel

The current staff is listed at the front of the annual report.

With the arrival of Rev. Justin Schroeder, the staff has been working together to affirm our staff covenant, to discuss church work with a broader lens, and to look forward to the possibilities of what this church can be for the next 150 years (okay, maybe we're not looking ahead quite *that* far).

This year, we hired sound operators to further enhance the Sunday morning experience. Wesley Full was moved from custodial duties to sound operator, but left us in February. Ben Burger and Jose Meras joined us as sound operators soon after.

Chris Azar was hired in March as a part-time custodian.

### Building

The Treasurer's report has more information about Emily Grey Charter School and the buyout of their lease.

We had unexpected expenditures this year of \$7,917. These included a major plumbing repair, replacement of our automatic door system, removal of a diseased tree, and a roof repair. Other major projects completed in this fiscal year include a new dishwasher, new carpet for the north Arches Room, and the remodeling of our Senior Minister's office.

### Finance

Our reserve accounts have made a comeback from last year's economic slump. Our current balance on the reserve account is \$736,123, compared to \$560,772 at this time last year.

We are projecting the '09-'10 budget to come in with a 1% deficit of \$13,170. As of April 30, \$607,338 of the pledged \$753,000 has been paid. Our 09-10 fiscal year ends June 30.

Our '10-'11 pledge drive garnered \$860,000 in pledges. We have an overall increase of 15%. In addition, some generous donors agreed to match up to \$15,000 in new pledges. With \$32,320 in new pledges, we were able to utilize the entire match amount.

This year we implemented a Pledge Team model, where three people sit on the team for a term of three years each, one rotating out each year. Our Pledge Team Fantastic this year was comprised of Eric Cooperstein, Christa Anders, and Lark Weller. Thanks to all of them for doing a great job!

We also implemented a Planned Giving Team, who will be very active in '10-'11 and beyond. They will focus on bequests, special gifts, and education around planned giving. The team is comprised of Margit Berg (who will go off the team in July), Jane Hallas, Hal Schroer, and Martha Moriarty.

The Finance Monitoring Team of Nancy Gaschott (Treasurer), Jill Andersen, Dan Berg, and Paige Winebarger have focused on developing policies around our reserve funds. They have been a great team to work with and I always appreciate their knowledge and guidance.

## Split the Plate

*Thank you for all that you do to support our work! We truly need and appreciate you.*

Julie Manworren, Executive Director  
Simpson Housing

*You make a real difference for people in this community. Thank you to everyone at First Universalist.*

Mary Keefe, Executive Director  
Hope Community

*Thank you so much for your generosity and support! Please let everyone know how much we appreciate this!*

Heather L. Haynes, Director of Development  
Friends of the Mississippi River

*Your donation will be wisely used to help us ensure that every woman is able to make decisions about having children based on her own conscience and religious beliefs.*

Cheryl Jensen, Interim Executive Director  
Minnesota Religious Coalition for Reproductive Choice

*Please extend our sincere thanks to everyone whose generosity made this wonderful gift possible.*

Peter Dross, Director of Policy and Development  
Center for Victims of Torture

The following list is what we have collected and sent out as of April 30, 2010:

<b>Organization</b>	<b>Amount Collected</b>
Youth Farm	\$495.63
Global Citizen	\$515.00
Mpls Crisis Nursery	\$1,986.29
Organizing Apprenticeship Project	\$2,284.36
Unitarian Universalist Association	\$1,879.05
UU Service Committee	\$683.43
Minnesota UU Social Justice Alliance	\$566.75
Carl and Mildred Olson Fund	\$1,179.75
UUA Living Tradition Fund	\$2,472.24
TRUST	\$3,978.28
Hope Community	\$3,185.82
Simpson Housing	\$2,229.70
Haiti Relief	\$18,803.05
Chile Relief	\$1,916.90
MN Religious Coalition for Reproductive Choice	\$3,290.65
Boston Trip	\$1,505.15
Friends of the Mississippi River	\$2,820.04
Center for Victims of Torture	\$2,451.80
Minister's Discretionary Fund	\$1,570.84
<b>Total</b>	<b>\$53,814.73</b>

## Communications

Kevin Watson

---

**Online Communications:** In the fall our new church website launched! I would like to thank David Krewinghaus and Doug Smalley for their time and energy during the redesign process. Our website has had an average of 1600-2200 unique visitors per month since December. Having a welcoming and updated site is important for all these people who are members, friends, staff and lay leaders, as well as potential visitors to the church. In addition to our new website, our weekly email update and email blasts have been reimagined to look more like the new website. Shannon Bierbaum provided another year of incredibly fast podcast creation for First Universalist. This year made even more important with Sermon Based Small Groups using the podcast.

**Greener Communications:** *The Liberal* subscriptions for the print edition continue to decrease at a steady rate; we are currently hovering around 650. This is a reduction of almost 100 subscriptions, most of which have completely shifted to receiving their newsletter via email. Our electronic *Liberal* list is now almost 900, an increase of almost 100 contacts in the past church year. Beyond the electronic newsletter, our weekly email reaches over 900 individuals. We continue the process of getting greener office supplies and now use recycled copy paper for almost all printed materials, including *the Liberal*.

**Printed Communications:** During the winter months a new photo directory was published and distributed. After five years our congregation has changed significantly with many new members.

## ***SPIFF Committee***

*(Space, Planning, Improvement, Facilities and Furnishings)*

*Submitted by Lynne Stanley*

---

SPIFF members Ruth Arnold, Janet Chandler, Bette DeMars, Kristen Mengelkoch, Vicki Nolan, and Lynne Stanley (chair) worked with staff member Chrystal Teachout on a variety of issues concerning ongoing building needs. The work of SPIFF, Building And Grounds (BAG), and Green Sanctuary Team became more collaborative and coordinated, in part due to the addition of a SPIFF representative to BAG.

SPIFF's major project for the year was renovating Rev. Justin Schroeder's office. SPIFF member Kristen Mengelkoch drew up detailed plans which were put into action by BAG members and other volunteers. Additional electrical outlets, new light fixtures, and freshly painted, sheetrock walls were among the improvements, as well as energy efficient windows donated by Jim and Janet Chandler. A new sofa and pair of chairs will soon add to the comfort of the updated office.

Other notable SPIFF projects included selecting the Zimbabwean harvest baskets now in use for the offering collection, choosing welcoming signage for the Dupont Avenue entrance, offering ideas on plans for the northeast garden, designing a photo display board for the Unity Leadership Program, reviewing plans for the Atrium's flaming chalice mobile, purchasing new hangers for the Atrium coat closet, and providing input to Green Sanctuary Team on the updated waste and recycling system, including container design, location, and labeling.

Throughout the year, SPIFF assisted with a wide range of building maintenance and improvement concerns. For example, SPIFF selected paint colors for painting projects, evaluated options for exterior sign repairs, hung artwork, completed installation of the North Arches Meeting Room carpet, and recommended standard finishes for electrical outlet covers, switches and receptacles.

## ***Visual Arts Committee***

*Submitted by Bette DeMars, Chair*

---

Visual Arts Committee members enhance the church's appearance through their activities. Chancel flowers highlight each Sunday service and frequently offer an opportunity for congregants to honor an individual or event. For Justin Schroeder's ordination and ceremony of covenant, Pamela Balabuszko-Reay, working with Janet Mills, created an impressive arrangement to grace the chancel. Since maintaining live plants in the Atrium had become difficult, the committee purchased artificial plants to replace them. This year's holiday decorations transformed the sanctuary with an elegant bronze and gold décor.

Art exhibits included: "The Dolls" from the organization I Love a Parade, water colors by Richard Graves, a variety of fair trade pieces from Alsadu, and the Youth Cultural Exchange photos. As part of the year-long sesquicentennial celebration, church artists presented works from the theme "Illuminate the Past, Celebrate the Present, Inspire the Future." Youth also had an opportunity to participate in a show. With the theme "What I Love about My Church," they were invited to submit a piece they worked on at home or to attend a Sunday Morning art event lead by Jane Johnson. The ninth graders created beautiful mandalas as part of a classroom activity for the show.

Enhancing the Atrium with the chalice fabric mobile was a highlight for the year. After visiting Banner Creations to see ideas and discuss possibilities, Visual Arts members were fortunate to have SPIFF committee member and interior designer Kristen Mengelkoch agree to design a piece. Steve Oakley worked with her in various aspects to make this vision a reality. The colorful piece warms the Atrium space and welcomes all who enter the church.

Members include: Fran Addington, Cheryl Anderson, Ruth Arnold, Christine Bailey, Pamela Balabuszko-Reay, Rene Block, David Krewinghaus, Bette DeMars, Pat Foulkes, Anne Frenchick, Jane Johnson, Mary Johnson, Candace McClenahan, Janet Mills, Steve Oakley, Gratia Reynolds, Sylvia Rudolph, Ruthann Wood.

## Statement of Condition

April 30, 2010

(This is an unofficial document to be used for discussion purposes only.)

	Balance as of 7/1/2009	Balance as of 4/30/2010
<b>ASSETS</b>		
Operating Accounts	\$58,071	\$49,603
Receivables/Prepays	\$6,206	\$0
Pledges Receivable	\$772,997	\$157,010
Physical Plant	\$2,220,751	\$2,220,751
Reserve Funds	\$597,157	\$736,122
<b>Total Assets:</b>	<b>\$3,655,182</b>	<b>\$3,163,486</b>
<b>LIABILITIES</b>		
Payable/Prepaid/Carryover	\$75,418	\$59,153
Deferred Revenue	\$772,997	\$157,010
Debt	\$759,173	\$759,173
<b>Total Liabilities:</b>	<b>\$1,607,588</b>	<b>\$975,336</b>
<b>NET ASSETS</b>		
Equity	\$1,682,180	\$1,807,118
Temporarily Restricted Funds	\$214,388	\$257,861
Legacy Funds	\$159,026	\$107,816
Current Period Changes	-\$8,000	\$15,355
<b>Total Net Assets:</b>	<b>\$2,047,594</b>	<b>\$2,188,150</b>
<b>Total Liabilities &amp; Net Assets</b>	<b>\$3,655,182</b>	<b>\$3,163,486</b>
<i>Excludes First Universalist Foundation; see their report under the Foundation section.</i>		

Statement of Activities  
2010-11

	As of 4/30/10	Fiscal Year Ending 6/30/10	
	YTD	Annual	Reforecast
	Actual	Budget	Budget
<b><i>Income:</i></b>			
<b>OPR. CONTRIBUTIONS</b>	658,290.85	821,500.00	794,500.00
<b>FUNDRAISERS</b>	38,088.60	47,000.00	36,326.79
<b>INTEREST</b>	4,281.94	8,000.00	4,300.00
<b>BUILDING USE</b>	176,210.05	207,918.00	208,074.35
<b>MISC.</b>	121,112.30	120,223.15	144,151.66
<b>R.E. DONATIONS</b>	42,943.27	30,600.00	46,207.02
<b><i>Total Income</i></b>	<u>1,040,927.01</u>	<u>1,235,241.15</u>	<u>1,233,559.82</u>
	YTD	Annual	Reforecast
	Actual	Budget	Budget
<b><i>Expense:</i></b>			
<b>MINISTERS</b>	210,205.06	261,545.67	262,635.62
<b>LIFE SPAN FAITH DEV.</b>	111,921.98	128,170.65	138,508.24
<b>WORSHIP</b>	38,487.82	48,210.53	45,778.20
<b>MEMBERSHIP</b>	26,931.77	37,374.00	32,025.00
<b>DEN. CONNECTION</b>	30,250.00	39,500.00	39,500.00
<b>COMMUNICATIONS</b>	42,791.82	50,832.00	51,498.00
<b>FAITH IN ACTION</b>	47,921.59	65,964.98	64,502.00
<b>PASTORAL CARE</b>	6,766.61	8,450.00	6,950.00
<b>FINANCE/ADMINISTRATION</b>	150,865.32	211,029.21	181,217.54
<b>PROPERTIES</b>	178,078.14	215,935.78	212,369.12
<b>CAPITAL EXPENSE</b>	19,967.16	18,200.00	23,260.60
<b>CONGREGATIONAL LIFE</b>	71,875.42	88,114.00	88,031.00
<b>NON-OPERATING</b>	87,045.63	60,454.56	100,454.56
<b><i>Total Expense</i></b>	<u>1,023,108.32</u>	<u>1,233,781.38</u>	<u>1,246,729.88</u>
<b><i>Income - Expense</i></b>	<u>17,818.69</u>	<u>1,459.77</u>	<u>-13,170.06</u>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

INCOME	Approved Budget	09-10 Current	Approved Budget
	for 09-10	Full-Year Forecast	for 10-11
<b>OPR. CONTRIBUTIONS</b>			
159 Operating Carryover	\$0.00	\$0.00	\$0.00
179 New Member Pledges	\$25,000.00	\$10,000.00	\$25,000.00
Matching Grant for New Pledges			\$15,000.00
182 Contingency for Unpaid Pledges	-\$20,000.00	-\$20,000.00	-\$25,000.00
48 Pledges-Current	\$753,000.00	\$753,000.00	\$860,000.00
5 Pledges-Prior Year	\$10,000.00	\$1,000.00	\$5,000.00
55 Contributions Rec'd	\$30,000.00	\$21,000.00	\$22,000.00
56 Offering Plate Cash Donations	\$23,500.00	\$30,000.00	\$25,000.00
	\$821,500.00	\$795,000.00	\$927,000.00
<b>FUNDRAISERS</b>			
Additional Fundraisers			\$1,500.00
68 Auction	\$25,000.00	\$23,305.86	\$35,000.00
Special Event Fundraisers			\$5,000.00
Net Proceeds from Raffle	\$12,000.00	\$10,920.79	\$18,000.00
Valentine's Dance	\$10,000.00	\$1,906.00	\$5,000.00
	\$47,000.00	\$36,132.65	\$64,500.00
<b>INTEREST</b>			
53 Reserve Acct Dividend/Interest	\$8,000.00	\$4,300.00	\$6,000.00
<b>BUILDING USE</b>			
160 Antenna Lease	\$10,918.00	\$11,074.00	\$11,402.10
Emily Grey Lease Buyout			\$45,000.00
57 Rental Income	\$197,000.00	\$197,000.00	\$45,000.00
	\$207,918.00	\$208,074.00	\$101,402.10
<b>MISC.</b>			
162 Legacy Fund Distribution	\$0.00	\$0.00	\$9,773.12
1 From Foundation	\$10,000.00	\$11,000.00	\$9,500.00
37 From Designated Funds	\$11,373.70	\$18,010.11	\$0.00
Flower Donations	\$900.00	\$760.50	\$600.00
Hospitality Donations (coffee/cookies)			\$3,000.00
Bookstore Book Sales			\$3,500.00
Repayment to Reserves (Sr. Minister)	\$22,916.67	\$0.00	\$0.00
62 Other	\$0.00	\$6,640.92	\$0.00
	\$45,190.37	\$36,411.53	\$26,373.12
<b>NON-OPERATING</b>			
164 Offering Plate for Community	\$29,000.00	\$66,000.00	\$60,000.00
31 New Donors	\$5,000.00	\$10,000.00	\$10,000.00
32 Limpert Fund	\$8,678.22	\$8,678.22	\$3,000.00
17 150th Committee	\$29,454.56	\$29,454.56	\$5,000.00
	\$72,132.78	\$114,132.78	\$78,000.00
<b>CAPITAL EXPENSE</b>			
16 Capital Reserves	\$2,900.00	\$2,900.00	\$32,250.00
<b>R.E. DONATIONS</b>			
165 Coming of Age Fees	\$4,375.00	\$4,375.00	\$4,375.00
166 7th Grade Fees	\$625.00	\$1,155.00	\$625.00
8th Grade Fees			\$1,500.00
52 Adult Ed Fees	\$600.00	\$1,914.65	\$1,000.00
35 Youth Trip Fundraising	\$0.00	\$12,847.23	\$1,000.00
Misc. RE Income	\$0.00	\$3,135.14	\$2,000.00
272 R.E. Fees	\$25,000.00	\$22,500.00	\$30,000.00
	\$30,600.00	\$45,927.02	\$40,500.00
<b>Total Income</b>	<b>\$1,235,241.15</b>	<b>\$1,242,877.98</b>	<b>\$1,276,025.22</b>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

<b>EXPENSE</b>			
	Approved Budget	09-10 Current	Approved Budget
<b>Worship</b>	for 09-10	Full-Year Forecast	for 10-11
Senior Minister Severence	0	0	0
Senior Minister Salary	\$91,666.67	\$91,667.67	\$102,000.00
Senior Minister Benefits	\$20,709.00	\$20,709.00	\$24,278.00
Senior Minister Professional	\$9,000.00	\$9,000.00	\$9,000.00
Senior Minister Relocation/Settlement Payment	\$4,250.00	\$4,250.00	\$0.00
Senior Minister Installation	\$6,000.00	\$3,592.55	\$0.00
Ministerial Intern	\$0.00	\$0.00	\$13,500.00
Ministerial Intern Benefits			\$5,495.00
Ministerial Intern Professional			\$1,000.00
Summer Minister	\$5,000.00	\$5,000.00	\$4,000.00
Summer Minister Benefits	\$383.00	\$382.50	\$306.00
3 Interim Minister	\$0.00	\$0.00	\$0.00
131 Interim Minister Benefits	\$0.00	\$787.07	\$0.00
183 Interim Minister Professional	\$0.00	\$2,709.83	\$0.00
Rites of Passage	\$0.00	\$0.00	\$0.00
50 Associate Minister	\$89,045.00	\$89,045.00	\$89,935.00
184 Associate Minister Benefits	\$28,492.00	\$24,000.00	\$28,282.00
185 Associate Min. Professional	\$7,000.00	\$6,500.00	\$7,000.00
	<b>\$261,545.67</b>	<b>\$257,643.62</b>	<b>\$284,796.00</b>
<b>WORSHIP</b>			
129 Music Staff Salaries	\$34,013.00	\$34,013.00	\$34,013.00
137 Music Staff Benefits	\$3,102.00	\$2,700.00	\$3,002.00
142 Music	\$7,895.53	\$6,000.00	\$3,000.00
152 Guest Speakers	\$1,000.00	\$2,087.20	\$3,000.00
123 Add'l Worship Items	\$500.00	\$100.00	\$500.00
Winter Solstice Service	\$600.00	\$278.00	\$600.00
64 Multigenerational Worship	\$500.00	\$100.00	\$700.00
Multigenerational Music	\$225.00	\$100.00	\$350.00
43 Worship Associates	\$375.00	\$250.00	\$600.00
	<b>\$48,210.53</b>	<b>\$45,628.20</b>	<b>\$45,765.00</b>
<b>PASTORAL CARE</b>			
141 Event Supplies	\$50.00	\$0.00	\$50.00
89 Pastoral Care Supplies	\$700.00	\$500.00	\$700.00
138 Friendship/Caring Corner	\$400.00	\$50.00	\$400.00
Support Groups	\$0.00	\$0.00	\$3,500.00
134 Memorial Services	\$400.00	\$150.00	\$400.00
58 TRUST	\$6,000.00	\$6,000.00	\$0.00
83 Training & Resources	\$700.00	\$250.00	\$700.00
10 Safety Program	\$200.00	\$0.00	\$0.00
	<b>\$8,450.00</b>	<b>\$6,950.00</b>	<b>\$5,750.00</b>
<b>Worship Total</b>	<b>\$318,206.20</b>	<b>\$310,221.82</b>	<b>\$336,311.00</b>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

Programming			
	Approved Budget	09-10 Current	Approved Budget
	for 09-10	Full-Year Forecast	for 10-11
<b>CONGREGATIONAL LIFE STAFFING</b>			
Congregational Life Staff Salaries (1.75 FTE)	\$68,600.00	\$69,421.00	\$72,812.00
Congregational Life Staff Benefits	\$19,514.00	\$18,610.00	\$21,458.00
	<b>\$88,114.00</b>	<b>\$88,031.00</b>	<b>\$94,270.00</b>
<b>DEN. CONNECTIONS</b>			
161 Program Dues UUA	\$27,000.00	\$27,000.00	\$26,980.80
59 Program Dues PSD	\$10,000.00	\$10,000.00	\$9,435.25
163 PSD/GA Meetings	\$2,500.00	\$2,500.00	\$1,800.00
	<b>\$39,500.00</b>	<b>\$39,500.00</b>	<b>\$38,216.05</b>
<b>FAITH DEVELOPMENT</b>			
133 Lifespan Staff Salaries	\$86,646.00	\$82,000.00	\$80,044.00
135 Lifespan Staff Benefits	\$20,639.00	\$24,500.00	\$28,859.00
Classroom Supplies			\$1,500.00
Youth Social Activities	\$0.00	\$0.00	\$400.00
28 Sr. High Trips	\$1,000.00	\$17,512.38	\$1,545.00
Lifespan Leadership	\$0.00	\$0.00	\$0.00
66 Young Adults	\$1,000.00	\$1,000.00	\$1,030.00
84 Library/Bookstore	\$500.00	\$500.00	\$600.00
Bookstore			\$1,200.00
70 Curriculum	\$1,200.00	\$2,000.00	\$1,648.00
73 R.E. Other	\$2,000.00	\$2,200.00	\$2,060.00
71 Teacher Workshops	\$750.00	\$400.00	\$1,235.00
72 Teacher Appreciation	\$700.00	\$750.72	\$1,030.00
76 Grade 8	\$1,500.00	\$850.00	\$1,905.00
78 Grade 7	\$1,400.00	\$1,400.00	\$1,800.00
81 Grade 9 (COA)	\$5,300.00	\$3,000.00	\$5,450.00
82 Grade 10-12	\$750.00	\$750.00	\$1,030.00
77 Summer Programs	\$2,000.00	\$1,000.00	\$2,885.00
4 RE Musical	\$1,000.00	\$2,971.26	\$0.00
Theme Teaching with the Ministers	\$0.00	\$0.00	\$1,000.00
Worship	\$0.00	\$0.00	\$0.00
Labyrinth	\$585.65	\$150.00	\$600.00
136 Adult Education	\$1,200.00	\$1,389.75	\$1,500.00
	<b>\$128,170.65</b>	<b>\$142,374.11</b>	<b>\$137,321.00</b>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

	Approved Budget for 09-10	09-10 Current Full-Year Forecast	Approved Budget for 10-11
<b>MEMBERSHIP</b>			
Membership Support Salary	\$19,300.00	\$19,300.00	\$19,307.00
Membership Support Benefits	\$5,674.00	\$4,600.00	\$5,796.00
156 New Member Programs	\$2,000.00	\$2,500.00	\$2,500.00
Social Gatherings	\$5,000.00	\$1,250.00	\$1,200.00
178 Hospitality	\$4,400.00	\$4,700.00	\$7,000.00
Special Events			\$0.00
Visitor Welcoming			\$400.00
158 Pathway to Membership	\$1,000.00	\$100.00	\$800.00
	<b>\$37,374.00</b>	<b>\$32,450.00</b>	<b>\$37,003.00</b>
<b>FAITH IN ACTION</b>			
146 Faith in Action Staff Salaries	\$36,000.00	\$36,000.00	\$20,571.00
147 Faith in Action Staff Benefits	\$13,552.00	\$13,552.00	\$12,500.00
172 Affiliations	\$850.00	\$850.00	\$250.00
175 Action Groups	\$2,100.00	\$2,100.00	\$1,200.00
Green Sanctuary	\$3,000.00	\$2,500.00	\$3,000.00
Unity Summer		\$6,000.00	\$1,000.00
EcoMinds	\$3,462.98	\$1,500.00	\$0.00
85 Supplies//Misc.	\$0.00	\$0.00	\$0.00
113 Leadership Dev./Training	\$0.00	\$0.00	\$0.00
281 Special Projects	\$1,000.00	\$1,000.00	\$750.00
	<b>\$59,964.98</b>	<b>\$63,502.00</b>	<b>\$39,271.00</b>
<b>Programming Total</b>	<b>\$353,123.63</b>	<b>\$365,857.11</b>	<b>\$346,081.05</b>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

Operations			
	Approved Budget	09-10 Current	Approved Budget
	for 09-10	Full-Year Forecast	for 10-11
<b>FINANCE/ADMINISTRATION</b>			
151 Admin Staff Salaries	\$92,140.00	\$92,140.00	\$104,106.00
153 Admin Staff Benefits	\$27,183.00	\$27,183.00	\$35,260.00
154 Staff Support	\$1,500.00	\$1,500.00	\$1,500.00
167 Personnel Accrued Time	\$2,000.00	\$1,600.00	\$4,200.00
173 Health Insurance Increases	\$5,610.00	\$0.00	\$7,852.00
Staff Salary Increases			\$7,092.44
Benefit Increases			\$990.00
116 Worker's Comp.	\$5,500.00	\$5,436.00	\$6,000.00
75 CPA/Atty Expenses	\$2,000.00	\$600.00	\$2,000.00
Special Event Consultants			\$3,000.00
148 Visual Arts	\$4,829.54	\$4,829.54	\$5,000.00
234 Leadership Development	\$3,700.00	\$605.00	\$5,000.00
Ministerial Search Committee		\$137.29	\$0.00
180 Financial Canvass	\$2,000.00	\$3,244.28	\$2,500.00
181 Acctg./Payroll Fees	\$8,000.00	\$12,000.00	\$10,000.00
230 Investments Fees	\$1,000.00	\$1,211.00	\$1,000.00
36 Stewardship	\$650.00	\$0.00	\$0.00
186 Office Supplies	\$4,500.00	\$6,000.00	\$4,000.00
192 Postage (Exc.Liberal)	\$7,000.00	\$4,000.00	\$7,000.00
193 Equipment Maint.	\$17,000.00	\$23,000.00	\$21,200.00
216 Equipment Other	\$2,500.00	\$600.00	\$0.00
Repayment to Reserves (Sr. Minister)	\$22,916.67	\$0.00	\$0.00
207 Board Expenses	\$1,000.00	\$1,014.00	\$1,000.00
	<b>\$211,029.21</b>	<b>\$185,100.11</b>	<b>\$228,700.44</b>
<b>COMMUNICATIONS</b>			
144 Communications Staff Salary	\$30,922.00	\$31,098.00	\$31,200.00
145 Communications Staff Benefits	\$9,410.00	\$9,900.00	\$11,517.00
188 Liberal(Inc.Postage)	\$5,000.00	\$5,500.00	\$5,000.00
191 Bulletins & Printing	\$4,500.00	\$3,000.00	\$4,000.00
79 Electronic	\$1,000.00	\$2,500.00	\$1,700.00
	<b>\$50,832.00</b>	<b>\$51,998.00</b>	<b>\$53,417.00</b>

# Facility, Human, and Financial Resources

## Recommended 2010-2011 Budget

	Approved Budget for 09-10	09-10 Current Full-Year Forecast	Approved Budget for 10-11
<b>PROPERTIES</b>			
Properties Staff Salaries	\$20,592.00	\$23,000.00	\$24,752.00
Properties Staff Benefits	\$4,013.00	\$2,000.00	\$3,781.00
130 Additional Custodial Hours	\$0.00	\$900.00	\$1,000.00
169 Undesignated Bldg Maint	\$10,000.00	\$10,356.84	\$11,245.54
170 Kitchen Committee	\$1,000.00	\$11.00	\$0.00
33 SPIFF Committee	\$1,000.00	\$1,000.00	\$2,000.00
42 Sound System Services	\$1,850.00	\$12.00	\$6,940.00
213 Mortgage Interest	\$54,000.00	\$54,000.00	\$54,000.00
195 Utilities - Gas	\$27,000.00	\$22,000.00	\$25,300.00
Utilities-Gas Credit	-\$3,711.22	-\$3,711.22	\$0.00
90 Utilities - Electric	\$27,000.00	\$25,500.00	\$27,000.00
91 Utilities - Phone	\$4,500.00	\$3,675.00	\$4,500.00
92 Utilities - Water	\$6,500.00	\$6,400.00	\$6,500.00
200 Repairs & Maint.	\$16,000.00	\$23,000.00	\$18,000.00
201 Rubbish Hauling	\$8,800.00	\$5,500.00	\$6,000.00
203 Groundskeeping	\$6,900.00	\$6,000.00	\$7,900.00
253 Boiler/AC Maint.	\$11,330.00	\$15,000.00	\$14,300.00
257 Elevator Maintenance	\$3,000.00	\$2,667.00	\$3,300.00
254 Alarm Maintenance	\$2,000.00	\$1,430.00	\$2,200.00
174 Misc. Expenses	\$0.00	\$0.00	\$0.00
206 Insurance	\$14,162.00	\$12,037.50	\$13,500.00
	<b>\$215,935.78</b>	<b>\$210,778.12</b>	<b>\$232,218.54</b>
<b>CAPITAL EXPENSE</b>			
23 Library/Bookstore Capital	\$0.00	\$0.00	\$0.00
Bookstore Capital			\$3,800.00
60 Capital Other	\$0.00	\$4,860.60	\$30,000.00
25 Computers	\$2,500.00	\$2,700.00	\$6,250.00
27 SPIFF Capital	\$1,900.00	\$2,200.00	\$7,250.00
30 Mortgage Principal	\$13,800.00	\$13,800.00	\$13,800.00
	<b>\$18,200.00</b>	<b>\$23,560.60</b>	<b>\$61,100.00</b>
<b>Operations Total</b>	<b>\$495,996.99</b>	<b>\$471,436.83</b>	<b>\$575,435.98</b>
<b>NON-OPERATING</b>			
171 Offering Plate for Community	\$29,000.00	\$66,000.00	\$60,000.00
38 New Donors Expensed	\$2,000.00	\$10,000.00	\$9,000.00
40 Limpert Fund TBD	\$0.00	\$3,073.22	\$0.00
45 150th Committee	\$29,454.56	\$29,454.56	\$0.00
<b>Non-Operating Total</b>	<b>\$60,454.56</b>	<b>\$108,527.78</b>	<b>\$69,000.00</b>
<b>TOTAL EXPENSE</b>	<b>\$1,227,781.37</b>	<b>\$1,256,043.54</b>	<b>\$1,326,828.03</b>
Income -Expense	\$7,459.77	-\$13,165.56	-\$50,802.81
<b>THE CHURCH IS IN AN EXCELLENT POSITION TO SUPPORT THE 2010/11 BUDGET</b>			
<b>Reserve Funds</b>	<b>Balance Forward</b>	<b>2010/11 Budget</b>	<b>Ending Balance</b>
Future Debt Fund	\$67,354	\$50,803	\$16,551
Capital	\$118,174	\$32,250	\$85,924
Unrestricted Gifts	\$66,022	\$0	\$66,022
Contingency Reserves	\$155,410	\$0	\$155,410
<b>Total Reserve</b>	<b>\$406,960</b>	<b>\$83,053</b>	<b>\$323,907</b>