

**First Universalist Church of Minneapolis**  
**Board of Trustees Meeting**  
**April 19, 2012**  
**Agenda**

*In the Universalist spirit of love and hope, we give, receive, and grow.* First Universalist Church

6:30 Call to Order  
—Chalice lighting and centering meditation – Craig Bishop

6:40 Consent Agenda  
—Approve March minutes  
—Approve new members

6:45 Review the Past  
—Conversation with the Senior Minister  
—Finance Committee report  
Policies for Reserve Funds – Dan Berg

7:30 Strategic Plan: review of a draft

8:00 Governance Committee

8:15 Preparations for the Annual Meeting  
—Resolutions  
—honoring Kate

8:25 Meeting summary and evaluation

8:30 Closing and Adjournment

**Attachments:**

1. President's Report
2. March Board Minutes
3. Statistical Report
4. Senior Minister report
5. Finance Committee notes
6. Draft of the strategic plan

**Dates for our calendar:**

May 17, 2012 6:30 – 8:30 Board Meeting

President's Report  
April 19, 2012

Dear Board:

It's an amazing day as I write this, early in the morning, with the sun filling my window and my office with light and heat. It reminds me how the simplest gifts give the most pleasure and turn us towards good work, towards starting our day in happiness and kindness—which is, of course, the work of First Universalist and thus our work as well.

Our work this month includes the board's response to the first draft of the strategic plan. Do print it out, read it carefully, mark it up, and come with your impressions and thoughts to the board meeting. The Strategic Planning team will take your input, make revisions as necessary, and then offer it to the congregation and staff for feedback. The goal is to share it with the congregation very soon after our board meeting so feedback from the congregation can be integrated into the final document for approval at our May board meeting.

The Governance Committee has been testing the congregational survey and is almost ready to send it out and turn their attention to monitoring. We'll hear more at the meeting. The Financial Monitoring Team has been in communication with the staff around the budgeting process and will be presenting a policy for our approval.

There are likely to be two resolutions presented at the annual meeting, one focusing on the marriage amendment and the other on the voter ID amendment. Resolutions require the signatures of five percent of the congregation to be presented at the annual meeting and do not require a prior action of the board, but we should be aware that they will be presented. The final wording of the resolution is currently being drafted by congregants.

Blessings,

Kathy

P. S. If you haven't read a poem yet today, I offer "Why I Wake Early" by Mary Oliver who knows how to celebrate the simple act of turning towards the sun.

*Why I Wake Early*

*Hello, sun in my face.  
Hello, you who make the morning  
and spread it over the fields  
and into the faces of the tulips  
and the nodding morning glories,  
and into the windows of, even, the  
miserable and the crotchety--*

*best preacher that ever was,*

*dear star, that just happens  
to be where you are in the universe  
to keep us from ever-darkness,  
to ease us with warm touching,  
to hold us in the great hands of light--  
good morning, good morning, good  
morning.*

*Watch, now, how I start the day  
in happiness, in kindness.*

## **First Universalist Church of Minneapolis Board of Trustees Meeting**

**Thursday, March 15, 2012, 6:30 p.m.**

**Board Members present (absent):** David Bach, Dan Berg, Craig Bierbaum, Craig Bishop, Kathy Coskran, Nancy Gaschott, David Leppik, Paul Robinson, Lark Weller

**Clergy present:** Justin Schroeder

**Others present :** Ginny McAninch

<b><u>Agenda Item</u></b>	<b><u>Presenter</u></b>	<b><u>Discussion</u></b>	<b><u>Action, if any</u></b>
Opening Words/ Meeting Preparation	David Leppik	The meeting was called to order at 6:30.	
Consent agenda	Kathy Coskran	Approve February minutes Approve new members  <b>Action: Motion to approve Consent Agenda.</b>	<b>Passed.</b>
Proposed sponsorship of Erin Dajka	Kathy Coskran	<b>Action: Motion to sponsor Erin Dajka as a UU Ministerial Candidate.</b>	<b>Passed.</b>
Conversation with the Senior Minister	Justin Schroeder	Justin announced the hiring of Lauren Wyeth as new Director of Religious Education. She has a great resume and he is confident that she will be a great asset to the church, developing and using the inherent gifts of the entire congregation. There will be a meet and greet in the library following Sunday's services. Justin reported on the pledge drive, which is well ahead of previous years at this point in the campaign. He indicated that we have received over \$40,000 in pledges from new members. The church has applied for a grant from the UU Funding Panel to create a six month position focusing on communication and the pastoral aspects of the anti-marriage amendment, creating resources and messages to be used within and outside First Universalist, by other welcoming congregations. Other UU congregations have committed to contributing to this effort and will help purchase equipment for the project. Craig Bierbaum applauded the initiative as a perfect demonstration of our 4 <sup>th</sup> visionary goal. It is strategic in promoting the mission and values of First Universalist Church, and visionary in its message to the community. Church member Meg Riley participated in the project planning and grant application. Kathy mentioned the congregation's conversation about an official resolution by the church in opposition to the anti-marriage amendment. There was consensus that this resolution be on the agenda for the Annual Meeting in June. Justin pointed out that, although 99% of church members probably agree with this position, there are some who may not, and we should be aware of this and respond respectfully. Several board members expressed frustration that the board packet has not been posted in a timely manner. Justin committed to its being posted on the Friday before board meetings. Paul Robinson asked whether there is any opportunity for local UU congregations to get together or work together on a common agenda, other than at annual conventions and Prairie Star District gatherings. Justin noted several excellent ideas that were discussed and will pursue.	
Finance Committee Report	Dan Berg	Dan reported that the Finance Committee meeting was cancelled and would be rescheduled to review the first draft of the 2012-13 budget.	
Strategic Plan Update	Kathy Coskran	Kathy reported in David Bach's absence that the committee has been digesting an overwhelming amount of information, and has taken an opportunity to step back and not get bogged down in the details. Several underlying themes have emerged: This is primarily a religious community with spiritual growth at the center; Sunday	

## **First Universalist Church of Minneapolis Board of Trustees Meeting**

		<p>morning services are wonderful and continue to be a priority for the congregation; We will grow in numbers and spirit; We have untapped capacity to fund our growth; There is a great interest in diversity--we want it and it won't be easy; We can't be everything to all people; We are radically recreating the DNA of our congregation; We will lift up the youth and become a truly intergenerational community; We value community; We have to attend to our infrastructure and grow our capacity, including right-size staffing; We need to commit to best practices in communication; We have a strong commitment to the broader community and need to find ways to serve; We want to perfect our digital ministry. At the last meeting, the committee created a new framework for organizing these priorities. They are now meeting on a weekly basis. The goal is to distribute a draft strategic plan for comment by the congregation in mid-April, with a (nearly) final draft by the May board meeting. Kathy noted that it has become obvious that this planning process started with the Senior Minister search three years ago. The "Mission Possible" process came next, and now the official strategic planning process. The committee is blending big ideas with practical details to achieve actionable goals. Paul observed that the themes of community and connection are apparent in the list of themes that Kathy presented. There was some discussion about how staffing requirements would be presented in the plan. David Leppik sought clarity on the physical space question. Kathy explained that the committee has studied other UU strategic plans and that this has been useful in designing a framework for ours. Kathy said there would be a timeline as part of the plan, with appendices providing greater depth and detail. Justin commented that the committee has been truly visionary, with its focus just beyond the horizon. Everyone agreed and appreciated that the committee is doing outstanding and very difficult work.</p>	
<p>Governance Committee Report</p>	<p>Craig Bierbaum</p>	<p>The committee took feedback from the last board meeting and subsequent online comments and produced a revised survey. They will test the survey in the social hall after Sunday's services. Craig explained how this would work. There is consensus in the committee that the survey is too long, but Sunday's test should provide guidance in how to cut. There was considerable discussion about the content and timing of the survey. There was also a desire to have the Board sign-off on the final version before it is released to the congregation. There was a general feeling that May is the right month to launch the survey, even though there is already a great deal happening that month. The survey outcomes will be most useful in fall and should be ready for the board/staff retreat. Craig also presented the issue that has been raised by members of the congregation that standing committees should be composed of church members exclusively. The committee agrees and will propose this as a revision to the <a href="#">Governing Policies Handbook</a>.</p>	
<p>Document Revisions</p>	<p>Kathy Coskran</p>	<p>Kathy referred to document revisions that are proposed and included in the <a href="#">Board Packet</a>.</p> <p>Visionary Goal 2: David Leppik had proposed a new version that was inspired and welcomed as a great improvement over the previously approved version. Kathy had modified David's suggestion to be more consistent in style and structure to the other three visionary goals. The board discussed both versions and concluded that the following should replace the current Visionary Goal 2:</p>	

## First Universalist Church of Minneapolis Board of Trustees Meeting

		<p><i>First Universalist Church is a home for ageless wisdom. People of all ages find opportunities to engage in an intellectual and spiritual search for deeper meaning and understanding in the UU tradition, both as individuals and in community. We know our roots, find our wings, and apply our knowledge and wisdom to all our endeavors.</i></p> <p><b>Action: Motion to adopt this language as Visionary Goal 2.</b></p> <p>There were four proposed changes to the Bylaws, all were presented and explained in the March <a href="#">Board Packet</a>. There was discussion about all four changes. A minor change was proposed to the amendment for Article II, Section 3, but there was greater focus and discussion regarding the clarity of changes being suggested to Article I, Section 2. Additional changes were suggested to these proposed amendments, which are included in their approved format in these minutes as <a href="#">Attachment A</a>.</p> <p><b>Action: Motion to recommend amendments as proposed for approval at the annual meeting.</b></p>	<p><b>Passed.</b></p> <p><b>Passed</b></p>
	Lark Weller	Lark reported that the "Leap of Faith" group is meeting soon with their counterparts from All Souls Unitarian in New York City. She handed out a list of discussion topics and invited more.	
Executive Session	Kathy Coskran	The Board entered into Executive Session at 8:20 to discuss Senior Minister Compensation. After a thorough discussion the Board approved a base compensation (including housing allowance) that Kathy would present to Justin for budgeting purposes.	
Meeting Summary and Evaluation		None.	
Adjourn		The meeting was adjourned at 9:19.	

Important Dates:

Next meeting: April 19, 2012

Opening Words and Treats for Next Meeting: Craig Bishop

# **First Universalist Church of Minneapolis Board of Trustees Meeting**

## **Attachment A**

Additional modifications to Bylaw changes proposed in the [Board Packet](#) (supersedes changes to these sections presented in the March Board Packet):

### **ARTICLE I. Members**

#### **Section 2. Qualification and Admission of Members**

Any person fourteen years of age or older who has made a written application for membership, has signified sympathy with the purposes of the Church, and has made an annual ~~recordable~~ pledge and contribution of record to the Church shall be eligible for membership provided that the applicant is approved by a majority of the Board of Trustees. Membership becomes effective upon that vote, after which the President of the Congregation shall issue a Membership Certificate.

All Members under previous bylaws are Members hereunder without further acceptance by the Board. To continue membership and to be eligible to vote, a Member shall make a pledge and a contribution of record to the Church treasury within the twelve (12) months prior to any meeting at which the voting privileges of the Church are exercised, or make such a contribution at the meeting.

Exceptions to the membership requirements, both for new and continuing Members, may be approved by the Senior Minister. Members are encouraged to show continued interest in the Church by taking part in its activities.

### **ARTICLE II**

#### **Section 3. Notice**

Written notice of each meeting of the Members, whether the Annual Meeting or a Special Meeting, shall be mailed or e-mailed to each Member and electronically posted on the website not less than ten (10) nor more than thirty (30) days before the meeting, addressed according to the most recent membership records. The notice shall include a) the time, place, and purpose of the meeting; b) the proposed agenda; c) the text of any resolution duly presented to the secretary; and d) the text of any proposed amendments to the Bylaws.

**First Universalist Church  
Statistical Report  
April 19, 2012**

**MEMORIAL SERVICES:**

Allan Roadfeldt, died April 5, memorial service here April 11, conducted by Ralph Krog

**MARRIAGES/SERVICES OF COMMITMENT: 0**

**MEMBERS FOR APPROVAL: 6**

Camille and John Peschken, Maple Grove  
Dennis and Roberta Haskin, Bloomington  
Arif Mamdani and Channing McKinley, St. Paul

**MEMBERS REINSTATED: 0**

**MEMBERS FOR REMOVAL: 4**

Lauren and Allison Wyeth were approved as members on the November Statistical Report for the December 15<sup>th</sup> Board of Trustees meeting, before Lauren was hired by the Church. According to church policy, their memberships need to be annulled.  
Rev. Steven Protzman, moved to Iowa City, IA to minister a congregation there.  
Allan Roadfeldt, passed away April 5, 2012

**CHILDREN DEDICATED: 0**

	To Date	End of Year Totals			
MEMBERS	2011-2012	2010-11	2009-10	2008-09	2007-08
(Fiscal Year)	59	98	75	72	41
<b>TOTAL MEMBERS:</b>	<b>916</b>	<b>927</b>	<b>849</b>	<b>840</b>	<b>824</b>

**TOTAL MEMBERS AS OF THE LAST MEETING: 914**

**To be added: 6**  
**To be removed: 4**

**TOTAL MEMBERS: 916**





Sr. Minister Report to the Board of Trustees, April, 2012

**Mission:** In the Universal Spirit of love and hope, we give, receive, and grow.

**Visionary Goals:**

**1) The people of First Universalist Church grow in their UU faith: we are equipped to live out our values and experience worship, spiritual practices, and rituals that challenge, comfort, celebrate, and heal**

On Easter Sunday, we offered an all ages, multi-generational worship service, led by Ruth MacKenzie, Lauren Wyeth, and the worship team. Families and children participated in the service, and it was a deeply engaging experience, as we wove the Passover and Easter (and table fellowship) stories together.

On April 15, we kicked off our new sermon series, "The Good News," exploring what our "Good News" is as Unitarian Universalists (and religious liberals).

On April 22, the Rev Jen Crow will be a part of the service, as we introduce her to the congregation, reminding them that she will begin in August, and that Rev. Kate Tucker will be retiring from ministry on June 15<sup>th</sup>.

We are planning a summer worship series called "Standing on the Side of Love," as we look at UU history and men and women who "stood on the side of love."

**At First Universalist Church, people of all ages find opportunities to engage in an intellectual and spiritual search for deeper meaning and understanding both as individuals and in community**

Lauren Wyeth began as our Director of Religious Education on March 5, 2012. She has been busy connecting with families, children, and youth, and we're thrilled that she's here. Under her leadership and the involvement of the Program Team, we are planning a full range of summer activities for children, youth, and families.

**First Universalist Church is an intergenerational community of mutual caring and support. We build this community by actively welcoming all and encouraging each other to discover, develop and share their gifts**

Small Groups continue to play a significant pastoral care role in church member's lives, as group members tend to, and care for, one another in deep and profound ways.

The Program Team is in the process of doing some very intentional planning for what the summer programming will look, as we strive to serve families, children, and youth in meaningful and effective ways this summer (and not entirely “shut down” the religious education program.)

**The people of First Universalist Church work to build a just, loving and sustainable world. We are a visible, influential voice, and we act to shape the larger community into a more just and equitable society.**

We are building energy and momentum around the Marriage Prohibition Amendment and our role in this statewide conversation.

A number of First Universalist members were a part of the “Reproductive Rights” rally at Planned Parenthood on Good Friday.

I recently had a fascinating conversation with Rev. Oliver White, Pastor of Grace Community United Church of Christ in St. Paul. Rev. White was recently in the paper, because he had spoken in favor of GBLT people, and emphasized that Grace Community is a welcoming and affirming church. However, it is primarily an African American community, and a number of his parishioners have left over this issue. They are currently facing some significant financial challenges, and in our meeting we discussed how we might partner and/or support Grace Community. I am very excited how we might support Grace Community and Rev. Oliver White, whether it’s through a Sunday offering, or a more formal partnership of some kind. We’ve committed to being in conversation with one another. (Here are some links to relevant articles:

[http://www.twincities.com/stpaul/ci\\_20114401/strapped-st-paul-church-pro-gay-pastor-helped](http://www.twincities.com/stpaul/ci_20114401/strapped-st-paul-church-pro-gay-pastor-helped) and <http://minnesota.publicradio.org/display/web/2012/03/05/daily-circuit-same-sex-equality/>)

### **Updates and Additional Report:**

**Unitarian Universalism and Diversity Workshops:** There are two upcoming opportunities on the weekend of May 4, 5, and 6, that I hope the Board of Trustees will participate in. First, Whitebear Unitarian Church is hosting the Rev. Mark Morrison Reed. Mark is the author of: *Been in the Storm So Long*, *Black Pioneers in a White Denomination*, *Darkening the Doorways: Black Trailblazers* and *Missed Opportunities in Unitarian Universalism*, and *In Between: Memoir of an Integration Baby*.

On Friday, May 4, at 7:00 p.m., he'll be reading from his book, "Voices from the Margins." And on Saturday, May 5, from 9:30 a.m. to 2:30 pm, he'll be leading a workshop, on "The Perversity of Diversity."

Also on Saturday, May 5, the Rev. Marlin Lavanhar, Sr. Minister of All Souls Unitarian Church, in Tulsa, OK, will be speaking at Unity Church Unitarian in Saint Paul, about his experience with a multi-racial congregation (some of you may remember that a Universalist Pentecostal African American Church church merged with All Souls several years ago.) He'll be talking about the merger of these two churches, how it has changed them, impacted their worship life and more. This is from 9-12 on Saturday. I hope Board members will attend both of these sessions (both at White Bear and Unity.)

**Intern in 2012-2013:** UTS student Laura Smidzik will be our intern for 2012-2013. She will begin in August and be supervised by the Rev. Jen Crow, our Minister of Program Life.



**Leap of Faith Update:** At the end of March, the First Universalist Leap of Faith Team went to New York for a long weekend visit (to visit All Souls New York). It was a good visit, affirming that First Universalist is on the right path in so many ways, and at the same time, revealing to us the ways we might continue to deepen our ministry and improve. As part of this report, I'm including brief comments from trip participants.

Next Steps: The Leap of Faith team will be gathering again for a full debrief of the experience, and then we'll figuring out next steps to engage with congregants about our learnings, and how to implement some of what we've learned. I continue to be in touch with Rev. Galen Guengerich from New York.

From Eric Cooperstein:

I have a couple of take-aways from the trip that might be helpful to the Board. One is that I am seeing the subject of being a welcoming congregation through a whole new lens. The layout of the building, the messages from the pulpit, how we greet each other

- all has more meaning to me now. I used to think it was all about growth but now I see it as a fundamental way in which we relate to one another.

I find myself seeing the wisdom in some of the guidelines imposed (okay, strongly recommended) by the UUA. In the contrast with All Souls I see how we benefitted from a 2-yr interim ministry, not just in the work that Charolotte did with us on governance and related topics but on the underlying concept of preparing as a congregation to call a new minister. Those two years, which included the preparation and execution of the 150th celebration, were critical to our identity as a congregation. I'm inclined to believe that other rules, such as Kate having to separate from us for a period of time after she retires, are grounded in wisdom that we might not quite be able to see ourselves.

I see an organizational challenge in finding a rhythm and a familiarity in our services and programs that allows congregants to feel at home while at the same time not falling into a sense of complacency that deters us from continuing to change and grow.

From Lark Weller:

I have a few primary takeaways, as well.

1. One of the conversation topics I was most interested in having at All Souls was "unabashed and intentional hospitality." I came away from the trip totally clear that those terms, "unabashed" and "intentional," are right on. Being a truly welcoming place requires the desire to be welcoming, but more so requires active effort and a degree of intentional engineering. We talked about providing "welcome team" members with actual talking points for engaging conversations with people we don't know, that this is everyone's responsibility, and that we expect all congregational leaders to model welcoming behavior. I think it feels weird to many of us to so engineer a situation to ensure that we're being welcoming, but the alternative appears to be falling into comfortable conversations with people we already know, not wearing our nametags because we assume that the people we want to know who we are do know who we are, not having signs directing new people to the Sanctuary, not having greeters at the doors after 9:31 or 11:16 a.m., etc. As Eric points out, our being truly welcoming would be built into every part of our community: physical space, personal interactions, all aspects of the service and communication materials, how we treat first-time visitors and long-term members. Susan's point of being welcoming in the eyes of "the welcomed" (rather than in the eyes of "the welcoming") is critical, and is something I think we can work on.

2. I came away grateful for our own staff and the amazing work they do to connect so much of our congregational life (worship, activities, communications) to intentional and cohesive themes, visions, etc. This really helps to build a common experience for congregants, who can go out from there to explore their spirits, meaning, and lives on

their own and with others. I also think this is important to counterbalance the "cult of the individual" that I see UUs tend toward....Church is about more than our having a place to feel smart and advance a pet project, it's a place to be in community together and to help each other find and build meaning in our lives.

3. It was reinforced how important it is for us to be frank with people about money and our expectations of it. I think the way we've been talking about money at First Universalist--giving as a spiritual practice, aligning our spending with our values--is an important role of the church, and was surprised to see All Souls almost completely abdicating itself from that role, from what I gathered in my conversations with people. I would love to see us continue to strengthen our messages about giving along these lines.

All in all, the trip was fascinating and strengthened my gratitude to be a part of the First Universalist community. We have work to do to become who we truly want to be, but I think we have the energy and interest lining up to make it happen. I look forward to seeing where we go from here!

From Charmagne Campbell-Patton:

One of the biggest take-aways for me from our trip was just how important it is to step outside of my own comfort-zone and worldview as regularly as possible to take things in from a new perspective. As we discussed, doing that more as a group and as a church (by visiting other UU and non-UU churches, mosques, synagogues etc) would be so great. Not only did seeing how All Souls and Middle Church do things give us new ideas for things we could try (ways we could be more welcoming etc), it also seems to have deepened each of our appreciation of what a beloved community we already have. I think there is something to be said for the idea that "absence makes the heart grow fonder."

I have also been thinking of this question of diversity and inclusivity (racial/ethnic but also class, age and gender). I would love to think about how we can continue the conversation we began in NYC and really be authentic about how we're talking about issues of diversity and inclusivity. I was thinking about a listening project or something that takes some of the deep listening from the small groups space but focused on a topic like diversity. I think looking internally is an important first step in this process and that might be one way to do that. Thoughts still formulating on that one....

And like Lark and Eric, I have also been thinking a lot about hospitality. When I came to church on Easter, I could tell that something had shifted for me. I walked into the

sanctuary and thought about it as my home, not as this other place that I went to once a week and only knew a handful of people. I took it upon myself to seek someone out who I didn't know for a conversation on my way out of the sanctuary, which was really nice.

Overall, I too am full of gratitude for the opportunity to be with you all and to think about so many important topics. It is a privilege to be part of a community so committed to growing not just quantitatively, but qualitatively - to deepen engagement and create a connected community. And I too am incredibly appreciate for the amazing staff at First Univ!

From Heidi Mastrud:

There were many takeaways from this trip. I can't wait to begin work on strengthening our commitment to being a welcoming congregation where new and old feel part of something larger than themselves.

There is also something simmering in me about creating cultural norms where it's okay to engage in tough conversations because we know that they stem from a place of respect and love. I think we've been living into that idea here, and I think our trip showed me how important it is that we remain committed to that as an organization.

**Pledge Drive Update:** To date, we have received over \$960,000 in pledges (this is by the far the most of amount of pledge dollars we've received at this point in the campaign!). There are over a hundred people who pledged last year (who pledged about \$110,000) that have not pledged yet. They have all been contacted by the pledge team.

### **Staff Compensation Analysis:**

**Background:** It has been a long time since we've done a comprehensive compensation analysis. As a result, we had been operating without a clear sense of an overarching compensation philosophy. We now have that in place.

Here's how we got there:

Our HR consultant obtained salary data from:

\*The Unitarian Universalist Association

\*Minnesota Council of Nonprofits 2010 Salary Survey (their most recent version)

\*MN Department of Employment and Economic Development (DEED)

Job description were matched by our Directors (with salary information hidden) and reviewed by our Director of Finance and Administration and then by our HR consultant. We feel confident that we are comparing apples to apples.

Our HR consultant advises that to be competitive, we should as a rule of thumb pay our employees at 85% of the midpoint the market pays for those types of jobs. (We choose 85% of midpoint, because the church offers a generous benefits package: 100% health care coverage for employees and a generous retirement plan.) We believe we should deviate upwards from the 85% of midpoint for key employees in order to be competitive.

Currently, 13 of our 25 employees are paid below market midpoint, including some of our key employees. We are hoping to begin to address some of these salary issues in next year's budget (2012-2013), and in subsequent years as well.

### **Quote to Inspire and Guide our Conversation Around the Strategic Plan:**

This reading is an excerpt from the sermon delivered on Oct. 28, 2007 at the installation of Galen Guengerich as the new Senior Minister of All Soul's Church in New York City.

In her address, Harvard Professor, Dr. Diana Eck, herself a Methodist and one of the world's leading scholars of American religion, called on Unitarian Universalists to take seriously our place in the religious landscape of America, saying:

#### **READING:**

...I believe that Unitarian Universalists have a very important role in this new religious America and the new millennium of the world in which we live. You are, in my estimation, the church of the new millennium. In this era, Unitarian Universalism is not the lowest common denominator, but the highest common calling...

In a world divided by race and by religion and ideology, the very presence of a church like this, committed to the oneness of God, the love of God, the love of neighbor and service to humanity is a beacon. The Unitarian theology, and yes you have one, does not reduce the mystery of the divine, the transcendent, but amplifies it, broadens it to include the investigation of the many, many ways in which the divine is known and yet unknown... The world is in need of your theology.

## Notes from First Universalist Church Finance Committee Meeting

DATE: 26 March 2012

PRESENT: Dan Berg, Craig Bishop, Susan Claeys, Bill Elwood, Nancy Gaschott, Shawn Hartfeldt, Riley Owens.

GUEST: Rev. Justin Schroeder

*NOTE: The regularly scheduled March 14 meeting had been postponed to provide staff more time to prepare for the meeting.*

1. ISSUE: Should we suggest that the Governing Policies Handbook (GPH) be amended to provide more time for staff to prepare the draft budget before it must be presented to the Finance Committee for review?

The existing GPH language provides for the presentation of “the draft annual operating budget and capital expenditure budget to the Finance Committee for review and comment no later than 12 weeks prior to the Annual Meeting.” When the Annual Meeting is held, as it normally is, in the first week of June, this means that the draft budgets must be ready for the Finance Committee in early – mid March.

DISCUSSION AND DECISION: The committee agreed that the 12 week rule was unnecessary, and that, when the Annual Meeting is in early June, providing that the Finance Committee reviews the draft budgets by the end of March would be sufficient.

Accordingly, this note taker suggests that the following amendment be enacted by the board of directors:

Section IV: Senior Minister Limitations/ Subsection G Annual Budgeting and Long-term Financial Planning/ 1. Annual Operating Budget and Capital Expenditure Budget/

The 3<sup>rd</sup> bullet point should be changed as follows:

Present the draft annual operating budget and capital expenditure budget to the Finance Committee for review and comment no later than ~~12~~ 9 weeks prior to the Annual Meeting.

## 2. PRESENTATION OF THE ANNUAL OPERATING BUDGET

Susan and Justin presented an initial very “high-level;” (i.e. without detail) budget with a deficit of over \$39,000, no salary increases to any full time staff (including the salary increase the board had voted to



provide to the Senior Minister), and a significant decrease in denominational dues.

They then presented a compensation review<sup>1</sup> illustrating that some staff were currently being underpaid by the church.

Ultimately Susan and Justin offered a second approach, also without detail -- a summary of a balanced budget -- with appropriate salary increases, and ambitious plans to bring more revenue to the church. This would be accomplished by:

(a) having two “miracle Sundays” with special fundraising appeals, one this church year and one next church year, and

(b) by finding a tenant to rent some of the church’s unused weekday space.

Justin would like First Universalist to be a Fair Share church, paying what the UUA guidelines indicate, but it’s not possible right now.

The committee members posed questions to Justin and Susan, and discussed the budget proposals. Ultimately, the following is the collective “advice and comment” the Finance Committee offered to the Senior Minister on these budget approaches:

- The committee affirmed the momentum of the church and the positive membership growth and overall church liveliness and energy.
- The projected revenue from the pledge drive appears reasonable.
- It makes sense to seek a tenant for both revenue purposes AND the efficiency of making use of space that is not needed during the week.
- “Start tomorrow” on the search for this tenant. To have a tenant-included budget approved in June the tenant would need to be named.
- Why not view the tenant-included budget as a contingency budget: once the tenant is identified, then enact the other positive spending consequences?

---

<sup>1</sup> Bill Elwood reminded Justin and Susan that the our own Prairie Star District provides compensation analyses, and that, in the future, they don’t necessarily need to hire consultants to provide this information.

- Fair compensation to our valuable staff is very important to every member of the Finance Committee.
- We should not be cutting back on denominational dues. Our church is seen as a leader in the region; it's just not appropriate for us to plan to pay so little in dues.
- "We don't have a revenue problem, we have a spending problem."
- "Budget discipline is important." On the issue of a balanced budget the committee leaned heavily toward a no deficit budget, but at least one member would be open to a small deficit (defined as \$50K) if a tenant is not found.
- It's important to have the relationship between Unity Leadership, the church's Foundation, and the church itself settled – both in the financial sense and in the legal/organizational sense. Perhaps the Foundation could provide more support to the social justice work of the church.

Adjourned at 6:15 (NOTES: Nancy Gaschott)

**First Universalist Church Reserve Funds**

**PLAN OF OPERATION: STATEMENT OF INVESTMENT AND SPENDING OBJECTIVES AND POLICIES**

The following Statement of Investment and Spending Objectives and Policies has been adopted by the Board of Trustees ("the Board") of the Church and may be amended by the Board from time to time.

**I. INVESTMENT PHILOSOPHY AND OBJECTIVES**

The First Universalist Church Reserve Funds ("the Reserve Funds") are composed of unrestricted net assets and are invested to generate income and appreciation to support the fulfillment of the mission of the Church. The Reserve Funds are made up of cumulative net operating surpluses of the Church, capital reserves and other Board Designated funds. The Reserve Funds are maintained to:

- a. Preserve real purchasing power of principal by striving for returns which either match or exceed inflation.
- b. Provide sufficient liquidity to support the Church's annual cash flow needs.
- c. Allow Board approved deficit budgeting.
- d. Meet unexpected capital needs subject to Board approval.

**II. GOVERNANCE AND REVIEW**

The Board of Trustees shall be the custodian of the Reserve Funds, and shall maintain a plan of operation setting forth the administration of the Reserve Funds in accordance with other Board policies. Accordingly, oversight of Reserve Fund assets and any changes to this Plan of Operation are ultimately the responsibility of the Board of Trustees. The Board may appoint or delegate to a committee, composed of members of the Board of Trustees, staff members, and/or other church members, to assist it in fulfilling its responsibility.

The Board will fulfill its fiduciary responsibility regarding the Reserve Funds, itself or through its appointed committee, in part, by:

- Developing and/or recommending these Investment and Spending Objectives and Policies in order to guide the Reserve Funds' investment, management, and use.
- Considering proposed changes, as initiated by Board or staff, to these policies from time to time and presenting any such changes to the Board for its review and approval.
- Selecting and/or recommending an Investment Manager or Managers.
- Evaluating investment structure and performance at least quarterly to ascertain progress against the fund's objectives, analyze returns, monitor the level of diversification and sector concentration compared with the broader market, and ensure compliance with relevant policies.
- Exercising ordinary business care and prudence with respect to the Reserve Funds.

### III. INVESTMENT POLICIES

In order to meet the Investment Objectives identified in Section I, a significant portion of the Reserve Funds will be held in cash and not be invested in order to meet liquidity requirements identified in the Governing Policies Handbook. These requirements are established and may be revised by the Board at its discretion.

The Reserve Fund's invested assets should be diversified to reduce risk, by manager (e.g. mutual funds), asset class (e.g. equities, bonds) and within asset classes (e.g. geography, economic sector, industry, quality and size). The purpose of diversification is to provide a reasonable assurance that no single sector or class of securities will have a disproportionate impact on the fund. To insure this diversification:

- The total security position (debt and equity) in any one company, whether owned directly or as a mutual fund holding, should not exceed 10 percent of the Reserve Funds invested assets.
- No more than 25 percent of the Reserve Funds invested assets should be invested in one mutual fund or the securities of any one sector.

In order to maintain risk levels consistent with the overall objectives of the fund, and to achieve the investment objectives of the fund, the following ranges will be reflected:

Class	Min.	Target	Max
Equities	45%	60%	75%
Bonds/Cash*	25%	40%	55%
Other/Alternatives	0%	10%	20%

\*Excluding cash needed for liquidity.

Assets may be invested in mutual funds meeting the guidelines defined in this section.

#### IV. INVESTMENT MANAGER

An Investment Manager, if selected, shall manage assets according to the representations made to the Church at the time of selection and according to a written agreement between the Church and the Investment Manager. Any significant deviation from the manager's policies or style will require notice to the Church and written approval from the Church.

Communication by the Investment Manager to the Church must include monthly written statements, regular meetings on a schedule determined by the Church, and written notice of any material change in firm ownership, organizational structure, financial condition, senior staffing and management, and assets under management.

#### V. SPENDING (PAYOUT) POLICY

There is no spending policy regarding the Reserve Funds.

#### VI. PROXY VOTING

The Board may implement a proxy voting policy whereby the proxies issued by companies will be voted according to guidelines consistent with UU principles.

Policy approved by vote of the Board of Directors of First Universalist Church:

---

APPROVED

**Reflections on our “Leap of Faith” partnership with Unitarian Church of All Souls (NYC)**  
**Submitted by Lark Weller, First Universalist Board of Trustees**

It was a privilege to take part in this “partnership exchange” with other First Universalist members and staff. Here are some of the main take-away lessons that I think the First Universalist team is mulling over.

- **Hospitality.** All Souls made us think about "unabashed and intentional hospitality" in some new and interesting ways. Being a truly welcoming place requires the desire to be welcoming, but also requires active, continuous effort, and a degree of intentional engineering. We discussed some ways that First Universalist could be more intentional about its welcoming, and what tools the church could provide congregational leaders to help them effectively model welcoming behavior. Being welcoming should be built into every part of our community: physical space, personal interactions, all aspects of the service and communication materials, how we treat first-time visitors and long-term members. We discussed the importance of being welcoming in the eyes of "The Welcomed," rather than in the eyes of "The Welcomers."
- **Staff.** We came away grateful for our own staff and the amazing work they do to connect so much of our congregational life (worship, activities, communications) to intentional and cohesive themes. This helps to build a common experience for congregants, who can go out from there to explore their spirits, meaning, and lives on their own and with others.
- **Embracing exploration.** We experienced, and recognized the importance of, “different” and “new to us” practices that helped us reexamine how we do things at First Universalist. Several of us feel that some regular exploration of other churches and faith traditions could help us expand our understanding of hospitality, diversity, inclusivity, tradition, and meaning—as well as affirm what we love about First Universalist. I would love to see Trustees periodically attend services together at places of worship *other* than First Universalist. Seeing how other faith communities operate and worship is powerful, and provided a lot of food for thought for the First Universalist team.
- **Money!** It was reinforced to me how important it is for us to be frank with people about money and our expectations of giving. This is another area in which I think congregational leaders should be asked to model our “desired behavior.” I think the way we've been talking about money at First Universalist—giving as a spiritual practice, aligning our spending with our values—is an important role for the church.

The trip was fascinating and strengthened my gratitude to be a part of the First Universalist community. The First Universalist team is discussing what next steps we can take based on our experiences, so stay tuned!

# 2012 Congregational Survey - Revised

## Board of Directors Annual Congregational Monitoring Survey

Dear Members and Friends of First Universalist Church:

Welcome to our 2012 Annual Congregational Survey. Thank you for taking a few minutes to complete this important survey. We believe you will find the experience interesting and thought provoking.

This survey will be used as a tool for measuring how well we are fulfilling our mission via the Visionary Goals and may highlight areas that need improvement or need adjustment to better accomplish our mission and visionary goals.

While a majority of the questions provide specific choices each section ends with an open ended question for you to provide your opinion on the topic.

At the end of the survey you can provide feedback on any aspect of the church that you want the board to hear about.

We thank you in advance for taking this survey. It typically takes 10 minutes to complete plus whatever time you need to complete open ended questions.

Each member of the household (including teenagers) may fill out the survey for him/herself. If you have younger children, choose one family member to answer child-related questions.

# 2012 Congregational Survey - Revised

## First Universalist Mission and Visionary Goals

---

\*\*\*Mission\*\*\*

---

The First Universalist mission statement is:

In the Universalist spirit of love and hope  
we give, receive and grow.  
First Universalist Church

---

\*\*\*Visionary Goals\*\*\*

---

In addition First Universalist uses a longer set of statements(shown below) called visionary Goals to flesh out the vision:

#1 - We, the people of First Universalist Church, grow in our UU faith: we are equipped to live out our values and experience worship, spiritual practices, and rituals that challenge, comfort, celebrate, and heal.

#2 - First Universalist Church is a home for ageless wisdom. People of all ages find opportunities to engage in an intellectual and spiritual search for deeper meaning and understanding in the UU tradition, both as individuals and in community. We know our roots, find our wings, and apply our knowledge and wisdom to all our endeavors.\*

#3 - First Universalist Church is an intergenerational community of mutual caring and support. We build this community by actively welcoming all and encouraging each to discover, develop and share their gifts.

#4 - The people of First Universalist Church work to build a just, loving and sustainable world. We are a visible, influential voice, and we act to shape the larger community into a more just and equitable society.

This survey will be used as a tool for measuring how well we are fulfilling our mission and may highlight areas that need improvement or need adjustment to better accomplish our missions and visionary goals.

\*Revised by the Board in March 2012



# 2012 Congregational Survey - Revised

## First Universalist Visionary Goal #1

We, the people of First Universalist Church, grow in our UU faith: we are equipped to live out our values and experience worship, spiritual practices, and rituals that challenge, comfort, celebrate, and heal.

### 1. The worship life at First Universalist is...

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
Challenging	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Comforting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Celebratory	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Healing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

### 2. I have a spiritual practice.

- Yes and I practice it regularly (e.g. daily, weekly, monthly, etc.)
- Yes and I practice it occasionally
- Yes and I practice it infrequently (once or a few times in the past 12 months)
- No

### 3. My family has a spiritual practice or family rituals. [PARENTS AND TEENS ONLY]

- Yes, and I practice it regularly
- Yes, and I practice it occasionally
- Yes, but I practice it infrequently
- No
- Not applicable

### 4. In the past 12 months, First Universalist has helped me to live out my values.

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree

## 2012 Congregational Survey - Revised

**5. In the past 12 months, First Universalist has helped my family to live out our values.**

**[PARENTS AND TEENS ONLY]**

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree
- Not applicable

**6. If you have any additional thoughts related to Visionary Goal #1 feel free to provide them here**

# 2012 Congregational Survey - Revised

## First Universalist Visionary Goal #2

First Universalist Church is a home for ageless wisdom. People of all ages find opportunities to engage in an intellectual and spiritual search for deeper meaning and understanding in the UU tradition, both as individuals and in community. We know our roots, find our wings, and apply our knowledge and wisdom to all our endeavors.

### **7. In the past 12 months, I learned something at church that changed my perspective.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

### **8. In the past 12 months, First Universalist has helped me explore my beliefs in meaningful ways.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

### **9. In the past 12 months, First Universalist has helped me understand the beliefs of others.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

### **10. First Universalist educates me in ways that enrich my life.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

## 2012 Congregational Survey - Revised

### 11. I understand what it means to be UU

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

### 12. If you have any additional thoughts related to Visionary Goal #2 feel free to provide them here



# 2012 Congregational Survey - Revised

## First Universalist Visionary Goal # 3

First Universalist Church is an intergenerational community of mutual caring and support. We build this community by actively welcoming all and encouraging each to discover, develop and share their gifts.

### 13. I feel at home at First Universalist

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree

### 14. In the past 12 months, I took an opportunity to comfort or help someone who is part of the First Universalist community. (Not including family members)

- Frequently
- Several times
- Once or twice
- Never

### 15. In the past 12 months, I have made a new friend or meaningful connection with someone at First Universalist.

- Yes
- No

### 16. In the past 12 months, at church or a church sponsored event, I interacted with...

	Frequently	Several times	Once or twice	Never	n/a
People significantly older than me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
People about my age	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Adults significantly younger than me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Teenagers [TEENS: CHOOSE n/a]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Children	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## 2012 Congregational Survey - Revised

**17. When I really needed support in the past 12 months, First Universalist was there for me.**

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree
- Not Applicable

**18. There is someone I would like to invite to First Universalist but he/she would feel unwelcome.**

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree

Feel free to elaborate your response:

**19. Has anything happened in the past 12 months to make you or your children feel unwelcome at First Universalist?**

- Yes
- No

**20. If you have any additional thoughts related to the Visionary Goal #3 please feel free to provide them here**

# 2012 Congregational Survey - Revised

## First Universalist Visionary Goal # 4

The people of First Universalist Church work to build a just, loving and sustainable world. We are a visible, influential voice, and we act to shape the larger community into a more just and equitable society.

**21. In the past 12 months, I have been more active in improving the world because First Universalist has given me the courage, inspiration, or opportunity.**

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree

**22. In the past 12 months, my children have been more active in improving the world because First Universalist has given them the courage, inspiration, or opportunity.**

**[PARENTS ONLY (up to 6th grade)]**

- Strongly Agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly Disagree
- Not applicable

**23. First Universalist is a visible, influential faith community.**

- Strongly agree
- Agree
- Neither agree nor disagree
- Disagree
- Strongly disagree

## 2012 Congregational Survey - Revised

**24. If you have any additional thoughts related to the Visionary Goal #4 please feel free to provide them here**



## Church Involvement

### **25. How often do you attend Sunday Services at First Universalist? (Not including summer)**

- Almost every Sunday
- One or two Sundays per month
- Less than once per month
- Rarely, a few times per year
- Not at all

### **26. How often do you attend Summer Services at First Universalist?**

- Almost every Sunday
- One or two Sundays per month
- Less than once per month
- Rarely, a few times per summer
- Not at all

### **27. When two services are offered which service do you more typically attend.**

- 9:30
- 11:15
- Both Equally
- Neither

### **28. How likely would you be to recommend First Universalist Church to a friend or relative?**

- 1 - Extremely Likely
- 2
- 3
- 4
- 5
- 6
- 7 - Not Likely at All

# 2012 Congregational Survey - Revised

## 29. How long have you been participating in this congregation? (Use the timeline below as a guide)

- 0-1 Year
- 2-3 Years
- 4- 5 Years
- 6-10 Years
- 9-15 Years
- 16-20 Years
- 21-25 Years
- 26-30 Years
- More than 30 Years

### Recent First Universalist Timeline

Years	# Years Ago	Senior Minister
2009-Present	0-3	Justin Schroeder
2007-2009	3-5	Interim Ministers - Ted Tollefson, Charlette Cowtan
1997-2007	5-15	Frank Rivas
1995-1997	15-17	Interim Ministers - Wayne Robinson, Sheryl Wurl, Ke
1988-1995	17-24	Susan Milnor and Terry Sweetser
1993	19	Moved from 50th and Girard to 34th and Dupont
1986-1988	24-26	Interim Ministers
1963-1986	26-49	John Cummins
1939-1963	49-73	Carl Harold Olson

# 2012 Congregational Survey - Revised

## Church Involvement Groups and Activities

**30. Please indicate, if applicable, which Groups, committees, or activities you participated in during the past year. (Check all that apply)**

	Participated	Facilitated or Led
Congregational Life (Sermon-Based Small Groups, History Hounds, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Religious Education (RE-Teacher, Youth Advisor, Mentor, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Congregational Care (Caring Corner, TRUST, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Fellowship (Usher, Greeter, Office Support, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Shared Interest (Circle Supper, Book Club, Support Groups, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Worship & the Arts (Choir, Visual Arts, Buddhism Classes, Labyrinth, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Faith in Action (Eco Minds, Habitat for Humanity, MUUSJA, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Organizational (Board, Committee, SPIFF, etc.)	<input type="checkbox"/>	<input type="checkbox"/>
Other (If unsure of which category above)	<input type="checkbox"/>	<input type="checkbox"/>

List other group(s) here

## Demographic/Household Information

### 31. How old were you on your last birthday?

Age

### 32. What is your sex or gender identity?

- Male
- Female
- Other

### 33. How do you identify yourself?

- Bisexual
- Gay/Lesbian
- Heterosexual
- Other

### 34. What is your relationship status?

- Married or equivalent
- Living with partner
- Separated
- Single
- Divorced
- Widowed

Other (please specify)

### 35. What is your highest level of formal education that you have completed?

- Less than High School
- High School Graduate
- Associate Degree, Certification Program or Some Collage
- Bachelor's or Conservatory Degree
- Master's Degree
- Doctorate or Professional Degree

# 2012 Congregational Survey - Revised

## 36. How do you identify yourself in terms of your racial/ethnic background? (Select all that apply – list from 2010 US census)

- White
- Black, African Am., or Negro
- American Indian or Alaska Native
- Asian Indian
- Chinese
- Filipino
- Other Asian —For example, Hmong, Laotian, Thai, Pakistani, Cambodian
- Japanese
- Korean
- Vietnamese
- Native Hawaiian
- Guamanian or Chamorro
- Samoan
- Other Pacific Islander — For example, Fijian, Tongan

Other (please specify)

## 37. How many children under the age of 25 do you have? (Skip this question if not applicable.)

Ages 0-4 – Pre K	<input type="text"/>
Ages 5-11 – 1st- 6th Grade	<input type="text"/>
Ages 12-14 – 7th – 9th Grade	<input type="text"/>
Ages 15-18 - 10th – 12th Grade	<input type="text"/>
Ages 19-25	<input type="text"/>

## 2012 Congregational Survey - Revised

### 38. What was your total household income from all sources (before taxes) in 2011?

- Less than \$10,000
- \$10,001 - 25,000
- \$25,001 - 50,000
- \$50,001 - 75,000
- \$75,001 - 100,000
- \$100,001 - 150,000
- \$150,001 - 200,000
- \$200,001 - 300,000
- \$300,001 - 400,000
- \$400,001 or More

### 39. How much do you pledge to the church? (Include the entire household pledge, even if you pledge separately.)

- \$300 or less - (\$25 per month)
- \$301 - 750 - (\$26-63 per month)
- \$751 - 2,000 (\$64-167 per month)
- \$2,001 - 3,375 (\$168-281 per month)
- \$3,376 - 5,000 (\$282-417 per month)
- \$5,001 - 7,500 (\$418-625 per month)
- \$7,501 - 11,000 (\$626-917 per month)
- \$11,001 - 18,000 (\$918-1,500 per month)
- \$18,001 - 28,000 (\$1,501-2,333 per month)
- \$28,001 - 40,000 (\$2,334-3,333 per month)
- Not yet a pledging member

### 40. Thinking about your household's total annual charitable giving, what percent goes to First Universalist (pledge and/or other donations, not including political contributions)?

Percent of giving

### 41. Have you included First Universalist in your will or estate plan?

- Yes
- No

# 2012 Congregational Survey - Revised

## 42. Which traditions or sources inform your spiritual identity today? (Check all that apply)

- EARTH CENTERED - Reverence for rhythms in nature and nature as the embodiment of the divine.
- INDIGENOUS PEOPLE's TRADITIONS - Honoring the rituals and mystical beliefs of Native Americans and others.
- EASTERN RELIGIONS - Valuing the teachings of Buddhism. Taoism and/or Hinduism.
- JEWISH TRADITIONS - Respect for the laws and teachings of the Holy Scriptures.
- CHRISTIAN TRADITIONS - Moved by Biblical stories and regard the teachings of Jesus as one source of revelation
- ISLAMIC TRADITIONS - Valuing the spiritual teachings of Mohammad and the Koran.
- PROPHETIC WOMEN & MEN - Honoring the life and teachings of people like Moses, Esther, Buddha, Jesus, Emerson, Gandhi, Olympia Brown, Martin Luther King, and others.
- ETHICS - Embracing ethical and cultural values to guide a life of compassion and principles.
- SECULAR HUMANISM - Relying on reason, human experience, and the results from science as the basis for moral living
- MYSTICAL EXPERIENCE - Moved by the experience of a transcending mystery or wonder
- FAMILY TRADITIONS - Holding family rituals and traditions as a central element in a spiritual life.

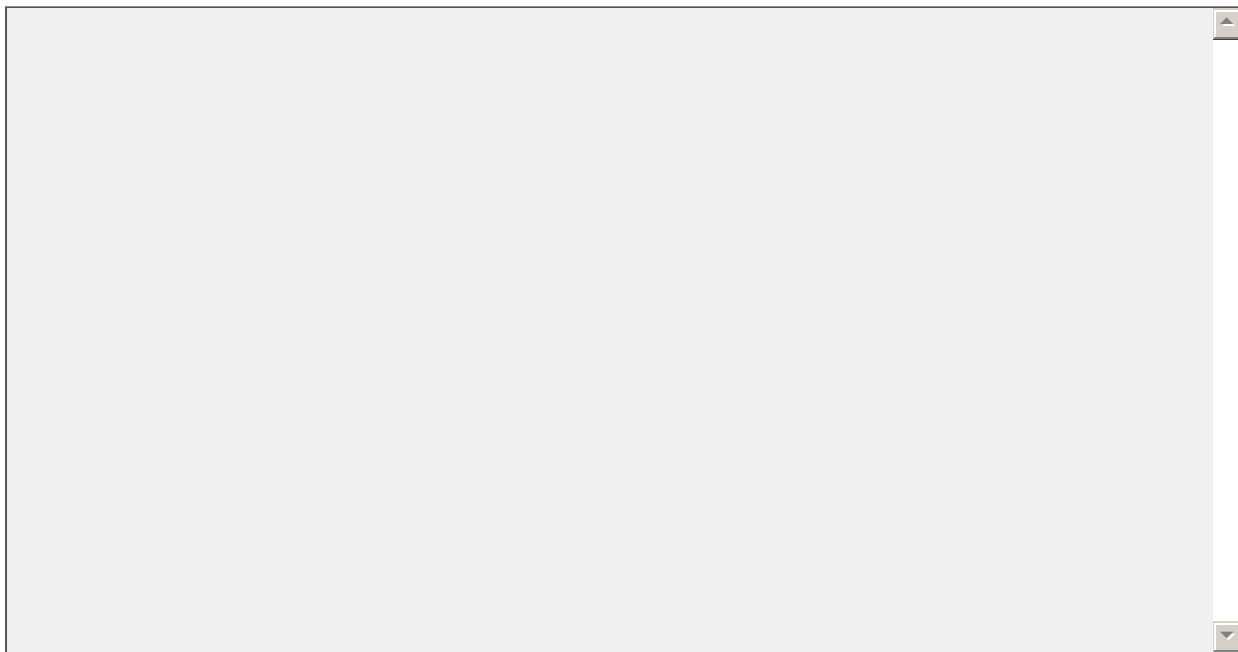
Other (please specify)



## Tell us what you think

If you have additional thoughts you would like to share with the Board of Trustees, please provide them here.

**43.**  
**Additional**  
**thoughts**





**44. While your survey responses will be kept confidential, if you wish, you may leave your contact information.**

**Name (Optional)**

**Email Address (Optional)**

**Phone Number (Optional)**

Or if you would like you can e-mail the board directly at [boardchair@firstuniv.org](mailto:boardchair@firstuniv.org)