

First Universalist Church Board of Trustees
May 24, 2018
Board Packet

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First Universalist Church of Minneapolis

Board of Trustees Meeting

May 24, 2018

6:30 p.m. Cummins Room

Agenda

I. Call to Order (6:30).

- Lighting of the Chalice

May this flame that burns before us light our way, informed by the wisdom of leaders gone before, and inspired by the trust that we have been given as stewards of this Church. May we have vision, compassion, and courage as we serve this congregation now and for the generations to come.

- Reading (see SM report)
- Spiritual reflection question (see SM report)

II. Consent Agenda (6:50)

- Approval of minutes from Annual Meeting
- Approval of minutes from April 2018 Board of Trustees meeting.
- Monitoring: Acceptance of attendance and membership numbers
- Monitoring: Acceptance of staff and significant volunteer changes
- Monitoring: Acceptance of annual staff survey results.

III. Admin (calendaring future events) (6:55)

- Bylaws meeting - May 30, 2018, 6:30 p.m.
- Annual meeting and Board brunch (June 3, 2018, 11:30 am to 2:30 pm)

IV. Financial (7:00)

- A. Final budget review review (Jen Crow)
- B. Discussion of three-year financial projection
- C. Discussion of waiver of one-year reserve replenishment policy.

IV. Co-Ministry (7:30)

- A. Discussion of resolution for presentation to congregation.

- B. Letter to congregation.

BREAK (8:00 - 8:10)

V. Final Review of Proposed Bylaws (8:10 - 8:45)

VI. Planning for annual meeting (8:45 - 9:00)

- A. Discussion of rules of debate and script.
- B. Managing Bylaws discussion.

1. Procedure for handling small typos and wording changes raised at meeting.

VI. Adjournment (9:00)

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First Universalist Church of Minneapolis
Board of Trustees Meeting
April 19, 2018

Trustees and Ministers present: Richard Spratt, Bryana French, Caitlin Rogers, Karin Wille, Jen Crow, Eric Cooperstein, Cindy Marsh, Jen Crow, Lillie Pang, Justin Schroeder, Dick Niemiec

I. Call to Order

- a. Lighting of the Chalice
- b. Reading and reflection— We contemplated forgiveness.

II. Consent Agenda

- a. Approval of Minutes from March meeting
- b. Monitoring: Acceptance of attendance and membership numbers
- c. Monitoring: Acceptance of staff and significant volunteer changes

APPROVED

III. Financial

Rev. Crow led the Board through a discussion of the staff's proposed balanced budget and the staff's proposed and recommended alternative deficit budget. Key income and expense expectations considerations include:

Income assumptions

- Loss of Shir Tikvah income (moving to a larger rental space for high holy days).
- Other fundraising set at \$12,000
- Annual pledges will reach goal of \$1,174,500
- Southside Children's Center completes the third year of their three-year lease.
- Miscellaneous other rentals increased by \$4,500
- Increase in offering plate to the church by \$10,000, corresponding decrease of offering plate to the community of \$10,000.
- Release of History Hounds funds (\$3500)
- Use of AV fund to cover AV costs (\$4500)
- Use remaining Sanctuary Church funds set aside last year to cover ISAIAH membership (\$1,000) & any Sanctuary Church needs

Expense assumptions

- Elimination of Guest Speaker line (\$1800)
- Large decrease to General Maintenance and Repairs (\$6000)
- Small decreases to circles, temporary labor, and adult education expenses.

Although the staff presented a balanced budget, as requested by the Board of Trustees, it is not the budget that the Senior Ministers recommend to the Board. The budget that the Senior Ministers recommend to the Board includes the following expense adjustments in order to allow for continued progress toward our visionary goals:

• Additional hours for Franco	\$3000
• Adding a one-quarter time minister of color negotiations)	\$17,000 (give or take with
• Sending 2-3 staff to Finding Your Way Home	\$1500
• Targeted raises to positions below minimum salary guidelines	\$12,000
• Targeted cost of living increases for non-program staff	\$8,500
• Return to UUA health insurance	\$9,500
• CPR training for ushers and staff	\$1,700
• Prof. expenses for admin.	\$ 500
Total additions needed	\$53,700

The ministers voiced their belief that these additional expense are necessary to provide the balance needed to ensure continued alignment of our values with our employment practices while also allowing us to make strides toward the realization of specific visionary goals.

Raises are merit increases. The ministers are asking to move the recently received bequest to the next fiscal year and then move the principal of the mortgage to be paid below the line, and not included in operating expenses.

Justin feels like the projected pledge income for 18-19 is reasonable. Currently at \$831,000 pledges with approximately 400 pledging units in so far. The missing 287 pledging units represent \$312,000. We are ahead, dollar wise, of where we were at this time during the last two pledge cycles. Some concern that there is still \$340,000 outstanding and we don't know if those pledges will actually be made. Some concern that by the annual meeting we should

really know what our operating budget is by then. It is disconcerting that members and friends have such difficulty submitting a pledge card by a certain date.

We are trying to pay fair wages and that is a value the Trustees agree with but we struggle with whether we outstretched our ability to fundraise. This congregation has been very generous with targeted giving: Habitat for Humanity, Holiday Giving, Capital Campaign, etc. But the pledge campaign does not inspire the same level of generosity from some members. If the congregation is unwilling to support the level of services we want, then there is a limit to the salaries we can pay or the size of the staff we have. The primary variables in our budget are pledges and salaries.

Jen feels strongly that we need a plan to pay off the mortgage. We did not raise enough with the capital campaign to do that. One idea is to allow 50% of new bequests to go toward paying off the mortgage (with the remaining 50% going to the Legacy Fund).

Once we pay off the mortgage, we need to have a balanced budget. The Current Legacy Policy about Gift Acceptance says we can use 10% for operating funds. We agreed that the policy says that we have to apply the request that has already come in to the Legacy fund. We will approach the congregation at a later date and explain the new proposal with the intent to pay down the mortgage. The Finance Team will look at policy to ensure that if people have made a commitment via either a pledge or capital gift and then they die and there is a bequest, that the bequest would be used to honor the commitments.

MOTION MADE AND SECONDED: To pass the balanced budget. The motion failed, with two in favor, four opposed, and two abstentions..

MOTION MADE AND SECONDED: To pass the alternative budget recommended by the ministers. This requires that the mortgage principal be paid out of reserves rather than current income which also means there will be a significant deficit for the year. There was a discussion about promises made to the congregation several years ago that we would try to pay the mortgage principal out of current income each year and that the congregation must be told that we have not been successful in doing that and may not be able to commit to that in the future.

The motion passed with five in favor and three opposed.

A bequest was recently received by the Church from the estate of a member. Pursuant to the Board's policy, it needs to approve the designation of the bequest.

MOTION MADE AND SECONDED: To accept the bequest and, per our gift acceptance policy, allocate 10% to operations and 90% to the Legacy Fund.

MOTION PASSED.

IV. CO-MINISTRY

- We have received draft job descriptions from Jen and Justin.
- Christa has been working on the letters of the agreement and the Board answered the few questions she needed answered in order to finish drafting the letters.

V. BYLAWS

The proposed changes to the bylaws regarding ministers was discussed. The proposed changes are intended to bring the bylaws into consistency with existing practice and make it possible to have co-ministers now but not be locked into perpetuity with the co-minister structure.

Due to the late hour, it was agreed to hold an additional meeting to discuss the bylaws. We will put something in the May 11 Liberal and share a link to the draft of the new bylaws.

VI. Adjournment

Remember that the Annual Meeting is June 3.

The meeting was adjourned by the Chair at 9:24.

**2018 Statistical Report
April, 2018
Board Meeting May 17, 2018**

MEMORIAL SERVICES: 0

MARRIAGES/SERVICES OF COMMITMENT: 1

Grace Fremont and Liam Everett, April 14 – conducted by Rev. Jen Crow

MEMBERS FOR APPROVAL: 0

MEMBERS REINSTATED: 1

Morgan Paldron

MEMBERS FOR REMOVAL: 7

Larry Schmidt and Jeanne Olson, asked to be removed – away 5 months of the year

Jayne Miller – moved to Pittsburgh

Nick and Kim Keller – asked to be removed

Jane Reynolds and Lori Schroeder – moving out of state

CHILDREN DEDICATED:

	To Date	End of Year Totals			
MEMBERS	2017-2018	2016-2017	2015-2016	2014-2015	2013-2014
(Fiscal Year)	51	109	54	58	46
TOTAL MEMBERS: 1040		1,011	934	920	921

TOTAL MEMBERS AS OF THE LAST MEETING: 1046

To be added: 1

To be removed : 7

TOTAL MEMBERS: 1040

April Attendance							
			2018				2017
Adults	9:30 AM	11:15			9:30 AM	11:15	
1st week	329	288	617		128	280	408
2nd week	212	247	459		323	220	543
3rd week			*		419	373	792
4th week	253	259	512		260	213	473
5th week	288	290	578		350	371	721
Monthly Total	1082	1084	2166		1480	1457	2937
Average for April	270.5	271	541.5		296	291.4	587.4
RE							
1st week	18	8	26*		52	46	98*
2nd week	49	55	104*		167	166	333
3rd week			*		18	18	36*
4th week	232	149	381		177	131	308
5th week	162	149	311		74	59	133*
Monthly Total	299	212	822		414	361	908
Average for April	59.8	42.4	164.4		82.8	72.2	181.6
Combined Average	330.3	313.4	705.9		378.8	363.6	769
Notes	*Worship and RE canceled due to inclement weather				1st Week: Spring Break, childcare only		
	1st Week: Easter service, childcare only				3rd Week: Easter service, childcare only		
	2nd Week: Spring Break, childcare only				5th Week: Multi-gen service , no 5th-12th gr RE		

Ministers' Report May Board Meeting

Opening Reading and Reflection:

From Jen Crow's recent Liberal Article:

What would it be like if we could embody our Universalist faith that reminds us that all people are born whole and holy and worthy of basic human rights and care? What would it be like if we could embody the three practices of Revolutionary Love that the Sikh activist and author Valerie Kaur outlines for us? Love of others, love of our opponents, and love of ourselves.

To love others, we have to wonder about others. We have to move past your animal response of putting people into one group or another, of feeling afraid of those who are different than us, and instead move into wondering. Wonder what they are making for dinner tonight, she says. Wonder what they hope for for their children. Wonder how they met their beloved, or what makes them laugh. If we are going to practice loving others, then we need to move toward relationships that span differences.

Loving our opponents can be incredibly difficult. When we remember that we are all born whole and holy and worthy, then we know that our opponent's participation in oppression hurts them, too. And we remember that while oppression hurts everyone, it does not harm everyone equally, so sometimes we need one another to practice loving our opponents. Sometimes we need to take turns, asking others in our community to love our opponents for us when we cannot.

The practice of loving ourselves may not be as straightforward as it sounds. I love some yoga and lattes, Valerie Kaur says, but that is not all that loving ourselves is about. Love of ourselves sometimes means being called back to ourselves by our spiritual practices and by each other. And sometimes, when the pain is too great with us, we cannot love ourselves all on our own and we need to let others help us with it. When we are grieving, or hurting, or in the process of creating something new, we need others to tend to us. When someone is giving birth or dying, you don't tell them, good luck loving yourself and getting your own water - you tend to them, bringing water and clean clothes, easing their pain, breathing with them, and when the time comes for them to do something really hard, you look them in the eye or whisper in their ear - you are brave, you can do this, I am with you. This practice of loving ourselves asks us to let other people in, allowing them to love us when we need this kind of care the most.

These three ways of being: loving others, loving our opponents, and loving ourselves can move us into deeper alignment with our faith as we labor together for the birth of revolutionary love - as we live from love instead of fear, healing our hearts, our homes and our world.

Reflection Questions: How are you loving others? Who are you wondering about? What kind of wondering do you have about the person you'll speak with tonight? What opponents are you seeking to love? Or, if you're unable to love your opponent, could someone else love them for you? How are you loving yourself, letting other people into your life, your heart ache, or your heart break?

Monitoring Items:

Transitions in Staff and Volunteer Positions: No significant transitions to report.

Staff Survey: The 2017-2018 results are below. We note that that survey needs to be updated to reflect a racial justice lens/set of questions.

Key: 1) Strongly Disagree, 2) Disagree, 3) Neutral, 4) Agree, 5) Strongly Agree.

1) I have a clear understanding of the mission and the goals of the church.

2014: 4.17	17 total survey respondents in 2014
2015: 4.3	13 total survey respondents in 2015
2016: 4.6.	15 total survey respondents in 2016
2017: 4.6	13 total survey respondents in 2017
2018: 4.71	14 total survey respondents in 2018

2) I understand how my work directly contributes to the overall mission and goals of the church.

2014: 4.53
2015: 4.54
2016: 4.67
2017: 4.69
2018: 4.71

3) There is a strong feeling of teamwork and cooperation among First Universalist staff.

2014: 4.17
2015: 4.23
2016: 4.13
2017: 4.00
2018: 4.28

4) Our staff maintains high standards of quality for our work.

2014: 4.23
2015: 4.15
2016: 4.53

2017: 4.46
2018: 4.43

5) Information and knowledge are communicated effectively among First Universalist staff.

2014: 3.17
2015: 3.85
2016: 3.6
2017: 3.62
2018: 3.43

6) I have a clear understanding of the goals and responsibilities of my job.

2014: 4.29
2015: 4.54
2016: 4.33.
2017: 4.62
2018: 4.79

7) The expectations for my job duties and performance are clear and consistent.

2014: 4.17
2015: 4.38
2016: 4.33
2017: 4.31
2018: 4.50

8) I have the resources I need to do my job.

2014: 3.47
2015: 4.25
2016: 3.87
2017: 4.08
2018: 3.93

9) I receive useful and constructive feedback from my supervisor.

2014: 4.23
2015: 4.38
2016: 4.47
2017: 4.46
2018: 4.70

10) I have worked at First Universalist for more than one year.

2014: 9 Yes's. 8 No's.

2015: Three have worked less than a year. Two have worked 1 to 2 years. Five have worked 2 to 4 years. Two have worked 5 to 10 years. One has worked 10 years or longer.

2016: 2 less than a year. 4 one to two years. 5 two to four years. 3 five to ten years. 1 more than ten years.

2017: 2 one to two years. 7 two to four years. 3 five to ten years. 1 more than 10 years.

2018: 2 less than a year. 1 one to two years. 4 two to four years. 6 five to ten years. 1 more than 10 years.

11) My annual performance review with my supervisor was constructive and useful.

2014: 3.27

2015: 3.8

2016: 4.29

2017: 4.36

2018: 4.5

12) Do you feel supported in your role by the Congregation and the Board of Trustees?

2015: 3.69

2016: 4.06

2017: 4.23

2018: 4.43

13) In your interactions with the congregation and the Board of Trustees, have you been treated with respect?

2015: 4

2016: 4.26

2017: 4.31

2018: 4.29

14) I would recommend First Universalist as a place to work to a friend or colleague.

2014: 3.47

2015: 3.85

2016: 4.06

2017: 4.54

2018: 4.57

Summary: Communication and information sharing among staff continues to be a place where we can experience improvement. Overall, many answers are within range of previous years. Of note, there was a significant move upward in the number of staff who strongly recommend First Universalist as a place to work.

Shir Tikvah Update:

We are continuing our monthly meetings with Shir Tikvah, and met with them a week and a half ago. The door has closed on several opportunities they were exploring, and it felt like some new possibilities opened up for all of us in our last meeting. While it's still too early to say with certainty what will happen, we are drilling down on some of the details, exploring exactly how much space (and how many rooms) Shir Tikvah would need if they were here. We feel a deep connection with our colleagues at Shir Tikvah and are learning a great deal about ourselves and them in these conversations.



First Universalist Church of Minneapolis

May 24, 2018

To Whom It May Concern:

This letter formally authorizes Arif Bashir Mamdani to serve as an agent of First Universalist Church of Minneapolis for the sole purpose of performing weddings.

Eric Cooperstein, Board President

Rev. Justin Schroeder, Senior Minister

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Financial Report
Third Quarter Review
Prepared by Rev. Jen Crow
May 21, 2018

Summary

Thanks to a number of reductions in expenses and budget adjustments, we are currently projecting a \$9,000 surplus for the 2017-18 operating budget. Given the reduced pledge base, this is a significant accomplishment. Aggressive expense cuts along with a very successful Close the Gap effort created this correction.

Income

A number of income items are significant to note:

- Pledge income is projected to be \$1,080,000 vs. the budgeted \$115,775.
- The Legacy Fund contribution came in higher than budgeted (\$5,000)
- Offering Plate for the church is lower than budgeted (\$6,000)
- Close the Gap came in at \$50,100, much higher than expected

Expenses

A number of expense items are significant to note:

- Program expenses are projected to run \$14,000 under budget
- Bank service charges are projected to run \$4,000 higher than budgeted
- Utilities are running \$5,000 higher than budgeted
- Repairs and maintenance are projected to run \$8,000 under budget

Capital Campaign/Building Project

As of April 30, 2018, we have received just under \$1.7 million in Capital Campaign contributions. Expenses have included architect fees, fundraising costs, and staff salaries - as well as our first major purchase of new hearing assist devices. We currently have \$1.3 million in capital campaign income in hand.

Conversations continue between the Building Team and our architects, and at recent meetings it became clear that the initial vertical expansion plan presented by the architects includes items that make it significantly beyond our budget. Adjustments have begun in earnest, and we plan to report back to the congregation as soon as more clarity is achieved.

Tuck-pointing and exterior repair work on the Sanctuary building will begin this summer, and is budgeted to cost up to \$170,000.

2018-19 Proposed Operating Budget
Prepared by Rev. Jen Crow
May 2018

Overview

The draft budget presented here and approved by the board at its April meeting is a deficit budget (\$53,000). Unlike in years past, this budget includes the payment of the principal of the mortgage and line of credit (\$42,000) in the budget. This deficit budget is in effect very similar to the “balanced” budget of last year.

In this budget, we assume that our annual giving will return to pre-capital campaign levels and reach a total of \$1,175,000, and that rental of our building will continue at the same rate. This budget includes expense increases that provide the balance needed to ensure continued alignment of our values with our employment practices while also allowing us to make strides toward the realization of specific visionary goals.

In particular, the Senior Ministers and the Board believe that is critical for our congregation to focus our attention and our resources on our visionary goal that calls us to become a multi-cultural, multi-racial, intergenerational community, where our sense of who we are is ever-expanding. In service of that vision, this budget allows the church to better support the employees of color currently on staff, and further increase the diversity of our worship and ministry staff. This budget also includes necessary increases in expenses, such as meeting the increased cost of health insurance and retirement benefits for employees.

While it is unusual for the Senior Ministers and the Board to present a deficit budget to the congregation, we believe that the time is right for the essential changes that are proposed, and we are beginning a conversation about how to retire our mortgage, which continues to be a significant expense in our operating budget (\$72,000/year), so that we will not run a deficit budget year over year.

In previous years, the Board has permitted the expense of the mortgage and line of credit principal (\$42,000) to be paid “below the line,” meaning that this expense was not considered a part of the operating budget. The Board has changed this practice for our 2018-19 operating budget, resulting in an increase of \$42,000 to be included in our annual expenses. This \$42,000 represents the majority of the deficit.

Income

This budget includes the following:

- Annual Giving reaches the goal of \$1,174,500
- Fundraising set at \$12,000
- Rental income equal to 2017-18 budget
- Increase in offering plate to the church by \$10,000, corresponding decrease of offering plate to the community of \$10,000
- Release of temporarily restricted funds whose identified use has past, History Hounds and Audio Visual Fund, (\$7800)

Expenses

This budget includes the following:

- Elimination of Guest Speaker line (\$1800)
- Decrease to Maintenance and Repairs (\$8000)
- CPR training for Ushers and Staff (\$1700)
- Salary and benefit increases that include:
 - funding for additional hours for our pianist (\$3,000)
 - funding to support staff of color attending Finding Your Way Home - an annual conference for Unitarian Universalist religious professionals of color (\$1500)
 - hiring of a part-time Minister of color (up to \$17,000)
 - employees who have been employed for more than a year becoming eligible for retirement benefits (\$5,000)
 - increased costs of health insurance (up to \$23,000)
 - adjustment of salaries to bring them closer to appropriate salary ranges (\$7,000)
 - professional expenses for operations staff (\$500)
 - a small pool for bonuses for staff in lieu of raises (\$6,000)

First Universalist Church of Minneapolis
July 2018 to June 2021

Headings and Account		2020-2021		2019-20		2018-19		Year End Projections (2017-18)		2017-18	
Revenues											
Pledges											
Unpaid - Current Year		\$	(62,372.39)	\$	(60,486.75)	\$	(58,725.00)	\$	-	\$	(58,725.00)
Unrestricted Pledge Donations		\$	1,247,447.88	\$	1,209,735.00	\$	1,174,500.00	\$	1,080,000.00	\$	1,174,500.00
Total Pledges		\$	1,185,075.49	\$	1,149,248.25	\$	1,115,775.00	\$	1,080,000.00	\$	1,115,775.00
Contributions Unrestricted											
Hospitality Donations		\$	600.00	\$	600.00	\$	600.00	\$	700.00	\$	700.00
Legacy Fund Contribution		\$	50,000.00	\$	50,000.00	\$	47,000.00	\$	43,552.50	\$	38,000.00
Memorials Designated								\$	16,176.83	\$	-
Offering Plate for Church		\$	48,000.00	\$	48,000.00	\$	48,000.00	\$	32,000.00	\$	38,000.00
Unrestricted Donations		\$	65,000.00	\$	65,000.00	\$	65,000.00	\$	65,000.00	\$	65,000.00
Unrestricted RE Donations		\$	500.00	\$	500.00	\$	500.00	\$	400.00	\$	-
Total Contributions Unrestricted		\$	164,100.00	\$	164,100.00	\$	161,100.00	\$	157,829.33	\$	141,700.00
Contrib Released from Restr											
Families Moving Forward *		\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	1,527.98	\$	5,000.00
Holiday Giving *		\$	-	\$	31,500.00	\$	-	\$	23,552.82	\$	45,000.00
Miscellaneous *								\$	50,864.65	\$	25,445.89
Capital Campaign *		\$	70,000.00	\$	70,000.00	\$	70,000.00	\$	88,628.20	\$	-
Offering Plate for Community *		\$	30,000.00	\$	30,000.00	\$	30,000.00	\$	31,822.37	\$	40,000.00
History Hounds release		\$	-	\$	-	\$	3,500.00				
Audio Visual fund		\$	-	\$	-	\$	4,500.00				
Children's Offering *								\$	1,106.09	\$	-
Total Contrib Released from Restr		\$	105,000.00	\$	136,500.00	\$	113,000.00	\$	197,502.11	\$	115,445.89
Fundraisers											
Boston Youth Trips		\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	15,000.00	\$	10,000.00
Families Moving Forward 10%		\$	500.00	\$	500.00	\$	500.00	\$	152.70	\$	500.00
Holiday Giving 10%		\$	-	\$	3,500.00	\$	-	\$	2,819.76	\$	5,000.00
Miscellaneous Fundraisers		\$	12,000.00	\$	12,000.00	\$	12,000.00	\$	50,099.14	\$	20,000.00
Senior High Youth Trips		\$	500.00	\$	500.00	\$	500.00	\$	1,500.00	\$	-
YCE		\$	11,000.00	\$	11,000.00	\$	11,000.00	\$	30,000.00	\$	11,000.00
Total Fundraisers		\$	34,000.00	\$	37,500.00	\$	34,000.00	\$	99,571.60	\$	46,500.00
Program Fees											
Adult Ed Fees		\$	-	\$	-	\$	-	\$	7.00	\$	-

Daytime Connections	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,546.00	\$	-
Miscellaneous RE Fees							\$	792.75		
Summer Camp Fees	\$	-	\$	-	\$	-	\$	-	\$	6,600.00
Total Program Fees	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	2,345.75	\$	6,600.00
Dividends & Interest										
Don Carter Fund Div & Int - Admin	\$	3,250.00	\$	3,250.00	\$	3,250.00	\$	2,500.00	\$	-
Unrestricted Dividends & Interest	\$	15,000.00	\$	15,000.00	\$	15,000.00	\$	14,000.00	\$	15,000.00
Total Dividends & Interest	\$	18,250.00	\$	18,250.00	\$	18,250.00	\$	16,500.00	\$	15,000.00
Rental Income										
Miscellaneous Room Rentals	\$	15,000.00	\$	-	\$	13,500.00	\$	9,000.00	\$	9,000.00
Shir Tikvah	\$	-	\$	-	\$	-	\$	4,800.00	\$	5,000.00
Southside Child Development Center	\$	103,992.00	\$	103,992.00	\$	103,992.00	\$	103,992.00	\$	103,992.00
T-Mobile Antennae Lease	\$	14,525.00	\$	14,375.00	\$	14,200.00	\$	14,025.00	\$	13,950.00
Weddings & Commitments	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00
Weight Watchers	\$	4,800.00	\$	4,800.00	\$	4,800.00	\$	4,800.00	\$	4,800.00
Total Rental Income	\$	139,317.00	\$	124,167.00	\$	137,492.00	\$	137,617.00	\$	137,742.00
Realized Gains & Losses										
Realized Gains/Losses - Fundr	\$	-	\$	-	\$	-	\$	(3,575.53)	\$	-
Total Realized Gains & Losses							\$	(3,575.53)	\$	-
Unrealized Gains & Losses										
Unrlzd Gain/Loss Oper A/C - Fundr	\$	-	\$	-	\$	-	\$	18,878.24	\$	-
Total Unrealized Gains & Losses							\$	18,878.24	\$	-
Other Income										
Miscellaneous	\$	3,333.00	\$	3,333.00	\$	3,333.00	\$	2,250.00	\$	3,333.33
Total Other Income	\$	3,333.00	\$	3,333.00	\$	3,333.00	\$	2,250.00	\$	3,333.33
Total Revenues	\$	1,649,075.49	\$	1,633,098.25	\$	1,582,950.00	\$	1,708,918.50	\$	1,582,096.22
Expenses										
Salaries & Wages										
Salaries	\$	902,646.62	\$	852,084.10	\$	826,470.00	\$	821,363.00	\$	809,361.00
Total Salaries & Wages	\$	902,646.62	\$	852,084.10	\$	826,470.00	\$	821,363.00	\$	809,361.00
Payroll Taxes										
FICA	\$	69,052.47	\$	66,089.00	\$	64,675.00	\$	61,785.00	\$	61,785.00
Total Payroll Taxes	\$	69,052.47	\$	66,089.00	\$	64,675.00	\$	61,785.00	\$	61,785.00
Employee Benefits										
Medical Insurance										

Medical Insurance	\$ 115,894.16	\$ 107,808.53	\$ 100,287.00	\$ 77,603.70	\$ 70,001.00
Total Medical Insurance	\$ 115,894.16	\$ 107,808.53	\$ 100,287.00	\$ 77,603.70	\$ 70,001.00
Long Term Disability Insurance					
LTD	\$ -	\$ -	\$ -	\$ -	\$ -
Total Long Term Disability Insurance	\$ -	\$ -	\$ -	\$ -	\$ -
Life Insurance					
Life Insurance	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00
Total Life Insurance	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00	\$ 2,378.00
403(b)					
403(b)	\$ 71,194.88	\$ 69,121.24	\$ 67,108.00	\$ 66,088.00	\$ 66,088.00
Total 403(b)	\$ 71,194.88	\$ 69,121.24	\$ 67,108.00	\$ 66,088.00	\$ 66,088.00
Total Employee Benefits	\$ 189,467.04	\$ 179,307.77	\$ 169,773.00	\$ 146,069.70	\$ 138,467.00
Professional Expenses					
Total Professional Expenses	\$ 26,900.00	\$ 26,900.00	\$ 26,900.00	\$ 23,928.00	\$ 24,900.00
Temporary Labor					
Childcare	\$ 16,000.00	\$ 16,000.00	\$ 16,000.00	\$ 18,500.00	\$ 16,000.00
Guest Speakers	\$ 700.00	\$ 700.00	\$ -	\$ 2,200.00	\$ 1,800.00
Musicians	\$ 14,800.00	\$ 14,800.00	\$ 14,800.00	\$ 14,800.00	\$ 14,800.00
Substitute Sound Technicians	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
Temp Labor - Admin	\$ -	\$ -	\$ -	\$ 1,000.00	\$ -
Total Temporary Labor	\$ 32,500.00	\$ 32,500.00	\$ 31,800.00	\$ 37,500.00	\$ 33,600.00
Program Expenses					
5th Grade OWL				\$ 50.00	
7th Grade (NF)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00
7th Grade Bike Trip				\$ 476.75	
8th Grade (OWL)	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 1,007.46	\$ 1,000.00
9th & 10th Grade (COA)	\$ 4,500.00	\$ 4,500.00	\$ 4,500.00	\$ 4,700.00	\$ 4,500.00
Adult Ed	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 600.00	\$ 1,700.00
Circles	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ 600.00	\$ 1,200.00
Classroom Supplies	\$ 9,500.00	\$ 9,500.00	\$ 9,000.00	\$ 9,000.00	\$ 11,000.00
Daytime Connections				\$ 1,546.00	
Memorials Exp - Past Care				\$ 450.00	\$ -
Music Purchases	\$ 3,150.00	\$ 3,150.00	\$ 3,150.00	\$ 3,000.00	\$ 3,000.00
Other - Adult Ministries	\$ -	\$ -	\$ 250.00	\$ 50.00	\$ 1,000.00
Other - CYFM	\$ 500.00	\$ 500.00	\$ 500.00	\$ 640.00	\$ 1,000.00
Other - FIA	\$ 1,000.00	\$ 1,000.00	\$ 1,000.00	\$ -	\$ 1,000.00
Other - Membership	\$ -	\$ -	\$ -	\$ -	\$ 1,000.00
Other - Pastoral Care	\$ 750.00	\$ 750.00	\$ 750.00	\$ 600.00	\$ 600.00
Other - Worship	\$ 500.00	\$ 500.00	\$ 250.00	\$ 225.00	\$ 1,300.00

Piano Tuning	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	3,000.00	\$	4,000.00
Senior High	\$	700.00	\$	700.00	\$	700.00	\$	700.00	\$	700.00
Summer Camps	\$	-	\$	-	\$	-	\$	-	\$	6,600.00
Teacher Workshops	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	1,250.00	\$	2,000.00
Worship Items Miscellaneous	\$	500.00	\$	500.00	\$	500.00	\$	500.00	\$	500.00
Youth Social Activities	\$	500.00	\$	500.00	\$	500.00	\$	400.00	\$	400.00
Total Program Expenses	\$	29,600.00	\$	29,600.00	\$	29,100.00	\$	29,745.21	\$	43,500.00
Miscellaneous Program Expenses										
Action Groups	\$	500.00	\$	500.00	\$	500.00	\$	500.00	\$	500.00
Boston Youth Trips	\$	10,000.00	\$	10,000.00	\$	10,000.00	\$	15,000.00	\$	10,000.00
Faithful Action Council	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,500.00
Friendship Caring Corner	\$	100.00	\$	100.00	\$	100.00	\$	100.00	\$	100.00
Labyrinth - AE							\$	-	\$	-
Library	\$	250.00	\$	250.00	\$	250.00	\$	-	\$	500.00
Library *							\$	189.34	\$	-
Other - Fundr							\$	-	\$	-
Racial Justice	\$	7,500.00	\$	7,500.00	\$	7,500.00	\$	7,500.00	\$	7,500.00
Racial Justice *							\$	1,000.00	\$	-
Senior High Youth Trips							\$	1,500.00	\$	-
Winter Solstice *							\$	2,170.89	\$	-
YCE Supplies	\$	11,000.00	\$	11,000.00	\$	11,000.00	\$	15,000.00	\$	11,000.00
YCE Travel	\$	-	\$	-	\$	-	\$	15,000.00	\$	-
Total Miscellaneous Program Expenses	\$	30,850.00	\$	30,850.00	\$	30,850.00	\$	59,460.23	\$	31,100.00
Membership Program Expenses										
Hospitality	\$	8,500.00	\$	8,500.00	\$	8,400.00	\$	8,000.00	\$	8,500.00
New Member Programs	\$	2,000.00	\$	2,000.00	\$	1,900.00	\$	1,500.00	\$	2,000.00
Visitor Wecoming	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	500.00	\$	1,000.00
Total Membership Program Expenses	\$	11,500.00	\$	11,500.00	\$	11,300.00	\$	10,000.00	\$	11,500.00
Fundraising Expenses										
Miscellaneous Fundraisers	\$	-	\$	-	\$	-	\$	-	\$	3,000.00
Planned Giving	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00
Pledge Drive	\$	4,000.00	\$	4,000.00	\$	4,000.00	\$	4,600.00	\$	4,000.00
Total Fundraising Expenses	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,600.00	\$	8,000.00
Administrative Expenses										
Bank Service Charges	\$	750.00	\$	750.00	\$	750.00	\$	500.00	\$	1,000.00
Consultants	\$	6,000.00	\$	6,000.00	\$	11,500.00	\$	11,500.00	\$	11,500.00
Credit Card Discount Fees	\$	13,500.00	\$	13,500.00	\$	13,000.00	\$	17,000.00	\$	13,000.00
Staff Training (CPR/AED)		\$0		\$0		\$0				

Employee Appreciation	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00	\$	1,000.00
Financial Review/Audit	\$	400.00	\$	400.00	\$	400.00	\$	300.00	\$	750.00
Internet	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,308.00	\$	1,500.00
Mileage	\$	500.00	\$	500.00	\$	500.00	\$	500.00	\$	1,000.00
Office Supplies	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00
Paper	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00
Payroll Fees	\$	5,500.00	\$	5,500.00	\$	5,500.00	\$	5,600.00	\$	3,100.00
Postage & Shipping	\$	5,500.00	\$	5,500.00	\$	5,500.00	\$	5,500.00	\$	5,500.00
Printing & Copying	\$	20,500.00	\$	20,500.00	\$	21,000.00	\$	22,000.00	\$	19,000.00
Software	\$	8,000.00	\$	8,000.00	\$	8,000.00	\$	7,800.00	\$	8,000.00
Telephone	\$	5,500.00	\$	5,500.00	\$	5,500.00	\$	5,300.00	\$	4,800.00
Volunteer Appreciation	\$	800.00	\$	800.00	\$	800.00	\$	500.00	\$	825.00
Volunteer Appreciation	\$	800.00	\$	800.00	\$	800.00	\$	500.00	\$	825.00
Website	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,500.00	\$	1,500.00
Total Administrative Expenses	\$	78,750.00	\$	78,750.00	\$	84,250.00	\$	87,808.00	\$	80,300.00
Miscellaneous Expenses										
Board Exp - Admin	\$	-	\$	-	\$	-	\$	20.00	\$	-
SPIFF	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00	\$	2,000.00
Visual Arts	\$	4,200.00	\$	4,200.00	\$	4,200.00	\$	4,200.00	\$	4,200.00
Total Miscellaneous Expenses	\$	6,200.00	\$	6,200.00	\$	6,200.00	\$	6,220.00	\$	6,200.00
Insurance										
Liability	\$	15,500.00	\$	15,500.00	\$	15,500.00	\$	15,450.00	\$	16,867.00
Workers Compensation	\$	7,000.00	\$	7,000.00	\$	7,000.00	\$	10,740.00	\$	7,120.50
Total Insurance	\$	22,500.00	\$	22,500.00	\$	22,500.00	\$	26,190.00	\$	23,987.50
Dues & Memberships										
Mid America	\$	11,668.86	\$	11,113.20	\$	10,584.00	\$	10,584.00	\$	10,584.00
Other Membership Fees and Dues	\$	-	\$	-	\$	-	\$	-	\$	800.00
UUA	\$	34,618.50	\$	34,618.50	\$	34,618.50	\$	34,618.50	\$	34,618.50
Total Dues & Memberships	\$	46,287.36	\$	45,731.70	\$	45,202.50	\$	45,202.50	\$	46,002.50
Utilities										
Electricity	\$	35,000.00	\$	35,000.00	\$	30,500.00	\$	31,000.00	\$	28,000.00
Gas	\$	18,000.00	\$	17,000.00	\$	16,000.00	\$	16,500.00	\$	16,000.00
Water & Sewer	\$	10,000.00	\$	10,000.00	\$	7,500.00	\$	8,500.00	\$	7,000.00
Total Utilities	\$	63,000.00	\$	62,000.00	\$	54,000.00	\$	56,000.00	\$	51,000.00
Repairs & Maintenance										
Alarm System	\$	500.00	\$	500.00	\$	500.00	\$	400.00	\$	1,500.00
Elevator Maintenance	\$	3,300.00	\$	3,300.00	\$	3,300.00	\$	3,300.00	\$	3,300.00

General Repairs & Maintenance	\$	18,000.00	\$	12,000.00	\$	11,000.00	\$	12,000.00	\$	16,000.00
HVAC	\$	8,000.00	\$	8,000.00	\$	7,500.00	\$	7,000.00	\$	10,000.00
Total Repairs & Maintenance	\$	29,800.00	\$	23,800.00	\$	22,300.00	\$	22,700.00	\$	30,800.00
Other Building Related Expense										
Capital Campaign *	\$	70,000.00	\$	70,000.00	\$	70,000.00	\$	87,489.88	\$	-
Equipment Leases	\$	-	\$	-	\$	-	\$	-	\$	175.00
Groundskeeping	\$	15,000.00	\$	15,000.00	\$	15,000.00	\$	16,800.00	\$	16,800.00
Interest Expense	\$	29,544.00	\$	29,544.00	\$	29,544.00	\$	35,000.00	\$	37,500.00
Janitorial Supplies	\$	10,000.00	\$	5,000.00	\$	8,500.00	\$	8,500.00	\$	7,500.00
Other Exp - Facility *								3,990.47		-
Other Admin Expense	\$	-	\$	-	\$	-	\$	1.25	\$	750.00
Other Facility Expense	\$	-	\$	-	\$	-	\$	-	\$	750.00
Pest Control	\$	600.00	\$	600.00	\$	600.00	\$	600.00	\$	600.00
Sound System	\$	2,000.00	\$	500.00	\$	500.00	\$	500.00	\$	3,000.00
Trash & Recycling	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	5,000.00
Total Other Building Related Expense	\$	132,144.00	\$	125,644.00	\$	129,144.00	\$	157,881.60	\$	72,075.00
Offering Plate for Community										
Children's Offering *	\$	-	\$	-	\$	-	\$	1,106.09	\$	-
Habitat for Humanity *	\$	-	\$	-	\$	-	\$	1,643.57	\$	-
Offering Plate for Community *	\$	30,000.00	\$	30,000.00	\$	30,000.00	\$	31,822.37	\$	38,000.00
Simpson Meals *	\$	-	\$	-	\$	-	\$	889.78	\$	-
TRUST *	\$	-	\$	-	\$	-	\$	-	\$	2,000.00
Total Offering Plate for Community	\$	30,000.00	\$	30,000.00	\$	30,000.00	\$	35,461.81	\$	40,000.00
Other Charitable Contributions										
Families Moving Forward *	\$	5,000.00	\$	5,000.00	\$	5,000.00	\$	1,527.98	\$	5,000.00
Holiday Giving *	\$	-	\$	31,500.00	\$	-	\$	23,552.82	\$	45,000.00
Miscellaneous *	\$	-	\$	-	\$	-	\$	41,980.00	\$	25,445.89
Total Other Charitable Contributions	\$	5,000.00	\$	36,500.00	\$	5,000.00	\$	67,060.80	\$	75,445.89
Total Expenses	\$	1,711,197.49	\$	1,664,956.57	\$	1,594,464.50	\$	1,699,975.85	\$	1,588,023.89
Net Total (before principal payment)	\$	(62,122.00)	\$	(31,858.31)	\$	(11,514.50)	\$	8,942.65		
Principal on Mortgage& Line of Credit	\$	(42,193.00)	\$	(42,193.00)	\$	(42,193.00)	\$	42,975.00		
Net Total	\$	(104,315.00)	\$	(74,051.31)	\$	(53,707.50)	\$	(34,032.35)	\$	(5,927.67)

* Release from Restriction Account (No Net Impact)

	2018-19 budget	Projected 2017-2018	Actual 2016-17	Actual 2015-16
Annual Gifts	\$ 1,115,775.00	\$ 1,080,000.00	\$ 1,056,665.00	\$ 1,064,167.00
Unrestricted Donations	\$ 65,000.00	\$ 65,000.00	\$ 78,165.00	\$ 69,319.00
Offering Plate for Church	\$ 48,000.00	\$ 32,000.00	\$ 36,883.00	\$ 29,091.00
Offering Plate for Community	\$ 30,000.00	\$ 31,822.00	\$ 60,947.00	\$ 54,115.00
Legacy Fund Contribution	\$ 47,000.00	\$ 43,552.00	\$ 28,145.00	\$ 31,383.00
Fundraising	\$ 12,000.00	\$ 50,100.00	\$ -	\$ 15,780.00
Rentals	\$ 137,492.00	\$ 137,617.00	\$ 119,814.00	\$ 108,444.00

Salaries	\$ 826,470.00	\$ 821,363.00	\$ 756,092.00	\$ 753,830.00	the increase in the salary line from 16-17 to 17-18 includes major increases in RE staffing (\$30,000), ministry salaries (\$15,000), facilities salaries (\$26,000) and a smaller increase in admin (\$8000)
All Benefits	\$ 169,773.00	\$ 146,069.70	\$ 128,756.00	\$ 136,965.00	
Health Insurance	\$ 100,287.00	\$ 77,603.00	\$ 63,957.00	\$ 76,217.00	17/18 - 18/19 health insurance move includes the move to UUA health insurance. Continuing with BCBS would have cost \$81,000, UUA costs \$89,000 and I'm budgeting for a 15% increase beginning Jan. 1 - which may or may not happen
Utilities	\$ 54,000.00	\$ 56,000.00	\$ 49,667.00	\$ 43,621.00	
Mortgage Inteest & Principal	\$ 71,747.00	\$ 77,975.00			

Net after mortgage

the 17/18 and 18/19 salary line includes \$7,000 and \$6,000 respectively for staf bonuses in lieu of salary increases. This gives us 3% for all non-ministry, 30 hours or more per week staff

First Universalist Church of Minneapolis
Balance Sheet
March 2018

Headings and Account

Current Balance (This Year)

Assets		
Current Assets		
Cash & Cash Equivalents		
Cash	\$	813,725.90
Total Cash & Cash Equivalents	\$	813,725.90
Investments		
Schwab- Church Operating	\$	535,090.91
Schwab - Church Reserve	\$	331,765.98
Schwab - Don Carter & Mary Carter	\$	78,066.04
Schwab - Legacy Fund	\$	824,204.54
Schwab - Temporarily Restricted	\$	122,508.68
Thrivent Mutual Funds	\$	10,733.84
Total Investments	\$	1,902,369.99
Cash & Cash Equiv - Foundation		
Sunrise Bank - Foundation	\$	11,220.46
Total Cash & Cash Equiv - Foundation	\$	11,220.46
Investments - Foundation		
Schwab - Foundation	\$	1,751,469.64
Total Investments - Foundation	\$	1,751,469.64
Total Current Assets		\$ 4,478,785.99
Other Current Assets		
Other Current Assets		
Mortgage Escrow Deposits	\$	3,653.94
Prepaid Expenses	\$	16,320.96
Prepaid Loan Expenses	\$	5,224.66
Prepaid Medical Insurance	\$	9,320.36
Total Other Current Assets	\$	34,519.92
Total Other Current Assets		\$ 34,519.92
Fixed Assets		
Fixed Assets		
Fixed Assets	\$	1,663,636.05
Total Fixed Assets	\$	1,663,636.05
Total Fixed Assets		\$ 1,663,636.05
Total Assets		\$ 6,176,941.96

Liabilities & Equity		
Current Liabilities		
Accounts Payable		
Accounts Payable	\$	24,667.38
Total Accounts Payable	\$	24,667.38
Total Current Liabilities		\$ 24,667.38
Other Current Liabilities/Long-Term Liabilities		
Benefits Payable	\$	1,562.29
Accrued Expenses	\$	15,735.31
Deferred Revenue	\$	23,072.04
Misc Other Liabilities	\$	13,000.00
Line of Credit Advance Payble	\$	117,571.53
Mortgage Payable	\$	558,909.16
Total Other Current/Long-Term Liabilities	\$	729,850.33
Total Other Current/Long-Term Liabilities		\$ 729,850.33
Total Liabilities & Equity		\$ 754,517.71
Fund Principal and Excess Cash Received		
Fund Principal		
Undesignated Net Assets/Equity		
Church Equity	\$	1,418,130.75
Total Undesignated Net Assets/Equity	\$	1,418,130.75
Board Restricted Net Assets		
Contingency Reserve	\$	271,109.21
Legacy Fund	\$	783,428.17
Memorials	\$	6,781.88
Total Board Restricted Net Assets	\$	1,061,319.26
Temp Restricted Net Assets		
Capital Campaign Fund	\$	1,272,596.09
Cummins Ministerial Intern Fund	\$	221,372.65
Miscellaneous Funds	\$	114,874.20
Total Temp Restricted Net Assets	\$	1,608,842.94
Permanently Restricted		
Don Carter Endowment	\$	60,427.65
M E Carter Endowment	\$	16,039.03
Total Permanently Restricted	\$	76,466.68
Total Fund Principal	\$	4,164,759.63
Excess Cash Received		
Excess Cash Received	\$	1,257,664.62
Total Excess Cash Received	\$	1,257,664.62
Total Fund Principal and Excess Cash Received		\$ 5,422,424.25
Total Liabilities & Equity, Fund Principal, & Restricted Funds		\$ 6,176,941.96

Capital Campaign 2016-2017 Budget Breakdown (As of 4/30/2018)

Division	Budget	\$	Remaining Budget
Revenue			
Donations/Legacy Fund Transfer	\$ 6,400,000.00	\$ 1,696,917.13	\$ (4,703,082.87)
Expense			
Consultants	\$ 230,000.00	\$ 229,030.00	\$ 970.00
Printing/Supplies	\$ 8,000.00	\$ 8,000.00	\$ -
Launch Event	\$ 30,000.00	\$ 52,689.09	\$ (22,689.09)
Architectural Pre-Work	\$ 27,000.00	\$ 2,000.00	\$ 25,000.00
Total Budget	\$ 295,000.00	\$ 291,719.09	
Remaining Budget	\$ 3,280.91		
Projects			
Full Compass Hearing Assist	\$ 3,664.34		
Bookcase and End Table	\$ 884.00		
Architect Fee	\$ 87,664.86		
Staff Salaries	\$ 12,878.30		
Misc. Fees	\$ 1,915.38		
Consultant	\$ 2,500.00		
	\$ 109,506.88		
Total Loan from Legacy Fund	\$ -		
Net Income	\$ 1,295,691.16		

Bylaws of the First Universalist Church of Minneapolis

Approved _____

Preamble

First Universalist of Minneapolis (the “Church”) is a nonprofit corporation, organized under Minnesota Statutes Chapter 317A.

Article I - Members

1. Eligibility for Membership

Any person fourteen years of age or older who subscribes to the mission and values of First Universalist Church (the “Church”) and who desires to become a member of the Church may do so by signing the book kept by the Church for such purpose. The name will be added to the Register of Members.

2. Voting Members

A member shall become a voting member of the Church upon making a pledge in any amount to the current or upcoming operating fund or upon receiving a waiver regarding such pledge, from a minister of the Church. Unless a waiver has been received, if no pledge contribution has been received from that person, or that person’s household, at the time of a congregational meeting vote, then the member shall not be considered a voting member for the purposes of that meeting or that vote and until such time as a pledge contribution is received or a waiver is granted.

3. Register of Members

There shall be a register of the names of all members and voting members. Membership shall be reviewed at least annually by Executive Leadership. Members who do not respond to membership status inquiries mailed to their most recent postal or email address listed with the Church, shall be removed from membership after a period of one year from the date of such mailing.

4. Resignation of Membership

Any member may resign at any time by giving a written notice to a member of the Executive Leadership of the Church.

Members who have requested resignation shall be removed immediately.

Article II - Meetings of the Church

1. Annual Meeting

The annual meeting of the Church shall be held at the building where the usual religious services are held, or elsewhere at such place as may be designated by the Board of Trustees, at such time each year as the Board of Trustees shall determine. The purposes of the meeting shall be:

- Presentation of annual reports;
- Election of Board Trustees and Officers; the Chair and Directors of the First Universalist Foundation, Elected Members of the Nominating Committee of the Church, and Delegates to the General Assembly of the Unitarian Universalist Association;
- Presentation and approval of the budget recommended by the Senior Minister and the Board of Trustees for the next fiscal year;
- Discussion and vote on resolutions properly presented; and
- Transaction of other business which may properly come before the meeting.

Thirty (30) days prior to the Board's adoption of a budget to present at the Annual Meeting, the Executive Leadership shall notify the members of a meeting to discuss with members the proposed budget. Such meeting shall occur prior to the Board's adoption of the budget.

2. Meeting Quorums

Ten (10) percent of the voting members of the Church shall be required to form a quorum at all meetings, except that for the purpose of selecting or removing a minister the quorum shall be twenty-five (25) percent.

3. Special Meetings

Special meetings of the Church may be called by the Board of Trustees. If a written request to the Board of Trustees by 50 voting members or ten (10) percent of the members (whichever is fewer) for a special meeting is denied by the Board of Trustees, said meeting may be called by such 50 voting members or ten (10) percent of the members (whichever is fewer).

4. Meeting Notices

Written notice of each meeting of the Members, whether the Annual Meeting or a Special Meeting, shall be sent to each member and posted on the website at least seven (7) days before the meeting, addressed according to the most recent

membership records. Notice may be provided by electronic means when possible. Notice of the meeting shall include an agenda of the principal matters of business to be considered at the meeting.

5. Meeting Agendas

Any voting member desiring to have any matter considered at the meeting shall request the Board of Trustees to place it on the agenda, and if it is in the form of a resolution, shall furnish the Board with a copy of such resolution. Such request shall be presented to the Board of Trustees in writing at least fourteen (14) days prior to the meeting, or such later date as the Board of Trustees may designate. The Board may place such requested item on the agenda and must do so if the request is supported in writing by at least 15 voting members of the Church. If the request is approved for inclusion on the agenda and includes a resolution, such resolution shall be reproduced by the Board of Trustees and distributed to the voting members as a part of the notice of the meeting. Matters not placed on the agenda may nevertheless be considered at the meeting, but may not be put to final vote unless three-fourths (3/4ths) of the voting members present at such meeting shall first vote to so consider it. If the meeting is a special meeting, business transacted at the meeting which is not included in the purposes described in the notice of the meeting may be voidable as described in Minn. Stat. 317A.433.

6. Voting by Proxy.

There shall be no voting by proxy by members until the Board's establishment of a proxy voting policy in line with our values of inclusion and democracy.

Article III - Board of Trustees

1. Board Membership

- a. The Board of Trustees shall consist of nine (9) members, except as provided in the paragraph below. Each Trustee shall be a voting member of the Church and shall be elected for a term of three (3) years. The terms shall be staggered so that no more than three (3) Trustees shall be elected for three-year terms at the same annual meeting. At every annual meeting, voting members shall elect three (3) Trustees and vote on any vacancies that have been filled by the Board since the last annual meeting. A Trustee may be nominated to serve a second consecutive term. A Trustee who has served two consecutive terms may not be nominated to serve an additional term until the Trustee has been off the Board of Trustees for at least three years.
- b. A Trustee shall take office upon the election of that Trustee and shall continue until the term expires, the Trustee resigns or dies, or the Trustee is removed. In the event of a vacancy on the Board of Trustees for any

reason, the Board may at its sole discretion elect a successor to fill the vacancy for the remainder of the unexpired term. Such election shall be subject to approval by voting members of the Church at the next annual meeting.

- c. Any Trustee may resign by giving notice in writing to all other Trustees. A Trustee may be removed, with or without cause,
- by action of two-thirds (2/3rds) of the Trustees;
 - by vote of a majority of the voting members of the Church present at an annual meeting of the Church; or
 - at a special meeting called pursuant to Article II(3) of these Bylaws.

If three (3) or more vacancies exist at any one time, a congregational meeting for the purpose of filling these vacancies shall be held within thirty (30) days.

- d. Trustees shall serve without compensation, but may be reimbursed for travel and reasonable expenses incurred in fulfilling their duties.

2. Board Powers

- a. The business, property, and affairs of the Church, including the approval of the annual budget in the circumstance detailed in the paragraph below, shall be governed by the Board of Trustees, which shall promulgate policies for the conduct of the affairs of the Church consistent with the laws of the State of Minnesota, the Articles of Incorporation, and these Bylaws.
- b. At the annual meeting, the budget for the next Church year shall be presented to the congregation for its approval. If there is not a quorum present to approve the budget (per Article II(2)), the Board of Trustees is empowered to approve the budget.

3. Board Meetings

- a. Regular meetings of the Board of Trustees shall be held at a location and on dates and times determined by the Board of Trustees and published to the congregation.
- b. Special meetings of the Trustees may be called by the President, or by the Secretary on the written request of any two (2) Trustees. Written notice of special meetings shall be sent to each Trustee before the date of the meeting. Such notice may be provided in person, or by electronic communication to those who have consented to electronic communication, at least four (4) calendar days before the meeting, or by notice mailed to

the Trustee at least seven (7) calendar days before the meeting. Such notice may be waived with the consent of each Trustee in situations where a more urgent need is present as determined by the President.

- c. A majority of the Trustees shall constitute a quorum. If a quorum is present when a duly called meeting is convened, the Trustees present may continue to transact business until adjournment, even though the withdrawal of one or more Trustees leaves less than the number otherwise required for a quorum.
- d. Any action by the Board of Trustees may be decided upon by a majority of the votes cast by those present at the meeting unless otherwise specifically increased in Board of Trustees policies or as required by applicable law.
- e. A Trustee may not appoint a proxy for himself or herself or vote by proxy at a meeting of the Trustees.
- f. A Trustee may participate in a meeting of the Trustees by means of conference telephone or by such other means of remote communication, in each case through which that Trustee, other Trustees so participating, and all Trustees physically present at the meeting may communicate with each other on a substantially simultaneous basis. Participation in a meeting by remote communication constitutes presence at the meeting.
- g. Any action that could be taken at a meeting of the Trustees may be taken instead by written action signed, or consented to by authenticated electronic communication by all of the Trustees. A Trustee may consent to an action by affixing his or her signature on a document setting forth the action, or by electronic communication as defined in Minnesota Statutes, section 317A.011, subd. 7a, as amended from time to time.
- h. All board meetings shall be open to the members, with the exception that the Trustees may vote to hold all or a portion of a board meeting in Executive Session to discuss confidential matters.

4. Other Committees

The Board of Trustees may appoint such other committees as it deems appropriate to assist the Board in doing its work. The Board will determine the scope of the work of any such committee in a manner that preserves Board wholeness and is consistent with these bylaw and such policies as are established by the Board from time to time.

Article IV - Officers of the Church and the Board of Trustees

1. Number, Term, and Duties

There shall be four officers: President, Vice-President, Secretary, and Treasurer. The officers shall be elected from amongst the Trustees to one-year terms by the members at the Annual Meeting. Officers shall take office on July 1 following their election unless they are elected to fill a vacancy, in which case they shall take office upon election. No officer may hold more than one office at a time. The Board of Trustees shall establish such additional officers as it may find necessary. In the event of a vacancy in the offices of Vice-President, Secretary, or Treasurer, the Board may appoint a Trustee to fill the unexpired portion of that officer's term.

2. President of the Congregation

The President of the Congregation shall prepare agendas for all Board meetings and all official meetings of the membership and shall preside over these meetings. If the President becomes unable to serve out his/her term, the Board will elect another Trustee to serve as President.

3. Vice-President

The Vice-President shall perform the duties of the President of the Congregation in her/his absence.

4. Secretary

The Secretary shall be responsible for the recording of the minutes of all official meetings of the membership and of the Board of Trustees and forwarding the minutes to Church staff in a timely manner for archiving with other official records of the Church. The Secretary shall oversee the publishing of all notices as required by these Bylaws. The Secretary shall also be responsible for ascertaining the eligibility of all who wish to vote on Church business.

5. Treasurer

The Treasurer shall lead the financial monitoring efforts of the Board of Trustees and shall present the budget to the Congregation at the Annual Meeting.

6. Authorization for Board or Member Action

The President of the Congregation, acting together with either the Vice-President, the Secretary, or the Treasurer is hereby authorized and directed to execute and acknowledge any instruments, certificates, and other documents on behalf of the Church and to perform any additional acts on behalf of the Church which they may deem necessary and proper to complete a course of action approved by a majority decision of the Board of Trustees or the Members of the Church at a lawful meeting.

Article V - Ministers and Staff

1. Executive Leadership of the Church

- a. The Board of Trustees shall establish an executive leadership structure for staff of the Church ("Executive Leadership"). Executive Leaders who report directly to the Board of Trustees shall include at least one Called Minister (defined as a minister who is called by and elected by the voting members of the Church as described in Article V(2) below), except during periods when no called minister serves the Church as described below, and may include one or more additional called or hired ministers or non-ministerial executives as determined by the Board of Trustees. The Executive Leadership structure established by the Board of Trustees may, but need not, include provision for an executive team that reports collectively to the Board of Trustees. The Board of Trustees is responsible for ensuring that Executive Leadership position(s) that report to the Board of Trustees are filled in a timely manner.
- b. In the event that no Called Minister currently serves the Church, whether because of resignation, disability, death, or other reason, the Board of Trustees may engage an interim minister who reports directly to the Board of Trustees. The Board of Trustees shall be responsible for taking the steps necessary for the congregation to select and call one or more ministers to serve as the Executive Leadership of the Church, as set forth in Article V(2) below.
- c. Executive Leaders shall have responsibility for working collaboratively to advance First Universalist's mission, ends, values, and vision within limits and policies as established by the Board of Trustees.
- d. Nothing in this section shall be construed to allow the Board of Trustees to supercede the authority of the congregation to call ministers or to remove called ministers.

2. Selection or Removal of Called Minister(s)

- a. To fill a Called Minister position, the Board of Trustees shall direct the Nominating Committee to recommend to the members a Search Team comprised of voting members of the Church. The members shall approve the Search Team at a meeting called for that purpose pursuant to Article II. The Search Team will conduct the search and present a candidate to the congregation for approval. After the Search Team has selected a candidate but prior to the candidate's presentation to the congregation, the Board of Trustees will be authorized to determine the compensation and other terms and conditions of employment offered to

the candidate and will conduct any negotiations regarding the same. The Board of Trustees shall establish such other processes as may be appropriate to facilitate the selection process, including a process for selection of the Search Team that includes substantial input from the voting members of the Church.

- b. The Board of Trustees shall determine job descriptions and other responsibilities of the Called Minister(s).
- c. The selection or removal of a Called Minister shall require consent of three-fourths (3/4ths) of the voting members of the Church in attendance at a meeting of the Church called for that purpose pursuant to Article II.

3. Staff other than Called Minister(s)

- a. For Executive Leaders other than Called Ministers, the Board of Trustees approves the hiring and removal of other Executive Leader(s) (if any) who report to the Board of Trustees, including any interim ministers. The Board of Trustees may, but need not, appoint a search team from among staff, trustees, and voting members of the Church to assist it in sourcing and recommending candidates for such positions.
- b. Executive Leaders administer and approve the hiring and removal of professional and other staff who do not report directly to the Board of Trustees, subject to policies and budgets established by the Board of Trustees.

4. Employment Agreements

- a. The Board of Trustees shall establish the compensation and other terms of employment of the Called Minister(s) and other Executive Leaders who report to the Board of Trustees and shall memorialize such terms in a written agreement which will be subject to review and potential modification over time.
- b. Any other written employment agreements must be approved in advance by an Executive Leader or other staff member authorized by the Board of Trustees to sign such agreements.

Article VI -The First Universalist Foundation

1. Purpose

The First Universalist Foundation of the First Universalist Church of Minneapolis shall be responsible to the Trustees of the Church for allocating funds from the First Universalist Foundation for social justice. In carrying out this responsibility the Foundation may initiate, receive, solicit, and evaluate proposals from groups within or

outside of the Church to promote social justice. The Foundation shall keep accurate records of all Foundation proceedings and of all business transacted.

2. Directors

The First Universalist Foundation shall consist of nine (9) Directors, each of whom shall be a member of the Church. The Directors shall be elected by the Members at the Annual Meeting. The term of office of each of the Directors shall be three (3) years. The terms shall be staggered so that no more than three (3) Directors shall be elected for three-year terms at the same Annual Meeting. No Director may be a member of the Board of Trustees. No Director shall serve more than two (2) consecutive, full terms. Directors elected to fill out an unexpired term on the Foundation shall be eligible to serve two (2) full terms in addition to the partial term served.

3. Vacancies

Directors unable to carry out their responsibilities as determined by the Foundation shall be replaced by appointment by the Trustees from among nominees presented by the Nominating Committee to the Trustees, following notification of the Members as specified in Article III, Section 3. Persons so appointed shall serve until the next Annual Meeting, at which time they or replacements shall be elected in accordance with Article II, Section 5, to serve out the remaining terms.

4. Officers

The Foundation shall have a Chair, who shall preside at all meetings of the Foundation. The Foundation Chair shall be nominated by the Nominating Committee and elected by the Members at the Annual Meeting from among the Directors of the Foundation. The term of office of the Chair of the Foundation shall be one year.

5. Duration

The Foundation's structure or purpose may not be dissolved or modified except upon the affirmative vote of the majority of Members of the Church voting at an Annual Meeting or Special Meeting of Members called for that purpose.

6. Funds and Disbursements

- a) No part of the Foundation's funds shall be used as a substitute for or replacement of regular operating expenses of First Universalist Church.
- b) Operating Expenses. Proper expenses of the Foundation shall be a legitimate claim on the Foundation's funds and shall be paid from those funds upon certification by the Foundation.

- c) Allocations. The Foundation may allocate its funds in accordance with its Mission and shall report at least quarterly to the Board of Trustees regarding such allocations.
- d) Disbursements. Decisions regarding disbursements from the Foundation funds, grants, and operating expenses shall be made by majority vote of the Directors of the Foundation.

Article VII – Nominating Committee

1. Function

The Church shall have a Nominating Committee charged with recommending for approval by the members at the annual meeting, candidates for appointment to open seats on the Board of Trustees, the First Universalist Foundation, and for the Nominating Committee itself.

2. Composition

- a. The Nominating Committee shall be composed of:
 - 1) six at-large members elected by the Members at the Annual Meeting, and
 - 2) one Trustee appointed by the President of the Congregation with approval of the Board of Trustees, in July of each year.
- b. The President, with the approval of the Board of Trustees, shall appoint the chair of the Nominating Committee from among the elected members of the Nominating Committee after July 1 each year.
- c. The term of office of the at-large members of the Nominating Committee shall be three years, and their terms shall be staggered so that the term of office of two at-large members will expire each year. No person shall serve on the Nominating Committee for more than six (6) consecutive years.
- d. In the event of any vacancies in the at-large positions on the Nominating Committee, the Board of Trustees, upon the recommendation of the Nominating Committee, shall appoint replacements for such persons, and such replacements shall serve until the next Annual meeting, at which time a replacement shall be elected to serve out the remaining term. Vacancies in any positions on the Nominating Committee which are appointed by the President of the Congregation shall be filled by the President of the Congregation with the approval of the Board of Trustees.
- e. The Nominating Committee shall submit its slate of candidates to the Board of Trustees for review 30 days before the annual meeting. The Board of Trustees shall submit the Nominating Committee's

recommendations to the membership at the Annual Meeting of the Church. Additional nominations may be submitted from the floor of the annual meeting by voting members.

- f. The failure of the Board or the Nominating Committee to comply with any provision of this section shall not invalidate any election.

Article VIII - The First Universalist Church Legacy Fund

1. Establishment and Purpose

The Church shall maintain a fund to be known as the First Universalist Church Legacy Fund (the Legacy Fund). The purpose of the Legacy Fund is to support and enhance the mission of the Church. The Legacy Fund will be made up of gifts to the Legacy Fund from Members and friends of the Church and other money placed into the Legacy Fund from time to time by the Board of Trustees.

2. Distributions

The Board of Trustees shall direct the distribution of money from the Legacy Fund. Except where authorized otherwise in the terms of a gift or by the Membership at a regular or special meeting of the members pursuant to Article II, the Board of Trustees shall make distributions from the Legacy Fund annually in amounts not to exceed seven (7) percent of the fair market value of the Legacy Fund as determined by the Board of Trustees.

Article IX - Amendment of Bylaws

These Bylaws may be amended at any annual or special meeting of the Church by a vote of two-thirds (2/3) of the voting members present at the meeting. Notice of the meeting, stating the purpose including the proposed amendment, shall be given as provided in Article II hereof.

Article X - Other Provisions

1. Fiscal Year

The fiscal year of the Church shall begin on each July 1 and end on the following June 30.

2. Affiliation

This Church is a member of the Unitarian Universalist Association and the MidAmerica Region.

3. Real Estate

- a. No member shall have rights in or to any property of the Church at any time.

- b. The main meeting place of the Church and any real property intended to become the main meeting place of the church shall not be constructed, substantially reconstructed (as determined by the Board of Trustees), purchased, sold, conveyed, or encumbered, or made subject to any lien unless such activity or transaction shall be first authorized by a vote of two-thirds (2/3rds) of the Board of Trustees, and three-fourths (3/4ths) of the voting members in attendance at a meeting of the Church; each body acting separately, at an annual meeting of either, or at a special meeting of either duly called for that purpose, which purpose shall be plainly stated in the notice.
- c. Any other real estate purchased, sold, conveyed, encumbered, or made subject to any lien must be authorized by a majority vote of the Board of Trustees.

4. Indemnification

The Church shall indemnify Trustees and other persons acting in an “official capacity” as provided in and limited by Minnesota Statutes Chapter 317A up to the coverage limits of its then applicable insurance policies.

5. Parliamentary Procedure

Where these bylaws or no other rules adopted by the Board of the Trustees govern, Robert's Rules of Order, Newly Revised, shall be the parliamentary rules of procedure governing all meetings of this Church.

Draft resolution regarding Co-Ministry

Whereas, First Universalist Church has called Justin Schroeder to serve our congregation as Senior Minister and called Jennifer Crow to serve our congregation as Executive Minister, reporting to the Senior Minister; and

Whereas, both Reverends Schroeder and Crow have provided outstanding and visionary leadership to First Universalist Church; and

Whereas, Reverends Schroeder and Crow have advised the Board of Trustees that the strength of their individual and combined ministries would be greatly enhanced if they could serve as equal co-ministers to First Universalist Church; and

Whereas, the Board of Trustees has deliberated on the ministers' request and determined that it is in the best interests of First Universalist Church to move from a senior-minister leadership structure to a co-ministry leadership structure;

Therefore, be it resolved that we, the members of First Universalist Church, hereby ratify the Board of Trustees' decision to have Reverends Schroeder and Crow serve as Senior Co-Ministers, sharing responsibility for executing the visionary goals of this Church, according to such terms and conditions as the Board of Trustees deems appropriate.

Frequently Asked Questions about Co-Ministry

What is our current ministerial leadership structure?

Currently, we have two ministers called by the congregation: Senior Minister Justin Schroeder and Executive Minister Jen Crow. Reverends Elaine Tenbrink and Ruth MacKenzie are hired ministers. Under our policy governance structure, the Senior Minister is essentially the chief executive of the church, responsible for and reporting to the Board of trustees regarding our visionary goals and the supervision of the staff.

Why are we changing to a co-ministry model?

Justin and Jen approached the Board about one year ago with a request that the Board change the leadership structure from a hierarchical senior minister / executive minister relationship to a more equitable co-minister relationship. Justin and Jen realized as they worked closely together over several years that their ministries were both complementary and intertwined in ways that were functionally equitable but not formally so. Before approaching the Board, they spent time working with an outside coach to assist them in envisioning what a co-ministry might look like and how it would further enhance their individual ministries at our church.

The Board of Trustees enthusiastically supports the move to co-ministry. It is another example of how Justin and Jen provide visionary leadership for our church, seeking to practice equity themselves and model how equity can be lived out in the world. The Board believes that Jen and Justin have demonstrated, and will continue to demonstrate, the honesty, maturity, and compassion that is necessary to succeed as co-ministers.

What effect will this have on our congregation?

Because Justin and Jen have effectively been working as co-ministers for quite some time now, the congregation may not perceive a significant difference. Preaching responsibilities will be adjusted so that Justin and Jen preach an equal number of times through the church year but otherwise their portfolios of responsibility will not change. Justin and Jen will be jointly responsible for reporting to the Board regarding the execution of our visionary goals and the supervision of staff. The Board, in turn, will evaluate both Justin's and Jen's performance individually and as a co-ministry team.

What happens if Justin or Jen decides to leave our church?

The Board spent some time considering what might happen if either of our co-ministers was unable to continue to serve our church, whether because of a voluntary departure, illness, retirement, etc. Would the church seek to call a new minister to serve in a co-minister role with the continuing co-minister? Should the remaining co-minister become the senior minister? The Board came to the realization that it would be difficult, perhaps impossible, to predict how one of our co-ministers might cease to serve our congregation, what the needs of the Church might be at that time, and what ministry structure would be appropriate. Hence, the Board is recommending that the congregation adopt the revised bylaws regarding executive leadership, which would

make it clear that when transitions occur with called ministers, the Board would discern what steps were appropriate, determine what resources might be needed through the transition (including acting or interim ministers), and create a search committee to seek a new called minister if necessary.

What is the role of the congregation in this transition?

Only the congregation can call a minister to serve and only the congregation can discharge a called minister. Under our Church's policy governance structure, the Board of Trustees is responsible for supervising the minister(s) who provide the executive leadership of the church. This includes monitoring the Church's compliance with Board policies, setting and modifying compensation, etc. As a technical matter, determining the appropriate responsibilities of the ministers providing executive leadership, their titles, and the manner in which the Board monitors their work is the responsibility of the Board of Trustees. Hence, deciding whether we should have two senior co-ministers is likely a Board function. However, it also seems counterintuitive that the congregation would not have an opportunity to weigh in on this type of a change. That is why the Board is presenting a resolution on co-ministry to the congregation at the Annual Meeting.

Dear Members and Friends of First Universalist Church,

It gives me great pleasure to write to inform you of an upcoming change in the ministry of First Universalist Church. At the request of our two called ministers, Senior Minister Justin Schroeder and Executive Minister Jennifer Crow, the Board of Trustees has agreed that Justin and Jen should serve as Senior Co-Ministers, with equal responsibilities and compensation structures. The Board will ask the congregation to ratify this transition at the Annual Meeting on June 3, 2018.

The Board of Trustees enthusiastically supports the move to co-ministry. It is another example of how Justin and Jen provide visionary leadership for our church, seeking to practice equity themselves and model how equity can be lived out in the world. The Board believes that Jen and Justin have demonstrated, and will continue to demonstrate, the honesty, maturity, and compassion that is necessary to succeed as co-ministers.

More information about the decision to move to a Senior Co-Ministry model can be found in Frequently Asked Questions about Co-Ministry, which is [enclosed / available at <link>]. Questions or comments about this leadership change can be sent to boardchair@firstuniv.org.

Your Board of Trustees is excited about this change and Justin's and Jen's joint leadership of the ministry of this church!

Sincerely,

Eric T. Cooperstein
President, 2017-18
First Universalist Church