

First Universalist Church Board of Trustees
January 17, 2019
Board Packet

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First Universalist Church of Minneapolis

Board of Trustees Meeting

January 17, 2019

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 CSM report)

II. Consent Agenda (6:50)

- Approval of minutes from December meeting.
- Monitoring: Acceptance of attendance and membership numbers
- Monitoring: Acceptance of staff and significant volunteer changes [none to report]
- Monitoring: Review of Physical Plant for Capital Improvements (Deferred maintenance) (see Co-Senior Minister report).
- Monitoring: Financial Review (see Co-Senior Minister report).
- Monitoring: Staff salary and benefits (see Co-Senior Minister report and attached UUA 2019-20 guidelines).

III. Admin (6:55)

- A. Approval of Justin's sabbatical for January – June 2020 (dates approximate)
- B. Retreat Planning.

IV. Shir-Tikvah (7:10)

- A. Vision for co-locating with Shir Tikvah – Jen (10 minutes) (*see* draft statement in Co-Senior Minister report)
- B. Communications Plan – Cindy Marsh and George Dow (20 minutes)

V. Financial (7:45)

- A. Jen will review the results through November 2018.

BREAK (7:55 – 8-10)

VI. Planning for Co-Senior Minister Evaluation Process (8:10 – 9:00)

- A. Should we resurrect the Congregational Survey? *A copy of the previous congregational survey is included in the Board packet.*
- B. Board evaluation of co-ministers. *A copy of the questions that the Board answered last year is included in the Board packet.*
- C. Whether to gather opinions from key congregants and other stakeholders (“360 Review”)

VII. Adjournment (9:00)

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First Universalist Church of Minneapolis

Board of Trustees Meeting

December 20, 2018

6:30 p.m. Cummins Room

Present: Eric Cooperstein, Richard Spratt, Bryana French, Cindy Marsh, Keven Ambrus, Jen Crow, Justin Schroeder, Lillie Pang, Christa Anders, Dick Niemiec

Guest: Ray Dillon

I. Call to Order

- Lighting of the Chalice
- Reading (see SM report)
- Spiritual reflection question (see CSM report)

II. Consent Agenda

- Approval of minutes from October 2018 meeting (there was no meeting in November).
- Monitoring: Acceptance of attendance and membership numbers for past 2 months.
- Monitoring: Acceptance of staff and significant volunteer changes
- Monitoring: Protection of Assets, Staff/Volunteer Grievances, Exit Interviews.
- Co-Senior Minister October Report, including updates on:
 - o Cummins Internship progress
 - o Shir Tikvah discussion status
 - o Long-range sabbatical planning

MOTION TO APPROVE THE CONSENT AGENDA. APPROVED.

III. Administrative

- a. Approval of minister housing allowances for the ministers' tax planning:
 - Justin Schroeder. \$35,000
 - Jen Crow. \$35,000
 - Elaine Tenbrink \$22,800
 - Ruth MacKenzie. \$22,000

NOTE: This is for the ministers' tax planning and does not represent actual payments to the ministers.

MOTION TO APPROVE THE HOUSING ALLOWANCES. APPROVED.

b. Approval of ordination of Sarah Smalley, member of First Universalist

Sarah Smalley has passed the Ministerial Fellowship Committee (MCF) and is in preliminary fellowship and is now eligible to be ordained. In Unitarian Universalist congregations, ministers are ordained by the congregation. There is a lot of ritual in this ceremony. The Board President asks for an affirmation from the congregants who are there as part of the ceremony. The Board discussed whether we want to have a Board process for recommending someone for ordination.

MOTION to approve ordinations when:

-The candidate has passed the Ministerial Fellowship Committee of the UUA and are approved for Preliminary Fellowship

-There is some relationship or connection to our congregation (i.e. member or worked at the church).

APPROVED.

MOTION TO APPROVE PRESENTING SARA SMALLEY TO THE CONGREGATION FOR ORDINATION. APPROVED.

c. Change Team update / long-range minister-of-color planning

Richard provided an update from the Change Team and passed out minutes from a recent meeting. The Change Team did an audit using materials from the Dismantling Racism book and another from the Crossroads organization in Chicago. Change Team members felt like we were between a 2 and 4 in the following continuum:

1. An Exclusionary Institution
2. Passive Club Institution
3. A Compliance Organization
4. An Affirming Institution
5. A Transforming Institution
6. An Anti-Racist Multicultural Organization in a Transformed Society

There was a suggestion from the Change Team that we should bring in a consultant to help us. It was pointed out that the Beloved Conversations is specifically intended to help move the congregation forward. Another idea was to bring in someone from an organization that really is anti-racist organization and have them talk about what they learned and how they got to where they are. Maybe we need to introduce all new staff to

the church so the church members know who is a new hire (and so they don't ask if they are a new caterer!).

What are things happening in practice that are structurally oppressing or limiting our work? Could someone from Rainbow Research help us identify what the issues are and where to move? Because we want to move to action not just admire the problem some more. What have other organizations done? Maybe Rainbow would have ideas for other organizations.

Jen said a set of outside eyes would be helpful to see what we can not see. She does not assume that we have a road map or that we know how to get there. Change Team also recommended that demographic information be collected about members and let members self-identify. We don't even collect the information right now. The listening mechanisms really need to be in place and we don't know how to reach out to people to be in relationship.

The Board was in support of the recommendations from the Change Team.

Updates from Justin:

- We did get a grant from UUA to support a ministerial intern of color
- However, it is a light year for internships – not so many people out in the pipeline. It does not seem likely that we will have an intern in the 2019-20 church year.
- Jen and Justin are continuing to consider strategies for hiring a full-time minister of color in the next several years. It is so important to have a leadership team that is multiracial.

d. Planning for February 2, 2019 retreat

Ideas for things to consider at the retreat:

- Managing Change
- Holding anxiety
- Explaining the why we are asking around Shir Tikvah
- Full time minister of color in the next three years
- Reading from a book – maybe from Centering, White Fragility, other
- Sexual Violence -presentation from Bryana
- Follow-up from Policy Governance discussion on January 4, 2018

IV. Financial

a. Review of first quarter and October results

Reverend Crow reported on the financials. First quarter review showed nothing surprising. Currently projecting a small deficit but controlling spending to come in to this year on target. Capital campaign tuck-pointing project is done. The mortgage is paid off!! And the line of credit is open should we need it - \$175,000. Capital gifts are coming in as expected. At this point we have quite a bit of money sitting in the bank. Will be looking at how to invest it in January.

The consultant has made recommendations to have more staff training and procedures on financial issues. They have made some staffing changes and Brad is now cross-training a new staff person so that there is some redundancy. Jen will be implementing the recommendations in a reasonable time period.

There is a recommendation to have a capitalization policy for depreciable assets, rather than expense them entirely in the year they are purchased, such as computers. We use modified cash-basis accounting and don't pay taxes so it is not clear what the benefit would be of capitalizing assets. Jen and Keven will do a joint phone call with Kurt to talk through any issues.

V. Shir Tikvah Developments and Planning for Congregational Conversations

Cindy has joined Jen in partnering with moving the project forward:

1. Do we have enough space for both congregations?
2. What are the financial and legal issues that we could work out and that both organizations can live with?

Jen reported that she is working on bringing the staff of both organizations together, looking at the available space and even going to some furniture showrooms together. Volunteer architects from both congregations and Paul May met last week to talk about the space. Talking about how to get larger spaces out of this place so both congregations have room to grow. Architects would have some better ideas by March.

Tom MacLeod, Kevin Ambus, and Nancy Gashott are working on possible financial arrangements. Shir Tikvah has some work to do – they have not started a financial campaign or listed their building etc. Cindy feels that there is a lot of optimism that they can get there. Lots of planning that has to happen concurrently. Need to think about how to get our congregation ready for a congregational vote at the annual meeting. The Board needs to pick up some of this work.

There will be a retreat on January 20 from 1 to 4 for the Boards and the legal and financial team. It likely will be at First Universalist. Beth Zemske will be leading part of this time about unearthing fears and roadblocks.

Cindy Marsh and George Dow are leading the Communications and Engagement Team. At the State of the Church meeting on February 10, 2018, we will outline the project and the opportunities for congregants to provide input. In March and April there will likely be focus groups. Will need one board member at each one of the focus groups. Maybe get some outside facilitation. Maybe get them done enough so that there could be a second round of communication to address questions, issues, fears etc.

What is the threshold that we will want to move forward? We will likely want to have more than 50%?

The team is talking a lot about Governance Structures – what do we want to have? How do you make it equitable and plan for growth? Could have multiple governance structures. The Financial Legal Team will be looking at the synergies in terms of operating expenses. Not expecting there to be a lot of savings. We are more heavily staffed in operations. Spending time talking about exit ramps. Have to build that into the Governance. Have to make it long term to make it work.

Choice Points analysis – we thought financially this would help us move toward a multicultural church. Is that still valid? Would the relief allow us to continue or add to our racial justice work? We believe yes. This has to be linked back to our racial justice work. The vision seems to be lost. How will this help us move along the continuum toward a multicultural church.

Plan is to have a financial model by February. We have a lot of work to do between now and June. Have to be realistic and accurate.

Environmental, societal, white nationalism and the connection to anti-Semitism, - we learn more and get pushed, we will learn more, and we have to be in alignment in commitments and goals. Hope is that we would work together on racial justice. Really pushing our congregation around we own this and keeps pushing us forward into shared use and community ask.

VI. Annual Work Plan

Following up on September's discussion, the Board reviewed the staff's annual work plan for executing our four visionary goals. Justin presented the work plan, staffing updates, and some of the things that they are working on and thinking about.

Vision is weaving somatic learning into the racial justice work. Continue to reimagine stewardship and away from pledge to a more sustaining gift. Allowed some creativity

around targeting different people around giving. There was a top donor gathering and thank you event for the capital campaign.

What are the stretches and how will you know if you get there?

- Successfully integrating the new minister of color

- Shir Tikvah is a stretch

- Wednesday evening dinner that will live into our commitment to dismantle white supremacy and be inclusive. Lauren, Ruth and Elaine are the staff leads.

- How will we have an assessment of how the church is doing?

A suggestion was made to have the visionary goals align with the continuum on becoming an anti-racist multicultural. We will talk more about evaluation at our January board meeting.

VI. Executive Session

The Board moved into executive session to discuss a confidential congregant matter.

VII. Adjournment

Meeting was adjourned by the Chair.

December 2018 Attendance									
				2018					2017
Adults	9:30	10:00	11:15			9:30	10:00	11:15	
1st week	235		280	515	**	370		306	676
2nd week	302		228	530		245		263	508
3rd week	390		480	870		303		336	639
4th week	134		113	245			196		196
5th week		275		275			208		208
Christmas Eve				190					*
Monthly Total	1061	275	1101	2435		918	404	905	2227
Average for December	353.66 66667	137.5	367	487		306	202	301.66 66667	445.4
RE									
1st week	213		161	374		185		175	360
2nd week	203		154	357		162		161	323
3rd week	186		134	320		125		133	258
4th week	0	0*	0	0*			0*		0*
5th week	5		0	5			8		8
Monthly Total	607	0	449	1056		472	8	469	949
Average for December	202.33 33333		149.66 66667	264		157.33 33333	8	156.33 33333	237.25
Combined Average	556	137.5	516.66 66667	751		463.33 33333	210	458	682.65

Dec 23 Pageant: 350

Dec 24 Pageant: 296

*Dec. 24 service, no RE or childcare

*Dec. 30 service, New Years Eve, Multigen service - no RE, childcare nursery-Preschool only

** 1st week - 3 in. of snow Saturday night

**2018 Statistical Report
December 2018
Board Meeting January 18, 2019**

MEMORIAL SERVICES: 2

Janice Archerd Anderson, Dec. 15 - conducted by Rev. Ruth MacKenzie

Gregg Giswold, Dec. 22 - conducted by Rev. Ruth MacKenzie

MARRIAGES/SERVICES OF COMMITMENT: 0

MEMBERS FOR APPROVAL: 1

Kay Johnson, Minneapolis

MEMBERS REINSTATED:

MEMBERS FOR REMOVAL: 2

Gregg Giswold, deceased December 5, 2018

Josephine Owens - moved away

CHILDREN DEDICATED:

	To Date	End of Year Totals			
MEMBERS	2018-2019	2017-2018	2016-2017	2015-2016	2014-2015
(Fiscal Year)	51	66	109	54	58
TOTAL MEMBERS:	1081	1049	1,011	934	920

Total members as of the last meeting: 1082

To be added: 1

To be removed : 2

TOTAL MEMBERS: 1081

Opening Reading and Reflection:

You Get Proud by Practicing

by Laura Hershey

If you are not proud
For who you are, for what you say, for how you look;
If every time you stop
To think of yourself, you do not see yourself glowing
With golden light; do not, therefore, give up on yourself.
You can get proud...
You only need more practice.
You get proud by practicing...

You can add your voice
All night to the voices
Of a hundred and fifty others
In a circle
Around a jailhouse
Where your brothers and sisters are being held
For blocking buses with no lifts,
Or you can be one of the ones
Inside the jailhouse,
Knowing of the circle outside.
You can speak your love
To a friend
Without fear.
You can find someone who will listen to you
Without judging you or doubting you or being
Afraid of you
And let you hear yourself perhaps
For the very first time.
These are all ways
Of getting proud.
None of them
Are easy, but all of them
Are possible. You can do all of these things,
Or just one of them again and again.

You get proud
By practicing...

It is sunlight
When you practice seeing
Strength and beauty in everyone,
Including yourself.
It is dance
when you practice knowing
That what you do
And the way you do it
Is the right way for you
And cannot be called wrong.
All these hold
More power than weapons or money
Or lies.
All these practices bring power, and power
Makes you proud.
You get proud
By practicing.

Remember, you weren't the one
Who made you ashamed,
But you are the one
Who can make you proud.
Just practice,
Practice until you get proud, and once you are proud,
Keep practicing so you won't forget.
You get proud
By practicing.

Reflection Questions:

What speaks to you in this reading? What catches you? What rings true?

I. Monitoring Items

A. Staff and Volunteer Changes

There have been no significant staff or volunteer changes.

B. Review Physical Plant for Capital Improvements

The review of our physical plant is a continuous part of our planning for building renovations. Currently, the priority is to attend to any maintenance that can help prevent damage to the building, for example the tuckpointing work just completed on the sanctuary building and the roof repairs (\$14,000) just approved for both buildings.

C. RFP for Audit/Financial Review

The Board considered the need for financial audits and reviewed in previous months, and per the counsel of our financial consultant, Kurt Hochfeld, concurred that there is no need for a true financial audit each year. The Board will continue to require a fiscal year-end review of financial practices and procedures similar to what has been done for the past several years.

D. Financial Obligations - Deferred, Long Term Compensation and Benefits

In December, Rev. Crow reviewed our salary and benefits package with UUA Compensation and Practices Manager, Jan Gartner. She noted several places where our practices at First Universalist are not consistent with UUA recommendations. These include:

- Eligibility for all UUA benefits (UUA health insurance, dental insurance, life and long-term disability) is determined by Plan provisions and cannot be altered by the congregation. In the case of insurance plans, all employees scheduled to work 750 hours a year are eligible. (This is about 15 hours/week.) While eligibility isn't something we can choose, we are able to contribute to the premiums for UUA insurance plans as you wish. We need to review current guidelines in our employee handbook and practice to ensure that we are consistent with UUA plan requirements here.
- The UUA guideline for health insurance premiums is that the congregation should pay 80% of the employee's premium plus 50% of the additional cost of dependents for all full-time employees, and pro-rate for part-time employees, beginning at 750 hrs/year. Currently we pay 100% of the employee's premium, 0% for additional dependents, and pro-rate premiums and allow access to our plan only for employees who work 30hrs per week or more year-round. The majority of congregations pay at least 70% of the employee premium and meet

the 50% guideline for additional dependents. This is an area for improvement for us.

- New salary recommendations are available from the UUA here:
https://www.uua.org/sites/live-new.uua.org/files/salary_recgs_19-20_geo4.pdf
- Retirement Contributions: Employees become eligible for employer contributions once they have met the year of service requirement (completed 1000 hours of service in 12 consecutive months). Once this eligibility has been achieved, the employee is eligible for employer contributions no matter how many hours they work or how long ago the eligibility requirement was met. This is an area where we need to do some review to ensure that all employees are (and have been) receiving appropriate employer contributions. The eligibility requirements from the UUA (and it is their plan that we participate in so we must follow them) are not consistent with the requirements we have been using. This needs to be addressed asap.
- Long Term Disability and Life Insurance: The UUA believes that LTD should be a core benefit and that all eligible employees should have access to both LTD and Life Insurance. We currently allow new employees to sign up for and pay their own premium for LTD and Life Insurance. This is another area where we need to confirm that we are meeting the plan's eligibility guidelines. LTD and Life Insurance premiums are paid by the church for ministers only.

II. Financial Condition - November 2018

Revenue

- In total, revenue ahead of our Year to Date budget.
- Annual Gifts are coming in as expected but are slightly under budget.

Expenses

- Spending is up across most categories. Q2 reviews are coming up and we'll stress the importance of ending the year on budget.
- There's a \$20,000 Printing and Copying variance in comparison to last year. In November 2017 we received a \$20,000 credit to buyout our Ricoh contract which explains why Administrative Expenses appear to be much higher than last year.
- Overall, we're under budget in comparison to our Year to Date Budget. Nothing has changed that would make us think our year end projections are inaccurate at this point.

On a separate note, the mortgage and line of credit have been paid off resulting in no interest payments for the remainder of the year.

III. Draft Statement for the Vision Behind Co-locating with Shir Tikvah

Answering the “Why?”: The Vision Behind Co-Locating at 3400 Dupont Ave

As people of faith, we are called to live and act out of a prophetic imagination about what is possible as we strive to heal the world and build the Beloved Community. Given our current political climate, to even consider co-locating is a defiant act, an act that disrupts the dominant the narratives of fear, division, and hyper-individualism, and dreams about new ways to model what we want to see and be in the world.

As we consider co-locating, the follow vision drives us:

Earth Stewardship Impact: We are in a climate-crisis. One way we can respond as faith communities is by being good stewards of the earth, by sharing the building at 3400 Dupont, and reducing our environmental footprint.

Healing Justice Impact: There is a long history of anti-semitism in the Twin Cities, and co-locating, in a historic Synagogue, invites us to name and revisit this history, to identify anti-semitism and white supremacy as it exists currently in Minneapolis, and to create a new story about how we (Unitarian Universalists and Jews) support and enliven each other’s mission, ministry, and grow in our own unique religious identities, as we collectively and collaboratively work toward the dismantling of white supremacy culture, that harms us, our siblings, and the planet.

Financial Impact: By sharing the costs of the facility and some staff, we anticipate additional financial resources for stronger and deeper impact as it relates to mission, justice work, and ministry efforts, including racial justice efforts.

Incubator Impact: As a shared house of worship, 3400 Dupont becomes a new space, a learning incubator for the kind of “brave space,” partnering, collaboration, and communication that is needed to meet the challenges we face in the 21st Century.

IV. Approval of Sabbatical for Rev. Schroeder:

Justin is intending to take a six month sabbatical, January, 2020, through June, 2020. Per the Letter of Agreement, Justin accrues one month of sabbatical time for each year served at First Universalist. By June of 2019, Justin will have served ten church years at First Universalist. He previously used two months of sabbatical time in September and October of 2016, and two months of sabbatical in the spring of 2014.

V. Racial Justice Change Team Requests and Minutes

The Change Team met on Saturday (see attached notes). We would like the Board to appoint/approve an additional one or two Change Team members.

Ministers

Notes for setting ministerial salaries:

- All recommendations are for Salary + Housing.
- **Second minister salaries** should be determined primarily by level of responsibility, authority, and impact relative to lead minister, regardless of title. May blend Associate/Assistant salary lines.
- **Program ministers** (e.g., Minister of Pastoral Care, Minister of Music, Minister of Religious Education) are generally treated as second ministers - Associate, Assistant, or blend.
- **Interim minister salaries** should be at midpoint or above.

Important Notes

- Recommendations assume full-time exempt or 40 hours/week nonexempt. Divide by 2080 for hourly rate.
- Cost of benefits and payroll taxes not included.
- Some recommendations may not comply with state and local minimum wage laws.
- Refer to **Guide to Salary Recommendations** for appropriate use of charts.*

TITLE <i>See capsule job descriptions</i>	Small			Midsize I			Midsize II			Midsize III			Large I			Large II		
	<150 members			150 - 249 members			250 - 349 members			350 - 499 members			500 - 749 members			750+ members		
	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX
Lead Minister: Solo, Senior, or Co-lead	52,850	66,150	79,400	66,000	84,250	102,250	73,900	96,200	118,350	80,750	105,800	131,250	87,450	115,600	144,300	109,100	147,250	185,250
Second Minister: Associate function	47,950	57,100	66,250	54,850	70,150	85,400	61,750	80,150	98,550	67,300	88,400	109,450	72,850	96,650	120,300	94,350	127,300	160,250
Second Minister: Assistant function	46,300	54,750	63,250	48,150	58,750	71,200	51,000	66,750	82,400	53,650	72,500	91,400	56,150	78,300	100,450	70,050	99,600	129,000

Religious Education Staff

Important Notes

- Recommendations assume full-time exempt or 40 hours/week nonexempt. Divide by 2080 for hourly rate.
- Cost of benefits and payroll taxes not included.
- Some recommendations may not comply with state and local minimum wage laws.
- Refer to **Guide to Salary Recommendations** for appropriate use of charts.*

Notes for setting religious education staff salaries:

- Be sure to use the appropriate position based on our capsule job descriptions, regardless of your congregational position title.
- "Credentialed" refers to those who have completed UUA RE Credentialing Program at one of three levels.
- Religious Education program size may impact placement within the range, if it is especially large or small relative to membership.
- Religious Education staff primarily responsible for providing clerical/administrative support should be classified as Administrative staff.

TITLE <i>See capsule job descriptions</i>	Small			Midsize I			Midsize II			Midsize III			Large I			Large II		
	<150 members			150 - 249 members			250 - 349 members			350 - 499 members			500 - 749 members			750+ members		
	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX
Credentialed, Master Level	42,700	50,150	57,500	46,950	53,900	60,850	56,700	62,500	68,050	64,050	70,550	76,850	71,300	78,500	85,700	90,500	99,550	108,600
Credentialed, Credentialed Level	40,250	47,300	54,250	44,250	50,750	57,250	53,500	59,000	64,250	60,400	66,600	72,550	67,300	74,050	80,850	85,400	93,900	102,400
Credentialed, Associate Level	37,850	44,550	51,050	41,650	47,750	54,050	51,300	56,400	61,700	56,800	62,450	68,100	62,250	68,550	74,700	73,650	81,050	88,350
Religious Educator	36,050	41,550	48,850	39,700	46,750	53,700	45,400	53,350	61,200	49,600	58,450	67,150	53,950	63,500	73,000	62,400	75,250	86,300
Religious Education Coordinator	28,650	33,050	38,000	31,550	37,150	42,750	36,050	42,350	48,650	39,350	46,350	53,300	42,850	50,400	57,900	49,450	59,600	68,600

Music Staff

Notes for setting music staff salaries:

- Be sure to use the appropriate position based on our capsule job descriptions, regardless of your congregational position title.
- "UUA Certified" refers to those who have completed the UUA Music Leadership Certification Program.
- When hiring contract musicians (rather than staff musicians), we suggest consulting your local musicians' union to determine appropriate rates.

Important Notes

- Recommendations assume full-time exempt or 40 hours/week nonexempt. Divide by 2080 for hourly rate.
- Cost of benefits and payroll taxes not included.
- Some recommendations may not comply with state and local minimum wage laws.
- Refer to ***Guide to Salary Recommendations*** for appropriate use of charts.*

TITLE <i>See capsule job descriptions</i>	Small			Midsize I			Midsize II			Midsize III			Large I			Large II		
	<150 members			150 - 249 members			250 - 349 members			350 - 499 members			500 - 749 members			750+ members		
	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX
UUA Certified Music Director	40,100	47,200	56,550	45,050	53,000	60,950	51,450	60,500	69,600	55,850	65,750	75,650	66,050	77,800	89,500	78,300	92,100	109,600
Music Director	36,650	45,100	55,500	39,200	50,400	58,750	49,600	57,500	65,450	54,750	64,500	74,050	60,050	71,300	82,500	71,100	87,750	104,550
UUA Certified Choir Director	30,550	37,800	46,450	34,700	41,800	50,550	42,000	48,800	56,150	46,850	55,250	63,250	51,850	61,650	71,350	61,400	75,750	90,100
Choir Director	29,150	36,100	44,450	33,400	40,150	48,700	40,500	46,900	53,300	44,700	52,500	60,350	49,000	58,150	67,250	57,850	71,550	85,150
Instrumentalist	24,000	29,550	36,350	26,300	31,750	38,400	32,650	37,750	42,850	35,950	42,200	48,550	39,450	46,750	54,050	46,500	57,500	68,450

Membership Staff

Notes for setting membership staff salaries:

- Be sure to use the appropriate position based on our capsule job descriptions, regardless of your congregational position title.
- Membership staff primarily responsible for clerical/administrative support should be classified as Administrative staff.

Important Notes

- Recommendations assume full-time exempt or 40 hours/week nonexempt. Divide by 2080 for hourly rate.
- Cost of benefits and payroll taxes not included.
- Some recommendations may not comply with state and local minimum wage laws.
- Refer to **Guide to Salary Recommendations** for appropriate use of charts.*

TITLE <i>See capsule job descriptions</i>	Small			Midsize I			Midsize II			Midsize III			Large I			Large II		
	<150 members			150 - 249 members			250 - 349 members			350 - 499 members			500 - 749 members			750+ members		
	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX
Membership Director	40,250	47,300	54,250	44,200	50,750	57,300	53,400	58,950	64,150	60,350	66,500	72,450	67,200	73,950	80,750	85,250	93,800	102,300
Membership Manager	34,150	39,350	46,200	37,550	44,250	50,800	45,950	50,500	55,300	46,950	55,350	63,500	51,100	60,100	69,050	59,100	71,200	81,650
Membership Coordinator	28,650	33,050	38,000	31,550	37,150	42,750	36,050	42,350	48,550	39,350	46,350	53,300	42,850	50,400	57,900	49,450	59,600	68,600

Administrative and Operations Staff

Notes for setting administrative and operations staff salaries:

- Be sure to use the appropriate position based on our capsule job descriptions, regardless of your congregational position title.
- Check minimum and prevailing wage rates in your location. Adjust our recommendations as appropriate to take into account the minimum wage and local norms.

Important Notes

- Recommendations assume full-time exempt or 40 hours/week nonexempt. Divide by 2080 for hourly rate.
- Cost of benefits and payroll taxes not included.
- Some recommendations may not comply with state and local minimum wage laws.
- Refer to **Guide to Salary Recommendations** for appropriate use of charts.*

TITLE <i>See capsule job descriptions</i>	Small			Midsize I			Midsize II			Midsize III			Large I			Large II		
	<150 members			150 - 249 members			250 - 349 members			350 - 499 members			500 - 749 members			750+ members		
	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX	MIN	MID	MAX
Dir. of Finance & Operations	-	-	-	-	-	-	-	-	-	61,700	76,500	91,100	64,250	80,200	96,050	69,200	86,500	103,850
Business Administrator	-	-	-	-	-	-	53,850	66,100	78,250	56,100	69,550	82,800	58,400	72,900	87,300	62,900	78,650	94,400
Congregational Administrator	40,650	47,750	54,800	41,550	48,850	56,050	42,300	49,600	57,000	42,850	50,900	59,150	43,600	52,400	61,250	44,150	54,000	64,050
Office Administrator	31,900	37,350	42,900	33,100	38,900	44,850	33,450	39,600	45,400	34,500	40,650	46,550	35,600	41,750	47,850	36,000	43,100	50,500
Office Assistant	27,050	31,500	36,650	27,400	32,150	37,200	28,200	32,900	38,000	28,650	33,650	38,900	29,350	34,600	39,650	30,200	35,450	40,800
Bookkeeper	35,250	41,550	47,650	35,950	42,300	48,550	36,550	42,750	49,200	37,400	43,900	50,500	38,350	45,100	51,700	38,950	46,800	54,600
Childcare Worker	25,900	29,400	33,850	26,450	30,100	34,550	27,000	30,700	35,300	27,600	31,350	35,950	28,250	32,100	36,850	29,000	33,000	35,650
Childcare Worker, Hourly rate	12.44	14.16	16.26	12.73	14.45	16.62	12.98	14.76	16.97	13.26	15.07	17.28	13.59	15.45	17.71	13.94	15.86	17.13
Custodian	28,150	32,000	37,600	28,750	32,750	38,450	29,350	33,400	39,300	30,050	34,100	40,050	30,750	34,900	41,100	30,550	35,900	42,200
Custodian, Hourly rate	13.54	15.39	18.09	13.82	15.73	18.47	14.12	16.06	18.89	14.43	16.39	19.27	14.79	16.80	19.75	14.68	17.26	20.29

CHANGE TEAM MEETING
JANUARY 12, 2019

The Change Team, a Committee of the BOT, met at 8 am on January 11. Members present: Richard Spratt and Lillie Pang, Co-Chairs, Ben Miles, Kayci Rush, Justin Schroeder. Absent: Sarah Hedge

Richard called the meeting to order; Justin opened with a poem titled Seven of Pentacles. The dates of the March and April meetings were changed to March 9 and April 6, respectively.

Kayci provided an overview of the Demos Racial Equity Report (the full report was shared with the committee via email). Demos is a think tank headquartered in CA that engaged in a racial equity transformation process over the past few years; their report was just issued in December of 2018. Kayci observed that traditional organizational structures like First Universalist continues to promulgate whiteness.

Demos trained all staff in creating and learning new norms and developing new organizational systems and practices. Demos' board committed the resources and the money to hire a consultant and make this happen. Kayci observed that continuing to support racial justice as a congregation and being rooted in racial justice are 2 different things, and that First Universalist has to decide which one it wants to be.

Lillie asked what is our goal, and how do we know if we've achieved it? Kayci noted the Demos report is really clear that they started with the staff, then created new partnerships with other organizations. She also noted that Lauren is a good example of someone who got training in racial justice and then used that to transform RE services. Ruth, Elaine, and Jen have likewise had a similar impact in their program areas, based on their RJ commitments and the training led by Heather Hackman. Lillie asked whether Lauren's success could be used as a model to assess other church programs. She described a process used in the schools that could be adopted to use for a collaborative assessment of other programs.

A robust conversation ensued about how to articulate, and achieve, some level of racial equity in the leadership, staff and congregation. Justin noted that Heather's training was head and information oriented and that the body work addressed in books like My Grandmother's Hands is important, too. Kayci articulated a concern that racial justice is still too tied to Justin's leadership and questioned whether all church staff have the same level of training and commitment to and execution of racial justice goals in their areas of responsibility. Ben expressed that FU should allocate more money and time to the racial justice mission. In particular, it was noted it would be beneficial to find a way for senior leadership to devote more time to racial justice (individually and as a group).

Justin's articulation of a "big vision" racial justice goal is that First Universalist is a faith community that understands and has grappled with how whiteness works and with our historic whiteness, and that when someone walks into this church, they understand that this work has been done - aligning who we say we are with our actual habits and practices as a faith community.

What could a church “rooted in racial justice” look like? Justin noted some additional possibilities: training for new staff; including racial justice competencies in all staff job descriptions and performance reviews; quarterly (?) communication pieces to the congregation about what’s happening “behind the scenes” and elsewhere in the church, getting racial justice more rooted into the budget (including the full time minister of color, which has already been recommended by the CT) and different kinds of training (like participation in beloved conversations circles or an “all reads” congregation book group).

Richard raised the question of how the CT can support Justin in his leadership in racial justice, noting it’s a long journey that never ends. Lillie noted that congregants come at this issue from varying places in their own lives and experience, and that ultimately everything comes back to relationship. Kayci commented that My Grandmother’s Hands is focused not only on trauma but the importance of self care.

Justin responded to Richard’s question by saying what’s helpful to him is a real curiosity about what is happening in racial justice work, whether with staff or in the congregation. There was more conversation about how to articulate goals and know what is happening in staff/leadership. Justin recommended a quarterly “report out” from the staff, the Board, the change team and the RJET, INCLUDING information about how congregants can get involved. Karin noted that there have been conversations about having those groups meet together on a quarterly, semi-annual or annual basis, which other than informal pot lucks has not yet happened.

Ben noted again that more resources needed to be devoted to this work. Lillie suggested getting an intern to share some of the load. Ben suggested that one of the senior leadership team devote more time to racial justice and off load/outsource some of what they are doing. Some team members expressed support for Justin mentoring another staff member to do this work so that not so much falls on him.

Karin expressed again her desire to put goals and “to do” lists, including what has already been accomplished, down on paper. Justin volunteered to create a list for our next meeting. Lillie suggested that CT members create their own lists as well, and reinforced the need to capture work being done in all areas of the congregation. Justin suggested we put the lists into 3 buckets: systems/policies; programs and staff.

Justin requested that another person be appointed to the CT. He suggested Daryn Woodson, who was not able to participate earlier in the year. The Team enthusiastically supported Justin talking with Daryn again.

Regarding POCI participating in budget discussion, Justin suggested that he and Jen reach out to POCI to invite them to one or both budget hearings (April 28 and April 30; specifics are on the church calendar). Justin will also share budget assumptions once they have been established by the Board.

Lillie reported that the Board is looking at a grievance procedure to address congregational disputes. Justin and the program staff will be attending the Wilder training on diversity, equity and

inclusion; Change Team members are invited to attend also (Justin previously furnished the training info to the Team). Justin also reported on the current timeline for the Shir Tikvah co-location process.

Lillie, Richard, Justin, Sarah and Ben attended the POCI youth listening session. Lillie reported that a lot of kids seemed to feel connected but that some do not. Sarah had volunteered to type up the notes from the meeting and to talk to Emma about scheduling another session. Justin will talk to Emma, Lauren and Ruth about a possible youth member for the CT. Lillie suggested comparing prior notes from POCI listening sessions over time to look for trends.

Richard asked Justin to bring an organizational chart to the next meeting.

The next CT meeting is February 16 from 8 to 10:30 in the library. Team members will share something we are grateful for in our racial justice journey at church.

Following sharing of closing thoughts, the meeting adjourned at 10:40 a.m.

Respectfully submitted,

Karin Wille

Capital Campaign 2016-2017 Budget Breakdown (As of 10/31/2018)			
Division	Budget	\$	Remaining Budget
Revenue			
Donations/Legacy Fund Transfer	\$ 6,400,000.00	\$ 2,101,509.67	\$ (4,298,490.33)
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		
Architect Fee	\$ 95,302.57		
Staff Salaries	\$ 54,734.98		
Misc. Fees	\$ 3,025.46		
Consultant	\$ 2,500.00		
Fire Alarm Control Panel	\$ 6,000.00		
Tuckpointing	\$ 67,853.99		
Owner Representative	\$ 900.00		
	\$ 233,981.34		
Total Loan from Legacy Fund	\$ -		
Net Income	\$ 1,575,809.24		

**First Universalist Church of Minneapolis
Analysis of Revenues & Expenses - Summary
July to November 2018**

Accounts	Current Balance (This Year)	YTD Budget (This Year)	Annual Budget (This Year)	Last Year YTD Actual
Revenues				
Pledges	\$389,866.37	\$310,333.48	\$1,115,775.00	\$409,575.17
Contributions Unrestricted	\$41,534.87	\$47,541.70	\$161,100.00	\$42,797.10
Contributions Temp Restricted	\$0.00	\$0.00	\$0.00	\$0.00
Contrib Released from Restr	\$150,005.55	\$47,083.35	\$113,000.00	\$94,944.12
Fundraisers	\$19,817.60	\$14,166.70	\$34,000.00	\$18,204.23
Program Fees	\$4,401.60	\$416.65	\$1,000.00	\$793.00
Dividends & Interest	\$1,921.77	\$7,604.15	\$18,250.00	\$2,013.76
Rental Income	\$46,353.84	\$57,288.30	\$137,492.00	\$51,552.60
Realized Gains & Losses	(\$4,398.38)	\$0.00	\$0.00	(\$631.34)
Unrealized Gains & Losses	\$1,672.92	\$0.00	\$0.00	\$5,772.80
Other Income	\$1,822.00	\$1,388.75	\$3,333.00	\$1,481.90
Total Revenues	\$652,998.14	\$485,823.08	\$1,583,950.00	\$626,503.34
Expenses				
Salaries & Wages	\$349,262.18	\$357,330.00	\$857,592.00	\$322,050.70
Payroll Taxes	\$25,935.57	\$27,334.20	\$65,602.05	\$24,858.02
Employee Benefits				
Medical Insurance	\$35,153.05	\$37,312.95	\$89,551.00	\$32,445.37
Long Term Disability Insurance	\$0.00	\$437.50	\$1,050.00	\$0.00
Life Insurance	\$543.50	\$990.80	\$2,378.00	\$539.79
403(b)	\$29,825.30	\$31,227.95	\$74,947.00	\$27,480.13
Total Employee Benefits	\$65,521.85	\$69,969.20	\$167,926.00	\$60,465.29
Professional Expenses	\$12,988.00	\$11,249.95	\$27,000.00	\$7,273.95
Temporary Labor	\$15,385.75	\$13,033.21	\$32,300.00	\$13,507.91
Program Expenses	\$21,825.92	\$12,124.95	\$29,100.00	\$14,057.29
Miscellaneous Program Expenses	\$24,299.61	\$12,854.15	\$30,850.00	\$19,852.13
Membership Program Expenses	\$3,031.59	\$4,708.30	\$11,300.00	\$3,673.48
Fundraising Expenses	\$152.87	\$2,083.30	\$5,000.00	\$0.00
Administrative Expenses	\$32,807.79	\$35,104.15	\$84,250.00	\$10,860.39
Miscellaneous Expenses	\$943.95	\$2,583.35	\$6,200.00	\$2,223.86
Insurance	\$6,754.33	\$9,375.00	\$22,500.00	\$6,873.12
Dues & Memberships	\$9,413.63	\$18,834.40	\$45,202.50	\$22,601.26
Utilities	\$23,343.80	\$18,843.06	\$54,000.00	\$20,003.64
Repairs & Maintenance	\$7,711.32	\$9,291.70	\$22,300.00	\$8,163.20
Other Building Related Expense	\$152,045.30	\$50,895.63	\$129,144.00	\$71,129.70
Offering Plate for Community	\$8,350.51	\$12,500.00	\$30,000.00	\$13,704.65
Other Charitable Contributions	\$11,988.19	\$2,083.35	\$5,000.00	\$32,509.45
Total Expenses	\$771,762.16	\$670,197.90	\$1,625,266.55	\$653,808.04
Net Total	(\$118,764.02)	(\$184,374.82)	(\$41,316.55)	(\$27,304.70)

First Universalist Church of Minneapolis
Balance Sheet
November 2018

Headings and Account

Current Balance (This Year)

Assets		
Current Assets		
Cash & Cash Equivalents		
Cash	\$	970,945.75
Total Cash & Cash Equivalents	\$	970,945.75
Investments		
Schwab- Church Operating	\$	640,829.22
Schwab - Church Reserve	\$	326,190.08
Schwab - Don Carter & Mary Carter	\$	76,747.19
Schwab- Legacy Fund	\$	809,727.33
Schwab - Temporarily Restricted	\$	119,345.21
Thrivent Mutual Funds	\$	11,383.86
Total Investments	\$	1,984,222.89
Cash & Cash Equiv - Foundation		
Sunrise Bank - Foundation	\$	11,247.94
Total Cash & Cash Equiv - Foundation	\$	11,247.94
Investments - Foundation		
Schwab - Foundation	\$	1,594,434.09
Total Investments - Foundation	\$	1,594,434.09
Total Current Assets		\$ 4,560,850.67
Other Current Assets		
Other Current Assets		
Mortgage Escrow Deposits	\$	2,864.88
Prepaid Expenses	\$	8,160.48
Prepaid Loan Expenses	\$	3,730.90
Prepaid Medical Insurance	\$	18,110.74
Total Other Current Assets	\$	32,867.00
Total Other Current Assets		\$ 32,867.00
Fixed Assets		
Fixed Assets		
Fixed Assets	\$	1,682,053.55
Total Fixed Assets	\$	1,682,053.55
Total Fixed Assets		\$ 1,682,053.55
Total Assets		\$ 6,275,771.22

Liabilities & Equity

Current Liabilities		
Accounts Payable		
Accounts Payable	\$	79,065.08
Total Accounts Payable	<u>\$</u>	<u>79,065.08</u>
Total Current Liabilities		\$ 79,065.08
Other Current Liabilities/Long-Term Liabilities		
Benefits Payable	\$	(441.29)
Accrued Expenses	\$	18,764.29
Deferred Revenue	\$	27,853.59
Misc Other Liabilities	\$	13,000.00
Line of Credit Advance Payable	\$	106,367.06
Mortgage Payable	\$	542,620.29
Total Other Current/Long-Term Liabilities	<u>\$</u>	<u>708,163.94</u>
Total Other Current/Long-Term Liabilities		\$ 708,163.94
Total Liabilities & Equity		<u>\$ 787,229.02</u>
Fund Principal and Excess Cash Received		
Fund Principal		
Undesignated Net Assets/Equity		
Church Equity	\$	2,619,492.61
Total Undesignated Net Assets/Equity	<u>\$</u>	<u>2,619,492.61</u>
Board Restricted Net Assets		
Operating Reserve	\$	31,084.19
Contingency Reserve	\$	271,109.21
Legacy Fund	\$	869,326.74
Memorials	\$	6,781.88
Total Board Restricted Net Assets	<u>\$</u>	<u>1,178,302.02</u>
Temp Restricted Net Assets		
Capital Campaign Fund	\$	1,334,429.76
Cummins Ministerial Fund	\$	218,416.70
Miscellaneous Funds	\$	126,424.52
Total Temp Restricted Net Assets	<u>\$</u>	<u>1,679,270.98</u>
Permanently Restricted		
Don Carter Endowment	\$	59,385.48
M E Carter Endowment	\$	15,762.35
Total Permanently Restricted	<u>\$</u>	<u>75,147.83</u>
Total Fund Principal	<u>\$</u>	<u>5,552,213.44</u>
Excess Cash Received		
Excess Cash Received	\$	(63,671.24)
Total Excess Cash Received	<u>\$</u>	<u>(63,671.24)</u>
Total Fund Principal and Excess Cash Received		<u>\$ 5,488,542.20</u>
Total Liabilities & Equity, Fund Principal, & Restricted Funds		<u><u>\$ 6,275,771.22</u></u>



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Progress in Visionary Goal 1

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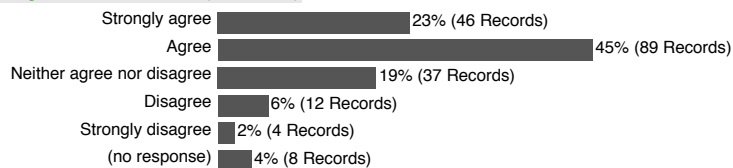
We, the people of First Universalist Church, grow in our UU faith: we are equipped to live out our values and experience worship, spiritual practices, and rituals that challenge, comfort, celebrate, and heal.

[\[Hide all instructions\]](#)

The worship life at First Universalist is...

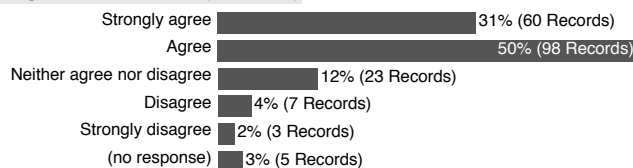
1 Challenging

Using 196 finished records (of 800 total)



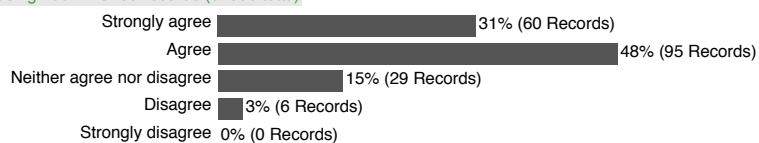
2 Comforting

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3 Celebratory

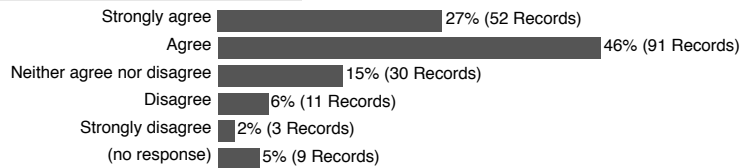
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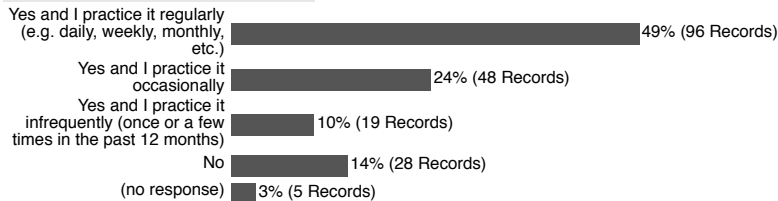
4 Healing

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5 I have a spiritual practice

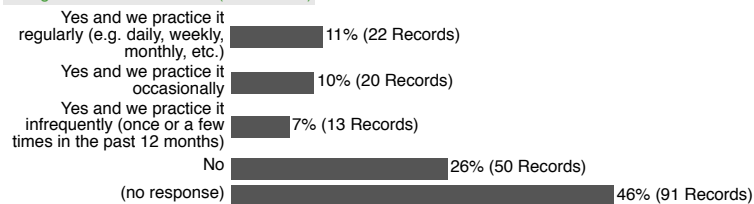
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6 My family has a spiritual practice

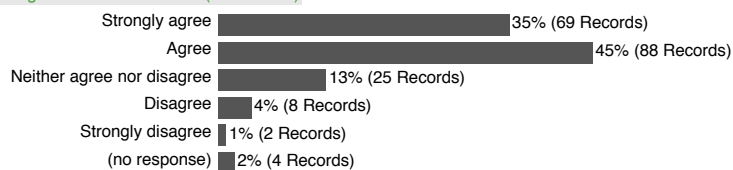
[Parents and teens only; otherwise skip this question]

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

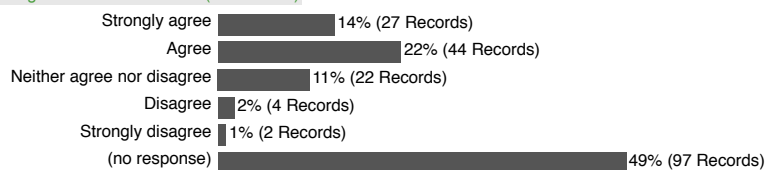
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8 In the past 12 months, First Universalist has helped my family to live out my values.

[Parents and teens only; otherwise skip this question]

Using 196 finished records (of 800 total)



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

Using 196 finished records (of 800 total)

[32 answers](#)

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Every question is optional.

Once you hit "continue" you will not be able to change your answers.

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Progress in Visionary Goal 2

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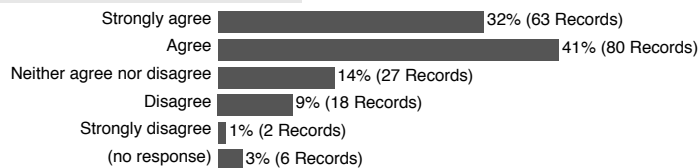


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First Universalist Church is a home for ageless wisdom. People of all ages find opportunities to engage in an intellectual and spiritual search for deeper meaning and understanding in the UU tradition, both as individuals and in community. We know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

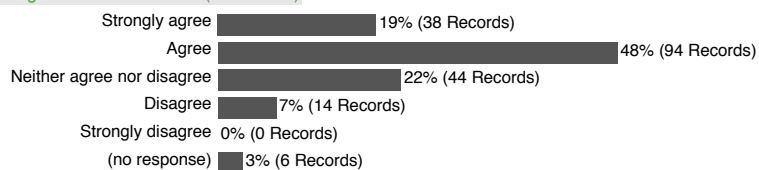
1 In the past 12 months, First Universalist has helped me explore my beliefs in meaningful ways.

Using 196 finished records (of 800 total)



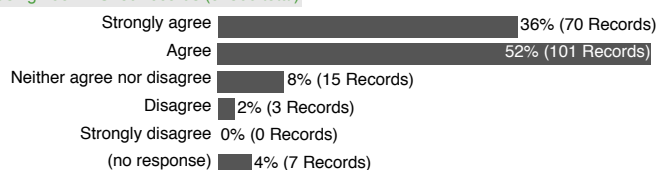
2 In the past 12 months, First Universalist has helped me understand the beliefs of others.

Using 196 finished records (of 800 total)



3 I understand what it means to be UU.

Using 196 finished records (of 800 total)



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

Using **196 finished** records (of 800 total)

[36 answers](#)

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Progress in Visionary Goal 3

Using 196 records (of 800 total)



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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.

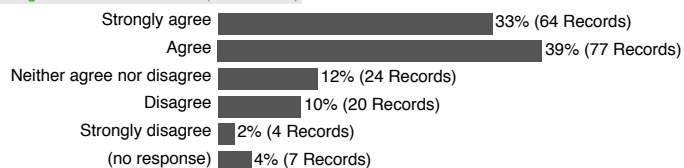
1 I feel at home at First Universalist.

Using 196 finished records (of 800 total)



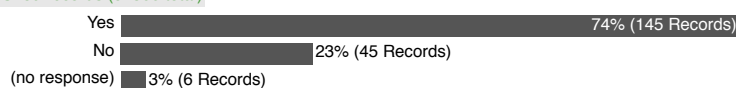
2 In the past 12 months, I took an opportunity to comfort or help someone who is part of the First Universalist community. (Not including family members)

Using 196 finished records (of 800 total)



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

Using 196 finished records (of 800 total)



4 People significantly older than me

Using 196 finished records (of 800 total)



4 People about my age

Using 196 finished records (of 800 total)



4 People significantly younger than me

Using 196 finished records (of 800 total)



4 Teenagers (Teens: leave blank)

Using 196 finished records (of 800 total)



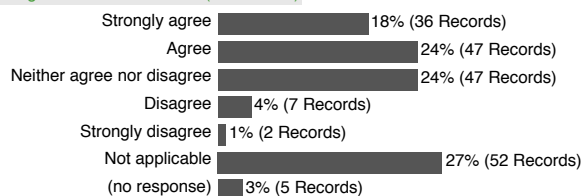
4 Children

Using 196 finished records (of 800 total)



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

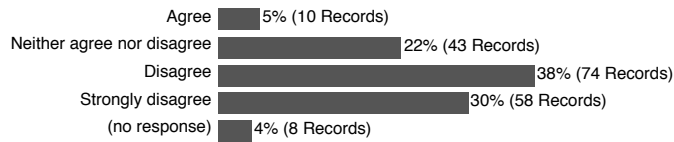
Using 196 finished records (of 800 total)



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

Using 196 finished records (of 800 total)





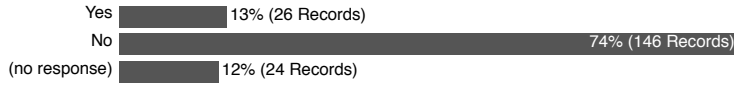
6 Feel free to elaborate your response:

Using 196 finished records (of 800 total)

[36 answers](#)

7 Has anything happened in the past 12 months to make you or your children feel unwelcome?

Using 196 finished records (of 800 total)



8 If you have any additional thoughts related to Visionary Goal #3 feel free to provide them here.

Using 196 finished records (of 800 total)

[30 answers](#)

[\[Hide all instructions\]](#)

Once you hit "continue" you will not be able to change your answers.



Filtered to 196 records:

Finished

2016

+ Add Filter...

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Click on the links in the bar graphs to show a complete report using just that subset.

Progress in Visionary Goal 4

Using 196 records (of 800 total)

Not Started 0% (0 Records)

In Progress 0% (0 Records)

Skipped 0% (0 Records)

Aborted 0% (0 Records)

Timed Out 0% (0 Records)

Finished 100% (196 Records)

[\[Hide all instructions\]](#)

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.

1 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.

Using 196 finished records (of 800 total)

Strongly agree 26% (51 Records)

Agree 34% (67 Records)

Neither agree nor disagree 28% (54 Records)

Disagree 8% (16 Records)

Strongly disagree 1% (2 Records)

(no response) 3% (6 Records)

2 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]

Using 196 finished records (of 800 total)

Strongly agree 7% (14 Records)

Agree 14% (27 Records)

Neither agree nor disagree 12% (23 Records)

Disagree 4% (8 Records)

Strongly disagree 1% (2 Records)

(no response) 62% (122 Records)

3 First Universalist is a visible, influential faith community.

Using 196 finished records (of 800 total)

Strongly agree 32% (63 Records)

Agree 52% (102 Records)

Neither agree nor disagree 10% (19 Records)

Disagree 4% (7 Records)

Strongly disagree 0% (0 Records)
(no response) 3% (5 Records)

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

Using 196 finished records (of 800 total)

[45 answers](#)

[\[Hide all instructions\]](#)

Once you hit "continue" you will not be able to change your answers.

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Filtered to 196 records:

Finished

2016

+ Add Filter...

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Click on the links in the bar graphs to show a complete report using just that subset.

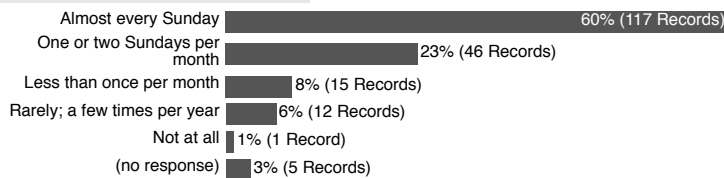
Progress in Involvement

Using 196 records (of 800 total)



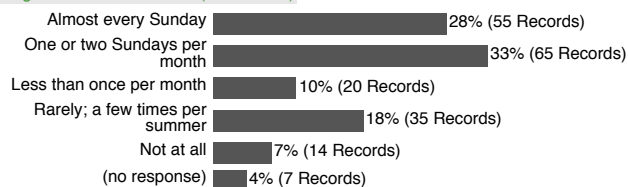
1 How often do you attend Sunday services at First Universalist? (Not including summer)

Using 196 finished records (of 800 total)



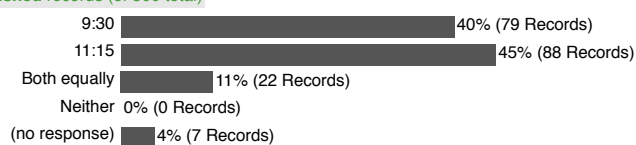
2 How often do you attend Sunday services at First Universalist in the summer?

Using 196 finished records (of 800 total)



3 When two services are offered, which service do you more typically attend? If you volunteer instead of attending the service, select that time

Using 196 finished records (of 800 total)



4 (If you volunteer instead of attending, select below.)

Using 196 finished records (of 800 total)

I usually miss the service because I am volunteering at that time.

(no response) 93% (182 Records)

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

Years	#	Years Ago	Senior Minister/Event
2009 to Present	0 to 7		Justin Schroeder
2007 to 2009	7 to 9		Interim Ministers: Ted Tollefson, Charlette Cowtan
1997 to 2007	9 to 19		Frank Rivas
1995 to 1997	19 to 21		Interim ministers: Wayne Robinson, Sheryl Wurl, Ken Brown
1988 to 1995	21 to 28		Susan Milnor and Terry Sweetser
1993	23		Moved from 50th and Girard to 34th and Dupont
1986 to 1988	28 to 30		Interim ministers
1963 to 1986	30 to 53		John Cummins
1939 to 1963	53 to 77		Carl Harold Olson

Using 196 finished records (of 800 total)

0-1 year 5% (10 Records)
2-3 years 8% (16 Records)
4-5 years 8% (16 Records)
6-10 years 18% (36 Records)
11-15 years 15% (30 Records)
16-20 years 10% (20 Records)
21-25 years 13% (25 Records)
26-30 years 8% (16 Records)
More than 30 years 10% (20 Records)
(no response) 4% (7 Records)

[Hide all instructions]

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

6 Community Circles (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 29% (57 Records)
Facilitated or led 4% (7 Records)
(no response) 70% (137 Records)

7 Spiritual Deepening Circles (Chi-Gung, Racial Justice Circles, Spirituality in the Second Half of Life, etc.) (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 24% (47 Records)
Facilitated or led 5% (9 Records)
(no response) 73% (144 Records)

8 Care Circles (Grief Circle, Caregivers Support Circle, etc.)

Using 196 finished records (of 800 total)

Participated 4% (7 Records)
Facilitated or led 1% (2 Records)
(no response) 95% (187 Records)

9 Newcomer Circles

Using 196 finished records (of 800 total)

Participated 5% (9 Records)
Facilitated or led 2% (3 Records)

(no response) 94% (184 Records)

10 Wellspring

Using 196 finished records (of 800 total)

Participated 9% (18 Records)
Facilitated or led 2% (3 Records)
(no response) 89% (175 Records)

11 Religious Education: children participated, or adults led (teaching, advising, mentoring) (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 26% (50 Records)
Facilitated or led 10% (19 Records)
(no response) 69% (135 Records)

12 Congregational Care Provider (Pastoral Care Team, served at memorial services, knitted prayer shawls, etc.)

Using 196 finished records (of 800 total)

Participated 15% (30 Records)
Facilitated or led 2% (3 Records)
(no response) 83% (163 Records)

13 Welcome Teams (ushers, greeters, coffee, etc.) (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 21% (42 Records)
Facilitated or led 2% (4 Records)
(no response) 78% (152 Records)

14 Music - choir, instrumental group, other music groups. (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 15% (30 Records)
Facilitated or led 2% (3 Records)
(no response) 84% (165 Records)

15 Faith in Action (Day of Service, Habitat for Humanity, Green Sanctuary, etc.) (Includes multiple responses)

Using 196 finished records (of 800 total)

Participated 28% (54 Records)
Facilitated or led 2% (3 Records)
(no response) 71% (140 Records)

16 Committees/Organizational Leadership (Board, Foundation, fundraising)

Using 196 finished records (of 800 total)

Participated 17% (33 Records)
Facilitated or led 2% (3 Records)
(no response) 82% (160 Records)

17 Shared interest groups (labyrinth, circle supper, Association of Universalist Women) (Includes multiple responses)




Using 196 finished records (of 800 total)

Participated 27% (52 Records)
Facilitated or led 2% (4 Records)

(no response)  72% (142 Records)

18 Other

Using 196 finished records (of 800 total)

Participated  15% (29 Records)
Facilitated or led  2% (3 Records)
(no response)  84% (164 Records)

19 List other group(s) here

Using 196 finished records (of 800 total)

[38 answers](#)

[\[Hide all instructions\]](#)

Once you hit "continue" you will not be able to change your answers.



Filtered to 196 records:

Finished

2016

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Click on the links in the bar graphs to show a complete report using just that subset.

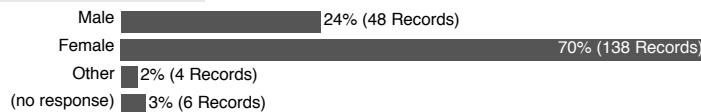
1 How old were you on your last birthday?

Using 196 finished records (of 800 total)

[167 answers](#)

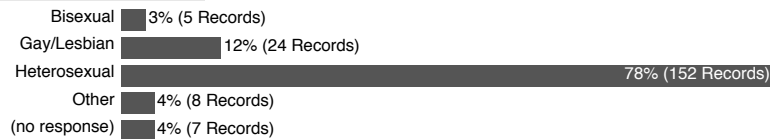
2 What is your sex or gender identity?

Using 196 finished records (of 800 total)



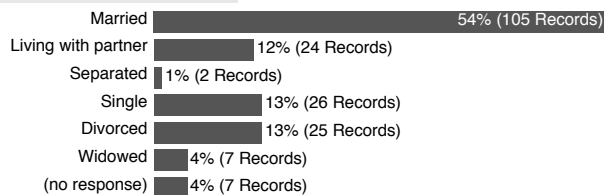
3 How do you identify yourself?

Using 196 finished records (of 800 total)



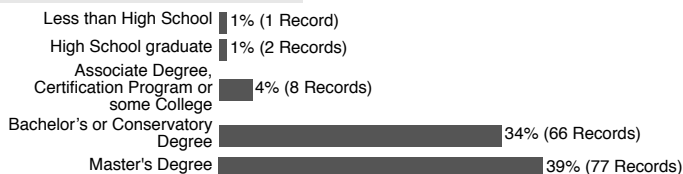
4 What is your relationship status?

Using 196 finished records (of 800 total)



5 What is your highest level of formal education that you have completed?

Using 196 finished records (of 800 total)



Doctorate or Professional Degree 18% (35 Records)
(no response) 4% (7 Records)

6 Briefly describe the race/ethnicity of the members of your household

Using 196 finished records (of 800 total)

0 answers

6 With which racial groups do members of your household identify? Choose all that apply. (Includes multiple responses)

Using 196 finished records (of 800 total)

Black/African American/African descent 4% (8 Records)
White/Caucasian/European American/European descent 92% (181 Records)
Asian American/Pacific Islander 3% (6 Records)
Native American/Native Alaskan/Indigenous 3% (6 Records)
Latino/Hispanic 2% (4 Records)
Other 2% (3 Records)
(no response) 4% (7 Records)

7 If other, please specify.

Using 196 finished records (of 800 total)

7 answers

8 Which age groups, if any, best describe your young children?

(Select all that apply)

(Includes multiple responses)

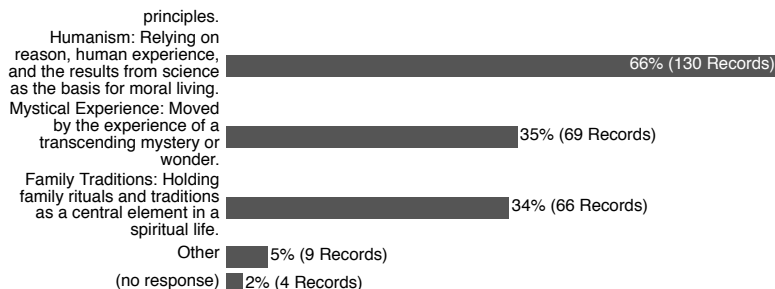
Using 196 finished records (of 800 total)

Ages 0-4 or Pre-K 7% (13 Records)
Ages 5-11 K-6th Grade 16% (32 Records)
Ages 12-14 or 7th-9th Grade 10% (20 Records)
Ages 15-18 or 10th-12th Grade 7% (13 Records)
Ages 19-25 12% (23 Records)
(no response) 62% (121 Records)

9 Which traditions or sources inform your spiritual identity today? (Includes multiple responses)

Using 196 finished records (of 800 total)

Earth Centered: Reverence for rhythms in nature and nature as the embodiment of the divine. 48% (94 Records)
Indigenous People's Traditions: Honoring the rituals and mystical beliefs of Native Americans and others. 18% (36 Records)
Eastern Traditions: Valuing the teachings of Buddhism, Taoism and/or Hinduism. 46% (90 Records)
Jewish Traditions: Respect for the laws and teachings of the Holy Scriptures. 18% (35 Records)
Christian Traditions: Moved by Biblical stories and regard the teachings of Jesus as one source of revelation. 44% (87 Records)
Islamic Traditions: Valuing the spiritual teachings of Mohammad and the Koran. 4% (8 Records)
Prophetic Women & Men: Honoring the life and teachings of people like Moses, Esther, Buddha, Jesus, Emerson, Gandhi, Olympia Brown, Martin Luther King, and others. 51% (99 Records)
Ethics: Embracing ethical and cultural values to guide a life of compassion and 67% (131 Records)



10 If other, please specify:

Using 196 finished records (of 800 total)

[14 answers](#)

11 What was your total household income from all sources (before taxes)

Using 196 finished records (of 800 total)



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

Using 196 finished records (of 800 total)



11 Thinking about your household's total annual charitable giving (pledge and/or other donations, not including political contributions) how much goes to First Universalist?

Using 196 finished records (of 800 total)



11 Have you included First Universalist in your will or estate plan?

Using 196 finished records (of 800 total)

Yes 0% (0 Records)

No 0% (0 Records)

n/a 0% (0 Records)

(no response)  100% (196 Records)

[\[Show questionnaire instructions\]](#)