

First Universalist Church Board of Trustees
February 20, 2020
Board Packet

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First Universalist Church of Minneapolis
Board Meeting
Thursday, February 20, 2020, 6:30 - 9:00pm
First Universalist Cummins Room

Facilitator: Bryana, Snacks & Process Observer:

I. Call to Order and Agenda Approval (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.
- Group Agreements (see Board Packet)
- Reading and reflection (see Senior Co-Ministers/Leadership report)

II. Consent Agenda (6:50)

- *Approval* of January meeting minutes
- *Monitoring*: Acceptance of attendance and membership numbers and trends
- *Monitoring*: Acceptance of staff and significant volunteer changes

III. Reports (6:50 – 7:30)

- **Senior Co-Ministers/Leadership Report**
 - *Monitoring*: Annual work plan
- **Financial Report**
 - *Inform*: Second Quarter Operating Budget
 - *Approval*: Capital Campaign Budget Review and Building Update
 - *Approval*: Wake Now our Vision Campaign

IV. Shared Work (7:30 – 7:45)

- **Healthy Congregation**
 - *Approval*: Charge
- **Planning for Co-Minister Evaluation** (see 2017-18 in board packet)
- **Social Hall Sign-Up**

BREAK (7:45 – 8:00)

V. Shared Work: Continued Racial Justice Discussion (see Ben's email) (8:00 – 8:45)

- Our positionality
- The role of the Board
- Next steps

VI. Process Observations (8:45)

Adjourn: 9:00

First Universalist's Mission

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

First Universalist's Visionary Goals

1. First Universalist is a faith community committed to a transformational spiritual path guided by Unitarian Universalism's theology and Seven Principles. Our worship, spiritual practices, and rituals unify us, challenge our assumptions, provide comfort, and connect us to the holy.
2. First Universalist is a multi-generational congregation where we connect to ageless wisdom, our ever-evolving religious tradition, listen for the call of love, and build meaningful relationships and community.
3. First Universalist is a multi-racial, multi-cultural, and intergenerational faith community of mutual caring and support where people bring all of who they are and welcome each other with joy. Our sense of who we are as a community of faith is ever expanding.
4. First Universalist is a faith community that acts with humility, bravery, and compassion to create a racially just and sustainable world.

GPH Board Responsibilities

The Board has the ultimate fiduciary and policy-making authority for the Church with the exception of calling ministers and approving the annual budget, which are reserved to the congregation.

It is the Board's responsibility to articulate and develop the visionary goals statements, and to develop policies and practices that ensure accountability in achieving those ends

Group Agreements

1. **Listen actively** -- respect others when they are talking.
2. **Speak from your own experience instead of generalizing** ("I" instead of "they," "we," and "you").
3. **Do not be afraid to respectfully challenge one another** by asking questions, but refrain from personal attacks -- focus on ideas.
4. **Participate to the fullest of your ability** -- community growth depends on the inclusion of every individual voice. For White participants and others with privilege, check in with yourself to make sure your silence is not perpetuating the status quo
5. **Share the air** - Notice if your voice is dominating the space, if so, talk less and encourage hearing from other voices, particularly those from more marginalized communities
6. **Instead of invalidating** somebody else's story with your own spin on her, their, and/or his experience, share your own story and experience.
7. Seek to **achieve resolution through deeper understanding** of each other's position -- try to move forward and walk out of the room being able to speak in one voice as a Board.
8. **Be conscious of body language and nonverbal responses** -- they can be as disrespectful as words
9. **Confidentiality** -- maintain appropriate confidentiality, respecting individual privacy and positions and comments on issues

Minister's Report
2/13/20

I. Monitoring Items

A. Staff and Volunteer Changes

Charles Jones joined the facilities team earlier this month. He recently worked at St. Stephens and will be primarily working Thursday - Sunday.

B. Review Physical Plant for Capital Improvements

No updates

C. Treatment of Staff

No updates

D. Financial Obligations

Please see financial update prepared by Brad Schmidt

II. Financial Condition

Please see financial update prepared by Brad Schmidt

III. Informational Updates

A. Updated church alcohol policy

Staff recently completed a revision to the church's alcohol policy. A copy is included below. Essentially, the policy revision prohibits alcohol at all church events/gatherings/etc. The Senior Ministers can make exceptions to this rule with advance notice and compelling rationale for the exception. The policy continues to allow alcohol at rental events provided it is served by a licensed bartender.

B. Summer location during renovations

Shir Tikvah has graciously agreed to host us for Sunday morning worship, religious education, childcare and coffee hour this summer, from June 7 through September 6. They are sharing their space as an act of radical hospitality and are only asking that they recoup their costs for the arrangement.

First Universalist Alcohol Policy

First Universalist strives to make people feel comfortable, safe, and included when they are engaging in church activities. This mission entails a strict policy on alcohol at church events.

Alcohol is not permitted in the building or on the grounds outside of the building. This includes the sale of alcohol and the raffle or auction of alcohol. Any exceptions are to be made at the discretion of the Events Coordinator and the Senior Ministers, with compelling reason and advance notice.

Rentals

With permission from the Events Coordinator, outside groups renting the space may serve alcohol in the social hall, as long as it is served by a licensed bartending service. Additional rules may apply.

Contact Events Coordinator Lucia Webb at lucia@firstuniv.org with any questions.

First Universalist Church of Minneapolis
Board Retreat
Thursday, January 26, 2020, 5:30 - 9:00pm
Location: Roat Osha 3001 Hennepin Ave S, Minneapolis, MN 55408

Present: Daryn Woodson, Bryana French, Eric Cooperstein, Christa Anders, Jen Crow, Richard Spratt, Keven Ambrus, Kristin Siegesmund

I. Call to Order and Agenda Approval

A. Grounding-in: 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.

B. Group Agreements (see Board Packet) -Bryana read these to remind Board members of the agreements we have made to each other.

II. Consent Agenda

- Approval of December meeting minutes
- Monitoring: Acceptance of attendance and membership numbers
- Monitoring: Acceptance of staff and significant volunteer changes
- Monitoring: Staff and volunteer changes
- Monitoring: Staff salary ranges review
- Monitoring: Financial obligations of deferred, long term comp and benefits

APPROVED.

III. Breaking Bread Eating and connecting

Conversation and Questions for Jen

IV. Leading in Liminal Times

A. Shared work: Mission, Vision, & Process

Board engaged in small and large group reflections on *Emergent Strategy* and how we can practice living into our values as a board and beyond. Specifically, as it relates to 3rd visionary goal of becoming a multiracial, multicultural, and intergenerational faith community.

We want to continue to build and develop trust. Arif, Bryana and Laura will be meeting soon. We really need to make sure that we take the things we learned from that joint racial justice meeting and keep moving forward. We need some more dedicated time to be together with that broader group. Maybe some Saturday retreats.

There are a lot of things coming up in the next 6 to 9 months – Justin’s sabbatical, summer out of the building, Ruth’s retirement and more. We want to keep our eye on the ball and keep doing things and doing them differently so we get to where we want to go. Let’s not lose momentum on our third visionary goals

We have tenants leaving at the end of April.

We are going to have an intern!!! He is coming this weekend – snow and weather permitting. He will start in August.

Arif and Lauren are hitting credentialing milestones and are well-positioned.

Building renovations are going to be so exciting!!! We are really going to see lots of great changes and it will be more welcoming, more hospitable and more welcoming. Have to be out of RE by May 18 and out of the sanctuary on June 1 – right after Flower Communion. Jen is planning on having drawings available in March for congregants to review. Offices will be on the first floor. Classrooms will be on both first and second floors. There will be enough space for a dedicated sanctuary living space. All classrooms will get refresh. Gender neutral bathrooms. Talking about what to do in chalice room and social hall. Talking about changes to the sanctuary and what we can do. They are in the “value engineering” phase. Really creative people on the building team.

Plan is NOT to have tenants in the first year so we can live into the space. Both Sioux Chef and Southside Child Care are moving into their own buildings and we are excited that we have helped them get to their next phase.

In September it will be a whole new place with a different staff team. So where are the opportunities? Every major change has loss and opportunity.

B. *Shared work:* Practicalities

1. Staffing plans

We have 4 plus ministers but we don’t have an executive director. If we remove a minister, we would need something to fill in the gaps.

2. Basic Operating Budget Assumptions

A few directions from the Board re budgeting for next year:

- Balanced budget
- Plan for having a surplus
- The Board appreciates their UUAs aspiration re salary and we would like to move toward having staff get equitable compensation and it is not realistic to meet the UUAs guidelines in the immediate future. The big jumps in the UUA salary schedule will take some time to meet.

- Want to see money for racial justice work and money to continue and grow anything that comes out of our collective conversations with the Racial Justice Change Team, Education Team etc.
- Programming that meets the needs of the congregants – a good chunk of it should be programming and programming support
- Sanctuary work
- Environment justice
- And make sure that children and youth are well considered
- There are always ways to itemize things for funding if we “beat the budget”

3. Board Presence in Social Hall

Board presence in the social hall regularly with a rotating sign up sheet? People are asking for more information. Let’s try the first Sunday of the month – we could be in the hub area.

While Jen is out, we agreed that any legal matters will be referred to Eric and Kristin.

Keven will remain on top of the financial issues.

Building approval process will quickly become unwieldy. Jen has asked the board for approval for every expenditure. We agreed that the Board will soon approve the whole building expenditure/budget and then Jen can work within each line item. If she needs to go outside of the amount allocated within a line item, then she will come to the Board for approval.

When Jen is out for surgery, Ruth, Arif and Lauren will be responsible for holding down the fort.

The Board would like someone to come to the next Board meeting. Jen will likely ask Ruth and Arif to both be present.

Re the Pledge Team work – Board is willing to help with specific requests. Eric is willing to provide more direct guidance for the Pledge Team.

The Board is also willing to take on working on congregant issues as delegated by Jen. We will keep moving forward with the Healthy Congregations work. There have also been requests to move forward with a sexual harassment policy per a request from the AUW. It was mentioned that Unistar is working on something similar that we can look to for ideas.

V. Financial Report

Numbers are solidly in at \$1,170,000! This is really different from where we have been. Unrestricted donations are also up. Our financial position is solidly ahead of where we were last year. Last year at this point we were \$110,000 behind and now we at least \$20,000 ahead. We are doing well in terms of finance. We are not sure why this is; some speculation

that it has to do with changes to the tax code and people are giving away a lot of money this year but they will not be doing that next year.

VI. Updates

A. Healthy Congregation

Darryn, Dan and Eric have met. They have talked about having a small group 7 to 9 or so of people who would participate – maybe invite some people but also ask for people who are interested in doing this work.

The group will draft a charge for consideration by the Board at our next meeting. Create a congregational covenant; evaluating existing practices (Cyber Coffee Hour); doing inner work as well as outer work; go into dialogue with staff of color and POCI about what they are experiencing so we can help people understand what inner work is needed. This is a long term project of around 18 months. They want to set a specific timeline. They are working to get consent from congregants and will not be imposing anything. How do we make sure we get enough cross conversation and balance power?

B. Nominating Committee

We need a Board member to serve on the Nominating Committee. We will ask Ben if he is willing to do this. He is young! It is fun group.

January Attendance									
		2020				2019			
Adults		9:30 AM	11:15			9:30 AM	11:15		
1st week		187	237	424		273	272	545	
2nd week		221	174	395		308	262	570	
3rd week		198	228	426		221	243	464	
4th week		263	204	467		285	335	620	
5th week									
Monthly Total		869	843	1712		1087	1112	2199	
Average for January		217	211	428		272.5	278	550	
RE									
1st week		95	94	189		150	149	299	
2nd week		183	152	335		224	176	400 *	
3rd week		88	69	157		91	56	147	
4th week		168	151	319		225	174	399	
5th week									
Monthly Total		534	466	811		690	555	946	
Average for January		134	117	203		172.5	139	237	
Combined Average		351	327	631		444	417	786	

*Youth-friendly service, no 6th-12th grade RE

**2020 Statistical Report
January 2020
Board Meeting February 20, 2020**

MEMORIAL SERVICES: 1

Kris Carlton, Jan. 18

MARRIAGES/SERVICES OF COMMITMENT: 0

MEMBERS FOR APPROVAL: 0

MEMBERS REINSTATED: 0

MEMBERS FOR REMOVAL: 0

CHILDREN DEDICATED: 0

	To Date	End of Year Totals			
MEMBERS	2019-2020	2018-2019	2017-2018	2016-2017	2015-2016
(Fiscal Year)	6	81	66	109	54
TOTAL MEMBERS:	1064	1058	1049	1,011	934

Total members as of the last meeting: 1064

To be added: 0

To be removed : 0

TOTAL MEMBERS: 1064

First Universalist Church of Minneapolis
Financial Summary
Prepared by Bradley Schmidt
February 20, 2020

December 2019 Operating Budget

Summary

At the end of the second quarter, we are in a strong financial position with our net totals far exceeding our year to date budget (\$133,300.01). Unlike previous years, this is a direct result of increased giving and generosity rather than cuts in expenditures. Our annual giving revenue is \$72,117.20 ahead of budget and \$116,397.44 ahead where we were at this time last fiscal year. Our close the gap fundraising effort raised over \$40,000 in additional revenue and our investment accounts under the management of Accredited Investors has produced significant returns. Expenses are tracking as expected without any significant variances. Program expenses appear to be significantly over budget, but that's due to increased YCE and COA activity which has equal offsetting released from restriction revenue accounts. The end result is no net impact.

As we proceed into the second half of the fiscal year, The Sioux Chef will be moving out in February and Southside Childhood Development Center will be moving out in April. This will be a significant loss in rental income. Despite our best efforts, First Universalist Church is liable to pay property taxes for calendar year 2020. The first half of that payment will fall in this fiscal year. This will be a significant expense for which was not originally budgeted. Despite that, we expect giving to stay above budget and personnel expenses will continue to stay under budgeted due to Ruth's retirement and the allocation of staff salaries to the capital campaign budget. Overall, I am predicting that we will end the year with an \$11,769.19 surplus.

Capital Campaign

Summary

Our capital campaign commitments have remained constant at \$4.6M dollars and as of January 31, we are nearing the \$3M mark of total gifts received. We currently have a balance of \$1.6M which have on hand for the start of our major construction project starting this May. Our Owners Representative, Chelsea Waters and I have put together a Cash Budget Report forecasting our cash requirements for the remainder of the project. Our initial estimation is that First Universalist Church will likely have to borrow \$1M as we near the end of the project in August. Financing arrangements are currently being discussed with Sunrise Banks and will be shared with the board as we receive more detail.

Cummins Fund

The entirety of the Cummins Fund Investment Policy can be found here:

http://firstuniversalistchurch.org/wp-content/uploads/2014/02/First_U_Cummins_Investment_Policy_FINAL-APPROVED.pdf

Information relevant for our conversation.

“The annual payout shall be a maximum of 5% of the Fund's value, based on a 12 quarter trailing average of the market value of the Fund, with the 12th quarter ending on December 31st of the year prior to the church fiscal year in which the funds will be used. However, during the first five years of the Fund or until the ultimate fundraising goal is achieved, the Trustees may elect a payout of 10% of the contributions received by the Fund during the calendar year prior to the fiscal year in which it will be used, instead of 5% of the Fund's value as described above. Payout amounts that are not used in the fiscal year for which they are intended may be carried forward to the following fiscal year for the purpose stated in Section I of these Policies.”

Three years have passed since our last Cummins Fund payment. If you roll over the previous three years, First Universalist Church has \$30,813.79 (\$9,613.41, \$10,246.47, and \$10,953.91) reserved for intern related expenses in fiscal year 2020 – 2021.

Wake Now Our Vision

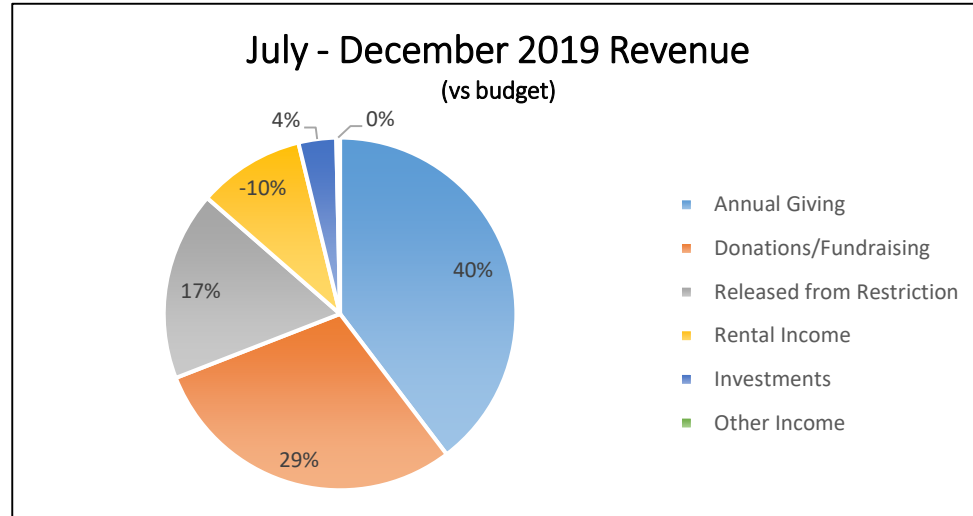
In November 2019 First Universalist Church received a check from the UUA in the amount of \$5,811.50 for the Wake Now Our Vision campaign which was agreed to be used to support our operating budget. What we didn't realize at the time was this was only the first of four installments for the same amount, the second of which arrived in January. Seeing as though \$5,811.50 has already supported our general fund, Jen Crow and I propose the remaining installments get deposited into our operating reserves.

First Universalist Church of Minneapolis
Year to Date Performance
July to December 2019

Revenue Summary

Annual Giving	\$ 72,117.20
Donations/Fundraising	\$ 53,499.80
Released from Restriction	\$ 31,510.30
Rental Income	\$ (17,787.21)
Investments	\$ 6,283.82
Other Income	\$ (622.96)
Total Revenue Variance	\$ 145,000.95

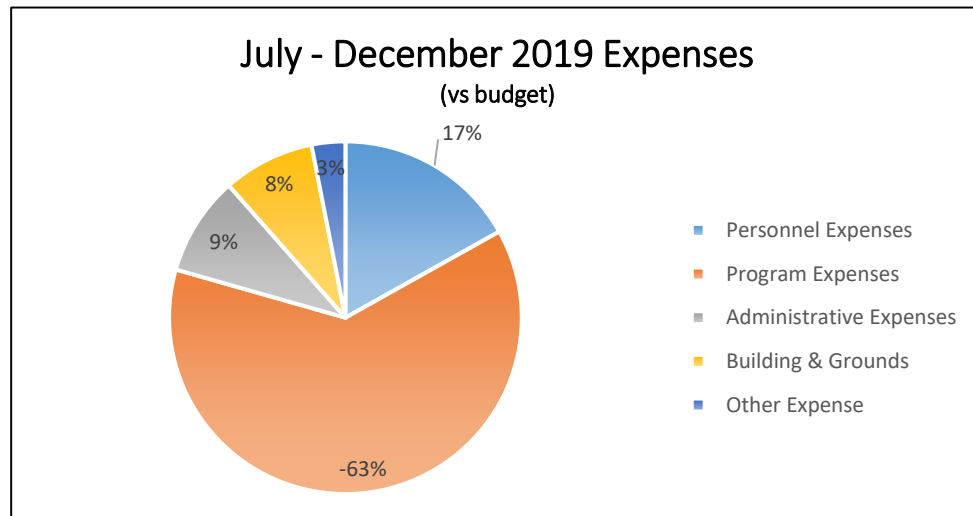
Variance



Expense Summary

Personnel Expenses	\$ 7,886.11
Program Expenses	\$ (29,208.86)
Administrative Expenses	\$ 4,249.43
Building & Grounds	\$ 3,928.76
Other Expense	\$ 1,443.62
Total Expense Variance	\$ (11,700.94)

Variance



Net Total

\$ 133,300.01

First Universalist Church of Minneapolis
Analysis of Revenues & Expenses
July to December 2019

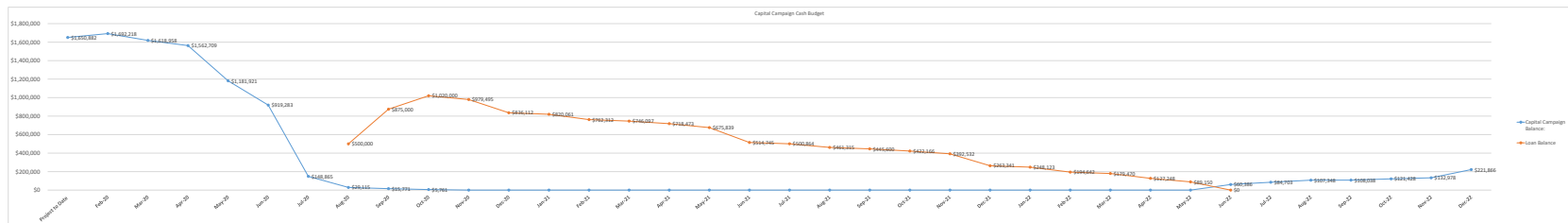
Headings and Account	Actual	Budget	Variance	Year End Projection	Annual Budget
Revenue					
Support					
Annual Giving	\$ 630,094.26	\$ 557,977.06	\$ 72,117.20	\$ 1,143,232.45	\$ 1,118,400.00
Donations/Fundraising	\$ 131,116.17	\$ 77,616.37	\$ 53,499.80	\$ 216,379.77	\$ 196,200.00
Released from Restriction	\$ 42,010.30	\$ 10,500.00	\$ 31,510.30	\$ 42,010.30	\$ 57,000.00
Support	\$ 803,220.73	\$ 646,093.43	\$ 157,127.30	\$ 1,401,622.52	\$ 1,371,600.00
Earned Revenue					
Rental Income	\$ 52,062.81	\$ 69,850.02	\$ (17,787.21)	\$ 116,480.00	\$ 140,700.00
Investments	\$ 15,408.80	\$ 9,124.98	\$ 6,283.82	\$ 21,831.06	\$ 18,250.00
Other Income	\$ 1,043.54	\$ 1,666.50	\$ (622.96)	\$ 1,043.54	\$ 3,333.00
Earned Revenue	\$ 68,515.15	\$ 80,641.50	\$ (12,126.35)	\$ 139,354.60	\$ 162,283.00
Revenue	\$ 871,735.88	\$ 726,734.93	\$ 145,000.95	\$ 1,540,977.12	\$ 1,533,883.00
Expenses					
Personnel Expenses	\$ 565,361.54	\$ 573,247.65	\$ 7,886.11	\$ 1,119,989.94	\$ 1,147,018.85
Program Expenses	\$ 65,776.61	\$ 36,567.75	\$ (29,208.86)	\$ 91,167.19	\$ 71,150.00
Administrative Expenses	\$ 35,595.37	\$ 39,844.80	\$ 4,249.43	\$ 91,977.99	\$ 83,850.00
Building & Grounds	\$ 62,089.79	\$ 66,018.55	\$ 3,928.76	\$ 134,246.06	\$ 138,702.00
Other Expense	\$ 53,435.44	\$ 54,879.06	\$ 1,443.62	\$ 91,826.75	\$ 109,758.06
Expenses	\$ 782,258.75	\$ 770,557.81	\$ (11,700.94)	\$ 1,529,207.93	\$ 1,550,478.91
Net Total	\$ 89,477.13	\$ (43,822.88)	\$ 133,300.01	\$ 11,769.19	\$ (16,595.91)

First Universalist Church of Minneapolis
Capital Campaign Budget Breakdown (As of 1/31/2020)

Division	Budget	Actual	Variance
Revenue			
Donations	\$ 4,664,680.59	\$ 2,984,924.58	\$ 1,679,756.01
Initial Project Expenses			
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 Initial Project Expenses	\$ 295,000.00	\$ 291,719.09	\$ 3,280.91
Remaining Budget	\$ 4,369,680.59	\$ 2,693,205.49	\$ 1,676,475.10
Project Expenses			
Architect Fee	\$ 132,797.57	\$ 132,797.57	\$ -
Debt Retirement	\$ 649,151.38	\$ 649,151.38	\$ -
Other Expenses	\$ 40,793.26	\$ 40,793.26	\$ -
Owners Rep	\$ 19,450.00	\$ 19,450.00	\$ -
Staff Salaries	\$ 78,131.12	\$ 78,131.12	\$ -
Tuckpointing	\$ 122,000.00	\$ 122,000.00	\$ -
	\$ 1,042,323.33	\$ 1,042,323.33	\$ -
Net Income	\$ 3,327,357.26	\$ 1,650,882.16	\$ 1,676,475.10

First Universalist Church of Minneapolis
Capital Campaign Cash Budget

	February	March	April	May	June	July	August	September	October	Total
Revenue										
Pledge Revenue	\$ 57,925.82	\$ 16,500.33	\$ 27,800.48	\$ 25,860.33	\$ 222,470.48	\$ 14,037.43	\$ 39,705.33	\$ 15,870.48	\$ 23,480.48	\$ 443,651.16
Construction Loan (Pending Approval)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000.00	\$ -	\$ -	\$ 1,000,000.00
Total Revenue	\$ 57,925.82	\$ 16,500.33	\$ 27,800.48	\$ 25,860.33	\$ 222,470.48	\$ 14,037.43	\$ 1,039,705.33	\$ 15,870.48	\$ 23,480.48	\$ 1,443,651.16
Expenses										
Flannery	\$ 5,000.00	\$ 15,000.00	\$ 15,000.00	\$ 250,000.00	\$ 400,000.00	\$ 650,000.00	\$ 550,000.00	\$ 278,759.00	\$ 110,000.00	\$ 2,273,759.00
Misc. Construction	\$ -	\$ -	\$ -	\$ 45,648.40	\$ 4,215.40	\$ 25,215.40	\$ 20,215.40	\$ 19,215.40	\$ 5,001.00	\$ 119,511.00
Owner Supplied Systems	\$ -	\$ 25,000.00	\$ 25,000.00	\$ 20,000.00	\$ 10,000.00	\$ 20,000.00	\$ 20,000.00	\$ 38,100.00	\$ 55,000.00	\$ 213,100.00
WPI	\$ -	\$ 8,750.00	\$ 8,750.00	\$ 8,750.00	\$ 8,750.00	\$ 8,750.00	\$ 8,750.00	\$ 8,750.00	\$ -	\$ 61,250.00
Miller Dunwiddie	\$ 8,490.00	\$ 34,010.00	\$ 28,300.00	\$ 28,250.00	\$ 8,490.00	\$ 8,490.00	\$ 8,490.00	\$ 8,490.00	\$ 8,490.00	\$ 141,500.00
Misc Consultants	\$ 3,100.00	\$ 7,000.00	\$ 7,000.00	\$ 4,000.00	\$ 2,000.00	\$ 7,000.00	\$ 2,000.00	\$ 900.00	\$ -	\$ 33,000.00
Contingency	\$ -	\$ -	\$ -	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ 50,000.00	\$ -	\$ 250,000.00
Total Expenses	\$ 16,590.00	\$ 89,760.00	\$ 84,050.00	\$ 406,648.40	\$ 483,455.40	\$ 769,455.40	\$ 659,455.40	\$ 404,214.40	\$ 178,491.00	\$ 3,092,120.00
Excess or (Deficiency)	\$ 41,336	\$ (73,260)	\$ (56,250)	\$ (380,788)	\$ (260,985)	\$ (755,418)	\$ 380,250	\$ (388,344)	\$ (155,011)	
Capital Campaign Beginning Balance:	\$ 1,648,882.16	\$ 1,690,217.98	\$ 1,616,958.31	\$ 1,560,708.79	\$ 1,179,920.72	\$ 918,935.80	\$ 163,517.83	\$ 543,767.76	\$ 155,423.84	\$ 413.32

[illegible]

First Universalist Church of Minneapolis
Balance Sheet
December 2019

Headings and Account	Current Balance (This Year)		Change in Balance
Assets			
Current Assets			
Cash & Cash Equivalents			
Cash	\$	847,473.60	\$ 187,493.57
Total Cash & Cash Equivalents	\$	847,473.60	\$ 187,493.57
Investments			
Schwab - Church Operating	\$	831,640.51	\$ 9,850.54
Schwab - Church Reserve	\$	359,867.24	\$ 6,801.59
Schwab - Don Carter & Mary Carter	\$	87,055.25	\$ 2,051.11
Schwab - Legacy Fund	\$	913,824.04	\$ 20,112.47
Schwab - Temporarily Restricted	\$	134,987.41	\$ 3,159.74
Thrivent Mutual Funds	\$	23,879.17	\$ 1,426.91
Total Investments	\$	2,351,253.62	\$ 43,402.36
Cash & Cash Equiv - Foundation			
Sunrise Bank - Foundation	\$	11,275.50	\$ -
Total Cash & Cash Equiv - Foundation	\$	11,275.50	\$ -
Investments - Foundation			
Schwab - Foundation	\$	1,696,891.24	\$ 39,691.71
Total Investments - Foundation	\$	1,696,891.24	\$ 39,691.71
Total Current Assets		\$ 4,906,893.96	\$ 270,587.64
Other Current Assets			
Other Current Assets			
Prepaid Expenses	\$	1,545.00	\$ -
Total Other Current Assets	\$	1,545.00	\$ (7,167.64)
Total Other Current Assets		\$ 1,545.00	\$ (7,167.64)
Fixed Assets			
Fixed Assets			
Accumulated Depreciation	\$	(2,438,538.30)	\$ -
Fixed Assets	\$	4,182,876.63	\$ -
Total Fixed Assets	\$	1,744,338.33	\$ -
Total Fixed Assets		\$ 1,744,338.33	\$ -
Total Assets		\$ 6,652,777.29	\$ 263,420.00

Liabilities & Equity			
Current Liabilities			
Accounts Payable			
Accounts Payable	\$ 35,766.53		\$ (5,924.65)
Total Accounts Payable	\$ 35,766.53		\$ (5,924.65)
Total Current Liabilities		\$ 35,766.53	\$ (5,924.65)
Other Current Liabilities			
Benefits Payable	\$ 360.56		\$ (334.99)
Accrued Expenses	\$ 18,041.00		\$ 2,881.86
Deferred Revenue	\$ 16,718.08		\$ (4,883.68)
Misc Other Liabilities	\$ 13,000.00		\$ -
Total Other Current Liabilities	\$ 48,119.64		\$ (2,336.81)
Total Other Current Liabilities		\$ 48,119.64	\$ (2,336.81)
Total Liabilities & Equity		\$ 83,886.17	\$ (8,261.46)
Fund Principal and Excess Cash Received			
Fund Principal			
Undesignated Net Assets/Equity			
Church Equity	\$ 1,223,144.95		\$ (158,142.36)
Total Undesignated Net Assets/Equity	\$ 1,223,144.95		\$ (158,142.36)
Board Restricted Net Assets			
Contingency Reserve	\$ 271,109.21		\$ -
Legacy Fund	\$ 890,730.50		\$ 15,888.85
Memorials	\$ 6,881.88		\$ -
Total Board Restricted Net Assets	\$ 1,168,721.59		\$ 15,888.85
Temp Restricted Net Assets			
Capital Campaign Fund	\$ 1,625,275.54		\$ 115,852.63
Cummins Ministerial Fund	\$ 237,112.57		\$ 4,223.62
Foundation	\$ 1,607,470.88		\$ 22,610.63
Miscellaneous Funds	\$ 7,706.48		\$ (1,059.60)
Total Temp Restricted Net Assets	\$ 3,477,565.47		\$ 141,627.28
Permanently Restricted			
Don Carter Endowment	\$ 50,000.00		\$ 836.74
M E Carter Endowment	\$ 14,000.00		\$ 234.68
Total Permanently Restricted	\$ 64,000.00		\$ 1,071.42
Total Fund Principal	\$ 5,933,432.01		\$ 445.19
Excess Cash Received			
Excess Cash Received	\$ 635,459.11		\$ 271,236.27
Total Excess Cash Received	\$ 635,459.11		\$ 271,236.27
Total Fund Principal and Excess Cash Received		\$ 6,568,891.12	\$ 271,681.46
Total Liabilities & Equity, Fund Principal, & Restricted Funds		\$ 6,652,777.29	\$ 263,420.00



2017 - 2018 BOT Survey on Senior Co-Ministers GPH Covenant Policies, Letters of Agreement and Co-Ministry Covenant

1. Section One - Reverend Crow, Part A

Section 1 contains questions drawn from the Governing Policies Handbook sections on How We Work Together. Please rate Rev. Crow's performance in these areas in 2017 - 2018.

1. I respect Rev. Crow

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

2. Rev. Crow treats me with respect, even in times of confusion, misunderstanding or disagreement.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

3. Rev. Crow listens well, with openness, a desire for understanding, and a willingness to change her perspective.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

4. Rev. Crow communicates kindly, offering thanks and encouragement.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

5. Rev. Crow communicates directly, shares information freely, and engages appropriately to resolve issues, including complex, awkward, and difficult issues.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

6. In making decisions, Rev. Crow seeks out reliable and alternative information and viewpoints.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

7. In making decisions, Rev. Crow uses critical thinking skills and anticipates consequences.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

Please share any comments on questions 1 - 7.

8. Rev. Crow supports me in my lay leadership role.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

9. Rev. Crow asks for help when needed.

Strongly Disagree

Strongly Agree

Strongly Disagree

Strongly Agree

10. I trust Rev. Crow.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

11. Rev. Crow trusts me and my leadership abilities.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

12. Rev. Crow operates in good faith.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

13. Rev. Crow works collaboratively with me and the Board.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

14. Rev. Crow uses power appropriately.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

15. Rev. Crow delegates power appropriately.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

16. Rev. Crow engages with the Board on "middle layer" issues (those that fall between staff ministry and Board vision).

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

Please share any comments on questions 8 - 16.

Next

2. Section Two - Reverend Crow, Part B

The Senior Co-Minister's Letter of Agreement indicates that the Senior Co-Minister role includes "executive performance" in addition to traditional ministerial skills. This survey is intended to evaluate Senior Minister performance in the area of "ministerial managerial arts."

On a scale of 1 to 5 (with 1 = Needs Improvement, 3 = Acceptable, 5 = Outstanding), please rate the Senior Minister's performance in the following areas in 2017-2018.

17. Verbal communication (presents verbal information clearly and concisely; thinks well on her feet; is responsive to questions).

Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding

18. Written communication (written information is relevant, accurate and clear; presented in a timely and accessible format).

Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding

19. Project management (maximizes effective use of paid and volunteer staff; meets deadlines; follows projects through to completion; communicates with Board as needed).

Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding

20. Prioritization management (manages competing priorities effectively; makes choices among priorities as needed).

Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
21. Staff management (makes good hiring decisions; provides effective training, supervision/direction and support; maximizes use of staff time and skills; has “open door” policy) .		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
22. Budget management (presents financial information in clear and understandable formats; takes responsibility for managing expenses and revenues within approved budget; reports expense/revenue issues promptly; seeks FMT/Board engagement/approval as needed).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
23. Conflict management (listens and understands opposing points of view; articulates opposing views respectfully; problem solves and presents solutions effectively).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
24. Executive presence (maintains professional demeanor; is accessible and approachable; leads by example).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
25. Please include any comments you have about any aspect of Rev. Crow's performance.		

Prev Next

3. Section Three - Reverend Schroeder, Part A

Section 1 contains questions drawn from the Governing Policies Handbook sections on How We Work Together. Please rate Rev. Schroeder's performance in these areas in 2017 - 2018.

26. I respect Rev. Schroeder.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

27. Rev. Schroeder treats me with respect, even in times of confusion, misunderstanding or disagreement.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

28. Rev. Schroeder listens well, with openness, a desire for understanding, and a willingness to change his perspective.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

29. Rev. Schroeder communicates kindly, offering thanks and encouragement.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

30. Rev. Schroeder communicates directly, shares information freely, and engages appropriately to resolve issues, including complex, awkward, and difficult issues.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

31. In making decisions, Rev. Schroeder seeks out reliable and alternative information and viewpoints.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
32. In making decisions, Rev. Schroeder uses critical thinking skills and anticipates consequences.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Please share any comments on questions 26 - 32.	
33. Rev. Schroeder supports me in my lay leadership role.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
34. Rev. Schroeder asks for help when needed.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
35. I trust Rev. Schroeder.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
36. Rev. Schroeder trusts me and my leadership abilities.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
37. Rev. Schroeder operates in good faith.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
38. Rev. Schroeder works collaboratively with me and the Board.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
39. Rev. Schroeder uses power appropriately.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
40. Rev. Schroeder delegates power appropriately.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
41. Rev. Schroeder engages with the Board on "middle layer" issues (those that fall between staff ministry and Board vision).	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree

Please share any comments on questions 33 - 41.

Prev Next

4. Section Four - Reverend Schroeder, Part B

The Senior Co-Minister's Letter of Agreement indicates that the Senior CoMinister role includes "executive performance" in addition to traditional ministerial skills. This survey is intended to evaluate Senior Minister performance in the area of "ministerial managerial arts."

42. Verbal communication (presents verbal information clearly and concisely; thinks well on his feet; is responsive to questions).

Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
43. Written communication (written information is relevant, accurate and clear; presented in a timely and accessible format).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
44. Project management (maximizes effective use of paid and volunteer staff; meets deadlines; follows projects through to completion; communicates with Board as needed).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
45. Prioritization management (manages competing priorities effectively; makes choices among priorities as needed).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
46. Staff management (makes good hiring decisions; provides effective training, supervision/direction and support; maximizes use of staff time and skills; has “open door” policy) .		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
47. Fundraising (effectively plans and manages revenue creation, including annual canvass and fundraisers; articulates vision/mission to maximize financial support) .		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
48. In making decisions, Rev. Schroeder seeks out reliable and alternative information and viewpoints.		
Strongly Disagree		Strongly Agree
Strongly Disagree		Strongly Agree
49. Conflict management (listens and understands opposing points of view; articulates opposing views respectfully; problem solves and presents solutions effectively).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
50. Executive presence (maintains professional demeanor; is accessible and approachable; leads by example).		
Needs Improvement	Acceptable	Outstanding
Needs Improvement	Acceptable	Outstanding
51. Please include any comments you have about any aspect of Rev. Schroeder's performance.		

Prev Next

5. Section Five: Co-Ministry

This is the first time we have evaluated our ministers as co-ministers. While the congregation just recently approved the co-minister arrangement, in reality, Reverends Crow and Schroeder have been co-ministering this past year in practice. This section attempts to get at how they are doing collectively in this new arrangement. These questions are directly connected to the working covenant for co-ministry that they have proposed.

52. The co-ministers help each other be the best ministers they can be, encouraging each other to find balance with work and family life.

Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Other (please specify)	
53. The co-ministers always speak positively of each other in front of the staff, congregants and colleagues.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
54. The co-ministers support each other and push each other to grow, including asking each other about next steps for their ministry.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
55. The co-ministers support each other in their respective racial justice journeys.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
56. The co-ministers seek to understand and respect each other's strengths and have balanced their portfolios to reflect those strengths as well as equitable workloads.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
57. The co-ministers hold at the center of their ministry: "what is in the best interests of the church?"	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
58. The co-ministers resolve disputes between them discerningly without letting others know about the conflict or "unresolved stuff."	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
59. The co-ministers engage external support for their co-ministry on a regular basis.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Comments:	
60. The co-ministers avoid triangulation.	
Strongly Disagree	Strongly Agree
Strongly Disagree	Strongly Agree
Other (please specify)	
61. Please share any other comments on any aspect of Reverends Crow and Schroeder's co-ministry.	

BOT CHANGE TEAM MEETING MINUTES

Feb. 6, 2020

6:30-8:00

Present: Richard Spratt, Kayci Rush, Ben Miles, Karin Wille; Absent: Sarah Hedge, Keven Ambrus, Justin Schroeder (on sabbatical), Jen Crow (on medical leave)

Richard opened the meeting with a reading from Voices on the Margin. The group then discussed Ben's recent email to the BOT, which he had shared with the CT. Ben articulated that if RJ is at the heart of this church, we need to put something into the game/be willing to take risks. He also feels that white leaders need to insure that the (white) congregation is brought along/attended to in our RJ work, regardless of where they're at.

Richard had shared notes of a recent DiAngelo/Reesma presentation, noting some commonalities between those notes and the notes from the RJ large group meeting in December. Richard further noted that much of the congregation probably doesn't understand policy governance and what the Board and the senior co-ministers are each responsible for.

The CT spent some time discussing where the Board/CT/RJET is on the issue of the third visionary goal, especially the current language in the goal about being a multiracial, multicultural church, as opposed to being an antiracist church. The Change Team would like the large group that met in December to move forward with assessing the visionary goal.

The Team next identified 3 other ideas/opportunities it would like to pursue. The first is doing, probably in the fall, a congregation wide All Reads with an appropriate book, followed by circle/small group discussions, out of which might come action plans.

The second is organizing around voting issues for the fall, in conjunction with MUUSJA, UUtheVote and/or the LWV.

The Team's third idea, which has been discussed before, is for the staff and/or Board to pick an anti-racist rubric for all areas of the church to use and then establish a plan of action for implementing it (Team - I can't figure out how to attach either rubric we discussed, so will forward under separate cover).

Ben and Richard, as CT Board members, will meet with Bryana to discuss these issues before the CT makes recommendations to the Board.

The meeting adjourned at 8 pm

Karin Wille, Recorder

	2013	2014	2015	2016	2017 Capital Campaign	2018	2019	Random or Institutionalized
Ministers	RJLT Consult with HH	HH TOT	Race racism whiteness	Join Sacred Solidarity	Sacred Solidarity	Hired Karen Hutt .25 FTE; Sacred Solidarity	Ruth presenting ASDIC	R: no specific expectations in this area
Worship	RJ sermons	Carlton Pearson; Worship Associate Program;	POCI service Lena Gartner	POCI service WS Teach-in	Imam Makram El-Amin 2nd WS Teach-in Karen Hutt	Karen Hutt Arif Mamdani	Karen Hutt	R: no consistent use of RJ Lens;
Staff		RE Curriculum revised; all program areas use RJ Lens	Shir Tikva exploration launched			ASDIC (Anti-racism Study Dialogue Circles). POCI RE Programming;- JOY OWL Revised Boston Trip revised	Staff retreat on WS; Working group for Intern of Color	I: Institutional change in programming with worship associate and children's RE; R: in terms of staff policies and procedures.
BOT		HH	Adopted Choice Points RJ resolution BLM Banner	Annual Giving transformed; Became Sanctuary Church	Change Team & RJET; Vendor Policy	CT recommends hiring full time Minister of Color; Preparing for Intern of color; POCI Listening sessions	Change Team	R: Inconsistent use of Choice Points; Board Practices are still evolving.
Budget & Foundation		Line item for RJ Foundation Granting: \$10,000 Grant to Support Sacred Solidarity Network. \$20,000 grant to Mni Ki Wakan.	RE fees ended	Space for SURJ; Million Artists Mvt.	Space for Sioux Chef Rental for Somali Child Care	S & R emergency fund for immigrants; Received grant for Intern of color; Co minister change	Space: Winyan Awanyankapi:Protecting the Lifegivers; MidWest Mixed's conference	R: Inconsistent use of Choice Points in budget decision & in-kind use of building space. Generous donation of funds & space,
Training	First 24 hour HH training	2nd & 3rd 24 HH training; Action Training	4th 24 hour HH training	5th 24 hour HH training		Racialized Trauma Training for staff; Moral Witness Training		No congregational wide training since 2016
Events			Debbie Irving, Waking up White		A Good time for the Truth	Peace Literacy Paul Chappell	Adrienne Marie Brown Not FU organized	R: FU/RJET events
Program- ing	Youth Cultural Exchange	POCI group; RJ circles; Talking to children circles; RJ Book studies;	Faithful Action adopts RJ lens Environmental Programming adopts RJ lens; Selma Pilgrimage	Sanctuary & Resistance' POCI circle, RJ circles, Examining whiteness Circles; WS Teach-in	Arts is Residence Sistet; Doctrine of Discovery program;	Beloved Conversations	Rachel Trauma w/Indigenous Community Increase Beloved Conversations groups	Institutionalized: Consistent use of RJ lens in church programming since 2014.
Community		BLM & BLMi interfaith vigil	MLK Parade BLM Jamar Clark	Philando Castile protest hwy 94	Indigenous Youth Ceremony;			R. No consistent pattern of community involvement
Partnerships		Emerge Beacon Interfaith Housing	Dakota Tribe/Bde Maka Ska; BLM MOA protest	Dakota continue; Joined Isaiah; Mni KeWakan Water Summit	Marnita's Table;	2nd water Summitt;	Me'Lea Connely and the Village Financial Cooperative,	R. driven by senior ministers; no clear partnership criteria

How to institutionalize RJ.

Ministers	Ministers will develop a Racial Justice Policy re: guest ministers, Annual Performance Evaluation includes racial justice leadership and training
Worship	Ministers will develop a RJ policy that reflects worship associates, worship themes, music, White Supremacy Teach-Ins, POC I led worship, etc.
Staff	Senior co--ministers will revise staff job descriptions and evaluations to reflect personal RJ goals; Ministers will develop staff on-boarding about racial justice and annual staff retreats/trainings for rj;
BOT	Develop policy for BOT training and Trustee on-boarding process that includes RJ.. Include Foundation and Nominating Committee; Develop formal policy re: Choice Points. Ministers will update hiring policies that include rj.
Budget & Foundation	Develop Budget Policy that utilizes Choice Point, solicits feedback from POC I adults and Youth; Budget /Fiscal decisions which reflect RJ values; support RJ work, and reimburses POC I.
Training	With RJET and POC I develop 3-5 year training calendar for congregation, staff, program leaders, RE, etc.
Events	With RJET and POC I, develop 3-5 year RJ event calendar; Annual guest speaker
Program-iing	Develop policy with staff and RJET & POC I that formalizes RJ programming church wide.
Community	Develop policy for responding and supporting community RJ events in a timely manner. Show Up.
Partner-ships	Develop policy for defining who First U partners with, the guiding values of these partnerships

	Status Quo Congregation (white cultural hegemony)	Multiculturally Aware Congregation	Anti-Racist Congregation
Public Witness and Prophetic Voice	The congregation is too consumed with internal affairs and strife to have a significant presence in the public square. Fear of offending other members in the congregation keeps discussion about social and political issues to a minimum.	Small groups, usually comprised of the same people, represent the church in public witness. The leaders of these small groups have “pet projects and issues” that they champion and invite others to participate with them. The majority of the congregation is not involved in social justice efforts.	The congregation is in agreement about their role in the public square. A large group of members regularly, boldly, and accountably uses its institutional capital to publicly proclaim its yearning for racial justice and equity as a natural outgrowth of its religious values. The congregation has a vital and healthy process that engages newcomers and invites them to contribute their perspective and energy to the collective project in the public square.
Mission & Purpose; Leadership	There is no mention of racial justice in the congregation’s mission or vision. The purpose of the congregation is to continue to provide services and programs for its current members. It behaves like a clique or small club. Leadership is coveted and tightly held by a few individuals.	The congregation includes racial justice in its mission, but does not reflect it consistently in its practices. The congregation is not yet practicing what it preaches. Leadership is more distributed, but an idolatry of the democratic process and making sure every voice is heard and included keeps the congregation mired in discussion and ineffective in its practices.	The congregation engages in critical self-assessment and seeks outside consultation to ensure that power structures and practices align with stated racial justice values and make space for diverse leadership and participation. Racial justice is explicitly mentioned in its mission/vision, and concrete practices are in place to support the continued relevance of the work. Leadership is actively shared and is seen as a behavior rather than a role; it is leveraged effectively in the service of the agreed-upon mission and vision.
Worship	Worship privileges and centers the White Protestant tradition, both in its format and with the music and rituals it observes.	Worship sometimes incorporates practices or music from other cultures. Can sometimes fall into cultural misappropriation – using these resources thoughtlessly or without proper contextualization.	The congregation regularly expresses its commitment to building a racially just and loving world through communal worship, embodied ritual, and practices of joy and gratitude. Multiple voices and cultures are carefully and thoughtfully incorporated in the service. Worship also occurs outside of the traditional Sunday morning format.

	Status Quo Congregation (white cultural hegemony)	Multiculturally Aware Congregation	Anti-Racist Congregation
Small group ministry & Pastoral care	No awareness of the impact of race/ethnicity and other social identities have on our daily experiences. Small group ministry does not address racial justice issues, or the impact of social justice work. Pastoral care providers have no training in supporting activists or people of color with the specific challenges they encounter.	Pastoral care providers have some awareness of the impact of race/ethnicity and other social identities have on our daily experiences. Success in addressing these issues is mixed, depending on the person providing the pastoral care. There is a budding awareness that the work of social justice and anti-racism in our many roles is taxing and requires support.	Multiculturally competent pastoral care acknowledges the various ways our social identities impact our daily lives. An understanding of power dynamics and the consequences of white supremacy is included in this understanding. All pastoral care providers have been trained and are supported in this awareness, and have tools and techniques that are effective in supporting those on the front lines of AR/AO work. The congregation prioritizes nurturing the spiritual and emotional health of its justice leaders, and equipping them with the competencies to be faithful and effective.
Religious education for adults	Issues of racial justice are not included in religious education. The congregation does not recognize the impact that anti-oppressive learning has on our many roles as parents, managers, teachers, service providers, etc.	Racial justice education is sometimes offered and is an option for interested members. The focus is primarily on helping white congregants become more “woke” regarding racism. The congregation offers some support for folks who want to apply their anti-racism skills in other areas of their lives (work, school, other volunteer organizations).	The congregation offers regular opportunities for members to learn about justice issues, gain concrete skills, and develop political analysis. The congregation expects its members to be engaged in their own education and development around racial justice issues, and it recognizes that it has an active role in supporting people as they apply what they are learning to other areas in their lives. The spiritual needs of members of color in the congregation are acknowledged and addressed through educational programming.
Religious education for children and youth	All education is targeted toward white children and youth. No discussion around racial justice issues is included.	Other cultures are sometimes incorporated into religious education. Sometimes racial justice issues are brought up, like when we study Dr. Martin Luther King Jr.	The different needs of white youth and youth of color are acknowledged and addressed in religious education. The teaching/learning occurs with a complex understanding of both social identity and faith development stages.

	Status Quo Congregation (white cultural hegemony)	Multiculturally Aware Congregation	Anti-Racist Congregation
Partnerships and Solidarity with community	The congregation exists in a bubble, with no partnerships in the community. In this type of congregation, the weekdays and the weekend are separate and independent spheres.	The congregation is building relationships with community members and organizations, and is getting involved in local issues. Some activist work is shared with others in the congregation, but the definition and scope of that work is not actively discussed or negotiated.	The congregation cultivates cultural and spiritual humility, and develops deep and mutually-fulfilling partnerships with other faith communities and coalitions working for racial justice. Congregants understand that they have opportunities to influence systems in their work life and the communities they live in; they leverage resources and support in their congregation to make this work more effective.
Finances	A small group of decision makers manage and control budget decisions for the congregation. No money is allocated toward racial justice work. There is little to no awareness of socially responsible investing by the congregation or its members.	Racial justice work is on a shoestring budget. It is often one of the first things cut when money is tight. There is some awareness of socially responsible investing, but it is not discussed openly and honestly in the congregation. Money is still seen as a taboo topic for the most part.	Commitment to racial justice work is reflected in the budget on a consistent basis. The congregation is self-aware about its financial resources and networks, and is willing to leverage this power to channel money into movement building for racial justice beyond the congregation. The congregation also engages in socially responsible investing and its members' financial practices are in alignment with these principles.
Theology	Individual expression and freedom of belief are the most important values. Theology is not public or shared.	The intersection between racial justice and theology is sometimes explored or shared, regarding individual members' theologies.	The congregation sees racial justice work as a natural expression their tradition's values and beliefs, can articulate a communal theology of racial justice, and is able to evaluate issues and actions through the lens of their faith.