

**First Universalist Church of Minneapolis**  
**WORKING Board Meeting**  
**Meeting via Zoom<sup>1</sup>**  
**Thursday, April 30, 2020, 6:30 - 8:00pm**

**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.*

- Grounding

**II. Building Update (6:35 – 6:50)**

Phase 1 work, Timeline, and Questions

**III. Summary Presentation of Racial Justice Rubric (6:50 – 7:00)**

Richard and Ben

**III. Work Groups (Incorporating RJ Rubric Recommendations) (7:00 – 7:40)**

- Healthy Congregations Task Force (Eric, Dan)
  - Consider Cyber Coffee Hour responses/guidelines for engagement
  - Recruiting Members to participate
  - What Healthy Congregation can look like in light of a pandemic
- Congregational Survey (Christa, Kristin)
  - Consider what is important to assess (e.g., visionary goals, sense of connection, online, leadership, etc.)
  - Draft survey and delivery modality
- Co-Senior Minister Evaluation (Bryana, Keven, Daryn)
  - Visionary Goals
  - COVID leadership
- Hiring Policy (Ben, Jen, Richard)
  - Review existing practices
  - Consider new ideas moving forward

**IV. Report Out (7:40 – 8:00)**

**Adjourn (8:00)**

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<sup>1</sup> Zoom MEETING: JOIN BY ENTERING THIS MEETING ID: 830 886 549 <https://stthomas.zoom.us/j/830886549>  
JOIN AUDIO BY TELEPHONE: +1 646 876 9923 US, 877 853 5247 US Toll-free

### 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

# First Universalist Church Building Renovation Update



Sunday, April 26, 2020

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## Not for Ourselves Alone: Building an Inclusive Future

First Universalist Church Capital Campaign

- Expand Welcoming Hospitality
- Enhance Worship Experience
  - Ensure Inclusive Programs
  - Encourage Future Ministries

In 2017, we raised more than \$4.5 million for renovations to improve our church's accessibility, hospitality, welcoming presence, and education & meeting spaces; allow us to address deferred maintenance and secure our financial future; and improve the worship experience through enhancements to the sanctuary.

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## A Brief History

**2012:** Our 2012–17 Strategic Plan identified the need for a capital campaign.

**2015:** Revs. Justin and Jen presented a broad vision for a campaign to the board.

**Fall 2015–Spring 2016:** Initial campaign plans were developed with a consultant and congregants with expertise in architecture, design, and construction.

**Fall 2016:** 25 Focus Groups, open to all members of our community, were conducted to gather input on needs, vision, and direction of the campaign and building/renovations.

**Winter 2017:** Our Capital Campaign *Not for Ourselves Alone: Building an Inclusive Future* was launched and resulted in \$4.5 million in gifts and commitments from members and friends of the congregation.

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## A Brief History (continued)

**Fall 2017:** A Building Team formed to work with the architects. The congregation was invited to listening sessions to share ideas directly with architects.

**Spring 2018:** Preliminary schematic design ideas were presented proposing a third floor on the education wing. When cost estimates came in, it was determined that this solution was financially out of reach.

**2018–2019:** We paid off our mortgage and tuckpointed the sanctuary building. The congregations of First Universalist and Shir Tikvah explored whether a renovated and expanded shared campus at 3400 Dupont could be mutually beneficial and financially feasible. After a period of careful consideration, the exploration of co-location was discontinued in fall 2019.

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## A Brief History (continued)

**Fall 2019:** The Building Team was reconstituted, an Owner's Representative and General Contractor were hired, and planning for renovations in 2020 began to move forward.

**March 2020:** Renovation plans were ready to be shared with the congregation, when the COVID-19 pandemic struck. The Board of Trustees held a special meeting and called for a phased approach to renovations, determining that now was not an appropriate time to take out a construction loan.

**April 2020:** In response to the Board's request, the Building Team, project manager, architects, and general contractor worked to determine the most cost-effective, impactful, and practical way to stage our renovations.

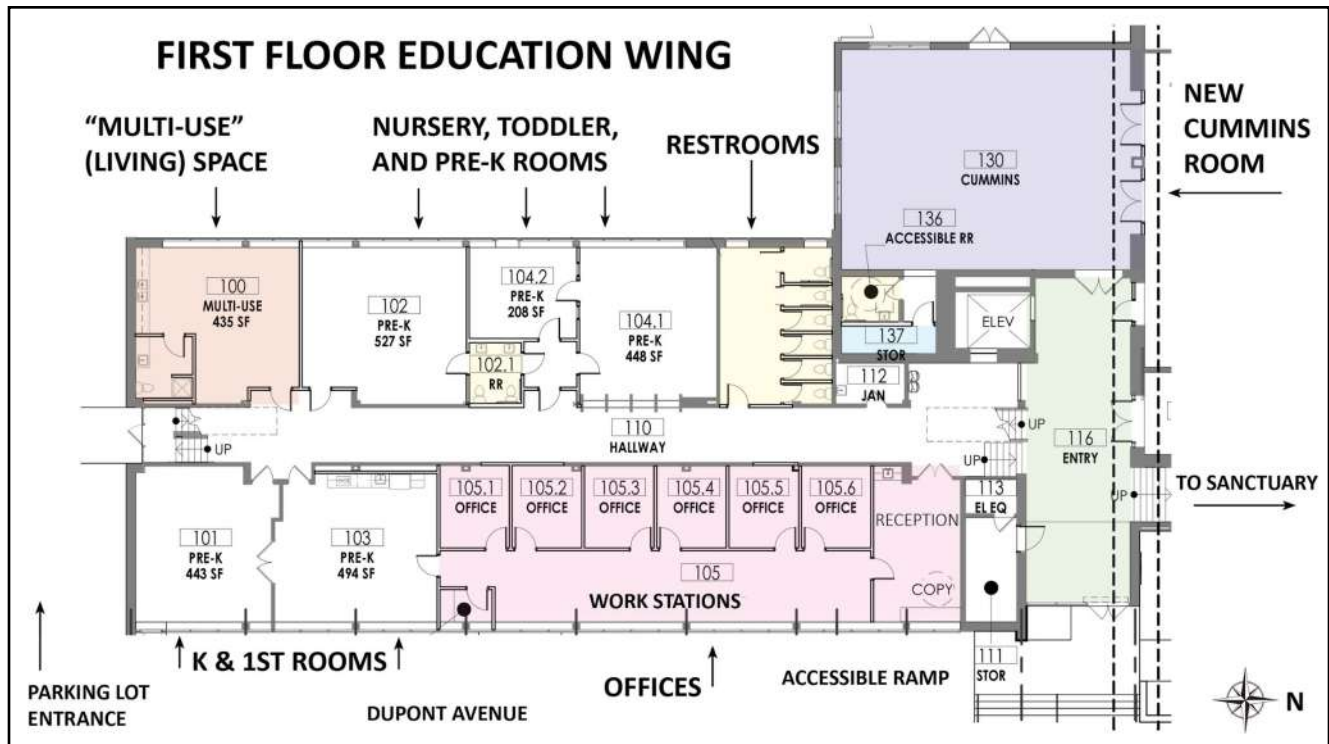
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## PHASE 1: MID-MAY – FALL 2020, \$2 million

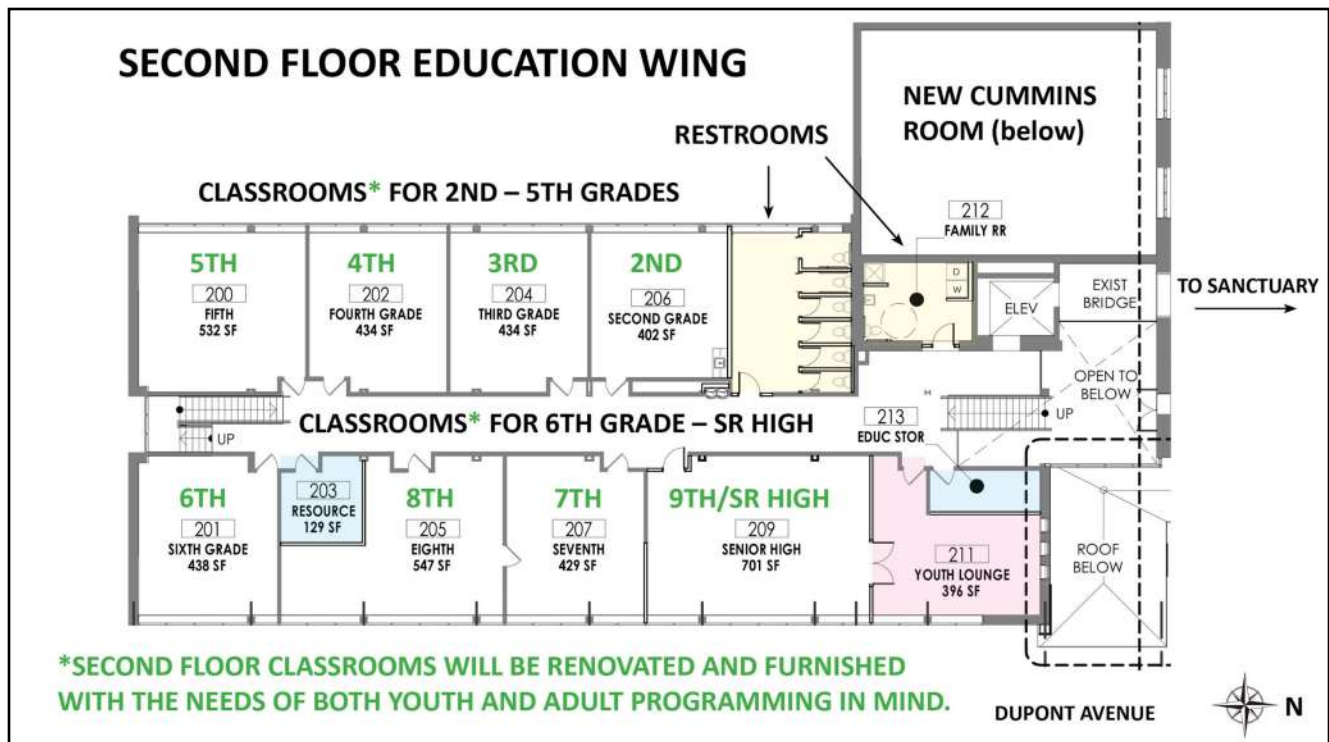
***Extensive remodeling of the Education Wing, Chalice Room, Atrium, Offices, and minor Exterior Work.***

- Creation of one central entrance through the Atrium
- Reconfigured rooms in education wing for children, youth, and adults
- Two banks of gender neutral restrooms - one on each floor
- A "multi-use" space will provide a living space that can house a family in sanctuary
- The current Chalice Room will become the new Cummins Room
- Offices will move to the first floor to provide a close connection to the entryway and new reception, which will create a more welcoming and cohesive flow
- Exterior work to enhance accessibility and highlight the central entrance

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## Phase One Possibilities

We could potentially do more work in Phase 1 if we receive more funds than we are currently projecting we'll receive by this summer.

- Solar Panels ~ \$100,000
- Playground ~ \$60,000

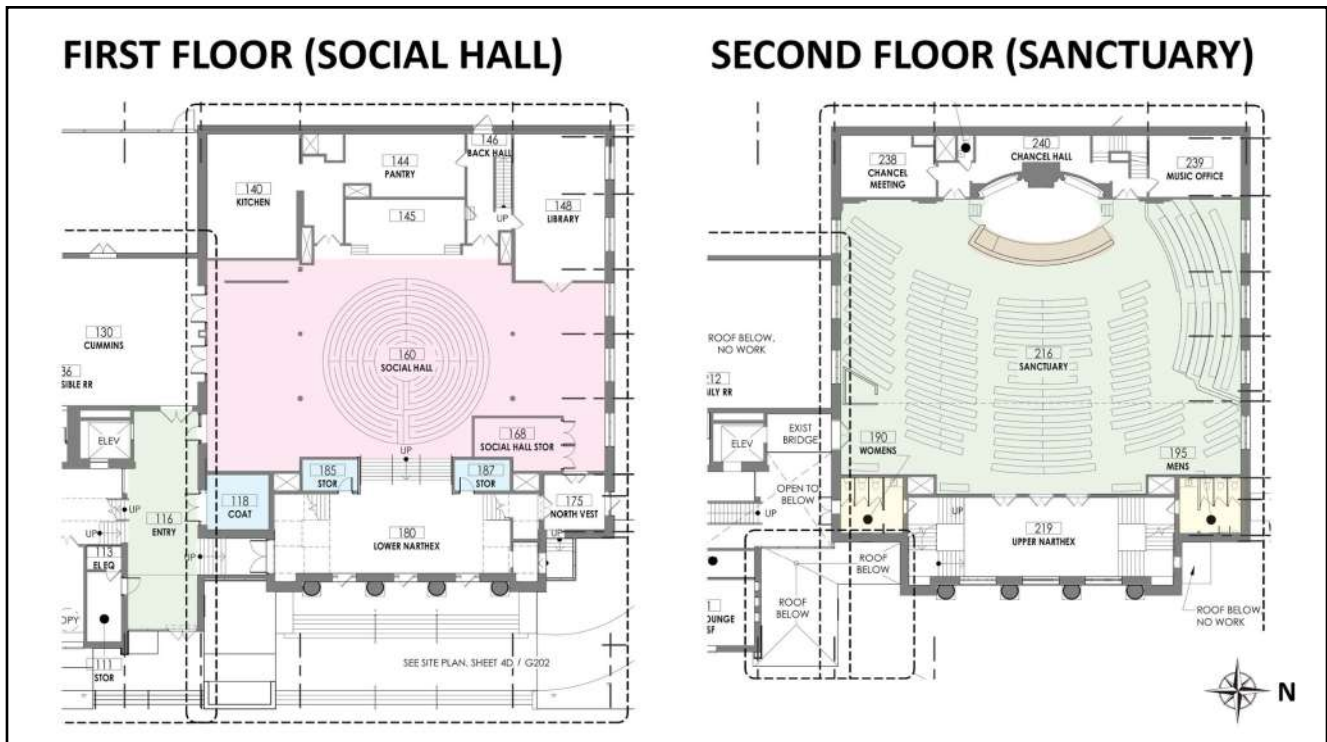
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## PHASE 2 (SUMMER 2021 or 2022)

### ***Renovation of the Sanctuary & Social Hall; Additional Exterior Work***

- Refresh of the Sanctuary to improve accessibility & welcoming
  - New carpet and paint
  - Accessible chancel
  - Hearing loop
  - A/V, lighting, HVAC, and acoustical improvements
- Refresh of the Social Hall to improve hospitality and functionality
  - Lighting, storage, paint, floor, widening of the stair
- Exterior work to enhance accessibility

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# Thank you!

We'll take questions using the Q & A feature.



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## Using Choice Points to Advance Equity

1. **Identify a Choice Point:** What is one of your points of opportunity to make or influence a decision that may affect equitable outcomes?
  
2. **Assess Impacts:** What are the impacts of current decisions and actions that may be unintentionally reinforcing bias, barriers or inequities?
  
3. **Generate Options:** What are some alternative action options that could produce different outcomes? (Try to generate several of them.)
  
4. **Decide Action:** Which option will generate the most leverage, momentum or gain towards advancing equity and inclusion?
  
5. **Change Habits:** What reminders or “equity primes” can be structured into you routine practices and protocols to make equity an ongoing priority and habit? What relationships, supports, incentives or accountability measures could help?

	<b>Status Quo Congregation (white cultural hegemony)</b>	<b>Multiculturally Aware Congregation</b>	<b>Anti-Racist Congregation</b>
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.

	<b>Status Quo Congregation (white cultural hegemony)</b>	<b>Multiculturally Aware Congregation</b>	<b>Anti-Racist Congregation</b>
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.

	<b>Status Quo Congregation (white cultural hegemony)</b>	<b>Multiculturally Aware Congregation</b>	<b>Anti-Racist Congregation</b>
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.

	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 Mandani	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	E: 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 & RJLT; 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 Mini 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-ling	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 Sister; 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 MCA protest	Dakota continue; Joined Isalah; Mini KeWakan Water Summit	Mamita's Table;	2nd water Summit;	MeLea Connelly and the Village Financial Cooperative.	R: driven my senior ministers; no clear partnership criteria

How to institutionalize R.J.

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

## UUA Healthy Congregations Resources

Developing a [Covenant of Right Relations](#) is an important step in clarifying expectations and creating a safe environment for congregations. "Covenant" is Latin for "come together" and means a "solemn agreement" or "promise from the heart" regarding a course of action between parties.

[Congregational Covenants](#) can take many forms and reflect the needs and best wishes of a variety of groups—from church committee members to staff groups to how members of an entire congregation agree to conduct themselves with one another. Creating and agreeing to a covenant can be an extremely effective tool for setting guidelines and building trust.

Developing a covenant can be a useful method for addressing [disruptive behavior](#). Sample covenants are provided to help guide and inspire you.

From the BOT May 2020 Minutes:

We will take some time to discuss the development of a congregational covenant, policies for addressing congregant disputes, and related issues that might be appropriate for Board designated task force. In other UU churches, the congregation takes responsibility for correcting counterproductive or destructive behavior. Should not be solely part of the ministers or the board's responsibility. It may be helpful to have a task force to work on this. The focus is on the future and the expectations we have about how we work together. Jen and Justin have a process for dealing with domestic violence between congregants. We will talk further about whether there should be a more formal policy.

UU Guide to Becoming a Safer Congregation <https://www.uua.org/safe/handbook>

Healthy Behavior <https://www.uua.org/topics/healthy-behavior>

Developing a Healthy Congregations Team  
<https://www.youtube.com/watch?v=HXNQy30tDio&feature=youtu.be>

Developing a Behavioral Covenant <https://www.uua.org/leadership/library/developing-a-behavioral-covenant>

# First Universalist Church 2019 Congregational Survey

Every few years the First Universalist Church Board of Trustees takes a survey of the congregation to determine how well the church and the ministers are making progress towards our visionary goals. Please take a few minutes to respond to this survey so that the ministers and the board can better assess our progress and work to improve progress towards our goals.

Each of the following sections lists one of our four Visionary Goals followed by four or five statements for you to rank. There is also space at the end of each section to elaborate and provide comments. Click "next" below to fill out the survey. Thank you!

\* Required

## Visionary Goal #1

First Universalist is a faith community committed to a transformational spiritual path guided by Unitarian Universalism's theology and Seven Principles (<https://www.uua.org/beliefs/what-we-believe/principles>). Our worship, spiritual practices and rituals unify us, challenge our assumptions, provide comfort, and connect us to the holy.

Thinking about your recent experience, please rate how strongly you agree/disagree with the following statements:

1. 1. First Universalist Church affirms the Seven Principles of Unitarian Universalism. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly Disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

2. 2. My experience at First Universalist has helped me feel more unified with others. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly Disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

3. 3. My experience at First Universalist has helped challenge some of my assumptions. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly Disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

4. 4. My experience at First Universalist has provided comfort to me. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly Disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

5. 5. My experience at First Universalist has helped connect me to what I find holy. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly Disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly Agree

6. Please share any comments about why you rated these statements as you did, and/or about any recent changes you've noticed or experienced related to Visionary Goal #1.

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### Visionary Goal #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 in community.

Thinking about your recent experience, please rate how strongly you agree/disagree with the following statements:

7. 1. My experience at First Universalist has helped me understand UU religious traditions. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

8. 2. My experience with First Universalist has provided me with wisdom from many sources \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

9. 3. My experience with First Universalist helps call me to act with love. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

10. 4. My experience with First Universalist has helped me build meaningful relationships. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

11. Please share any comments about why you rated these statements as you did, and/or about any recent changes you've noticed or experienced related to Visionary Goal #2.

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### Visionary Goal #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.

Thinking about your recent experience, please rate how strongly you agree/disagree with the following statements:

12. 1. I feel welcomed at First Universalist. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

13. 2. I feel that First Universalist is racially inclusive. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

14. 3. I feel that First Universalist is culturally inclusive. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

15. 4. I feel that First Universalist is an intergenerational community. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

16. 5. I take opportunities at church to interact with people I do not know well. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

17. Has anything happened in the last 12 months that has made you or your family feel unwelcome?

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18. Please share any comments about why you rated these statements as you did, and/or about any recent changes you've noticed or experienced related to Visionary Goal #3.

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### Visionary Goal #4

First Universalist is a faith community that acts with humility, bravery and compassion to create a racially just and sustainable world.

Thinking about your recent experience, please rate how strongly you agree/disagree with the following statements:

19. 1. First Universalist is actively working to create a racially just world. \*

*Mark only one oval.*

1

2

3

4

5

Strongly disagree

☐
☐
☐
☐
☐

Strongly agree

20. 2. First Universalist is actively working to create a more sustainable world. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

21. 3. Because of my involvement with First Universalist, I have been more active in improving the world in the last 2 years. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

22. 4. I believe that other members of First Universalist act to improve the world. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

23. 5. I believe First Universalist's racial justice-based work has a positive impact on my community. \*

*Mark only one oval.*

	1	2	3	4	5	
Strongly disagree	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Strongly agree

24. Please share any comments about why you rated these statements as you did, and/or about any recent changes you've noticed or experienced related to Visionary Goal #4.

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About  
you

Please answer a few questions about yourself to help us better understand the variety of experiences in our congregation.

25. How long have you been attending First Universalist?

*Mark only one oval.*

☐ Less than one year

☐ 1 - 2 years

☐ 3 - 5 years

☐ 6 - 10 years

☐ 11 - 15 years

☐ 16 - 20 years

☐ 21 - 30 years

☐ 31 - 40 years

☐ more than 40 years

26. Do you currently have children/youth in Religious Education?

*Mark only one oval.*

☐ Yes

☐ No

27. What is/are your racial identity/ies?

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28. What is your gender identity?

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29. What is your sexual orientation?

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30. Do you identify as a person with a disability?

*Mark only one oval.*

☐ Yes

☐ No

31. What is your age?

*Mark only one oval.*

☐ 14 - 17

☐ 18 - 24

☐ 25 - 34

☐ 35 - 44

☐ 45 - 54

☐ 55 - 64

☐ 65 - 74

☐ 75 - 84

☐ 85 - 94

☐ 95 +

32. Please share any additional comments here:

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## 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.		

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### 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.

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#### 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.		

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## 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.	

## **First Universalist Church - Staff Vendor Policy**

### **Revised December, 2019**

We believe that the church expresses its values in the way it spends its resources. We are committed to being intentional with contracts for services and vendors. We believe that the process of evaluating and educating current vendors and the process of intentionally choosing new vendors based on our values will promote our consistent and conscious intention of moving our church community forward using an equity<sup>1</sup> lens with a particular eye toward race, gender, and sexual orientation. Therefore, the First Universalist Church staff commits to:

- Search out qualified vendors and contractors from traditionally under-represented groups, especially people of color and Native communities. Our goal is to have at least 15% of our contractors and vendors be from traditionally under-represented groups, especially people of color and Native communities. These current and potential vendors and contractors will have demonstrated that they hold the essential skills, licenses, and qualifications to provide the services needed.
- Maintain an active conversation with vendors by engaging them in a process of evaluation and education, requiring answers to a series of open-ended questions that address hiring practices, fair compensation, and commitment to racial equity. A response to these questions will be required from all vendors above a threshold of \$5000.00 annually. These questions will include:
  - Please tell us about the company's commitment to equity, particularly with respect to race, gender, and sexual orientation and how it is demonstrated through the company's actions.
    - Filling out the following table might be a helpful way to approach this question:

Question	Answer	Comments
Describe your company's owners with respect to their race, gender identity, and sexual orientation.		
Describe the demographics of your employees with		

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<sup>1</sup> By equity, we mean the set of policies, practices, conditions, and norms under which people of diverse identities, backgrounds, and experiences can expect to achieve similar outcomes in similar situations.

respect to race, gender identity, and sexual orientation.		
Describe the demographics of your managers with respect to race, gender identity, and sexual orientation.		

- What steps have been taken within the company to ensure equity in hiring and staff development? Who are your vendors/contractors, and do you apply a vendor policy with an equity lens to your contractors?
- What does the company do to promote economic growth in the community, especially in neighborhoods that typically experience increased rates of poverty and unemployment?
- Does your company pay a minimum living wage (\$15/hr) to all adult employees? Is there equity in compensation for staff? What benefits are provided and for whom?
- Does your company contribute to religious causes or organizations? Which ones? As a percentage of annual revenue, how much is contributed?
- Does your company contribute to political causes or organizations? Which ones? As a percentage of annual revenue, how much is contributed?
- If your company does make donations to other political or religious causes and/or organizations, how are those recipients identified and selected? And for what reason(s) does your company make those donations?

Staff will report to the Board of Trustees and the congregation annually in an effort to be accountable and transparent.

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Sample text for a letter to current/future contractors & vendors:

Dear \_\_\_\_\_,

We are looking forward to reviewing your bid for \_\_\_\_\_, and we wanted to let you know a little bit about our congregation and ask for your help in us getting to know your company better.

We believe that the church expresses its values in the way it spends its resources. We are committed to being intentional with contracts for services and vendors. We believe that the process of evaluating and educating current vendors and the process of intentionally choosing new vendors based on our values will promote our consistent and conscious intention of moving our church community forward using an equity<sup>2</sup> lens with a particular eye toward race, gender, and sexual orientation. Therefore, the First Universalist church staff commits to:

- Search out qualified vendors and contractors from traditionally under-represented groups, especially people of color and Native communities. Our goal is to have at least 15% of our contractors and vendors be from traditionally under-represented groups, especially people of color and Native communities. These current and potential vendors and contractors will have demonstrated that they hold the essential skills, licenses, and qualifications to provide the services needed.
- Maintain an active conversation with vendors by engaging them in a process of evaluation and education, requiring answers to a series of open-ended questions that address hiring practices, fair compensation, and commitment to equity. A response to these questions will be required from all vendors above a threshold of \$5000.00 annually and other vendors as deemed appropriate by staff.

To help us in this commitment, we request that your company address the following questions:

- Please tell us about the company's commitment to equity, particularly with respect to race, gender, and sexual orientation and how it is demonstrated through the company's actions.

Filling out the following table might be a helpful way to approach this question:

Question	Answer	Comments
Describe your company's owners with respect to their race, gender identity, and sexual orientation.		
Describe the		

---

<sup>2</sup> By equity, we mean the set of policies, practices, conditions, and norms under which people of diverse identities, backgrounds, and experiences can expect to achieve similar outcomes in similar situations.

demographics of your employees with respect to race, gender identity, and sexual orientation.		
Describe the demographics of your managers with respect to race, gender identity, and sexual orientation.		

- What steps have been taken within the company to ensure equity in hiring and staff development? Who are your vendors/contractors, and do you apply a vendor policy with an equity lens to your contractors?
- What does the company do to promote economic growth in the community, especially in neighborhoods that typically experience increased rates of poverty and unemployment?
- Does your company pay a minimum living wage (\$15/hr) to all adult employees? Is there equity in compensation for staff? What benefits are provided and for whom?
- Does your company contribute to religious causes or organizations? Which ones? As a percentage of annual revenue, how much is contributed?
- Does your company contribute to political causes or organizations? Which ones? As a percentage of annual revenue, how much is contributed?
- If your company does make donations to other political or religious causes and/or organizations, how are those recipients identified and selected? And for what reason(s) does your company make those donations?

Your bid will not be considered until these questions have been answered.

Thank you for taking the time to be in relationship with us, and for being a part of this community together.

In gratitude,