

First Universalist Church Board of Trustees  
June 18, 2020  
Board Packet

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**First Universalist Church of Minneapolis**  
**Board Meeting Agenda**  
**Thursday, June 18, 2020 6:30pm - 8:30pm**  
Meeting via Zoom<sup>1</sup>  
Meeting ID: 830 886 549

**I. Call to Order and Agenda Approval (6:35)**

- Lighting the Chalice(s) (All)  
*May this flame that burns before us light our way, informed by the wisdom of leaders gone before, and inspired by the trust that we have been given as stewards of this Church. May we have vision, compassion, and courage as we serve this congregation now and for the generations to come.*
- Reading and Reflection (Jen) (see Co-Senior Minister's Report)

**II. Consent Agenda (6:50)**

- **Approval** of May meeting minutes
- **Monitoring:** Acceptance of attendance and membership numbers
- **Monitoring:** Acceptance of staff and significant volunteer changes (see Co-Senior Minister's report)
- **Inform:** Co-Senior Minister's Report

**III. Fiduciary Responsibility (Jen and Keven) (6:50 – 7:10)**

- Review Financial conditions
- Capital Campaign/Building Update

**IV. Shared Leadership (7:10 – 7:30)**

- Racial Justice Update (Bryana, Richard, Ben)
- Congregational Survey Update (Christa)
- Healthy Congregations Update (Dan, Eric)
- Governance Roles (Bryana)

**5 MINUTE BREAK**

**V. Co-Senior Minister Evaluation (7:35 – 8:30)**

- Break Out groups then Report Out (7:35 – 8:00)
  - Considering Visionary Goals
  - Applying UUA Racial Justice rubric
- Choice points for recognition (8:00 – 8:30)

**VI. Adjourn (8:30)**

<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

**June 2020 Co-Senior Minister's Report**  
**Prepared June 11, 2020**  
**By Rev. Jen Crow**

**Opening Reading/Reflection**

Junauda Petrus reads her poem, Give the Police to the Grandmothers

<https://vimeo.com/426276718>

What imagination, creativity, possibility does this poem spark in you? Are there other areas of your life, of church life, of our community life - where perhaps you have felt stuck that could open up with some imagination?

**Monitoring Items**

**Staff and Volunteer Transitions: Please see the Liberal article from 6/11/20**

With the annual meeting and the end of our fiscal year approaching, I wanted to share some of the ways that things will be changing at church in July. You already know that our beloved Rev. Ruth MacKenzie will be retiring soon. She'll be preaching her final sermon on Sunday, June 21st, and we will say goodbye to her with a special worship service on Sunday, June 28th. Please take the time to send a note, write an email, or show up for one of Rev. Ruth's open zoom hours to say thank you and goodbye. Ruth's ministry has changed us for the better and we are so grateful for her time here with us.

On July 1st, we'll begin our new fiscal year and with our new operating budget, we will feel the impact of the global pandemic and the economic downturn on our congregation's staffing. We continue to plan for our building to be closed for the foreseeable future, though we stand ready to re-open should circumstances change for the better. With the anticipated loss of all rental income and an expected decrease in giving, we are adjusting to the reality of more than \$200,000 in lost income for the 2020-21 church year. Significant changes in income and significant changes in the needs of the church as we've moved to all on-line ministries mean that we need to make significant changes in staffing.

Beginning on July 1, we are instituting a reduction in our work force on staff. We are saying goodbye to Phyllis Stenerson as our part-time child care staff person, Lucia Webb, our Events Coordinator, and Richard Thomas, our Custodian. All three of these staff members have finished work with us and are being paid through the end of June. Richard and Lucia have both been laid off with severance. Each of these staff members are beloved and have served our congregation well. We are incredibly sad to see them go. I hope you will take a minute to write them a note or send an email of thanks to let them know what they have meant to you and say goodbye. Notes can be mailed to the

church, care of Jenn Stromberg, or emailed to Jenn at [jenns@firstuniv.org](mailto:jenns@firstuniv.org), and we will pass them on to Phyllis, Lucia, and Richard. In addition to these changes, with Rev. Ruth's retirement we have decided to replace her full-time position with a half-time staff member, beginning on August 1. We hope that this position will grow to be full-time as we recover from the impact of this pandemic.

Even with these losses, we are optimistic about the year ahead and steadfast in our commitments as a church. We are thrilled to be welcoming Julica Hermann de la Fuente to our staff on August 1st as our new Director of Anti-Racism and Anti-Oppression Ministries. Julica is known across the country as a leading anti-racism and anti-oppression consultant within Unitarian Universalism. In her role with us, she will provide dynamic leadership and oversight to First Universalist's racial justice initiatives and she will continue to serve as a coach, consultant, and curriculum developer for our broader Unitarian Universalist faith. In this first year of work together, Julica and her family will remain based out of their home in Michigan, with Julica traveling to be with us regularly once we are able to meet again in person. We are thrilled that Julica will join us and you can read more about her below.

These changes bring both sadness and anticipation. Let's take the time to be gentle with ourselves and each other, to recognize and celebrate the gifts that have been given, to say goodbye well - and then begin again in love.

Rev. Jen

### **Introducing Julica Hermann de la Fuente**



Hello First U! I am so excited to be joining your ministerial staff and community and to bring my passion for justice and education to our collective efforts. I come to you in the last steps of the journey towards ordination as a Unitarian Universalist minister, having recently completed an internship at the UU Ministers Association. I was born and raised in Mexico City, and found my commitment to anti-racism and anti-oppression when I came to college at the University of Michigan, and then stayed. In addition to a Lay Community Ministry degree from Meadville Lombard Theological School, I also hold a Master's in Social Work and all-but-dissertation doctorate in Sociology from the University of Michigan, and am certified as a master life coach. When not on shift for the resistance, you will find me making costumes for my two daughters Aliana and Sofia, enjoying the company of my husband Michael, looking for more excuses to frost fancy cakes, and reading optimistic sci-fi and fantasy possibilities of a just and equitable universe. I look forward to sharing more stories about my family and how my vocational path has helped me hone my commitment to justice and change, and to get to know your stories as well. I'm thrilled about the good work we will be doing together!

If you'd like to hear Julica talking about her perspectives on anti-racism and accountability, you can listen to this episode of the VUU (a weekly UU talk show hosted by the Church of the Larger Fellowship) from early 2018:

<https://www.questformeaning.org/vuu-latest/207-anti-racism-work-creating-accountability-uu-world-julica-hermann-de-la-fuente/>

**Staff Grievances:** No staff grievances to report.

**Staff Performance Evaluations:** All staff performance evaluations will be complete by June 30, 2020.

## **Financial Summary**

### **Statement of Activities**

We continue to be on track to end this challenging fiscal year with a balanced budget. Annual giving revenue has dropped off over the past few months and we remain on track to meet our year end projections. We are still several months behind in receiving rent from Southside. Expenses have been adjusted to ensure that we will end the year without a deficit. As a comparison, we were reporting a \$100,000 deficit at this point last year.

### **Balance Sheet**

Investment accounts are starting to rebound from a disastrous March.

### **Capital Campaign**

We continue to be on track to be able to fully fund the first phase of our construction project with gifts received by the end of September.



**First Universalist Church  
Board Meeting  
May 21, 2020 at 6:30 via Zoom**

Participating: Bryana French, Christa Anders, Eric Cooperstein, Daryn Woodsen, Jen Crow, Benjamin Miles, Dan Moriarty, Keven Ambrus, Kristin Siegesmund, Richard Spratt

**I. Check-In**

Reverend Crow shared a poem, *Rain, New Year's Eve*, by Maggie Smith and participants shared what they are learning to love during this pandemic.

**II. Consent Agenda**

- Approval of April meeting minutes
- Approval of May budget meeting minutes
- Approval: Nominating Committee Slate
- Monitoring: Acceptance of attendance and membership numbers
- Monitoring: Acceptance of staff and significant volunteer changes
- Monitoring: Staff Survey
- Monitoring: Staff and Volunteer Grievances (see Co-Senior Minister Report)
- Monitoring: Congregant Grievances
- Approval: Recommendation of Emerita status for Rev. Ruth MacKenzie
- Inform: Co-Senior Ministers Report
- Inform: Delegate for General Assembly

**APPROVED.**

**III. Fiduciary Responsibility**

***Reviewing Financial Plan***

This is the first month that we saw the impact of the pandemic – we saw a 10% reduction in total dollar value of pledge payments received. According to our projections, we are still going to end the year with a slight surplus and we will hopefully bring in a balanced budget.

In the proposed operating budget, we have reached our goal. This is a first! We have never met our goal this early in the year before the annual meeting. We really don't know what is going to happen so Rev. Crow made some other adjustments to be more on the safe side. Some personnel expenses have been reduced based on the recommendations from the UUA that we plan on virtual church through May of 2021. The budget has an increase to the UUA dues but even with that increase we are still well below where they recommend. This budget also includes a surplus that includes some flexibility for things that may come up throughout the year.



We are on track to reach our goal of \$2 million of cash in hand for the capital campaign by September 1, 2020. The PPP is tracked as a loan but if we track our expenses and comply with the terms, it will be forgiven.

The tenant, Southside Child Care Center, has now vacated the building as of May 1<sup>st</sup>. They are behind in rent and still owe three months worth of rent. We will pursue this money but also understand that the COVID pandemic has wreaked havoc on the child care system and that they may not have the money if their parents have not been able to pay or have not been sending their children to the child care center because they have been furloughed or out of work. Many landlords are finding themselves in the same situation between a rock and a hard place.

The board discussed the need to do some strategic long range financial planning. Given all of the craziness of the world right now, it did not make sense to prepare a three year budget. We will come back to three year planning when that seems appropriate.

The church has been working to get all of the staff to have everything they need to work remotely. They are investigating whether to have some updates to be able to film in the sanctuary. Also looking at a change in the worship platform and changes to the website/technology upgrades. There is money in the budget to recognize our new realities and the need to invest in technology infrastructure.

**Motion to approve the budget. APPROVED.**

### ***Building Update***

We are all moved out of the RE wing and atrium. Asbestos abatement started this week. All of the applications are in for the demolition permits. There is a giant dumpster and staff is doing lots of the work right now tearing down walls in the bathroom, removing cupboards and cabinets. They are picking colors for the carpet right now – very exciting!! Once the permits get approved, the construction crews can come on sight.

## **IV. Shared Leadership: Work Group Report Back**

Board members reported out on their small group work regarding the congregational survey, ministerial evaluation, Healthy Congregations work, and hiring practices and policies.

## **V. Annual Meeting Logistics**

Board members discussed the logistics of running the annual meeting in a virtual platform and approved the recommendations developed by Christa Anders with Jenn Stromberg and Liz Farmer. These recommendations are in alignment with the practices suggested by the UUA for holding virtual meetings that require voting. For more information see:

<https://www.uua.org/leadership/library/voting-online>

## **VI. Annual Meeting Preparation**

MEETING adjourned at 8:22 p.m.

<b>May Attendance</b>								
		<b>2020</b>						<b>2019</b>
<b>Adults</b>	<b>Wed.</b>	<b>10:00 AM</b>			<b>9:30 AM</b>	<b>10:00</b>	<b>11:15</b>	
1st week	65	496	561		248		165	413
2nd week	79	421	500		272		181	453
3rd week	102	509	611		199		272	471
4th week	175	520	695			210		210
5th week		1147	1147					
Monthly Total	421	3093	3514		719	210	618	1547
<b>Average for May</b>	<b>84</b>	<b>773</b>	<b>703</b>		<b>240</b>	<b>210</b>	<b>206</b>	<b>387</b>
<b>RE</b>								
1st week		157	157		182		89	271
2nd week		122	122		102		55	157
3rd week		24	24		68		58	126
4th week		6	6			39		39
5th week		7	7					
Monthly Total			316		352	39	202	593
<b>Average for May</b>			<b>79</b>		<b>117</b>	<b>39</b>	<b>67</b>	<b>148</b>
<b>Combined Average</b>			<b>782</b>		<b>357</b>	<b>249</b>	<b>273</b>	<b>535</b>

Numbers in 2020 RE rows represent attendance from all virtual meetings for youth and families, combined.

**2020 Statistical Report  
May 2020  
Board Meeting June 18, 2020**

**MEMORIAL SERVICES: 0**

**MARRIAGES/SERVICES OF COMMITMENT: 1**

Elisha and Mojca Huse Remskar, May 3

**MEMBERS FOR APPROVAL: 0**

**MEMBERS REINSTATED: 0**

**MEMBERS FOR REMOVAL: 4**

Muriel Avery, died in 2018 (we just got notice)

Meredith Falley, died March 23

John Hancock, died May 10

Marilyn Lamoreaux, attending church closer to home

**CHILDREN DEDICATED: 0**

	To Date	End of Year Totals			
<b>MEMBERS JOINED</b>	<b>2019-2020</b>	<b>2018-2019</b>	<b>2017-2018</b>	<b>2016-2017</b>	<b>2015-2016</b>
<b>(Fiscal Year)</b>	<b>21</b>	<b>81</b>	<b>66</b>	<b>109</b>	<b>54</b>
<b>TOTAL MEMBERS:</b>		<b>1058</b>	<b>1049</b>	<b>1,011</b>	<b>934</b>

**Total members as of the last meeting: 1068**

To be added: 0

To be removed: 4

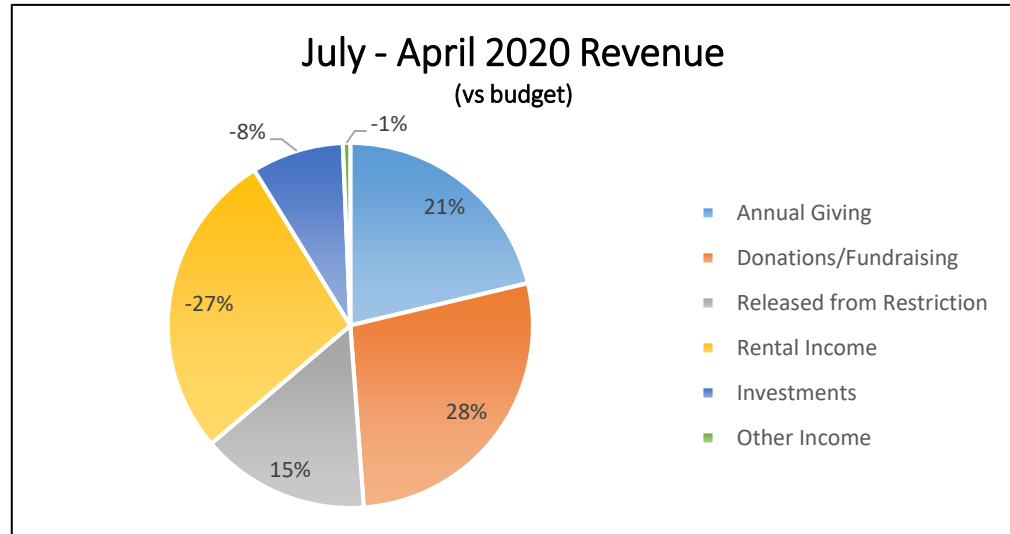
**TOTAL MEMBERS: 1064**

**First Universalist Church of Minneapolis**  
**Year to Date Performance**  
**July to April 2020**

**Revenue Summary**

Annual Giving	\$ 36,851.45
Donations/Fundraising	\$ 47,677.42
Released from Restriction	\$ 25,907.58
Rental Income	\$ (47,443.65)
Investments	\$ (14,133.48)
Other Income	\$ (1,131.96)
<b>Total Revenue Variance</b>	<b>\$ 47,727.36</b>

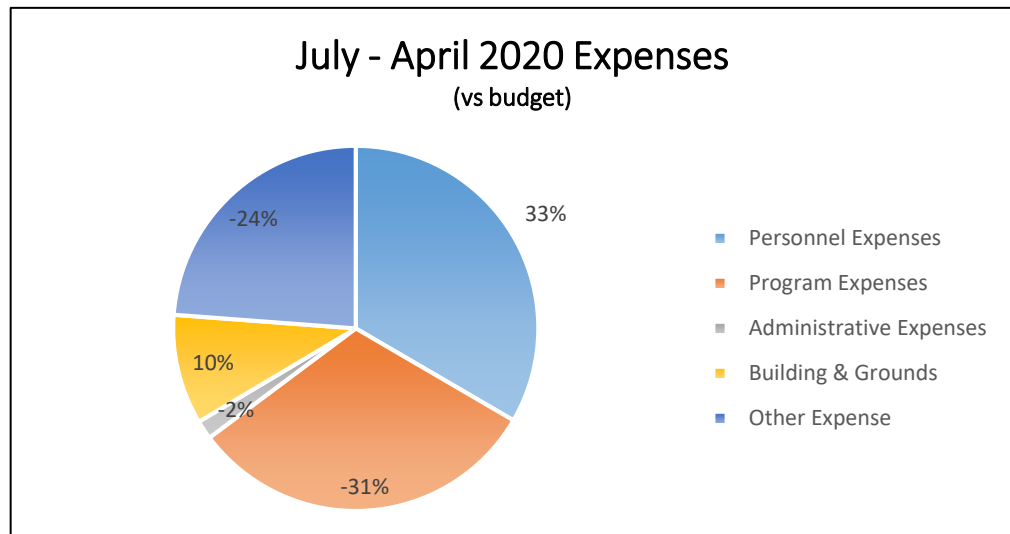
**Variance**



**Expense Summary**

Personnel Expenses	\$ 26,771.80
Program Expenses	\$ (25,156.12)
Administrative Expenses	\$ (1,338.12)
Building & Grounds	\$ 7,803.24
Other Expense	\$ (19,081.97)
<b>Total Expense Variance</b>	<b>\$ (11,001.17)</b>

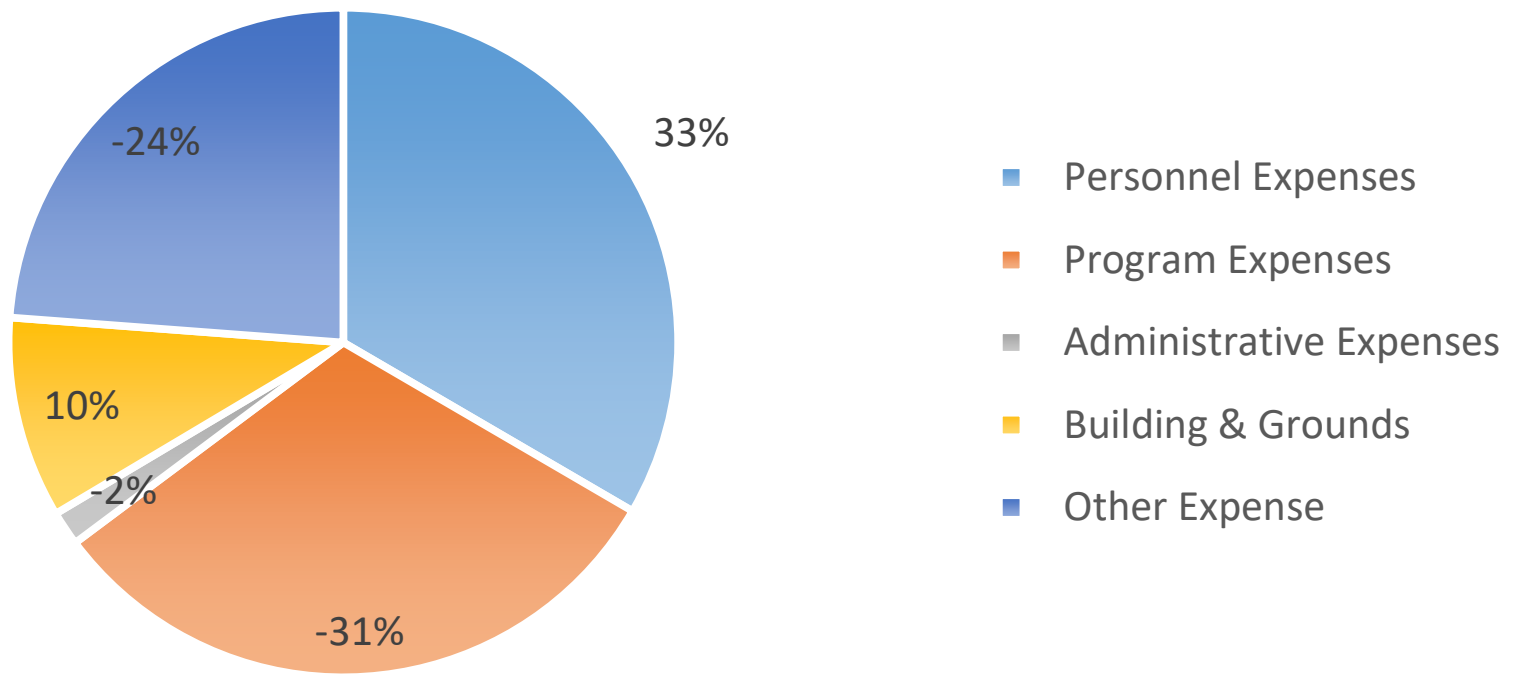
**Variance**



**Net Total**

**\$ 36,726.19**

## July - April 2020 Expenses (vs budget)



**First Universalist Church of Minneapolis**  
**Analysis of Revenues & Expenses**  
**July to April 2020**

<b>Headings and Account</b>	<b>Actual</b>	<b>Budget</b>	<b>Variance</b>
<b>Revenue</b>			
<b>Support</b>			
Annual Giving	\$ 971,024.83	\$ 934,173.38	\$ 36,851.45
Donations/Fundraising	\$ 227,448.81	\$ 179,771.39	\$ 47,677.42
Released from Restriction	\$ 79,407.58	\$ 53,500.00	\$ 25,907.58
<b>Support</b>	<b>\$ 1,277,881.22</b>	<b>\$ 1,167,444.77</b>	<b>\$ 110,436.45</b>
<b>Earned Revenue</b>			
Rental Income	\$ 68,973.05	\$ 116,416.70	\$ (47,443.65)
Investments	\$ 1,074.82	\$ 15,208.30	\$ (14,133.48)
Other Income	\$ 1,645.54	\$ 2,777.50	\$ (1,131.96)
<b>Earned Revenue</b>	<b>\$ 71,693.41</b>	<b>\$ 134,402.50</b>	<b>\$ (62,709.09)</b>
<b>Revenue</b>	<b>\$ 1,349,574.63</b>	<b>\$ 1,301,847.27</b>	<b>\$ 47,727.36</b>
<b>Expenses</b>			
Personnel Expenses	\$ 929,739.70	\$ 956,511.50	\$ 26,771.80
Program Expenses	\$ 84,549.81	\$ 59,393.69	\$ (25,156.12)
Administrative Expenses	\$ 71,946.42	\$ 70,608.30	\$ (1,338.12)
Building & Grounds	\$ 113,890.18	\$ 121,693.42	\$ 7,803.24
Other Expense	\$ 110,547.07	\$ 91,465.10	\$ (19,081.97)
<b>Expenses</b>	<b>\$ 1,310,673.18</b>	<b>\$ 1,299,672.01</b>	<b>\$ (11,001.17)</b>
<b>Net Total</b>	<b>\$ 38,901.45</b>	<b>\$ 2,175.26</b>	<b>\$ 36,726.19</b>

**First Universalist Church of Minneapolis**  
**Balance Sheet**  
**April 2020**

Headings and Account	Current Balance (This Year)		Change in Balance
Assets			
Current Assets			
Cash & Cash Equivalents			
Cash	\$	954,449.36	\$ 126,463.46
Total Cash & Cash Equivalents	\$	954,449.36	\$ 126,463.46
Investments			
Schwab - Church Operating	\$	870,929.54	\$ 23,279.00
Schwab - Church Reserve	\$	333,740.86	\$ 19,122.77
Schwab - Don Carter & Mary Carter	\$	79,458.99	\$ 6,432.65
Schwab - Legacy Fund	\$	834,738.58	\$ 60,342.78
Schwab - Temporarily Restricted	\$	122,624.26	\$ 9,838.87
Thrivent Mutual Funds	\$	24,955.42	\$ 1,076.25
Total Investments	\$	2,266,447.65	\$ 120,092.32
Cash & Cash Equiv - Foundation			
Sunrise Bank - Foundation	\$	11,275.50	\$ -
Total Cash & Cash Equiv - Foundation	\$	11,275.50	\$ -
Investments - Foundation			
Schwab - Foundation	\$	1,536,494.51	\$ 119,097.10
Total Investments - Foundation	\$	1,536,494.51	\$ 119,097.10
Total Current Assets		\$ 4,768,667.02	\$ 365,652.88
Other Current Assets			
Other Current Assets			
Prepaid Expenses	\$	20,369.05	\$ 17,513.82
Total Other Current Assets	\$	20,369.05	\$ 17,513.82
Total Other Current Assets		\$ 20,369.05	\$ 17,513.82
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		\$ 6,533,374.40	\$ 383,166.70



Liabilities & Equity			
<b>Current Liabilities</b>			
<b>Accounts Payable</b>			
Accounts Payable	\$ 88,335.88		\$ 53,842.98
<b>Total Accounts Payable</b>	<b>\$ 88,335.88</b>		<b>\$ 53,842.98</b>
<b>Total Current Liabilities</b>		<b>\$ 88,335.88</b>	<b>\$ 53,842.98</b>
<b>Other Current Liabilities</b>			
<b>Other Current Liabilities</b>			
Benefits Payable	\$ 1,337.13		\$ (166.86)
Accrued Expenses	\$ 15,024.47		\$ -
Deferred Revenue	\$ 41,259.73		\$ 4,120.00
Misc Other Liabilities	\$ 13,000.00		\$ -
<b>Total Other Current Liabilities</b>	<b>\$ 70,621.33</b>		<b>\$ 3,953.14</b>
<b>Total Other Current Liabilities</b>		<b>\$ 70,621.33</b>	<b>\$ 3,953.14</b>
<b>Total Liabilities &amp; Equity</b>		<b>\$ 158,957.21</b>	<b>\$ 57,796.12</b>
<b>Fund Principal and Excess Cash Received</b>			
<b>Fund Principal</b>			
<b>Undesignated Net Assets/Equity</b>			
Church Equity	\$ 1,043,924.60		\$ 50,703.83
<b>Total Undesignated Net Assets/Equity</b>	<b>\$ 1,043,924.60</b>		<b>\$ 50,703.83</b>
<b>Board Restricted Net Assets</b>			
Contingency Reserve	\$ 271,109.21		\$ -
Legacy Fund	\$ 837,023.89		\$ -
Memorials	\$ 6,881.88		\$ -
<b>Total Board Restricted Net Assets</b>	<b>\$ 1,115,014.98</b>		<b>\$ -</b>
<b>Temp Restricted Net Assets</b>			
Capital Campaign Fund	\$ 1,806,080.39		\$ (20,849.58)
Cummins Ministerial Fund	\$ 236,718.48		\$ -
Foundation	\$ 1,607,470.88		\$ -
Miscellaneous Funds	\$ 7,308.38		\$ (29,854.25)
<b>Total Temp Restricted Net Assets</b>	<b>\$ 3,657,578.13</b>		<b>\$ (50,703.83)</b>
<b>Permanently Restricted</b>			
Don Carter Endowment	\$ 50,000.00		\$ -
M E Carter Endowment	\$ 14,000.00		\$ -
<b>Total Permanently Restricted</b>	<b>\$ 64,000.00</b>		<b>\$ -</b>
<b>Total Fund Principal</b>	<b>\$ 5,880,517.71</b>		<b>\$ (0.00)</b>
<b>Excess Cash Received</b>			
Excess Cash Received	\$ 493,899.48		\$ 325,370.58
<b>Total Excess Cash Received</b>	<b>\$ 493,899.48</b>		<b>\$ 325,370.58</b>
<b>Total Fund Principal and Excess Cash Received</b>		<b>\$ 6,374,417.19</b>	<b>\$ 325,370.58</b>
<b>Total Liabilities &amp; Equity, Fund Principal, &amp; Restricted Funds</b>		<b>\$ 6,533,374.40</b>	<b>\$ 383,166.70</b>

**First Universalist Church of Minneapolis**  
**Analysis of Revenues & Expenses - Capital Campaign**  
**May 2020**

<b>Division</b>	<b>YTD Budget</b>	<b>YTD Actual</b>	<b>Total Variance</b>
<b>Revenue</b>			
Donations	\$ 3,113,011.54	\$ 3,354,194.56	\$ 241,183.02
<b>Initial Project Expenses</b>			
<b>Expense</b>			
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
<b>Total Initial Project Expenses</b>	<b>\$ 295,000.00</b>	<b>\$ 291,719.09</b>	<b>\$ 3,280.91</b>
<b>Remaining Budget</b>	<b>\$ 2,818,011.54</b>	<b>\$ 3,062,475.47</b>	<b>\$ 237,902.11</b>
<b>Project Expenses</b>			
Debt Retirement	\$ 649,151.38	\$ 649,151.38	\$ -
Staff Salaries	\$ 79,783.53	\$ 79,783.53	\$ -
Tuckpointing	\$ 122,000.00	\$ 122,000.00	\$ -
Flannery	\$ 285,000.00	\$ -	\$ 285,000.00
Misc. Construction	\$ 86,441.66	\$ 43,293.26	\$ 43,148.40
Owner Supplied Systems	\$ 70,000.00	\$ -	\$ 70,000.00
WPI	\$ 45,700.00	\$ 54,581.34	\$ (8,881.34)
Miller Dunwiddie	\$ 231,847.57	\$ 211,065.11	\$ 20,782.46
Other Expenses	\$ 71,100.00	\$ 3,100.00	\$ -
	<b>\$ 1,641,024.14</b>	<b>\$ 1,162,974.62</b>	<b>\$ 410,049.52</b>
<b>Net Income</b>	<b>\$ 1,176,987.40</b>	<b>\$ 1,899,500.85</b>	<b>\$ 654,513.45</b>

\*Initial Forecasted Revenue for September 2020: \$3,405,095.26



## 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.

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	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.

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	<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.

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