

First Universalist Church Board of Trustees  
February 16, 2023  
Board Packet

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**First Universalist Church of Minneapolis**  
**Board of Trustees Meeting**  
**February 16, 2023; 6:30-9:00**  
**First Universalist Church**  
**Room 209 & [Zoom](#) (*multiplatform*)**

**I. Welcome (6:30-6:35)**

- a. Call to Order and Agenda Approval
- b. Lighting the Chalice
  - i. *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.*

**II. Executive Session (6:35 ~ 7:00)**

- a. Somatic Practice - Grounding
- b. Spiritual Community Building - Rev. Arif

**III. Consent Agenda**

- a. *Approval* of January meeting minutes
- b. *Monitoring*: Acceptance of attendance and membership numbers and trends
- c. *Monitoring*: Acceptance of staff and significant volunteer changes
- d. *Monitoring*: Staff Work Plan Review

**IV. Change Team Updates (7:00 ~ 7:20)**

- a. Updates from Last Meeting
- b. Review Preliminary Findings

**V. Visionary Goals Process (7:20 ~ 7:45)**

- a. Congregational Framing Session Reflection/Feedback
- b. Congregational Engagement Timeline - Updates
- c. Facilitation Training and Congregational Sessions Updates

**VI. Commitment To Beloved Community (Formerly Covenant Development Team) (7:45 ~ 8:00)**

- a. Approve the Commitment Team Charge
- b. Request for Board Representation on the Commitment Team

**BREAK - 5 mins**

**V. Fiduciary Responsibilities (8:10 ~ 8:30)**

- a. Quarter 2 Financial Review
- b. Fundraising update

**VI. Nominating Committee (8:30 ~ 8:55)**

- a. Request Board Liaison
- b. Ideas Recruiting for Potential Candidates
- c. Future Thinking: In regards to term fulfillment, are the bylaws about terms adaptive enough to meet the reality of people's lives?

**VII. Gratitudes (8:55-9:00)**

**VIII. Adjourn - 9:00**

# February Associate Minister's Report

Prepared by Rev. Arif Mamdani

February 16, 2023

## Spiritual Grounding

Grounding ourselves in the Universalist spirit of love and hope asks us to practice love, to practice hope. Korean labor activist and political prisoner Park Nohae wrote these words on hope and people. Translated by Helen Kim, I offer them as our grounding text this evening:

People who speak of hope  
are themselves hope.  
People who are looking for a new way  
are themselves a new way.  
In good people already exists a good world.  
It is within people.  
It begins with people.  
Again, people are the only hope.

Park Nohae, Korean labor activist and political prisoner, translated by Helen Kim.

Where did you notice hope this month?

In which people?

When you read/hear the line “people who speak of hope / are themselves hope” what do you notice in your body? What does that say to you about hope?

Where did you notice hope at church?

## Monitoring Items

### Attendance and Membership Trends

Please see attached information.

## Staff and Volunteer Transitions:

There have been no staff or volunteer transitions this month.

## Treatment of Staff

Alignment of Salary Ranges to Job Descriptions - the report mentioned by Rev. Crow in last month's report will wait for her return and will be shared at the March meeting.

## Staff Work Plan Review

The yearly work plan is in progress in all areas that staff identified at the start of the year. Our top-line goals were to:

1. Complete our Visionary Goals process
2. Support, Create, and Encourage Experiences of connection, belonging, liberation, and joy

With those are our overarching goals for the year, highlights of our progress to date include:

- *Offer 3 seasons of connection (Fall, Winter/Spring, Summer), each with multiple opportunities for congregants to engage in spiritual practice, justice-making, religious education, small groups, and community building.* We are 2/3rds of the way through the year, and have nurtured opportunities for connection through a broad variety of groups, circles, and gatherings in Fall, Winter/Spring, and later this year we'll be release the Summer Program Guide to complete this goal. Our Wednesday night community dinners have been particularly successful and well received with more than 100 people (roughly) attending each month. These multigenerational gatherings are an effort that emerged as we were returning from the pandemic, we consider them a significant success. Of particular note here is that these are an effort led by Lauren Wyeth and Jim Poulter, with significant support from Hirut Hedge and Liz Farmer.
- *Support the Change Team in leading a congregational self-assessment using the Racial Justice Rubric for Congregations by December 2022.* The Change Team has reported on this already, but from a staff perspective, we feel this has been a strong area of collaboration as well as listening to what was emerging and pivoting as needed given the feedback received.
- *Assessments of music ministries and online and multi-platform opportunities.* Both of these efforts are completed. Rev. Ashley Harness' report on her work to assess multi-platform opportunities is [included below](#). Dr. Glen Thomas Rideout will share his report on the music ministry listening sessions later this month.

- *Development of a congregational covenant.* This work is well underway. We'll be formalizing the team's charge at tonight's meeting and they'll be requesting a board liaison to help support this work moving forward.

## Unplanned work that has emerged

Life is emergent and we try to hold our work plan lightly so that as events arise, we're able to shift and pivot to meet the moment as it is. Such was this case this year as conflict arose in the church in different ways. While these conflicts have been painful for many different people in many different ways, it was heartening to be reminded, in Rev. David Pyle's report on the conflict related to our choir director's dismissal, that conflict is a normal and expected part of culture change efforts within a congregation. The circles that we held related to Rev. Pyle's report on the choir conflict, and those related to our decision to take down an art exhibit have been challenging, but we believe are moving in good ways. We still have a lot to learn about how to work with conflict in faith-rooted and skillful ways, but even in this year, it's clear that we are learning and growing in our skill and understanding in working with conflict. We are looking forward to working with Rev. Pyle on a Right Relations Team training later in the spring, and are anticipating with pleasure the work of the Commitments to Beloved Community Team that we'll be hearing from at the board meeting. Collectively learning to engage conflict well is one of the key disciplines that we will need to build in order to create a pluralist, multicultural, democratic church (and society) where all can flourish, so we are heartened by our progress to date and know that we'll have the opportunity to practice more in the future.

## Monthly Financial Review - December 2022

Our December profit and loss statement continues to follow the same narrative reported in previous senior minister reports. Expenses continue to track on budget and revenues continue to fall short of meeting the ambitious goal passed at last year's annual meeting.

At this point in the year, expenses are exceeding revenues by \$190,000 at the end of December 31st, approximately \$200,000 more than was budgeted. Excluding revenue released from restriction that has an equal offsetting expense:

- Total revenue has a negative \$183k variance to budget
- Annual Giving donations for the month of December were down \$50,000 in comparison to a 5 year rolling average.
- Close the Gap efforts raised nearly \$110k in additional Annual Giving revenue. As of December 31, \$22k has been collected. We anticipate the remaining balance to be collected in the coming months.
- Donations and fundraising make up for an additional \$23.5k of negative variability with rental and other income accounting for the remaining \$19k.

- Expenditures continue to track on budget across most categories.
- Personnel expenses are under budget due to a few vacant positions.
- Administrative expenses are under budget largely due to subscribing to, and upgrading, our software to support a multiplatform church.
- We conservatively expect to end the year with a \$137k deficit.
- We are hopeful that with our strategic fundraising efforts for the remainder of the year, and with no unforeseen large expenses, that we may be able to improve on this projection and end up somewhere between the best and expected case scenarios.

# Board Report: Digital Ministry Survey & Interview Findings

Rev. Ashley Harness-Jimenez

February 13th, 2023

## The Big Picture:

What does it mean to be and do church in a late-pandemic context that has been transformed into a multiplatform world? This is the question at the heart of the survey and interviews I've completed within First Universalist in the last couple months. This is also the question that congregations of all kinds and clergy of all traditions are talking about. I've also had many conversations with my peers in digital ministry across the country. There are so many nuances and so many possible technologies and tactics. The sky is truly the limit. So where do we start?

We start with our people. Our people named that they are longing for deeper connection to each other and tangible, embodied connection to their church. They want this in many forms: in-person, online, across multiple platforms, at all different times of day and night, in all different locations. What we need is ministry that is multi-platform, multi-location, and multi-synchronous (or available whenever people have time) to meet the longings of ALL our people. The work of this assistant minister position, then, becomes to ask the question of each program area, each team and each potential event, "How can we make this opportunity available and deeply connecting for ALL our people who need/want it?" And then we build the ministry capacity to meet that need using all the available "multi" (platform, location, synchronous) resources.

Let me give you an example: When we were planning our first ever multiplatform church retreat, we had choices. As gathering expert Priya Parker names, a multiplatform event is not actually one event, but three: 1) in-person 2) online and 3) the ways the first two come together ([see more brilliance from her on this topic here](#)). For the online participants, we wondered if we should use some of the new zoom technology for collaboration to build digital altars together, mirroring the activity happening in person. This is the "sexy," digital ministry possibility. But then we looked at the participant list. When we looked at who was registered, we realized that many of those beloveds would struggle with adding technology to the zoom experience. What they needed was "church in a box" to arrive by mail so they could participate fully with tactile items over zoom, the same tactile items we would use in the sanctuary space for rituals. In the end, we built powerful online rituals and blessings together by using a combination of tools and technologies based on the needs of our people in the moment. We also made limited content available to those who could not attend live via video, in collaboration with the keynote speaker. And we brought the online participants into the in-person

space by broadcasting them on screen for a shared moment of chalice lighting (including each online participant lighting their own candle on screen). In doing so, we created a people-centered, multi-platform, multi-location, multi-synchronous church event. My hope is that this was a test run for a new way of thinking and planning together as a whole church.

As we move forward, I will be moving in two primary directions. First, I will be bringing the survey and interview data as well as this new “multi” (platform, location, synchronous) framework to each of the staff program and lay-lead teams so we can think together about how this model can inform our ministry planning and what experiments we can run together in the coming months. Second, I will pursue the ideas that emerged that we have capacity to bring to life ASAP. For example, we are already offering pastoral support during worship through the chat to increase interaction. In addition, multiple people interviewed expressed a desire for shorter, more easily accessible online content they can engage at any time from anywhere. My hope is to quickly make elements of our weekly worship recordings available in smaller pieces for easy, on-demand access (eg., sermon podcast, weekly meditation, music, storytime) on YouTube.

Finally, as the Visionary Goals process unfolds, I expect the direction for our collective church energies will crystalize. There are surely many who are longing for the kind of community and spiritual fuel we are already offering who have yet to walk through the door in-person or engage us online. My hope is that expanding our “multi” (platform, location, synchronous) offerings will allow more people to meet those longings in time.

Church, from the beginning, has been a series of experiments in building Beloved Community. “Multi” (platform, location, synchronous) is merely another incarnation of this thousands of years old experiment made to meet and minister to people in this moment. I welcome your questions, your thought- partnership and your support as we continue this collective experiment of church together. Please see the detailed survey and interview highlights below.

### **Digital Ministry Survey Results - Highlights:**

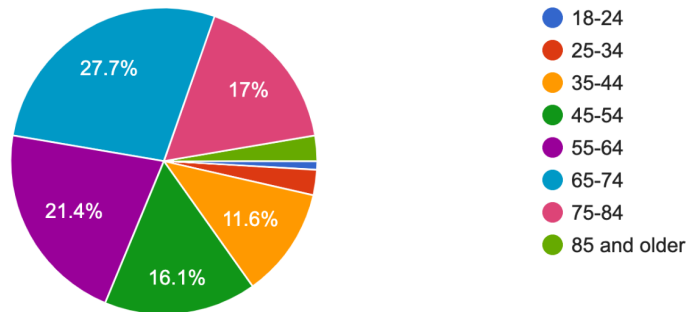
**113 people responded to the survey**

**Age breakdown:**



### How old are you?

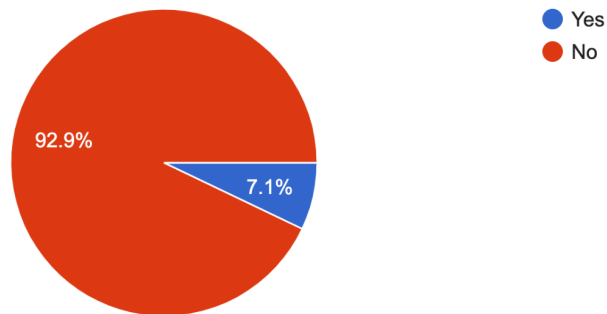
112 responses



### Race breakdown:

#### Do you identify as BIPOC (Black, Indigenous, Person of Color) or Multiracial?

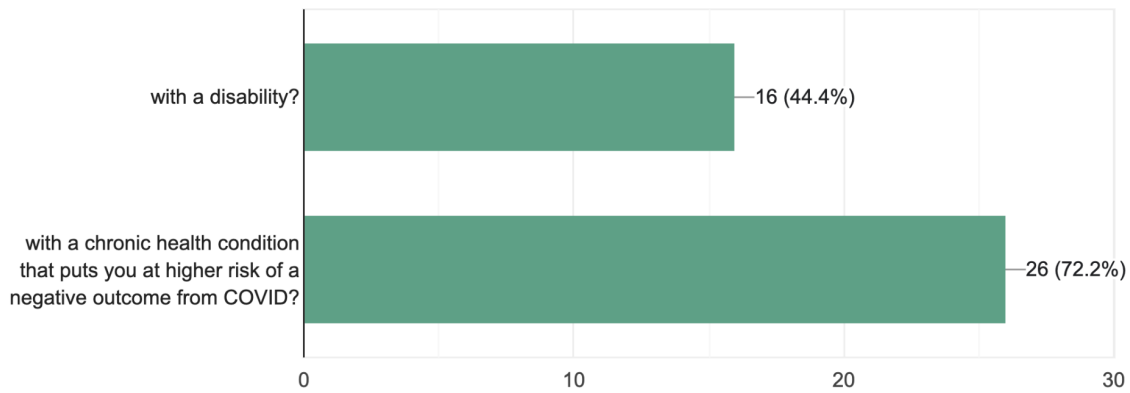
113 responses



### Disability/Immunocompromised breakdown:

Do you identify as a person:

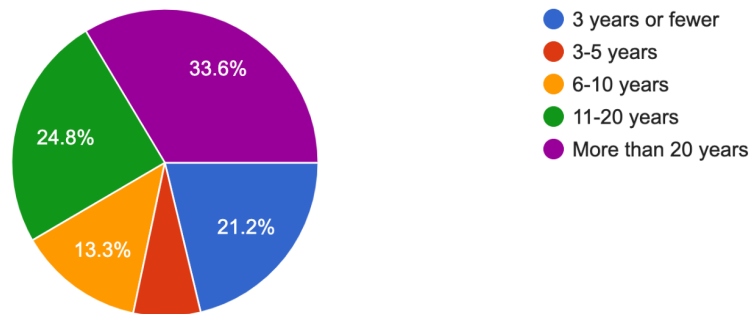
36 responses



### Longevity breakdown:

How long have you been a part of First Universalist Church?

113 responses

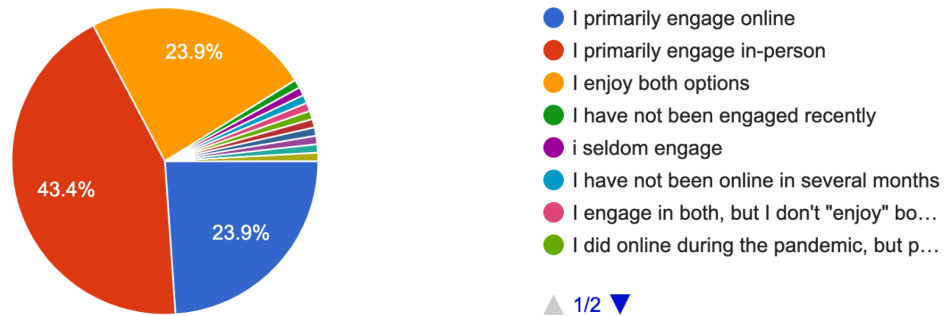


### What or who first brought you to First Universalist Church?

- Brought by a friend/partner
- RE/OWL - "a community in which to raise our kids"
- Grew up UU/Moved to Minneapolis looking for a UU church
- Social justice activity/reputation - seeing First U leaders at George Floyd Sq, through shared asylum work, or another community partner

### How do you engage in Sunday morning worship at this stage of the pandemic?

113 responses



### Tell us why you chose the above option for how you worship with us?

- **In-person:**
  - "I love the in person experience and the music! I do too much of my job in Zoom meetings so I enjoy the in person experience and meeting friends after the service."
  - "I can't touch or hold or look into someone's eyes, or feel their energy online."
  - RE/OWL
- **Online:**
  - COVID/health/mobility challenges
  - Weather
  - Convenience (of variable timing and location for engagement)

### How do you prefer to engage in church meetings and/or small groups at this stage of the pandemic?

112 responses



**Tell us why you chose the above option for your preference to engage meetings/small groups?**

- The people who chose online:
  - Covid
  - Convenience (particularly in cold, at night, during the week, or while parenting)
  - “On zoom, small groups are engaging in a way that Sunday service is not”
  - Like to engage when not in town or live far away
- In-person:
  - Zoom fatigue (particularly for those who work remotely)
  - Missing full-bodied connection
  - Wanting social time generally in life
  - Easier to meet people for the first time in person
- Depends:
  - “Depends what the issues is. Personal sharing is better in person”
  - “Online meetings are convenient since I live about 30 minutes away from church. I prefer in-person for small groups”

If you have been joining us in person recently, do you anticipate your preference for online or in person engagement to shift as we move into the winter and likely higher COVID transmission rates?

103 responses



**Tell us why you chose the above option for your winter participation plans?**

- People who chose online:
  - Most frequent reason to attend online is related to weather/driving conditions
  - Next most frequent reason to attend online is about COVID exposure

and/or mobility issues in winter

- In-person:
  - RE only exists in person for families
  - Person-to-person, embodied connection

### **What is the best part of online worship for you?**

- Convenience - both in terms of not having to be in a particular location AND not having to engage at a particular time (by far the most common answer)
- COVID safety
- Connection while out of state
- The ability to multitask (with exercise, parenting, housework)
- Interaction: "I like the chatbox, being able to see people's joys/concerns"; "It is well-done and I enjoy observing"
- Sermon & music both mentioned most as content highlight

### **What is the least fulfilling aspect of online worship for you?**

- Unidirectional/Observational quality: "Lack of engagement [in worship] shifts the focus from 'all of us together' to 'people on stage.'"
- Inability to interact in community/casual social time
- Singing (can't experience singing together in the same embodied way)

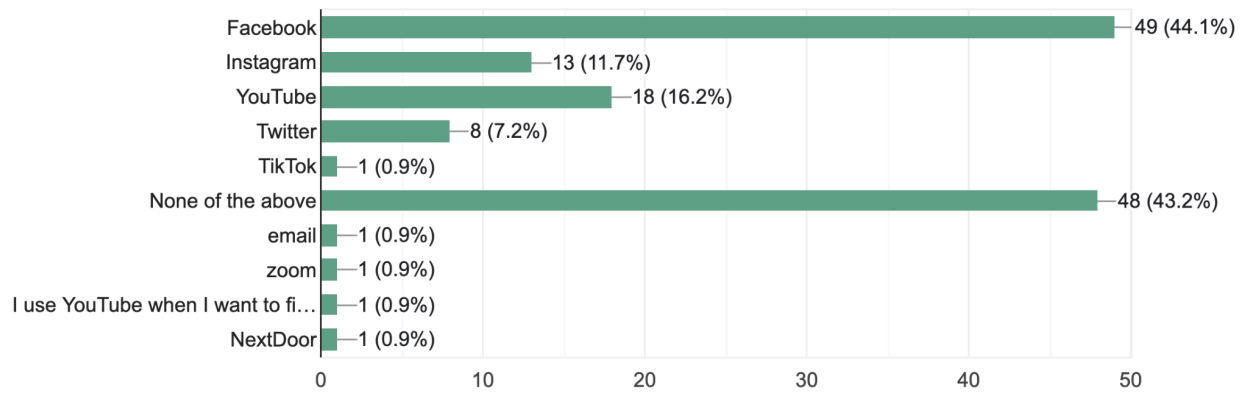
### **If you have worshiped in person on Sundays in the past, what about that experience do you miss in the online worship experience?**

- "Face to face connection"/"Hugs"/"heart connection"/"immersion"/"the energy of being together"
- "Spontaneous contact"/"running into friends"/"meeting new people"
- "Being IN an experience is usually better than watching and listening to an experience."
- "The feeling of singing with others"

### **Social Media usage:**

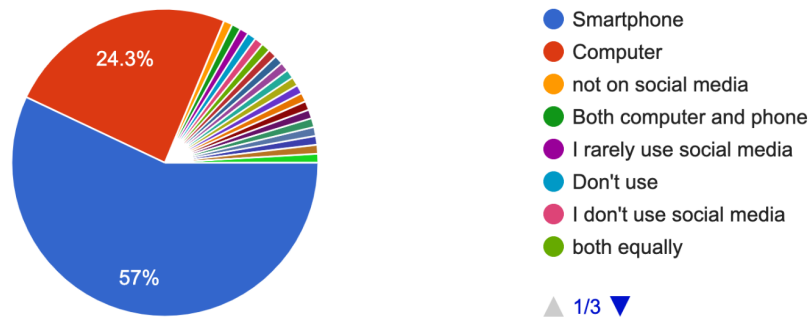
### Which of the following platforms do you use daily?

111 responses



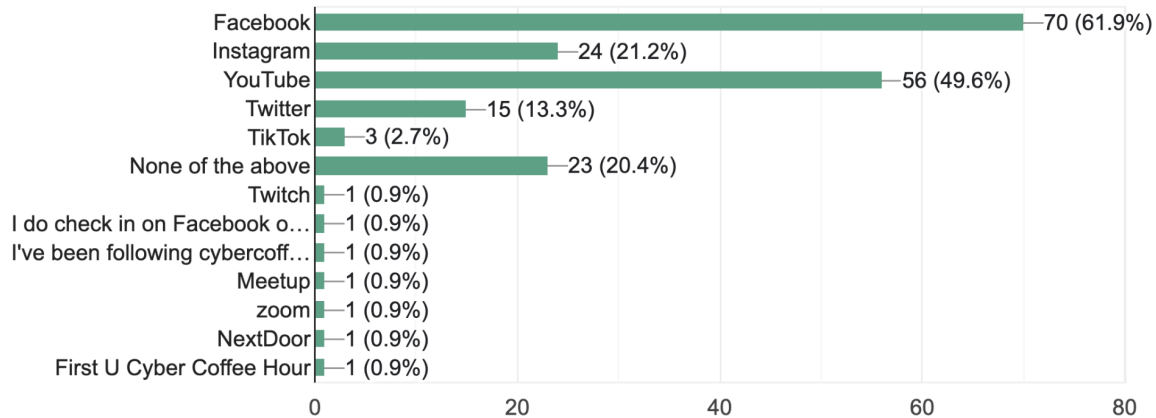
### Do you use social media mostly on your:

107 responses



### Which of the following platforms do you use at least once per week?

113 responses



### How would you describe the purpose of your social media use?

- Connection - to family and friends (by far the biggest use)
- Fun - entertainment, local events, memes
- Activism/Professional use

### Digital Ministry One-to-One Interview highlights:

I interviewed 12 congregants, all of whom were recommended by staff members. Some were regular online attendees. Others had particular professional experiences that would offer unique perspectives on our technology use. Others had marginalized life experiences staff wanted to understand better as it relates to their experience of digital ministry.

### **Key findings/themes that emerged:**

- Hunger for more small group worship and community-building online opportunities (both affinity-focused and general)
- Multi-platform small groups are challenging for intimate content, but work for “business” meetings
- Online Sunday morning worship is a lifeline for those who are immunocompromised, bringing worship to homes.
- Longing for more connectivity for congregants to each other (across the in-person/zoom divide and also in just the online space) in Sunday worship.
- Online Sunday morning worship provides a way of connecting with worship that limits microaggressions experienced by BIPOC congregants.

- There is SO MUCH MORE technology we can be using to support congregants living with disability to have a more accessible and just experience, both online and in person (eg. better closed captioning, ways to feed braille translation options, best formats for screen reading technology).
- For older participants: Interest in more online social justice action opportunities, or at least pathways to them with partners.
- For younger participants: Value added by church to activism is the spiritual expansion/development, not the organizing opportunity itself.
- Requests to make more content available and easily accessible in shorter chunks in asynchronous manner - sermons, music, meditations, etc.



**First Universalist Church of Minneapolis**  
**Board of Trustees Meeting**  
**January 19, 2023; 6:30-9:00**  
**First Universalist Church**  
**Cummins Room & [Zoom](#) (*multiplatform*)**

**Minute Notes in Yellow Color and Underline**

**I. Welcome (6:30-6:35)**

Present: Daryn, Rebecca, Cathay, Sarah, Bry, Jeff, Jen, Arif. Several congregants

- a. Call to Order and Agenda Approval
- b. Lighting the Chalice
  - i. *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.*

**II. Executive Session (6:35 ~ 7:00)**

- a. Somatic Practice - Grounding
- b. Spiritual Community Building - Rev. Jen

Agenda was revised: no Spiritual Community Building - Rev. Jen

**III. Consent Agenda**

- a. *Approval* of November meeting minutes
- b. *Monitoring*: Acceptance of attendance and membership numbers and trends
- c. *Monitoring*: Acceptance of staff and significant volunteer changes
- d. *Monitoring*: Treatment of Staff - Alignment of Salary Ranges to Job Descriptions
- e. *Monitoring*: Review physical plant for capital improvements
- f. *For Review*: Covenant Development Team Creation

**IV. Change Team Updates (7:00 ~ 7:05)**

- a. Updates from Last Meeting

Meeting 2 weeks ago: RJ rubric small groups - RJET, Environmental Justice, BIPOC youth and families, staff

Collecting the data - qualitative and quantitative rating. 16 rubric items

Provide report to board at the February meetings

Recruiting new members in spring

**V. Powerful Question, Visionary Goals Process (7:05 ~ 7:45)**

- a. Engagement Videos

Board engagement videos coming

- b. Congregational Engagement Timeline
- c. Congregational Framing Session

Next phase - framing session with congregation: introduce the Powerful Questions

2/2 - 6:30 - 8pm - will be recorded. Hope for at least 50 congregants. How many board members? At least 6 board members plan to attend

Board members engage in 3 hour facilitating conversation sessions - board member will pay attention to what is happening in the room. Congregation small groups in workshop: tell me a story. How is the church changing lives ten years from now?

5-6 large sessions - 30 participants each

Send Laura an email with each board member availability for 3 hour large session dates - 2-3 dates Feb 9 - March 15

Saturday February 18 facilitator training

April board retreat: data from workshops, convene data analysis team. Full day or 2 half day retreats. Share themes that emerge from the workshops. First session - Identify key themes for visionary goals. Second session- determine the visionary goals.

Board email conversation to follow: possibilities for recruitment of new members of Shepherd team

#### **VI. Charge for Covenant Development Team (7:45 ~ 8:00)**

- a. Consent to Approve the Covenant Team Charge

Article in Liberal defines covenant team - team has met and looking for a charge from the board and who are they accountable to. The team wants to broaden the membership

The covenant team is different from the right relations team. The covenant team will put a covenant up for congregation approval

Vote: Board approved that the covenant team will be a committee of the board. Next step - reach out to the covenant team for them to create a draft charge.

#### **VII. Final Report from Rev. David Pyle (8:00 ~ 8:20)**

- a. Create a Right Relations Team (charge from the Board)

Vote: Board approves that a Right Relations Team will be a committee of the board.

- b. How to Share with Congregation
  - i. Statement from Board
  - ii. Statement from Rev. Jen

Sharing the report with the congregation:

Staff leadership team hopes that the report is available to read and have a conversation about the report. Link to the report will be in the Liberal. Invitation to join a conversation circle starting next week. 6-8 opportunities to process the report in small groups in the community - facilitated conversation and notes will be provided back to the staff.

From staff, there will not be any added statement to go with delivery of the board report. The focus will be sharing and listening sessions.

Next step- board will meet to discuss a potential collective message to share with the congregation. Board will create a Google Doc to develop a reflection on David Pyle's report.

### **BREAK - 5 mins**

Martha Bird graciously brought the board a sweet potato pie from Sweet Potato Comfort Pie. She attended a MLK event and nominated First U to be a pie recipient. The board is so grateful to Martha!

### **VIII. Art Installation Updates (8:25 ~ 8:45)**

- a. Middle Bucket - Roles & Responsibilities

Circle process was held this past Sunday. The circle had confidentiality. This circle will determine next steps. Board members present in this meeting - Jeff, Daryn and Bry.

### **V. Fiduciary Responsibilities (8:45 ~ 9:15)**

- a. October and November Financial Review

Financial statements project a deficit

- b. End of Year Financial Review
- c. Fundraising update

Fundraising has got \$95K to close the deficit gap

- d. Request from Foundation Board to move Foundation assets from current investment firm to UUA Common Endowment Fund <https://uucef.org/about/>

The Study Group assess the Foundation Board request

- e. Creation of focused study group to provide recommendation to the board about values aligned investing

Rebecca will be on the Study Group. Daryn and Cathy are interested

**VI. Upcoming Announcements (9:15 ~ 9:25)**

- a. Nominating Committee

NC has reached out to each board member

- b. State of the Church - February 12, 2023 1 pm - ZOOM

Daryn, Rebecca, Ben, Matt, Arif

**VII. Gratitudes (9:25-9:30)**

**VIII. Adjourn - 9:30**

**Next Steps**

Rebecca will reach out for financial study group

2/2 - 6:30 - 8pm - will be recorded. Hope for at least 50 congregants. How many board members? At least 6 board members plan to attend

Send Laura an email with each board member availability for 3 hour large session dates - 2-3 dates Feb 9 - March 15

Saturday February 18 facilitator training

April board retreat:

Art circle will determine next steps

Vote: Board approved that the covenant team will be a committee of the board. Next step - reach out to the covenant team for them to create a draft charge.

Vote: Board approves that a Right Relations Team will be a committee of the board.

**Statistical Report for January 2023**

**Board Meeting February 16, 2023**

**MEMORIAL SERVICES: 0**

**MARRIAGES/SERVICES OF COMMITMENT: 0**

**MEMBERS FOR APPROVAL: 0**

**MEMBERS REINSTATED: 0**

**MEMBERS FOR REMOVAL: 1**

**JoAnn Berkenkamp**

**CHILDREN DEDICATED: 0**

**Total members as of the last meeting: 1069**

**To be added: 0**

**To be removed: 1**

**TOTAL MEMBERS: 1068**

**End of Year Totals**

Fiscal Year	2021-22	2020-21	2019-20	2018-19	2017-18
New Members Joined	15	18	21	81	66
Total Membership	1060	1058	1061	1058	1049

# January Attendance

	2023					2022					
Worship	Sun. 9a Sanctuary	Sun. 11a* Sanctuary	Sun. 11a Webinar	YouTube Views	Totals	Wed. 7p	Sun. 9a	Sun. 11a	Webinar	YouTube Views	Totals
1st week	*	69	53	129	251	38	-	-	205	-	243
2nd week	124	149	61	45	318	41	?	?	143	107	291
3rd week	87	136	68	144	367	37	-	-	176	127	340
4th week	96	129	58	143	368	31	-	-	187	166	384
5th week	96	152	61	164	473	-	50	47	138	119	354
Monthly Total	<b>403</b>	<b>635</b>	<b>301</b>	<b>461</b>	<b>1777</b>	<b>147</b>	<b>50</b>	<b>47</b>	<b>849</b>	<b>519</b>	<b>1612</b>
Average for January	<b>101</b>	<b>127</b>	<b>60</b>	<b>92</b>	<b>355</b>	<b>37</b>			<b>170</b>	<b>130</b>	<b>322</b>
<b>RE</b>					<b>9 &amp; 11 RE</b>						
1st week					-	-	-	-			
2nd week					160		60	51			111
3rd week					68	-	-	-			-
4th week					168	-	-	-			-
5th week					67						
Monthly RE Total					<b>463</b>						
Average for January					<b>116</b>						
Combined Average					<b>471</b>						

\*Youtube view recorded Feb. 7 at 3 p.m.

Due to incomplete attendance for worship and RE, combined averages and/or totals were left blank this month, as they would not communicate an accurate overall picture.

In-person worship attendance not collected on Jan. 9 (2nd week)

Online only worship Jan. 16 and 23 due to Omicron variant; no RE

YouTube views recorded Feb. 14, 2022 at 4 p.m.



# Summary Results from Anti-Racism Rubric

First Universalist Church - Fall 2022



## Change Team Charge

The charge of the Change Team, a Committee of the Board of Trustees, shall be to support the congregation in its journey to live into its values and commitment to being a racially just community.

The Change Team will support the board and other staff and volunteer teams as they build sustainable systems that center the liberation and joy of BIPOC folx, by reviewing and ensuring accountability to the congregation's racial justice commitment as articulated in the mission, visionary goals, and racial justice resolution.

The Change Team will lead this work by setting clear standards for inclusion of racial justice at all levels of the organization via use of a racial justice rubric.





# Perspectives Represented

41 participants

6 sessions:

- Staff
- Racial Justice Education Leaders
- Faithful Action Team
- Environmental Justice Leaders
- BIPOC Members & Families
- Open Invitation

Roles & Identities	#
Staff	13
Lay Leader	9
Member	25
RE Parent	6
LGBTQ+	13
BIPOC / Multiracial	7
White	31
Youth	1
Young Adult	5
Elder	18



## Overall Insights

- We have work to do across all 16 areas of the rubric, but limited capacity to focus on all areas so we need to identify those where there is some passion and momentum for change.
- Ongoing opportunities for church members and friends to see the rubric and explore what it means to be an anti-racist, anti-oppressive, multicultural (ARAOMC) church are helpful.
- There is skepticism and exhaustion at all of the attempts to understand where we are at as a church, particularly among BIPOC members, and a strong desire to see action.
- Much of the work before us is about changing culture, which requires more than policies and shifts to practices/behaviors, which is more of what is reflected in the rubric.

## Areas of most progress

*In these areas, average responses were 6 or higher and there was not a notable difference between White and BIPOC responses. While there is still work to be done in these areas, there is a strong foundation from which to build and momentum is moving in the right direction.*

- Mission & Purpose; Leadership
  - Messaging from leadership and ministerial staff is strong.
  - A lot of the congregation is still not fully connecting with core of racial justice.
  - What does anti-racist leadership (and followership) look like in practice?
- Partnerships & Solidarity with Community
  - We have built relationships; some shared activist work is actively discussed and negotiated; we do a good job encouraging people to influence systems outside this church.
  - We still have few mutually fulfilling partnerships with other faith communities.
  - What does it take to cultivate cultural and spiritual humility?



## Areas of least progress

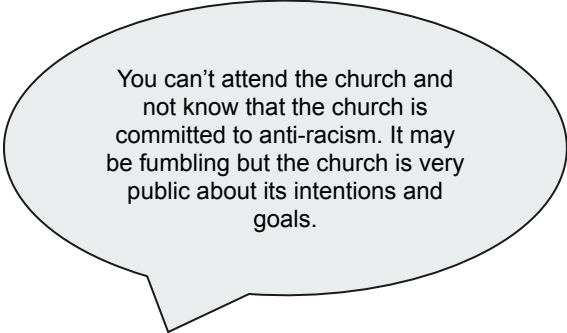
*These three areas had the lowest average overall and little difference in average between White and BIPOC respondents.*

- Communication Style
  - White ways of speaking and negotiating pervade with little recognition of power and privilege.
  - Perceived lack of communication and transparency from Board, Change Team and staff leave people feeling in the dark about what is happening, like they are not getting the full picture.
  - What are light and humorous ways we can call attention to the ways in which white supremacy culture pervades our communications and interactions?
- Membership & Welcoming
  - Policies and practices align with ARAOMC church (e.g., waiver for financial contribution requirement for members; culturally responsive training for greeters, etc.)
  - Many BIPOC folks still do not feel safe; microaggressions and macroaggressions are pervasive rarely called out; diversity still seen as an end rather than joy and liberation of BIPOC UUs, BIPOC a sense of belonging
  - What does anti-racist welcome, inclusion, and membership actually look and feel like in practice?



## Areas of least progress, cont.

- Public Witness and Prophetic Voice
  - Lot of training has been done; imperative from pulpit & public commitment to anti-racism
  - Still a small group of committed folks who show up
  - What will it take to move from “pet projects or issues” to “this belongs to all of us”?



You can't attend the church and not know that the church is committed to anti-racism. It may be fumbling but the church is very public about its intentions and goals.



## Areas of disconnect

- Worship
- Theology
- Faith Formation (adults & children/youth)
- Small Group Ministry
- Human Resources
- Membership & Welcoming\*

*In these areas, BIPOC responses were at least half a point lower than White responses, indicating that there may be misalignment with perception of where we are by White respondents and the lived experience of BIPOC respondents.*



## Areas of disconnect, cont.

“We said we want to see ourselves represented on the chancel and they listened and hired more diverse worship leaders. That shift makes me hopeful but it hasn’t landed or been integrated (amongst the congregation)”

- Worship
  - BIPOC Worship leaders are making a difference; worship is expanding beyond Sundays and beyond traditional ways of doing things.
  - Resistance to changes in worship practices are strong, with some loud voices drowning out the rest.
  - What would it look and feel like to move beyond tokenism to true prioritization of BIPOC joy and liberation in worship? Could we have BIPOC affinity spaces for worship?

“We can’t say we believe something and not back it up with how we behave.”

- Theology
  - We say all of the “right” things.
  - We are still centering the needs of White people in our anti-racism journey.
  - What would it take to move beyond words to action?



## Areas of disconnect, cont.

- Faith Formation for Adults
  - Leaning into community of communities model - full and complete blueprint for how to build multicultural, multiracial, multigenerational community where there is respect for and room for all.
  - Not all are in agreement about the larger mission and vision of the congregation and that is what holds it together.
  - What will it take to move beyond a sense of zero sum, where prioritizing the joy and liberation of BIPOC members moves us towards joy and liberation for all?
- Small Group Ministry
  - Integrated into faith formation; BLUU spaces and BIPOC spaces have been helpful.
  - Microaggressions in integrated small groups sessions persist.
  - How do we continue to offer race-based affinity groups while also building a multicultural space where microaggressions, power imbalances and white supremacist patterns are acknowledged and interrupted?





## Areas of disconnect, cont.

- Faith Formation for Children & Youth\*
  - Hiring of BIPOC and youth staff creates more of a sense of safety for BIPOC youth and parents.
  - BIPOC youth and parents often feel unsafe or unsupported in majority white spaces, microraggressions occur regularly
  - Not enough antiracism integrated across curriculum
  - Can we better train RE leaders in anti-racism? Is there an opportunity for BIPOC child and youth affinity spaces?
- Human Resources
  - Strong policies, hiring practices have led to more BIPOC staff
  - BIPOC staff are not given additional PD as a matter of policy; policies are not implemented the same across the board because of a lack of transparency and accountability.
  - What can we learn from exit interviews of BIPOC staff who have left about how to do better? How can we build a more transparent accountability structure for hiring and HR?



## Next Steps

- Board of Trustees to review feedback and discuss possible action steps, particularly as they relate to crafting Visionary Goals
- Change Team to share feedback with congregation, key staff and groups to identify action items
- Change Team looking to expand capacity to support this work going forward

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**Thank you!**

## First Universalist Church of Minneapolis Income Statement

	Actual	Budget	Annual Budget		Fiscal Year End Projection		
	07/01/2022 to 12/31/2022	07/01/2022 to 12/31/2022	Variance	07/01/2022 to 06/30/2023	Best	Expected	Worst
<b>Revenues</b>							
<b>Support</b>							
Annual Giving	\$553,084.42	\$693,900.00	(\$140,815.58)	\$1,282,500.00	\$1,261,834.42	\$1,228,084.42	\$1,160,584.42
Donations/Fundraising	\$47,668.43	\$71,184.92	(\$23,516.49)	\$230,800.00	\$218,418.43	\$195,418.43	\$155,718.43
Revenue Released from Restriction	\$366,266.30	\$21,000.00	\$345,266.30	\$42,000.00	\$366,266.30	\$366,266.30	\$366,266.30
<b>Total Support</b>	<b>\$967,019.15</b>	<b>\$786,084.92</b>	<b>\$180,934.23</b>	<b>\$1,555,300.00</b>	<b>\$1,846,519.15</b>	<b>\$1,789,769.15</b>	<b>\$1,682,569.15</b>
<b>Earned Revenue</b>							
Service/Rental Income	\$41,516.40	\$58,499.92	(\$16,983.52)	\$117,000.00	\$114,941.38	\$95,884.38	\$84,184.38
Investment Income	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Other Income	\$3,661.48	\$5,749.98	(\$2,088.50)	\$11,500.00	\$11,500.00	\$9,411.48	\$9,411.48
<b>Total Earned Revenue</b>	<b>\$45,177.88</b>	<b>\$64,249.90</b>	<b>(\$19,072.02)</b>	<b>\$128,500.00</b>	<b>\$126,441.38</b>	<b>\$105,295.86</b>	<b>\$93,595.86</b>
<b>Total Revenues</b>	<b>\$1,012,197.03</b>	<b>\$850,334.82</b>	<b>\$161,862.21</b>	<b>\$1,683,800.00</b>	<b>\$1,972,960.53</b>	<b>\$1,895,065.01</b>	<b>\$1,776,165.01</b>
<b>Expenses</b>							
Personnel Expenses	\$616,566.44	\$658,364.39	\$41,797.95	\$1,316,730.00	\$1,238,905.63	\$1,270,046.27	\$1,301,186.91
Administrative Expenses	\$87,169.63	\$64,448.09	(\$22,721.54)	\$128,696.77	\$1,238,905.63	\$1,270,046.27	\$1,301,186.91
Program Expenses	\$44,707.47	\$41,780.19	(\$2,927.28)	\$82,500.00	\$72,032.47	\$74,367.47	\$81,475.98
Building & Grounds	\$393,009.81	\$61,906.83	(\$331,102.98)	\$123,350.00	\$459,702.94	\$464,802.94	\$474,702.94
Other Expenses	\$62,147.04	\$3,749.98	(\$58,397.06)	\$7,500.00	\$62,147.04	\$62,147.04	\$62,147.04
<b>Total Expenses</b>	<b>\$1,203,600.39</b>	<b>\$830,249.48</b>	<b>(\$373,350.91)</b>	<b>\$1,658,776.77</b>	<b>\$1,992,821.80</b>	<b>\$2,033,846.07</b>	<b>\$2,085,333.85</b>
<b>Investment Activity</b>							
Unrealized Losses	(\$319.33)	(\$13,250.02)	\$12,930.69	(\$26,500.00)	(\$319.33)	(\$319.33)	(\$319.33)
Dividends & Interest	\$1,072.11	\$1,249.98	(\$177.87)	\$2,500.00	\$2,172.11	\$2,072.11	\$1,972.11
Realized Gains	\$62.45	\$0.00	\$62.45	\$0.00	\$62.45	\$62.45	\$62.45
Unrealized Gains	(\$165.80)	\$0.00	(\$165.80)	\$0.00	(\$165.80)	(\$165.80)	(\$165.80)
<b>Total Investment Activity</b>	<b>\$649.43</b>	<b>(\$12,000.04)</b>	<b>\$12,649.47</b>	<b>(\$24,000.00)</b>	<b>\$1,749.43</b>	<b>\$1,649.43</b>	<b>\$1,549.43</b>
<b>NET SURPLUS/(DEFICIT)</b>	<b>(\$190,753.93)</b>	<b>\$8,085.30</b>	<b>(\$198,839.23)</b>	<b>\$1,023.23</b>	<b>(\$18,111.84)</b>	<b>(\$137,131.63)</b>	<b>(\$307,619.41)</b>

# First Universalist Church of Minneapolis

## Balance Sheet

	Actual As of <u>12/31/2022</u>
<b>Assets</b>	
<b>Current Assets</b>	
Cash	\$45,395.46
Investments	\$3,410,110.54
Accounts Receivable	\$8,225.80
Other Current Assets	\$43,634.26
<b>Total Current Assets</b>	<u><b>\$3,507,366.06</b></u>
<b>Non-Current Assets</b>	
Fixed Assets	\$3,780,071.78
<b>Total Non- Current Assets</b>	<u><b>\$3,780,071.78</b></u>
<b>Total Assets</b>	<u><u><b>\$7,287,437.84</b></u></u>
<b>Liabilities and Fund Balance</b>	
<b>Liabilities</b>	
<b>Current Liabilities</b>	
Accounts Payable	\$87,198.83
Benefits Payable	\$27,244.80
Other Current Liabilities	\$7,168.94
<b>Total Current Liabilities</b>	<u><b>\$121,612.57</b></u>
<b>Long Term Liabilities</b>	
Loan Payable	\$1,606,994.59
Interfund Transfer	\$0.00
<b>Total Long Term Liabilities</b>	<u><b>\$1,606,994.59</b></u>
<b>Total Liabilities</b>	<u><b>\$1,728,607.16</b></u>
<b>Fund Balance</b>	
<b>Unrestricted Net Assets</b>	<b>\$3,978,946.14</b>
<b>Donor Restricted Net Assets</b>	<b>\$1,579,884.54</b>
<b>Total Fund Balance</b>	<u><b>\$5,558,830.68</b></u>
<b>Total Liabilities and Fund Balance</b>	<u><u><b>\$7,287,437.84</b></u></u>

**First Universalist Church of Minneapolis**  
**Analysis of Revenues & Expenses - Capital Campaign**  
**December 2022**

	Project to Date Actual	Total Budget	Project to Date Variance
<b>Revenues</b>			
<b>Revenues</b>			
Donations	\$ 4,847,788.24	\$ 5,158,077.07	\$ (310,288.83)
Construction Loan	\$ 1,606,994.59	\$ 2,000,000.00	\$ (393,005.41)
<b>Total Revenues</b>	<b>\$ 6,454,782.83</b>	<b>\$ 7,158,077.07</b>	<b>\$ (703,294.24)</b>
<b>Expenses</b>			
<b>Initial Launch/Fundraising</b>			
Architectural Pre-Work	\$ 2,000.00	\$ 27,000.00	\$ 25,000.00
Consultants	\$ 229,030.00	\$ 230,000.00	\$ 970.00
Launch Event	\$ 52,689.09	\$ 30,000.00	\$ (22,689.09)
Printing/Supplies	\$ 8,000.00	\$ 8,000.00	\$ -
<b>Total Initial Launch/Fundraising Expenses</b>	<b>\$ 291,719.09</b>	<b>\$ 295,000.00</b>	<b>\$ 3,280.91</b>
<b>Miscellaneous Projects</b>			
Architect Fee	\$ 166,795.87	\$ 166,795.87	\$ -
Debt Retirement	\$ 649,151.38	\$ 649,151.38	\$ -
Merchant Services	\$ 4,108.96	\$ 5,000.00	\$ 891.04
Misc. Capital Expenditures	\$ 104,839.17	\$ 79,555.75	\$ (25,283.42)
Staff Salaries	\$ 54,100.43	\$ 95,000.00	\$ 40,899.57
Tuckpointing	\$ 122,000.00	\$ 122,000.00	\$ -
Loan Principal	\$ -	\$ 2,000,000.00	\$ 2,000,000.00
Loan Interest	\$ 43,889.67	\$ 120,000.00	\$ 76,110.33
Contingency	\$ -	\$ -	\$ -
<b>Total Miscellaneous Projects Expenses</b>	<b>\$ 1,144,885.48</b>	<b>\$ 3,237,503.00</b>	<b>\$ 2,092,617.52</b>
<b>Phase 1</b>			
Architect Fee	\$ 134,872.70	\$ 134,372.00	\$ (500.70)
Flannery	\$ 1,459,726.11	\$ 1,521,669.00	\$ 61,942.89
Flannery Permits	\$ 19,614.13	\$ 19,614.00	\$ (0.13)
Misc. Consultants	\$ 44,012.00	\$ 14,381.00	\$ (29,631.00)
Misc. Construction	\$ 11,628.50	\$ 53,559.00	\$ 41,930.50
Owners Representative	\$ 87,654.10	\$ 87,654.00	\$ (0.10)
Owner Supplied Systems	\$ 151,936.45	\$ 97,248.00	\$ (54,688.45)
<b>Total Phase 1 Project Expenses</b>	<b>\$ 1,909,443.99</b>	<b>\$ 1,928,497.00</b>	<b>\$ 19,053.01</b>
<b>Phase 2</b>			
Architect Fee	\$ 134,775.04	\$ -	\$ (134,775.04)
Flannery	\$ 1,688,869.37	\$ 1,750,000.00	\$ 61,130.63
Flannery Permits	\$ -	\$ -	\$ -
Misc. Construction	\$ 55,871.45	\$ -	\$ (55,871.45)
Misc. Consultants	\$ 43,938.75	\$ 265,000.00	\$ 221,061.25
Owner Representative	\$ 94,630.00	\$ -	\$ (94,630.00)
Owner Supplied Systems	\$ 263,426.74	\$ 140,000.00	\$ (123,426.74)
Solar Panels	\$ 44,500.00	\$ 105,000.00	\$ 60,500.00
Contingency	\$ -	\$ 240,000.00	\$ 240,000.00
<b>Total Phase 2 Project Expenses</b>	<b>\$ 2,326,011.35</b>	<b>\$ 2,500,000.00</b>	<b>\$ 173,988.65</b>
<b>Total Expenses</b>	<b>\$ 5,672,059.91</b>	<b>\$ 7,961,000.00</b>	<b>\$ 2,288,940.09</b>
<b>Net Total</b>	<b>\$ 782,722.92</b>	<b>\$ (802,922.93)</b>	