

First Universalist Church Board of Trustees
January 19, 2023
Board Packet

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First Universalist Church of Minneapolis
Board of Trustees Meeting
January 19, 2023; 6:30-9:00
First Universalist Church
Cummins Room & [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. 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

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

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

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

- a. Consent to Approve the Covenant Team Charge

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

- a. Create a Right Relations Team (charge from the Board)
- b. How to Share with Congregation
 - i. Statement from Board
 - ii. Statement from Rev. Jen

BREAK - 5 mins

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

- a. Middle Bucket - Roles & Responsibilities

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

- a. October and November Financial Review
- b. End of Year Financial Review
- c. Fundraising update
- d. Request from Foundation Board to move Foundation assets from current investment firm to UUA Common Endowment Fund <https://uucef.org/about/>
- e. Creation of focused study group to provide recommendation to the board about values aligned investing

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

- a. Nominating Committee
- b. State of the Church - February 12, 2023

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

VIII. Adjourn - 9:30

Senior Minister Board Report
Prepared by Rev. Jen Crow
January 17, 2023

Spiritual Grounding

As we ground ourselves in the Universalist spirit of love and hope and the practices of giving, receiving and growing together - let us begin with the word "love." Author and activist, bell hooks ([bell hooks, Pathbreaking Black Feminist, Dies at 69 - The New York Times](#)), talks about love this way in her book, *all about love*:

*Imagine how much easier it would be for us to learn how to love if we began with a shared definition. The word "love" is most often defined as a noun, yet all the more astute theorists of love acknowledge that we would all love better if we used it as a verb. I spent years searching for a meaningful definition of the word "love," and was deeply relieved when I found one in psychiatrist M. Scott Peck's classic self-help book *The Road Less Traveled*, first published in 1978. Echoing the work of Erich Fromm, he defines love as "the will to extend one's self for the purpose of nurturing one's own or another's spiritual growth." Explaining further, he continues, "Love is as love does. Love is an act of will-namely, both an intention and an action. Will also implies choice. We do not have to love. We choose to love."*

Love is a verb.

Love is a choice

Love is about growth.

Love is as love does.

Each week we say:

Love is the spirit of this church

And service is its law.

This is our great covenant

To dwell together in peace

To seek the truth in love

And to help one another.

How have you experienced the bell hooks kind of love this week? How have you given it?

Bringing to mind a specific moment at church this past few weeks, how have you experienced love in action? How have you brought love? How might you have brought more love?

Monitoring Items

Attendance and Membership Trends

Please see attached information.

Staff and Volunteer Transitions:

There have been no staff or volunteer transitions this month. The hiring process continues for an Audio Visual Coordinator who will oversee livestreaming of all worship services and events.

Treatment of Staff - Alignment of Salary Ranges to Job Descriptions

In the fall of 2022, the UUA introduced a new Congregational Salary Program in order to live more fully into UU values and better meet the needs of today's congregations.

Highlights include:

- A greater emphasis on process and values
- A new structure for our Recommended Salary Ranges, featuring six job levels (instead of 26 job titles) and four congregational size profiles (replacing the previous six size categories)

This salary program exists to equip congregations for excellence as employers, assist congregations in attracting and retaining quality staff, and aid congregational decision-making. First Universalist has been using the UUA salary recommendations as guideposts for years, and we will transition to this new salary structure this year. We are grateful for the changes the UUA has made so that we might better promote equity, transparency, and economic justice, align with consistent expectations across our Association of Congregations, and do a better job of leveling the playing field among employees in establishing their terms of employment (as some people have built-in advantages due to cultural biases). To learn more about the [new UUA Salary Program](#) and [Unconscious Bias in Compensation](#), please visit the links included here.

A review of current salaries and how they align with the new recommendations will be provided to the staff and Board as we begin our budgeting process for the next fiscal year in March.

Review Physical Plant for Capital Improvements

A comprehensive review of our physical plant has taken place over the course of the past 3+ years, and the vast majority of anticipated - and current - needs have been

attended to. We continue to look ahead to a needed elevator update within the next 4 years at a current cost of roughly \$200,000.

Monthly Financial Review - November 2022

Our November income and expense statement continues to tell the story of a year of investment in critical staffing needs as we emerge from the worst of the Covid-19 pandemic. The 2022-23 fiscal year operating budget was passed by the Board and Congregation with an awareness that it was likely that contrary to the previous years, this would be a deficit year. We set an ambitious fundraising goal, with a total increase in annual giving of more than 10%.

As expected at this point in the year, expenses are exceeding income by \$156,000 at the end of November 30th, approximately \$100,000 more than was budgeted. Excluding revenue released from restriction that has an equal offsetting expense:

- Total revenue has a negative \$112k variance to budget
- Annual Giving revenue makes up \$85k of that negative variability.
- Donations make up \$10k of negative variability
- Service/Rental/Other Income represents the remaining \$17k negative variability.
- Expenditures are largely tracking on budget with a couple of exceptions.
- Personnel expenses are under budget due to a few vacant positions.
- Other Expenses are well over budget. This is the result of mis-allocation of staff travel and professional expenses here, rather than in personnel expenses. This will be corrected and adjusted.

Fundraising Update

Since the beginning of December 2022, staff and Board members have been calling and meeting one-on-one with members of the congregation to share our current fiscal year financial situation and invite additional gifts to this year's operating budget. We've also invited the entire congregation to make additional gifts through an end-of-year mailing and email. These invitations have resulted in generous financial support of the congregation and its mission, and we are grateful to share that as of this writing, an additional \$95,000 has been pledged in annual operating fund gifts for the 2022-23 fiscal year to offset the \$200,000 deficit that was projected at the end of the 1st quarter.

End of Year Financial Review

At the last board meeting in November, I shared that our financial consultant and the UUA recommendations agree that an annual year end financial review is unnecessary given the internal financial controls that we have in place. The UUA recommends that congregations engage in a cash management review at least once every 3 years. [UUA Recommendation](#)

Investment Policies

[First Universalist Foundation Investment Policy](#)

[First Universalist Legacy Fund Policies](#)

The Church's investment policies guide the management of our investments, totalling more than \$3 million. The investment policies, last updated in 2011 and 2013, focus efforts on preserving and increasing capital, and set parameters on how these funds can be invested. Current investment policies limit Socially Responsible Investing to 25-30% of our total portfolio, and specifically limit the percentage of funds that can be invested in equities, bonds, and other alternatives. For several years, the Board and staff have discussed the possibility of working to bring our investing strategies into greater alignment with our values. In particular, the First Universalist Foundation has researched, and requested that the church Board approve changes to our Investment Policies that would allow the Foundation investments to be held by the [Unitarian Universalist Common Fund](#).

Recommendation: I'd like to recommend that Foundation Board member Lynn Broadus, Board member Rebecca Slaby, and one or two other board members and/or congregants review our current financial policies, research alternatives, recommend changes to our financial policies, and recommend what, if any, changes should be made to where our investments are held. These recommendations could come back to the Board for its March or April meeting for review and approval.

Information Items

Conflict Assessment by Rev. David Pyle, UUA Congregational Life Consultant

At my request, conflict assessment was completed by Rev. Pyle regarding the departure of our Director of Choral Arts this fall, and the consequent interactions within the congregation. The final version of this report was delivered to me on Saturday, January 14th and has been shared with the Board and staff. A link to the full report will be publicized in our weekly newsletter, print copies will be available at church, and the text of the full report is available in this Board Packet.

I appreciate Rev. Pyle's care and deep listening throughout this process, and his skill and knowledge in navigating and transforming congregational conflict from harm to generativity and the deepening of connection. I - and the rest of the staff - are listening carefully to his distillation of concerns, reflections, and recommendations. Rev. Pyle offered 7 recommendations. I will name the below, along with a short summary of the work in progress toward each one.

1. Develop and implement a Right Relationship structure within the congregation.
For more information on the development of a congregational covenant and a Right Relations Team at First Universalist, please see the [Right Relations Covenant Update and Invitation](#) in our newsletter.

2. An open door for conflict transformation / mediation conversations with members of the senior staff and/or board and members of the congregation.

Staff remain open for conflict transformation/mediation conversations with all members of the congregation. We welcome these conversations in person and over zoom, and will access UUA support for mediation and facilitation until these resources are available within our congregation.

3. A highly communicative and open process about the Future of Music at First Universalist.

This process is underway, and has been shaped by a team of lay leaders along with Dr. Glen Thomas Rideout, Director of Worship Arts Ministries. Please see the article in a recent newsletter updating and inviting the congregation into [A Creative Process to Shape the Future of Music Ministries](#).

4. Engage in a process of exploring how congregational members can be more directly involved in the operational implementation of the Visionary Goals.

There is still much more work to be done to reinvigorate the experiences of shared ministry and congregational involvement in implementing our shared vision. While the Board leads the congregation through the process of developing new Visionary Goals, the staff is working to rebuild and reimagine ways for congregation members to be involved in the work of the church - while recognizing the significant shifts in patterns of volunteerism and church involvement moving out of the worst of the Covid-19 pandemic.

5. Develop a support system for Black, Indigenous, and Persons of Color (BIPOC) as well as Trans-identified and Gender non-conforming persons within and connected to First Universalist Church while the congregation is actively working to become an antiracist, multi-racial, multi-cultural religious community.

This is a continued area of growth for us as a congregation. This church year has seen the launch of a BIPOC specific book group and monthly BIPOC dinner church. We do

not yet have opportunities to develop a specific support system for Trans-identified and Gender non-conforming people within and connected to the church.

6. Offer continued opportunities for individual and community development in becoming anti-racist.

While there is always room to grow here, we continue to provide a steady offering of opportunities for individual and community development in becoming anti-racist. Offerings are listed in our seasonal program guides and you can explore the [Fall 2022 Program Guide](#) here.

7. Management Center Training – Managing to Change the World - Offer all congregational staff members who supervise staff to attend the Management Center Training “Managing to Change the World” course, and for the Senior Staff to also take the “Managing for Racial Equity, Inclusion, and Results” course.

The opportunity to take the [Managing to Change the World](#) course was offered to all staff members who supervise other staff this winter, and Rev. Arif and Rev. Jen will attend the training later this week. This opportunity will be offered again.

While there is much work still to do as we transform this time of conflict into an experience of deepening our spiritual growth and relationships with each other, I am grateful to be able to say that significant efforts are already underway to follow each of these recommendations.

Rev. Jen away beginning February 1

Thank you to the board, staff, and congregation for the previously approved time away each month to care for family and friends. It is a relief to know that when I am with these people I love, I can bring my full attention to that precious time. With all of the challenges at church this year, I am noticing that my body and spirit are more depleted than usual and it is time for me to take some time not just to care for others, but for myself, as well. I am taking this time away on the recommendation of my health care providers, mentors, and colleagues. Beginning on February 1, 2023, I will be away from my work at the church for 6 weeks. This will be a combination of study leave and personal time, and I look forward to renewing my spirit, learning more about conflict transformation in congregations, and attending the week-long conference for Senior Ministers of Large UU Congregations.

Welcome (6:30-6:35)

- a. Call to Order and Agenda Approval
- b. Lighting 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.

II. Consent Agenda

- a. Approval of October meeting minutes
- b. Approval of Ministerial Housing Allowances for 2023
- c. Approval of Ministerial Intern, Lóre Stevens, as a wedding officiant
- d. Monitoring: Acceptance of attendance and membership numbers and trends
Jeff asked about pre pandemic levels. Last Jen looked we were at or above pre pandemic levels. About 30 under from 2019 September.
- e. Monitoring: Acceptance of staff and significant volunteer changes
- f. Monitoring: Staff and volunteer grievances
- g. Monitoring: Exit Interviews
- h. For Information: Rev. Jen's schedule changes
- i. For Information: Year End Financial Review

Consent agenda approved except for the Year End Financial Review

III. Executive Session (6:35 -7:15)

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

IV. Change Team Updates (7:15 ~ 7:20)

Rubric process twice with staff and then open setting. Feedback was that the processes were focused on the numbers and not the stories behind them. People felt they didn't have enough time to tell their reasons for their ratings.

Decided to revisit the process. Should we still collect data on the rubric. Still to meet with BIPOC, environmental justice and other groups.

Request to modify the rubric to include music more directly. At this time, that won't be added but could be discussed in the future.

A member has left the Change team. 3 members left.

Goal of getting the Rubric out before looking at new members.

V. Financial Updates (7:20 ~ 7:50)

- a. First Quarter Financials
Annual Giving at risk. Plan to ask key donors for a matching fund
Questions about the flow of capital expenditure through Building and Grounds
- b. Fundraising planning and updates

Discuss Kurt's recommendation on Year End Financial Review. He helped us create an internal system of checks and balances. Kurt believes we have enough tools to do our own auditing. What can we do to assure that we are correctly performing our financial reviews. Jeff suggests we review the checks and balances process to see if they are sufficient.

V. Break (7:50 ~ 8:00)

VI. Powerful Question, Visionary Goals Next Steps (8:00 ~ 8:50)

- a. Board Covenant for Visionary Goals Process
 - a. Need to include Daryn, Rebecca and Liv in this covenant work in a follow up meeting
- b. Identifying the Shepherding Team
 - a. Description

- i. Group that helps keep the process on track logistically
- ii. Pay attention to communicating and planning meetings and events
- iii. Detail oriented and in service to the larger vision.
- iv. Help us stay on track!
- b. 5 selected for this: Ben, Jeff, Karin Wille, Cindy Marsh, Christa Anders
- c. How do we use BIPOC stories without tokenizing or misappropriating their stories? Discomfort in how these stories would be shared out. How will we represent the marginalized? Could the Exec team review this item and meet with Laura. Set up a separate meeting to review with the full board. 12/4 at 3:30 or 12/11 at 1pm (invite Lore as well)

VII. Open Position on the Board (8:50-8:55)

- a. Capacity to Fill It
 - i. If so, how and by when

Decision was to wait until the Spring nominating process

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

Adjourn - 9:00

Statistical Report for November 2022

Board Meeting December 15, 2022

MEMORIAL SERVICES: 0

MARRIAGES/SERVICES OF COMMITMENT: 0

MEMBERS FOR APPROVAL: 0

MEMBERS REINSTATED: 0

MEMBERS FOR REMOVAL:

Quang Nystrom

Kelly Westhoff-Nystrom

Dinah Patrykus

CHILDREN DEDICATED: 3

Kenzo Banks Harstad

Paul Seeger Davies

Tessa Thebus

Total members as of the last meeting: 1072

To be added: 0

To be removed: 3

TOTAL MEMBERS: 1069

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

November Attendance	2022					2021					
	Sun. 9a Sanctuary	Sun. 11a Sanctuary	Sun. 11a Livestream	YouTube Views	Totals	Wed. 7p online	Sun. 9a	Sun. 11a	Sun. 11a webinar	YouTube views	Totals
1st week	132	139	54		325	35	135	143	87	141	541
2nd week	93	165	47	109	367	40	137	120	112	91	500
3rd week	122	119	45	119	360	33	93	87	101	76	390
4th week	86	85	48	119	290	-	51	66	105	105	327
5th week											
Monthly Total	433	508	194	347	1342	108	416	416	405	413	1758
Average for November	108	127	49	116	336	36	104	104	101	103	440
RE					9 & 11 RE		9 a.m.	11 a.m.			
1st week					226		99	97			196
2nd week					197		88	88			176
3rd week					146		76	78			154
4th week					16						0
5th week											0
Monthly Total					585	0	263	263			526
Average for November					145		88	88			175
Combined Average					482	36	95	95			615

4th week- childcare only, no RE

2022 YouTube views recorded January 11, 2023

Statistical Report for December 2022

Board Meeting January 19, 2022

MEMORIAL SERVICES: 0

MARRIAGES/SERVICES OF COMMITMENT: 0

MEMBERS FOR APPROVAL: 0

MEMBERS REINSTATED: 0

MEMBERS FOR REMOVAL: 1

Jeanne Johnson, died December 16

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

December Attendance

	2022					2021					
	Sun. 9a Sanctuary	Sun. 11a* Sanctuary	Livestream	YouTube Views	Totals	Wed. 7p	Sun. 9a	Sun. 11a	Webinar	YouTube views	Totals
1st week	119	153	56	127	455	31	111	120	108	115	485
2nd week	112	124	51	131	367	24	103	94	125	167	513
3rd week	56	99	47	100	255	17	49	61	117	121	365
4th week		41	35	106	182	154			116	167	437
Worship Totals	287	417	189	464	1259	226	263	275	466	570	1800
Worship Averages	96	104	47	116	315	24	86	92	117	143	450
Blue Holidays		21	14		35						
Pageant		246	32	102	380				74	88	162
Winter Solstice		133	116	140	389						
Christmas Eve Candle		80	32	46	158				53	58	111
Special Services Total		480	194	288	962				127	146	273
December All Average					278						346
RE					9 & 11a RE						9 & 11a RE
1st week					191						151
2nd week					142						156
3rd week					-						-
4th week					-						-
5th week											
Monthly Total					333						307
Average for December					167						154
Combined Average					444						499

- One service at 10a Dec. 25
- Varying times for special services
- YouTube views recorded January 12, 2023 at 2:30 p.m.

- Dec. 22 Wednesday Meditation replaced by Tuesday Solstice online only
- Dec. 26 one service at 10 a.m. online only
- Don't have in-person attendance numbers for Dec. 24 services

January 14th, 2023

Rev. Jen Crow
Senior Minister
First Universalist Church of Minneapolis
3400 Dupont Ave. S.
Minneapolis, MN 55408

Assessment Report on the Congregational Conflict Related to the Termination of the Employment of Dr. Randal (Randy) Buikema.


Purpose

The Senior Minister of the First Universalist Church of Minneapolis requested the MidAmerica Region of the UUA conduct an assessment and listening process as a part of the congregation's engagement and transformation of a conflict that developed in the congregation related to the termination of employment for the congregation's former Director of Choral Arts, Dr. Randal (Randy) Buikema. The purpose of this assessment is to provide the congregational leadership with a summary of the concerns raised by congregation members and others connected with the congregation by this conflict, to provide an outside consultant view on those concerns, and to recommend a series of steps that the congregation may choose to take in response to those concerns.

As with many such engagements, a secondary purpose of this assessment process has been to provide congregation members and those connected with the congregation opportunities to process the experience of this conflict, both in groups, individually, or as partners with a pastoral care provider from outside the congregation.

Process

This assessment process has been conducted and facilitated by myself, Rev. David Pyle, the Regional Lead for the MidAmerica Region of the UUA, and the UUA Staff Primary Contact for First Universalist Minneapolis. Over the last 8 years I have served as a District Executive, a Congregational Life Consultant, and a Regional Lead within three of the five Regions of our UUA Congregational Life Staff, working with over 300 congregations during that tenure.

 2355 Fairview Ave #312 Roseville MN 55113 | P (312) 636-9724 |
dpyle@uua.org | C (847) 917-0072

uua.org/midamerica



My social position is that I am a cis-gendered, white male in a heterosexual relationship, who has some military service-connected disability. I am a Unitarian Universalist minister who has served in military and hospice chaplaincy, in parish ministry, and on the staff of the UUA. I live in southwestern Kentucky. Because of the natural limits of my social position, this assessment has also been reviewed by three BIPOC members of the UUA Staff, including a Co-Director of the UUA's Conflict Transformation Teams and two BIPOC Regional Leads. This final report includes their suggested additions, modifications, and comments.

This assessment process has been conducted using three primary methods. First, two group sessions were held. The first was held in-person at First Universalist Church of Minneapolis on Wednesday, October 19th. The second session was held on Zoom on Thursday, November 3rd. Each of these sessions used a methodology of active listening and listening for clarity, with the goal of allowing everyone who wished to speak to do so, speaking directly to myself as the facilitator, and with me asking clarification questions to ensure the deepest understanding possible of what each sought to share. At the end of each session, the Senior Minister of First Universalist Church, Rev. Jen Crow, was given the opportunity to share, focused on what she had heard and what her experience has been in relationship to this conflict. These two sessions together had 59 participants.



The second method for this assessment was an open invitation for individuals or partnered couples to speak directly with me about their experiences and concerns related to this congregational conflict. A total of 15 individuals accepted the opportunity to speak directly with me as a part of this assessment process. Each conversation was approximately 1 hour and consisted of individuals and partnered couples sharing their concerns and feelings with me, as well as my sharing some of my observations as felt appropriate. Some of these sessions also had elements of both processing and pastoral care.

The third method of this assessment was receiving written communications from 38 individuals, sharing their own experiences and concerns related to this congregational conflict. Some of these were in the form of emails, while others were formed as multi-page letters. The assessment also began with a prior written letter from 64 members and

friends of the congregation who were part of or connected to the choir, some of whom also wrote to me additional communications, attended one of the two group sessions, or asked for an individual or partnered couple meeting.

Those who attended the group sessions, met with me for individual or couple sessions, and sent me written communications were overwhelmingly individuals connected personally to the choir, either as members of the choir or as supporters of the choir. Those members were majority white identified, but carried other traditionally marginalized identities, including being LGBTQ+, neuro-divergent, and persons' with visible and non-visible disabilities. Of those who spoke with me either in group or individual settings, two identified themselves to me as BIPOC. The majority of those who attended the group sessions or spoke with me individually tended to be over the age of 50, and had long-tenures with the congregation, although that was not universally true. While it is more difficult to discern the demographics of those who wrote to me, many named their long tenure with the congregation as a part of their communications. Amongst all who communicated with me there were active and current members of the congregation, those who had been members but resigned their membership as a part of this conflict, and some who are not members of the congregation but were connected through the choir.



In each of the group sessions, as well as each of the individual or partnered couple meetings, I shared that this process was non-attributive, but not confidential. The goal is to provide the congregation's senior staff and governing board with a survey style assessment of the scope and nature of the concerns raised in this conflict, and as such I would not be providing direct attribution for anything I shared. However, it was made clear to all participating that nothing in this process should be considered confidential, with the exception of those spaces where, in meeting sessions with individual or partnered couples, elements of pastoral care became a part of the conversation.

This assessment is structured in three parts. In Part 1, titled, "What I heard" I will attempt to summarize the concerns I heard raised by the members and connected friends of the congregation that chose to communicate with me through one of these three methods with as little editorial input from myself as possible. The purpose of this section is to

give the congregation's senior staff and governing board as broad an understanding of the concerns raised as possible.

In Part 2, I will offer my own reflections as a Congregational Life Consultant on the concerns that I heard. In this section I hope to provide some helpful context, as well as frame this conflict through the experience of other congregations. This section is fully my own assessment and is intended to reflect only my voice.

In Part 3, I will make a series of both "next step" and longer-term recommendations for how the congregation may engage and transform this conflict.

The Senior Staff Leadership of First Unitarian Church of Minneapolis and the Governing Board initially received a draft version of this report on November 28th, 2022. They reviewed the draft document and asked clarifying questions during a digital meeting between them and myself in early December 2022. The Senior Leadership and Board made a few requests which were incorporated into the process, which included having the report reviewed by BIPOC members of the UUA Staff. Due to the UUA Holiday Break, this review took several weeks to accomplish, leading to this final report being released to the congregational leadership on January 14th 2023.



A few final notes to this introduction. First, even with as many people who shared with me in one of the many different forms, this represents only a portion of the congregation. While all of the concerns I heard raised that are shared in this report were shared by multiple people, there can be a kind of bias in an assessment of this type, in that those who chose to speak or communicate with me were self-selecting, with a majority of them being those with strong feelings related to this conflict. This assessment process did not try to get a full "representative sample" of the congregation, and so it must be understood as representing only a part rather than the whole of the congregation. This report is not intended and does not assess any broader trends or concerns within the congregation.

Second, this assessment is not intended to speak for anyone. Each person can and is encouraged to share of their own experience. Part 1 of this report's purpose is to provide to the congregation's senior staff and

governing board an assessment of the concerns raised as a part of this congregational conflict. As such, it is and can only represent a summary, and one that I will be willing to expand upon at the request of the congregation's senior staff and governing board as appropriate.

Lastly, in my conversation with the congregation's Governing Board in early December, a concern was raised that the report focuses primarily on the ways in which the congregation is experiencing tension related to race and racism, and does not specifically address tensions that might be present related to other marginalized identities, in particular LGBTQ+ identities. There are two reasons for this. First, with a few notable exceptions, the majority of those who spoke with me focused their sharing with me on concerns related to the racial dynamics of this conflict, which will be discussed in the next section of this report in detail.



Secondly, in the recommendations section of this report, I will repeatedly use the phrase “Black, Indigenous, and Persons of Color (BIPOC) as well as Trans-identified and Gender non-conforming persons” in making those recommendations. The reason for framing the recommendations in this way is that, in our shared experience as UUA Congregational Life Staff, these are the two groups of people with marginalized identities in Unitarian Universalist congregations most at risk for active harm during congregational conflicts, with the fewest established networks of support in a congregation. In doing so, I am not seeking to imply that other groups of people with other marginalized identities, such as LGBTQ+ identities or persons with visible and non-visible disabilities cannot also experience identity related harm during congregational conflicts.

Part 1: What I heard

In total, I was able to discern twenty-five distinct concerns that were raised by multiple individuals or groups who communicated with me through this assessment process. Some of these concerns were directly communicated to me, while others I was able to discern in conversation or looking at the shared trends in the written communications. However, these 25 concerns broke down into 6 main areas of concern:



1. Direct concerns over the handling of the employment, supervision, and for-cause termination of Dr. Randy Buikema's employment as the Director of Choral Arts.
2. Concerns about the place of music and arts at First Universalist Church, and in particular music and arts as a spiritual practice by the members of the congregation. This concern includes a perceived lack of recognition of the role and value of the choir, as well as a lack of understanding of the close, spiritual relationship between Dr. Buikema and many of the members of the choir.
3. Expressions of grief and loss that some members and friends of the congregation expressed to me that, while larger than the relationship with Dr. Buikema and the other members of the choir, were crystallized by the experience of these new losses.
4. Governance concerns that were expressed in many different ways but centered around the perception that the congregation's professional and lay leadership are empowered to make decisions without having adequate "buy-in" or support from the members of the congregation. While this was sometimes framed in terms of Policy Governance, this concern was more often expressed in a perceived lack of good communication between the congregation's leadership and membership.
5. Concerns that the congregation is culturally changing in ways that some members and connected friends of the congregation no longer feel connected to, supported by, or a part of. For many of the people that spoke or communicated with me, the choir had come to feel like their last and primary place of connection with the congregation.
6. Concerns about the congregation's engagement with the cultural transformation to become an intentionally anti-racist, multi-racial, multi-cultural congregation. I name this concern separate from the concern above because these two concerns, though related, were expressed differently by different people.

I will address each of these directly, and then add a few concerns that were shared but do not fit into these categories. Also, as a reminder, my goal with this section is to reflect back what I heard, not to validate or to share my opinion on any of these concerns. I will share my thoughts on these concerns in the next part of this assessment report.

1. Direct concerns over the handling of the employment, supervision, and for cause termination of Dr. Randy Buikema's employment as the Director of Choral Arts.

There were five major categories of concerns related to the supervisory aspects of the for-cause termination of Dr. Buikema's employment as the Director of Choral Arts. The first of these is that the termination seemed sudden, capricious, and without concern for the ways it would impact the relationships members of the choir held with Dr. Buikema. Many who spoke with me could not understand how Dr. Buikema's violation of church policy in sharing of his intent to resign with the choir and sharing his view of what had led him to that decision, could justify such immediate termination of employment. While many could understand it as a "technical" violation of church employee practice and policy, they could not accept that immediate termination was a just and justifiable response.



The second category of concern raised in relationship to the employment aspects of this termination for cause was the expressed requirement that Dr. Buikema not speak about or share himself the information related to the offer of a reduced position at the congregation, or alternatively the offer to leave with a severance package, but that he do so within an agreed upon narrative to be shared with the congregation and choir. This concern was expressed in two primary ways. First, as a concern about a continuation of a "culture of secrecy" in the congregation, and second as a violation of personal freedom for Dr. Buikema. One congregant described this as Dr. Buikema being put in between "a rock and a hard place", while another framed it as Dr. Buikema being forced to choose "between his covenant with the congregation and his covenant with the choir". This concern also encompassed an objection to there being a staff policy or direction from a supervisor that would in any way limit what a staff member would be able to share with congregation members about their own employment, terms, contract, and conditions.

A third element of concern related to the employment aspects of this conflict is that the decision to reduce Dr. Buikema's hours and benefits was perceived to be directly related to reductions in the performances of the choir that began during COVID, and that those reductions did not justify the reductions in hours or benefits that were part of the new position design for the Director of Choral Arts. This concern was framed

primarily as one that the employment decision was not proportional to the changes in the choir's performance schedule.

The fourth aspect of this concern is that the changes in the Director of Choral Arts position were not clearly communicated to the choir by the Senior Minister or the governing board prior to those changes being communicated by Dr. Buikema. While those expressing this concern would be able to acknowledge that Dr. Buikema's sharing this with the choir in the manner that he did prevented that communication, the center of this concern is that the choir should have been brought into the discernment process about this position months earlier, and that there should have been discussions with the choir before the new position was drafted and offered to Dr. Buikema.



This leads to the fifth concern that was expressed, and that is the suspicion or belief that there was unexpressed intent behind the alteration of the Choral Director position. Though there were several different versions of what this intent could be, in essence this concern is that the reasons for the change in the position of the Director of Choral Arts were not all expressed, and that there was an intentional plan for Dr. Buikema to leave the position. Opinions about what the unstated intents could be included changes related to the congregation's cultural transformation into a multiracial multicultural community, the congregation having both Dr. Buikema and Dr. Rideout on staff and not being able to budget for both, or concern of a personal issue between Dr. Buikema and Rev. Crow, or between Dr. Buikema and Dr. Rideout. However, the operative issue here is the suspicion that there was some intent being played out in this supervisory issue that was beyond what was being expressed.

2. Concerns about the place of music and arts at First Universalist Church, and in particular music and arts as a spiritual practice by the members of the congregation. This concern includes a perceived lack of recognition of the role and value of the choir, as well as a lack of understanding of the close, spiritual relationship between Dr. Buikema and many of the members of the choir.

There were two primary expressions of the concern about the place of music and arts at First Universalist that were clearly expressed both in

the written communications, but more so in the group and individual/partnered conversations. The first is the reduction in the role of the choir in worship that dates back at least 6-8 years, along with many other forms of congregant-led music in worship. Members named that the choir was the last member participant group to participate in worship, where once there were many such groups that presented music in worship. During COVID the role of the choir necessarily reduced and shifted for reasons of public health, and the perception was that the redesign and reduction of the Director of Choral Arts position was another step in the continued slide of member-participant music out of worship in favor of music by professional musicians and whole congregation singing. This was expressed not just as a change in the place and style of music in the congregation, but also as a distinct devaluing of the choir and the contributions of its members.



The second version of this concern was a little different, in that it was expressed as the congregation's senior staff leadership not understanding or valuing the close spiritual relationship between Dr. Buikema and the choir, and between the choir members themselves. Not understanding this and taking it into account in any decisions related to the status of the choir and to Dr. Buikema's employment was perceived as a devaluing of the choir as a part of the life of the congregation.

3. Expressions of grief and loss that some members and friends of the congregation expressed to me that, while larger than the relationship with Dr. Buikema and the other members of the choir, were crystalized by the experience of these new losses.

When working with grief, it is often true that grief is not attached to just one loss, but to many. While an experience of grief may be focused on a new loss, that grief brings forth others. In this case, some of the concerns that were raised in conversation with me turned to the other staff losses that have occurred at First Universalist, in some cases going back decades, and the unanswered questions related to the for-cause termination of Dr. Buikema's employment brought forth unanswered questions about other departures, including those of the most recent Co-Senior Minister and of other staff. For some, these departures and the unanswered questions around them are a part of the perceived culture of secrecy concern raised earlier in this report. Others raised this concern considering the cultural changes towards an anti-racist, multi-racial,

multi-cultural congregation that First Universalist is engaged in. However it was expressed, this kind of an expression of grief was an element of almost every conversation and communication I received, even when the sender was not aware they were expressing it.

That should not take away from the concern about the direct grief that members of the choir and of the congregation expressed related to Dr. Buikema. That members of the choir were not and continue to not be ready for the relationship with Dr. Buikema to end is clear in the continued efforts to maintain that relationship outside of the congregation. Several who spoke with me named that they were in continued friendships with Dr. Buikema, and others that they were organizing ways to remain in relationship outside of the congregation.

Still others expressed deep grief at the loss of the community of the choir, and the relationships that came from the spiritual practice of singing together. While they are seeking ways to maintain those relationships with Dr. Buikema and with each other, the grief is that they perceive they cannot do that through the congregation.

4. Governance concerns that were expressed in many different ways but centered around the perception that the congregation's professional and lay leadership are empowered to make decisions without having adequate "buy-in" or support from the members of the congregation. While this was sometimes framed in terms of Policy Governance, this concern was more often expressed as a perceived lack of good communication between the congregation's leadership and membership.

While some of those who communicated with me expressed direct concerns about the congregation's use of a modified version of Policy Governance for its Board-Executive level governance, this expression of concern about how the congregation is making decisions together was communicated overall in more broad strokes than a focus just on Policy Governance. Most of those who framed their concern directly in terms of Policy Governance also made it clear that these were concerns they had held for some time and saw in this conflict an expression of those concerns.



What was more often expressed were two concerns that relate to how the congregation makes decisions together. The first frame of this concern is one of “communication”. In essence, this concern is that there is not enough or clear enough communication from the senior staff or the governing board about the decisions and directions the congregation is taking, and the implications of those decisions upon the ability of members to participate in the congregation. Sometimes this was framed as “transparency” rather than communication, but the same concern was being raised... that there is information that the leaders have that is not being shared with the members and friends of the congregation, leading to a disconnect in understanding and accepting those decisions.

The second framing of this concern is less about information being shared from the leadership to the members, and more about members having an active role in the decision-making processes of the congregation. This concern was expressed in this conflict through the desire I named above that if the Senior Minister were considering significant changes to the position of the Director of Choral Arts, then there should have been a process with the members of the choir to discuss those changes and the reasons for them prior to the changes being initiated.

Both of these are expressions of the concern about how decisions are made in the congregation that point to a perceived gap in members being engaged and “brought along” on decision making related to how to implement the shifts in the congregation to live into the congregation’s Visionary Goals.

As stated above, there are some who expressed direct concerns to me that this disconnect was a direct result of the congregation’s use of a modified version of Policy Governance, and that a full revision of governance was the necessary step towards addressing this disconnect.

5. Concerns that the congregation is culturally changing in ways that some members and connected friends of the congregation no longer feel connected to, supported by, or a part of. For many of the people that spoke or communicated with me, the choir had come to feel like their last and primary place of connection with the congregation.



Multiple congregation members, both members of the choir and others that chose to communicate with or speak with me, expressed the concern that the congregation was changing in ways that no longer felt like it could remain their spiritual community. While there were others who expressed to me that the congregation would remain their spiritual community regardless of this conflict, two things became clear to me in the conversations I had with members, friends, and former members of the congregation. First, that the choir had been a place of connection to the congregation for many who had let go of their other areas of connection over the years. Secondly, that the disbanding of the choir, whether they were members of the choir or not, symbolized the ways that they felt the congregation was or had already moved beyond them. For some, this was connected to the loss of staff members to whom they had felt connected, including Dr. Buikema, but also the previous Co-Senior Minister and other staff.



Several of the individuals who wrote to me to express this concern the strongest did so with a disclaimer at the beginning of their email or letter... letting me know that they did not know if they should be sharing of their experience, since they had already decided that First Universalist was no longer their spiritual home, but that they had been encouraged to share of their experience with me anyway. One member who is staying in the congregation and grieving the loss of friends wrote to me that he felt that some of those who were leaving had already been on the pathway out of the congregation.

6. Concerns about the congregation's engagement with the cultural transformation to become an intentionally anti-racist, multi-racial, multi-cultural congregation. I name this concern separate from the concern above because these two concerns, though related, were expressed differently by different people.

I am actively and carefully choosing what and how to share of the concerns that I received that were related to the congregation's Visionary Goal of becoming an intentionally anti-racist, multi-racial, multi-cultural congregation, because I do not wish to cause or replicate harm. I am grateful that people were honest with me in their sharing. I encountered people with differing places on and awareness of their journey in becoming anti-racist. In sharing these concerns, I want to reiterate that I am not endorsing them.

The first of the concerns shared with me which relate to the congregation's Visionary Goal to become an intentionally anti-racist, multi-racial, multi-cultural congregation is an expression of the earlier concern about how the congregation is making decisions together. One congregation member who spoke with me framed it as the congregation having agreement on the "what" but expressed that the congregation needs more discussion and conversation together on the "how" of becoming an anti-racist, multi-racial, multi-cultural congregation. This concern was expressed that most of these decisions seemed to be made by staff and the governing board, without the congregation understanding the "why" of these decisions and how they are leading towards the visionary goal. In the absence of that awareness, congregation members then create stories and impute motives to the senior staff and the governing board that may or may not be accurate but are not examined or challenged.



I want to acknowledge that I heard from many individuals I spoke with a sense of shock at the racist attitudes and words that were expressed at the first meeting of the choir with Rev. Crow and members of the board, though a few sought to temper that shock with an explanation of the circumstances as a kind of justification. Similarly, I heard shock, surprise, and regret at how one member of the staff felt unsafe at the meeting where Dr. Buikema announced his resignation to the choir and the emotional reaction from the choir members that followed, though a few could not understand how such feelings by the staff member were justified.

Many of those who both wrote and spoke with me shared of their experience of the use of a "rubric" related to the transformation of congregational worship towards becoming anti-racist. They carried the perception that this rubric stated that there was no place for "white protestant music" within an anti-racist, multi-racial, multi-cultural congregation, and expressed some significant reactivity to that conception.

What was expressed most often by those who communicated with me was that they were unable to hold when they felt "called out" for what others perceived as expressions of racism and white fragility. And, because the conflict over the for-cause termination of Dr. Buikema's

employment was directly with Rev. Crow, they did not have anywhere they felt they could go to get support in how to hold, understand, and grow through that experience of being “called out” in community.

Other concerns that did not fit these broad categories

An unavoidable part of any assessment process like this is that it gives the impression that there was one reaction to these issues, and that these concerns are shared broadly. One of the surprises I had in conducting this assessment process was how varied the concerns actually were.

Several of those who communicated with me raised question of whether Dr. Buikema’s identity as a gay man had an impact on this conflict. Several other people raised the question of whether the limitations created by the health situation of Dr. Buikema’s partner played a role in the decisions that led to this conflict. In each case, these seemed to be framed more as questions than as statements.

Several people raised concerns that Rev. Crow might have just made a mistake, and the structure of the staff and governance at First Universalist make it difficult to admit a mistake, or for people to accept that something was just a mistake. This was a similar refrain from many, that Rev. Crow was doing the best she could with a very difficult set of circumstances, and their concern was that she seemingly just could not admit that. There were also many expressions of support for Rev. Crow, and surprise that this conflict developed as it had.

It is normal in an assessment process like this for the parties to the conflict that are the most unhappy and concerned to communicate the most. However, I did hear from several members of the congregation who were not as activated by the for-cause termination of Dr. Buikema’s employment, and who wanted to express support for Rev. Crow and for the direction of the congregation. Others wrote me just to express how much they missed the choir in worship.

Another framing of the concerns that I received from multiple individuals who communicated with me was that they shared the concern about how decisions were being made in relationship to music in worship and to the choir, but that as soon as they witnessed or heard



about Dr. Buikema's announcement to the choir of his resignation and the ways that activated anger and frustration among the choir members, they knew that his employment would be appropriately terminated for cause.

While some wrote to me to express support for the shared letter from 64 individuals connected to the choir, others connected to the choir wrote to me to express their reasons why they did not agree to sign the letter or chose not to respond to the requests to do so.

Part 2: My thoughts and reflections

I am grateful to everyone who chose to communicate or speak with me, to help me to gain as broad an understanding of this conflict as possible. I said at the in-person meeting that I thought this congregational conflict was about far more than the for-cause termination of Dr. Buikema's employment, and every conversation or communication affirmed that assessment.

Conflict is an inherent part of life in a Unitarian Universalist religious community. I believe that learning to engage in conflict well in our communities might be the fundamental spiritual practice of our faith. That spiritual practice is often difficult for congregations in parts of the country where engaging in conflict with each other is against regional cultural norms, such as the Mid-west. This conflict took too long to be engaged, and when it was intentionally engaged, that engagement did not happen well. While I was not at either of the initial meetings between the choir and the governing board and senior staff, it seems clear that neither meeting went the way anyone hoped.

It is not usual for a congregation the size of First Universalist to rely on the UUA's Congregational Life Consultants to help the congregation to engage a conflict of this type, for congregations of this size have the volunteer resources to be able to have a right relations or conflict transformation team trained within the membership to do much of what I have done so far with the congregation, but far more quickly and effectively than I have been able to. They also would not have done the assessment process the way I did (with this over-long report) but rather through a series of congregational meetings and listening sessions where



people would have been able to hear from one another, facilitated by other members of the congregation.

Large congregations often rely on staff to do the majority of conflict engagement and transformation, but this leads to an inherent weakness. First, staff are often already overburdened, and so staff-led conflict engagement often comes at the cost of other aspects of the congregation's mission. Secondly, when the staff are viewed as a party to the conflict, as is true in this circumstance, they become unable to be effective in transforming the conflict.

So, my first reflection is that the congregation needs a far better way to engage conflict than the UUA Staff can provide, and that developing that capacity for the congregation to engage conflict well together is vital for the future of the congregation and central to the practice of Unitarian Universalism.



My second reflection is that I am surprised the congregation has gotten as far as it has in the transformation towards becoming an anti-racist, multi-racial, multi-cultural congregation without a significant conflict before this one. Any kind of congregational culture transformation results in congregational conflict. Conflict that is engaged well is one of the most effective tools of congregational culture transformation. Conflict should not be seen as a distraction... conflict is a sign that the changes in the culture are getting "real". As the congregation engages so profound a culture transformation, and one that has not been successfully realized in our faith to my awareness, the congregation can expect that there will be other experiences of conflict like or bigger than this one. Learning to do that well is a prerequisite for successful culture transformation.

Staff members leaving a congregation have a responsibility to do so in a way that does not intentionally activate significant anger and conflict within the congregation. Moreover, congregational staff members should be actively seeking to prevent their departure or other employment issues from distracting a congregation from the fulfillment of its mission. While not everyone agrees that Dr. Buikema intended to create the anger and the conflict that occurred at the meeting with the choir where he announced his intention to resign, it was clear to me from what was shared with me that the announcement of his pending resignation was

done in a way that created and inspired significant anger and conflict. Intentionally seeking to create conflict in a congregation, especially to leverage that congregational conflict in a dispute with a supervisor, is a terminatable action for any church staff member. In fact, I myself have terminated the employment of church staff members for just such an action.

Serving on a church staff means committing to serve the mission of the congregation, and a part of that is committing to communicating with congregation members in ways that serve that mission of the congregation and are in accord with the elected leaders, staff leaders, and other staff members. If you, as a church staff member, find that you cannot continue to serve the mission of the congregation or communicate with congregation members in a joint way with the rest of the staff and elected leadership, then it is probably time for you to consider no longer serving that congregation. I do not know whether Dr. Buikema intended to create the anger and frustration that the choir members experienced after his announcement of his resignation and prior to informing his supervisor of that intent to resign but doing so would be a terminatable action in any Unitarian Universalist congregation I have ever served or worked with.



One of the moments that I found most profound in the group listening sessions was when a member of the congregation shared that they felt that Dr. Buikema had to make a choice between his covenant with the congregation and his covenant with the choir. I think this highlights an inherent aspect of the problem in that it implies that the division between the choir and the congregation had become wide enough that this was not the same covenant. That the choir felt it had a relationship with Dr. Buikema that transcended his employment by the congregation. That does not speak to me of a choir that feels integrated in the fabric of the congregation.

This is not an uncommon pattern. I have only seen one congregation react well to the for-cause termination of a staff member, and that was a minister few felt connected to. Choirs are inherently and spiritually connected to their choir directors, even when they do not actually like them. There is something inherent in the relationship between a choir and a director that creates a bond that is spiritual, pastoral, and personal. The creation of music together is one of the oldest human spiritual

practices. It often means that choir directors can have significant informal power in a congregation due to the nature of their relationship with the choir, and it means that choirs will often have strong reactions to anything that impacts the relationship between the choir director and the choir.

A for-cause termination of a choir director is one of the scenarios that no minister I have ever met wants to have happen. It is a scenario guaranteed to create a significant conflict in the congregation. It is one that always results in the loss of members, and it impacts a congregation for years afterwards. It often results in the ending of that choir and can make it difficult to form another choir for some time. I share all this to say that I know of no minister, Rev. Crow included, that would take the step of a for-cause termination of a choir director unless they felt they had no other viable option. And, I know that understanding this from the perspective of a Senior Minister who has to make that difficult decision can be almost impossible for members of the choir to do.



There are two last reflections I wish to make before I move into offering some recommendations. The first is to repeat something I said to some of those who chose to have meetings with me. The decision about what spiritual or religious communities you join and participate in is a sacred one, and one I never seek to influence. Every member of a congregation has to answer for themselves if a religious community is continuing to serve the needs of their mind, body, and spirit, and if they still feel connected to its mission and community. Someone doing that discernment well and learning that they are no longer feeling called to a religious community is not a failure. It is someone doing good spiritual and religious work. I have never and will never ask someone to remain in a religious community, just as I have never and will never ask someone to remain in a leadership role if they are no longer feeling the calling to do so. Everyone I spoke with who was in this discernment was doing this difficult and necessary spiritual work well, and I am grateful for the way they continue to journey with the question of where they feel called. I am glad that some of them are finding their ways to other Unitarian Universalist religious communities, and for those who may find another calling for their spiritual life. Because congregations change, and sometimes we cannot change with them. And we should honor those who leave a community as much as we should honor those who choose to join.

I am going to mostly keep my own counsel on the question of governance systems and how the congregation makes decisions together, mainly because that is a longer conversation than I can effectively engage in this reflection. I will simply say that one of the challenges that congregations successfully practicing one of the many forms of Policy Governance have to solve is how to balance a system that is designed to free the “executive” to accomplish the “ends” (read Visionary Goals in your system) is that the executive (Senior Minister in your system) has to make sure not to outpace the congregation. UU Governance can be difficult because, depending on the level of a decision being made, a member can have many different roles in that decision. But when a decision is made that they feel adversely affects them, they naturally shift mentally to the role that gives them the most authority. And in most UU congregations, that means they shift to the governance system known as Congregational Polity, even when that is not the appropriate level for the decision that is being made, and the most inefficient way for congregations to make decisions together.



And so, to short-circuit this process, executives in a congregation practicing Policy Governance successfully often find they have to be very intentionally focused on involving the congregation in the “how” or the actual doing of the congregation’s mission, so that congregation members feel ownership in the decisions being made and how they are being implemented, without trying to assume a level of authority inappropriate to a particular issue or decision.

Lastly, your congregation is engaged in a transformation that few if any other UU congregations are engaged in as actively and intentionally, towards not only becoming an intentionally anti-racist, multi-racial, multi-cultural congregation, and perhaps inspiring and leading the way towards such a transformation across our faith tradition. And, this transformation has been long awaited, and so many BIPOC Unitarian Universalists have chosen to leave our gathered congregations because we have not yet been able to make this transformation real.

And, that work is difficult. Not everyone is getting there at the same speed. We are in the position of needing to have this transformation already be real, and the spiritual work of this transformation taking time. We have the difficult challenge of needing to do three things at once... to

maintain the pace of a change that has long been needed, to provide the space and support and encouragement for people to make the spiritual transformations to journey with us towards that new culture, and to recognize and honor those who have traveled this far but cannot go further as their journey moves on from where we are going.

Part 3: Recommendations

1. Develop and implement a Right Relationship structure within the congregation.

As I said earlier in this assessment report, this will not be the last conflict in this congregation. Intentional culture change not only creates conflict, it requires it, for conflict that is engaged well is the greatest tool in intentional culture change. The congregation has begun a process to develop a Right Relationship Covenant, and this is a good first step, so long as it is not developed as a set of rules but rather as a set of commitments of how you will choose to be in community with one another.



But a covenant is only as good as the structure developed to support it. The congregation will need to develop a lay team that supports the work of the staff by providing a structure for congregation members to engage conflict. This should involve formal training for lay-leaders involved in this team in conflict engagement and transformation, and both governance and operational policy to support their work. The UUA does offer training for such teams, and we could also consider a training designed specifically for Right Relationship Teams in large congregations. Some congregations have also done training in other conflict engagement systems and built a successful conflict engagement team program around that. The core of this recommendation is that the congregation needs a lay-led but senior staff supervised conflict engagement support structure of some kind.

2. An open door for conflict transformation / mediation conversations with members of the senior staff and/or board and members of the congregation.

The most difficult recommendation for me to discern has been whether any form of conflict transformation / mediation / restorative justice

process would be effective in this conflict, and my assessment is that any kind of large group conflict transformation / mediation process would not be effective right now.

It may be that in the future such a process would be possible, and there are UUA and non-UUA resources that could assist the congregation when a group mediation process seems appropriate. I would assess that what would be needed for such a group mediation process to be effective would be for there to be more fluidity in the positions individuals have taken amidst this conflict, and a greater willingness to listen to one another than I encountered during the assessment process.

One of the dynamics of this conflict is that there is not a single overriding narrative of what has occurred, what the causes were, and where the harm lay. The one place where some significant commonality was expressed, in the letter from the 64 persons connected to the choir, there is not enough commonality on the facts and their interpretation related to the for-cause termination of Dr. Buikema's employment between the signatories of the letter and the congregation's governing board and senior staff for group process mediation to be possible.

My recommendation is for the governing board and the senior staff to offer to engage in facilitated conversations with individuals or small groups of congregation members as they are willing, in order to seek a way to restore relationship between members of the congregation and the congregational leadership. Facilitation support for these conversations could be an early developmental training for future members of a Right Relationship Team, with UUA support.

3. A highly communicative and open process about the Future of Music at First Universalist

When trust appears harmed or broken in a congregation, in any direction, the remedy is almost always to slow down, communicate more, and to be very intentional about including as many as possible in discernment and decision-making. I am aware that a process around the Future of Music at First Universalist had begun prior to the conflict coming to the forefront, and that it was delayed in significant part by this conflict. I believe it is critical that this process continue, and that it do so in a way that is highly communicative, provides many opportunities for



people to feel engaged in the discernment, and to share what is important to them. That does not mean that specific decisions will be made by everyone, but how decisions are being made should be as clearly defined as possible. This process in the congregation will not just be about the future of music at First Universalist. It also needs to be understood as a first step in rebuilding trust that has been perceived to be broken and ensuring that the whole congregation's voice can be shared and engaged in how the congregation makes decisions together.

4. Engage in a process of exploring how congregational members can be more directly involved in the operational implementation of the Visionary Goals

This one may take a bit for me to explain and will take some time to discern a way to implement. While some of those who communicated with me raised well developed concerns related to Policy Governance as a Board-Executive Governance system, many of the concerns that were raised were not related to issues that are directly impacted by Policy Governance.



When you think of Governance as “How we make decisions together” you realize that a congregation makes decisions together differently at different levels of decision-making. Most of the concerns that were raised in the assessment of this conflict are actually concerns about operational decision-making, not the strategic decision-making of the governing board. To use Policy Governance language, they are concern about decision making of “means” not “ends”.

This recommendation is for the Senior Minister, with the support of the Board and the staff, to explore ways to deepen the involvement of congregational members in the operational and mission-based decision making of the congregation... the “how” of the church. What this will look like may vary in different parts of the congregation, and it may only be a difference of emphasis from practices that you already have.

The center of this recommendation is to look for spaces in the congregation's operational decision-making where an intentional effort to involve congregation members in the discernment and decision-making of the “how” of church will both lead to greater congregational investment, better communication, and to addressing the challenge of

outpacing the congregation that sometimes occurs in congregations practicing Policy Governance.

5. Develop a support system for Black, Indigenous, and Persons of Color (BIPOC) as well as Trans-identified and Gender non-conforming persons within and connected to First Universalist Church while the congregation is actively working to become an antiracist, multi-racial, multi-cultural religious community.

As I named in the report, this will likely not be the last conflict that will occur during the cultural transformation to becoming an intentionally antiracist UU congregation, in part because change is difficult and because conflict is one of the primary tools of cultural change. However, the conflicts that are likely to occur as a part of this transformation will cause the greatest harm to those whose social position creates the dual challenge of both being most in need of the congregation becoming what it has committed to being, and who are likely to be the targets of anger, fear, and hatred that may be expressed by those struggling with the cultural transformation toward becoming an anti-racist, multi-racial, multi-cultural UU religious community. Conflicts in other UU congregations have led me to believe that the people most at risk due to race and white culture related conflicts in our congregations are people who hold BIPOC, Trans, or Gender-nonconforming identities. Those who hold multiple marginalized identities also appear to be at increased risk of being harmed by these kinds of conflicts in Unitarian Universalist congregations.

What that support system could entail is something that I would recommend asking those within the First Universalist Church community who are most at risk due to their social position and identities. Some of the strategies that I have seen be effective in moderating and alleviating this risk include:

- a. Providing facilitated caucus spaces or ongoing groups for those who share an identity to journey together through their interactions with the congregation and its membership
- b. Training and equipping staff and well-boundaried lay-leaders who hold dominant culture identities to intervene



- in situations that place persons with marginalized identities at risk of harm
- c. Providing intentional and pro-active staff and well trained / boundaried lay-ministry support for BIPOC, trans-identified, and gender non-conforming congregation members and friends throughout an incidence of conflict within the congregation
 - d. Provide opportunities, with financial support, for BIPOC, Trans-identified, and Gender non-conforming congregation members to participate in UU Community beyond the congregation. (There are also resources beyond the congregation that may help facilitate this).



At the heart of this recommendation however is that people who are BIPOC, Trans-identified, and Gender non-conforming should not be made to feel that they are responsible for the congregation's cultural transformation towards becoming an anti-racist, multi-racial, multi-cultural UU Congregation, nor should they be excluded from that work. The congregation should recognize the ways in which they are more vulnerable to harm than others during this kind of cultural transition, and to provide structures of support for them during this cultural transformation, while also centering the primary responsibility for this cultural transformation among those who are least at risk for harm.

6. Offer continued opportunities for individual and community development in becoming anti-racist.

Though a well-trained Right Relationship Team can be a help to the issue of congregation members developing in their anti-racist and anti-oppression awareness at different paces, a congregation engaged in the culture change towards becoming an intentionally anti-racist, multi-racial, multi-cultural congregation needs to offer two levels of support for its membership and others connected to the congregation as an ongoing aspect of the congregation's programming.

The first mode of support is trained members of the congregation, who can, on an individual or small group basis, provide partnership support to those who have encountered a space where they may have specific work or development to do in becoming antiracist. These trained

members of the congregation should share similar identities to those they are journeying with. When someone in the congregation experiences what may be an appropriate “call out” or “call in” related to their speech, behavior, or awareness regarding an oppression or oppressed identity, the congregation should invite them to partner with one of these trained and well-boundaried members in holding, exploring, and growing through that experience.

The second mode of support is ongoing opportunities for training, provided through the congregation, for individual and small group development in becoming antiracist. These training opportunities can be both in-person and online, and do not all have to be directly connected to the congregation but recommended by the congregation. If not part of a particular cohesive program, recommendations may take some curation by staff and volunteer leaders.

7. Management Center Training – Managing to Change the World

Offer all congregational staff members who supervise staff to attend the Management Center Training “Managing to Change the World” course, and for the Senior Staff to also take the “Managing for Racial Equity, Inclusion, and Results” course. Also, consider allowing or requesting staff members who are not supervisors to attend the “For Staff” trainings offered by The Management Center. Or choose to have a trainer come to First Universalist for an In-House training for the whole staff. There are also specific trainings for staff and supervisors who are themselves Black, Indigenous, or Persons of Color that UUA BIPOC staff members highly recommend.

I have two reasons for making this recommendation. First, the courses are excellent, and they are well suited to the culture transformation that First Universalist is seeking to create.

My second reason is a bit more nuanced. While I believe I would have made a similar decision in relationship to the employment of Dr. Buikema after the announcement of his intention to resign to the choir and the conflict that since ensued, I have concerns about how the supervisory relationships evolved to the point where that circumstance happened. Sometimes a staff member is just going to do something that makes for-cause termination of employment the only option, but often



good staff training together can prevent such circumstances from occurring, even if just by giving managers and staff a common language with which to talk about problems and concerns. The Management Center provides the best supervisor and staff training I know of to both give a common language and system, and to do so from and through an anti-racist lens. <https://www.managementcenter.org/trainings/>

Conclusion

It has been my honor to bear witness to the difficulty and deep discernment that this conflict has brought to the First Universalist Church community. I look forward to engaging any questions you have about this conflict assessment, and to the future journey in support of your congregation as your UUA Staff Primary Contact and Congregational Life Consultant. I can be contacted for any questions or concerns about this report at dpyle@uua.org.

Be well and blessed,



Rev. David Pyle
Congregational Life Consultant and Regional Lead
MidAmerica Region of the UUA



First Universalist Church of Minneapolis

Income Statement

	Actual 07/01/2022 to 11/30/2022	Budget 07/01/2022 to 11/30/2022	Variance	Annual Budget 07/01/2022 to 06/30/2023
Revenues				
Support				
Annual Giving	\$440,757.86	\$526,050.00	(\$85,292.14)	\$1,282,500.00
Donations/Fundraising	\$46,761.69	\$56,807.42	(\$10,045.73)	\$230,800.00
Revenue Released from Restriction	\$354,742.11	\$17,500.00	\$337,242.11	\$42,000.00
Total Support	\$842,261.66	\$600,357.42	\$241,904.24	\$1,555,300.00
Earned Revenue				
Service/Rental Income	\$34,405.07	\$48,749.92	(\$14,344.85)	\$117,000.00
Investment Income	\$7.30	\$0.00	\$7.30	\$0.00
Other Income	\$2,409.89	\$4,791.65	(\$2,381.76)	\$11,500.00
Total Earned Revenue	\$36,822.26	\$53,541.57	(\$16,719.31)	\$128,500.00
Total Revenues	\$879,083.92	\$653,898.99	\$225,184.93	\$1,683,800.00
Expenses				
Personnel Expenses	\$512,105.87	\$548,636.89	\$36,531.02	\$1,316,730.00
Administrative Expenses	\$65,287.42	\$53,740.03	(\$11,547.39)	\$128,696.77
Program Expenses	\$33,830.22	\$34,991.56	\$1,161.34	\$82,500.00
Building & Grounds	\$371,051.20	\$50,469.69	(\$320,581.51)	\$123,350.00
Other Expenses	\$53,573.75	\$3,124.97	(\$50,448.78)	\$7,500.00
Total Expenses	\$1,035,848.46	\$690,963.14	(\$344,885.32)	\$1,658,776.77
Investment Activity				
Unrealized Losses	(\$313.61)	(\$11,041.69)	\$10,728.08	(\$26,500.00)
Dividends & Interest	\$492.36	\$1,041.65	(\$549.29)	\$2,500.00
Realized Gains	\$62.45	\$0.00	\$62.45	\$0.00
Unrealized Gains	\$4.24	\$0.00	\$4.24	\$0.00
Total Investment Activity	\$245.44	(\$10,000.04)	\$10,245.48	(\$24,000.00)

First Universalist Church of Minneapolis

Income Statement

	Actual 07/01/2022 to 11/30/2022	Budget 07/01/2022 to 11/30/2022	Annual Budget 07/01/2022 to 06/30/2023
		Variance	
NET SURPLUS/(DEFICIT)	<u>(\$156,519.10)</u>	<u>(\$47,064.19)</u>	<u>(\$109,454.91)</u>
			<u>\$1,023.23</u>

First Universalist Church of Minneapolis

Balance Sheet

	Actual As of <u>11/30/2022</u>
Assets	
Current Assets	
Cash	\$62,093.19
Investments	\$3,473,774.55
Accounts Receivable	\$8,225.80
Other Current Assets	\$41,146.10
Total Current Assets	<u>\$3,585,239.64</u>
Non-Current Assets	
Fixed Assets	\$3,777,066.78
Total Non- Current Assets	<u>\$3,777,066.78</u>
Total Assets	<u><u>\$7,362,306.42</u></u>
Liabilities and Fund Balance	
Liabilities	
Current Liabilities	
Accounts Payable	\$953.48
Benefits Payable	\$62,407.13
Other Current Liabilities	\$26,227.22
Total Current Liabilities	<u>\$89,587.83</u>
Long Term Liabilities	
Loan Payable	\$1,606,994.59
Interfund Transfer	(\$28,924.81)
Total Long Term Liabilities	<u>\$1,578,069.78</u>
Total Liabilities	<u>\$1,667,657.61</u>
Fund Balance	
Unrestricted Net Assets	\$3,673,719.87
Donor Restricted Net Assets	\$2,020,928.94
Total Fund Balance	<u>\$5,694,648.81</u>
Total Liabilities and Fund Balance	<u><u>\$7,362,306.42</u></u>

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

	Project to Date Actual	Total Budget	Project to Date Variance
Revenues			
Revenues			
Donations	\$ 4,841,435.90	\$ 5,158,077.07	\$ (316,641.17)
Construction Loan	\$ 1,606,994.59	\$ 2,000,000.00	\$ (393,005.41)
Total Revenues	\$ 6,448,430.49	\$ 7,158,077.07	\$ (709,646.58)
Expenses			
Initial Launch/Fundraising			
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	\$ -
Total Initial Launch/Fundraising Expenses	\$ 291,719.09	\$ 295,000.00	\$ 3,280.91
Miscellaneous Projects			
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	\$ 38,888.63	\$ 120,000.00	\$ 81,111.37
Contingency	\$ -	\$ -	\$ -
Total Miscellaneous Projects Expenses	\$ 1,139,884.44	\$ 3,237,503.00	\$ 2,097,618.56
Phase 1			
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)
Total Phase 1 Project Expenses	\$ 1,909,443.99	\$ 1,928,497.00	\$ 19,053.01
Phase 2			
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	\$ 262,151.74	\$ 140,000.00	\$ (122,151.74)
Solar Panels	\$ 44,500.00	\$ 105,000.00	\$ 60,500.00
Contingency	\$ -	\$ 240,000.00	\$ 240,000.00
Total Phase 2 Project Expenses	\$ 2,324,736.35	\$ 2,500,000.00	\$ 175,263.65
Total Expenses	\$ 5,665,783.87	\$ 7,961,000.00	\$ 2,295,216.13
Net Total	\$ 782,646.62	\$ (802,922.93)	