



# ANNUAL REPORT 2023-2024



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.

 FIRST UNIVERSALIST  
CHURCH OF MINNEAPOLIS

# Agenda

165th Annual Meeting of the Members  
First Universalist Church of Minneapolis  
Sunday, June 2, 2024, 12:30 p.m.

Call to Order Jeff Snyder, *President*

Chalice Lighting and Opening Words Rev. Jen Crow

Appointment of Parliamentarian Jeff Snyder

Authorization of Board of Trustees to Approve the  
Minutes of this Meeting

Senior Minister's Report Rev. Jen Crow

President's Report Jeff Snyder

Financial Report & Presentation of Recommended Budget  
for 2024–25 Marc Gorelick, *Treasurer*; Rev. Jen Crow

Consideration and Vote on Annual Budget

Outgoing Foundation Directors Isabel Quast, *Chair*

Report of the Nominating Committee Ray Dillon, *Chair*

Election of:

Trustees, First Universalist Church

Officers, First Universalist Church

Directors, First Universalist Foundation

Members, Nominating Committee

Delegates to the 2024 General Assembly of the UUA

Rebecca Donley, Carol Jackson, Karen Wills

Motion to allow Board to appoint additional delegates to  
General Assembly

Closing Words Rev. Jen Crow

## 2023-2024 Board of Trustees

Jeff Snyder, *President*

Sarah Hedge, *Vice President*

Marc Gorelick, *Treasurer*

Matt Keller, *Secretary*

Cathy Geist

Emily Bijnagte

Ilo Leppik

Lou Quast

Emily Wallace

## Ministers & Staff

Aimee K. Bryant, *Artist in Residence*

Allison Connelly-Vetter, *Interim Director of  
Children, Youth, & Families Ministries*

Rev. Jen Crow, *Senior Minister*

Paolo Debuque, *Choir Director*

Olu Famule, *Assistant Livestream Tech*

Liz Farmer, *Membership Coordinator*

Rev. Ashley Harness, *Assistant Minister*

Hirut Hedge, *Children, Youth, & Families  
Program Specialist*

Rev. Arif Mamdani, *Associate Minister*

Jim Poulter, *Facilities & Events Manager*

Dr. Glen Thomas Rideout, *Director of  
Worship Arts Ministries*

Rachel Rott, *Communications Assistant*

Brad Schmidt, *Finance Manager*

John Steitz, *Sound Engineer*

Richard Thomas, *Custodian*

Claire Tralle, *OWL Program Coordinator*

Tracy Van Epps, *Facilities Manager*

Jie Wronski-Riley, *Bookkeeper*

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# SENIOR MINISTER'S REPORT

*Rev. Jen Crow*

My colleagues and mentors, the dear departed Revs. Janne and Rob Eller-Isaacs, often called upon the image of the redwood trees to describe what is possible and present in our congregations. They wrote:

“Redwood trees reproduce in a number of ways. The most common way that redwoods reproduce is for new growth to sprout where ancestral trees once stood. This life generating, dead or dying tree is called the root crown. Have you ever been in a cathedral of redwood trees? Often among them, you will find an opening with trees ringing the circle of what was at one time a grandparent tree, now no longer visible. If you look up, you see the high branches touching one another, reaching toward the sky. The roots are also intertwined underground, woven together, sharing nutrients.”

We, as present day Unitarian Universalists, circle the root crown of all who have come before us, and in this year as we continue to emerge from and live with the continued individual and collective trauma of the Covid-19 pandemic, and the simultaneously present pandemic of racism - we acknowledge both the grandparent trees and the root crown which have nurtured and created the new life we see emerging all over our congregation.

Like our Transcendentalist ancestors before us, who put their faith in spiritual communities grounded in personal spiritual practice, small group gatherings, acts of care and justice, and shared experiences of the holy that lead to a practicing faith that fuels individual and collective transformation, we, too, are re-emerging as a congregation rooted in shared ministry. From circle suppers to small groups and Daytime Connections, Care Companions and Worship Associates and Choir members to the often unseen heroes who come in at off hours to care for our church building, arts, and grounds, to leaders in stewardship, finance, and church governance, to Habitat

for Humanity volunteers, and Memorial Reception Team leaders and helping hands and our newly formed Youth Leadership and Children, Youth and Family Advisory Teams - just to name a few - the branches of our shared ministry are reaching toward the sky. The new prayer, “You are not alone, we are holding it together.” has joined the familiar refrain, “This is the work of the church.” reminding us of the deep and abiding love and interconnection at the center of our faith, and the action that this love and connection requires.

This year, with your effort and generosity, has brought financial stability back to our communal congregational life. We are re-examining our relationship with money as a part of faithful living, grounded in love and hope. With the ground a bit more steady beneath us, relationships are deepening and so are our efforts to grow into our mission and newly reimagined visionary goals. After many months of listening and reflection, First Universalist redefined its shared vision for the next 5 years. We have called each other into becoming a congregation where we practice Beloved Community, and together, we’ve already begun working to make it real.

Our building, recently renovated with the commitment that it is “Not for Ourselves Alone” is coming back into greater use as a site not only for our own nourishment, but for community gatherings and a safe home base for new immigrants, as well. Your board and staff leadership have been growing in their skills of conflict transformation and intercultural competence, using the Intercultural Development Inventory and Development Plans to better understand the centrality of culture and the multiple cultures within the congregation. We’ve been reconnecting with our prophetic spirit and experiencing the power of shared spiritual practice through Sunday worship, as well as in smaller, identity based groups. We understand ourselves as an intergenerational community, and our worship and our building are reliable, inspiring spaces where our children and youth feel a sense of belonging.

What a privilege it is to be in this with you all, sharing in the ministry together, as we live out the Universalist spirit of love and hope, practicing Beloved Community within and beyond this community, grounded in the root crown of the generations as new life and ministry emerges.

In gratitude,  
Rev. Jen



# BOARD PRESIDENT'S REPORT

*Jeff Snyder*

Members of First Universalist,

As I reflect on the 2023-2024 church year, I am filled with gratitude for our resilient and caring community. In the wake of the challenges we have faced over the last several years, this year has been one of rebuilding, renewal, and recommitment to our mission and visionary goals.

We started the year by welcoming 5 new board members, who brought fresh perspectives and dedication to our shared ministry. As you might expect, it took some time to find our stride, but over the course of the year, we have learned to effectively utilize our complementary skills and, in conjunction with our ministerial staff, have become a pretty effective governing team...with the same board in place for the coming church year, I expect our effectiveness to grow. One priority of this Board has been to increase our visibility. We have done this by being present at church on Sundays and congregational events and by holding regular listening sessions with the congregation. We are currently contemplating additional ways to increase our interaction with the congregation in the coming year.

At the beginning of the year, the Board reinstated the Finance, Governance, and Stewardship committees. These committees have provided an opportunity for increased congregational involvement and leadership opportunities, aligning with our commitment to shared ministry.

Additional congregational involvement has allowed us to deal more effectively with the financial challenges we faced this year, including a shortfall in this year's giving and getting the pledges necessary to support our 2024-25 goals. Our congregation met both challenges, responding with incredible generosity. This outpouring of support is a testament to the strength and dedication of our community.

One of the most significant accomplishments of this year was the approval of our new Visionary Goals at the congregational meeting in January 2024. These goals, which were the result of an extensive appreciative inquiry process started by last year's Board of Trustees, provide a roadmap for how we can live out our mission and make a meaningful difference in our lives and the wider world. These goals emphasize practicing Beloved Community, honoring our Unitarian Universalist faith, fostering our connection with the Earth, pursuing individual and collective work for justice, widening opportunities for leadership and engagement, and providing meaningful presence to one another.

As we navigated the challenges and opportunities of this year, we remained committed to understanding and embracing the multiple cultures within our congregation. The use of the Intercultural Development Inventory (IDI), a psychometric assessment tool that measures intercultural competence...the ability to shift cultural perspective and adapt behavior to cultural commonality and difference. IDI has been a valuable tool in helping the Board of Trustees start to grow our intercultural skills. By engaging with the IDI, we have been able to assess our current level of intercultural competence, and are in the process of identifying areas for growth. We believe that this work is essential in fostering a more inclusive community that truly embodies our principles of love, justice, and spiritual growth.

While the 2023-2024 church year has had its share of challenges, it has also been a year of growth, renewal, and reconnection with our values and mission. I am deeply grateful for the dedication, generosity, and resilience of our congregation, staff, and leadership. Together, we are building a beloved community that honors our faith, pursues justice, and provides meaningful presence to one another. As we move forward, I encourage each of you to continue active participation in the life of our church and working together to realize our shared vision. This might include joining one of our newly reinstated committees or contributing your time and talents to our various ministries and programs. Together, may we continue to give, receive, and grow in the Universalist spirit of love and hope.

Sincerely,  
Jeff Snyder  
President, Board of Trustees

# TREASURER'S REPORT

Marc Gorelick



*Note: Information in this report is accurate as of 21 May – some information may be changed by the time of the annual meeting.*

It has been an honor to serve as treasurer and Board member for First Universalist Church this past year. I have appreciated the opportunity to get more involved in the life of the congregation and work with so many wonderful congregants and staff. In this report I will share some of the financial highlights of the past year, and the proposed budget for the 2024-25 fiscal year.

**Finance Committee.** This year, we reinstated the Finance Committee. In addition to myself, members include Dan Berg, Julie Most, and Dick Niemiec, and Will Hegemann as liaison from the Stewardship Committee (see below). The committee meets monthly to review the financial status of the church with Rev. Jen and Brad Schmidt, our finance manager. (For those interested, meeting minutes and monthly financial information is included in the board meeting packets, which are available on the church website.) Other key activities of the Finance Committee included:

- Creating an inventory of staff and board financial policies
- Updating various investment policies
- Starting to draft an audit policy
- Reviewing investment performance of First Universalist funds
- Working collaboratively with Rev. Jen to build the 2024-25 proposed budget.

**Stewardship Committee.** The Board created a new Stewardship Committee, co-chaired by Emily Wallace and Will Hegemann. This committee is charged to “encourage and develop a spirit of generous giving in church members.” Its mission includes promoting generosity and giving, and overseeing fundraising activities including the annual pledge drive, fundraising events, and capital campaigns.

**2023-24 Fiscal Year performance.** The current fiscal year operating and capital budget anticipated total revenue of \$1,613,000, with 93% of that coming from congregational giving, and a deficit of just under \$100,000. As we reported at the mid-year meeting in January, while expenses were close to budget, congregational giving was significantly behind what was approved by the congregation. In response, many members of the church stepped up and dug deep and increased their giving for the current year. Through the 3rd quarter of the year, thanks to many acts of generosity, we are now projecting to end the year with a deficit of approximately \$60,000, or 40% less than budgeted!

*Treasurer’s Report continues on next page*

## ***Visionary Goals, Adopted in 2024***

The people of First Universalist practice Beloved Community among and beyond us. To do this we...

Honor the richness of our Unitarian Universalist faith and embody its love within the walls of our church and beyond.

Foster our connection with, care for, and action on behalf of Earth's environment and all of life.

Pursue our individual and collective work for justice, in relationship with those most affected by systems of oppression.

Widen the opportunities for leadership participation and engagement in the many facets of how our church functions and thrives.

Provide meaningful presence to one another in times of joy, grief, and change.

# TREASURER'S REPORT CONTINUED



**2024-25 proposed budget.** The proposed budget for the 2024-25 fiscal year, which was approved by the board on 16 May, anticipates total revenue for the year of \$1,791,850, and is essentially balanced (surplus of \$80). Highlights of the budget include:

## Revenue

- Pledge income of \$1,314,000. This reflects total pledges of \$1,355,000 (actual pledges as of this writing are \$1,345,000), with a 3% shrinkage factor to reflect pledges made but not fulfilled.
- Total fundraising income of \$206,000, compared with \$298,000 budgeted in 2023-24. This more conservative budget includes
  - \$30,000 from fundraising events, which are currently being planned - vs. \$50,000 in current year budget
  - \$62,000 from endowment income (guaranteed)
  - \$35,000 from offering plate donations - vs. \$38,000 projected actual for 2023-24
  - \$75,000 in various other donations (e.g., memorial gifts, Boston trip fundraising, RE appeal, other special appeals) - vs. \$135,000 in current year budget
- Rental income of \$114,000, an 11% increase from current year. This is due The Grace Neighborhood Nursery School continuing their rental agreement with us as well as a new rental agreement with BLUU (Black Lives of Unitarian Universalism), who will be leasing office space in our building.

## Expenses

- All senior leadership positions are retained.
- Nearly all previously reduced facilities hours are restored, and both positions are now benefits-eligible.
- All staff are at or above the UUA minimum guideline for our region.
- Merit increases aligned to 3% inflationary adjustment
- Worship/music staffing at 1.25 FTE
- \$5000 for sabbatical coverage
- Administrative expenses \$139,870 (23% reduction from 2023-24 year-end projection and 4% reduction from 2023-24 budget)
- Program expenses \$88,100 (36% reduction from 2023-24 year-end projection and 5% increase from 2023-24 budget)

## Membership Report 2023-2024

New Members: **20**

Total Membership: **993**



# PROPOSED 2024-2025 OPERATING BUDGET

First Universalist Church of Minneapolis			
Proposed Operating and Capital Budget, 2024-2025			
	2023-24	2023-24	2024-2025
	Operating Budget	Year-End Projections	Proposed Budget
Revenues			
Support			
Annual Giving	\$ 1,049,750.00	\$ 1,055,000.00	\$ 1,314,350.00
Donations/Fundraising	\$ 293,750.00	\$ 406,893.45	\$ 206,000.00
Building/Capital Fund	\$ 155,500.00	\$ 155,500.00	\$ 155,500.00
Revenue Released from Restriction	\$ -	\$ -	\$ -
<b>Total Support</b>	<b>\$ 1,499,000.00</b>	<b>\$ 1,617,393.45</b>	<b>\$ 1,675,850.00</b>
Earned Revenue			
Service/Rental Income	\$ 103,000.00	\$ 90,539.62	\$ 114,000.00
Investment Income	\$ -	\$ 7.00	\$ -
Other Income	\$ 11,000.00	\$ 1,190.43	\$ 2,000.00
<b>Total Earned Revenue</b>	<b>\$ 114,000.00</b>	<b>\$ 91,737.05</b>	<b>\$ 116,000.00</b>
<b>Total Revenues</b>	<b>\$ 1,613,000.00</b>	<b>\$ 1,709,130.50</b>	<b>\$ 1,791,850.00</b>
Expenses			
Personnel Expenses	\$ 1,205,500.00	\$ 1,196,489.71	\$ 1,291,000.00
Administrative Expenses	\$ 145,600.00	\$ 172,147.85	\$ 139,870.00
Program Expenses	\$ 84,500.00	\$ 120,143.46	\$ 88,100.00
Building & Grounds	\$ 139,300.00	\$ 146,333.86	\$ 139,300.00
Construction Loan	\$ 133,000.00	\$ 133,000.00	\$ 133,000.00
Other Expenses	\$ 5,000.00	\$ 2,405.22	\$ 500.00
<b>Total Expenses</b>	<b>\$ 1,712,900.00</b>	<b>\$ 1,770,520.10</b>	<b>\$ 1,791,770.00</b>
Investment Activity			
Investment Activity	\$ -	\$ -	\$ -
Total Investment Activity	\$ -	\$ -	\$ -
<b>NET SURPLUS/(DEFICIT)</b>	<b>\$ (99,900.00)</b>	<b>\$ (61,389.60)</b>	<b>\$ 80.00</b>

# FOUNDATION REPORT



*Isabel Quast, Chair*

The First Universalist Foundation acts as a catalyst for social change by promoting and supporting the development of emerging leaders, youth, young adults, and marginalized communities through monetary grants to nonprofits working in those communities.

The First U Foundation was created in 1984 from an endowment fund resulting from the sale of Unity Settlement House, a neighborhood center owned by the predecessor to First Universalist Church, The Church of the Redeemer, since 1893.

The settlement house was purchased from the church and demolished when I-94 was built through north Minneapolis. The settlement house served immigrant and Indigenous families on the near north side of the city. The Foundation strives to carry on that legacy through grants from income on the endowment.

Historically, the First U Foundation has given out grants ranging from \$5,000 to \$20,000.

#### Giving Priorities:

1. Demonstrate the potential to address one or more causes of forms of injustice.
2. Work to engage youth, young adults, and/or disenfranchised communities in the work of social change.
3. Have a commitment to measuring the impact or success of the funded program.
4. Focus on the Twin Cities community.
5. Organizations with annual budgets of less than \$1,000,000 will be given greater priority

**With great pleasure, we announce our 2024 grant recipients, at right.**

## 2024 Grant Recipients

Latino Youth Development  
Collaborative  
\$10,000

Minnesota Interfaith Coalition  
on Migration  
\$10,000

Black Lives of Unitarian Universalism  
\$10,000

Walk-In Counseling Center  
\$5,000

Bolder Options  
\$7,500

Beyond Walls Twin Cities  
\$2,500

Minnesota Prison Writing Workshop  
\$7,500

Exposed Brick Theater  
\$4,000

Our Justice  
\$7,500

Midwest Food Connection  
\$3,500

Augsburg Fairview Academy  
\$7,500

**\$75,000 TOTAL**





# RECOMMENDATIONS FROM THE NOMINATING COMMITTEE

From **Ray Dillon**, Chair of the Nominating Committee—an excerpt from the letter sent to Nominees for the Foundation Board:

Our church bylaws dictate that the nine Directors of the Foundation Board serve three-year terms on a staggered basis, so that in an ideal world, no more than three new members would be joining the Board in any given year. In the recent past, however, we’ve diverged from that ideal as some Directors have left the Board part way through their terms. To prevent having five of the nine Directors end their terms in the same year (2027), the Nominating Committee decided that we would use alphabetical order to assign two of you to two-year terms ending in 2026. We want you all to be very clear that the Nominating Committee sincerely hopes that each of you will serve for three years or more, regardless of whether on paper you’ve been assigned to finish two years of an incomplete term. We pledge to get the bylaws changed in the near future so that those of you who are being assigned to finishing out an incomplete term would be explicitly allowed to choose to serve the bylaws’ maximum of six years on the Board. However, because the church is already dealing with so many pressing concerns this year, we made a tactical decision not to push for that change to the bylaws at this annual meeting.

**The Nominating Committee’s commitment is to real people living in the real world.** We know that life circumstances can change, serious illness can strike, burn out can occur, and love can call us in new directions. For these reasons, our committee will continue to contact each director of the Foundation Board every February to ask if you intend to continue to serve for the following year. In effect, this breaks your two- or three-year term into one-year commitments. If you continue to feel fulfilled as a director, we would be delighted to have you serve a full six years on the Foundation Board. Your accumulated experience will be of great benefit to the church’s mission, plus you’ll be saving our Nominating Committee the trouble of replacing you!

According to the church bylaws, *the Nominating Committee shall submit its slate of candidates to the Board of Trustees for review 30 days before the annual meeting.*

Below is the slate our Committee proposes for church year 2024-25 beginning July 1, 2024. (Submitted to the First U Board on April 30, 2024.)

## Board of Trustees

*(officers will remain as listed on page 1)*

Emily Bij nagte	Ilo Leppik
Cathy Geist	Lou Quast
Marc Gorelick	Jeff Snyder
Sarah Hedge	Emily Wallace
Matt Keller	

## Nominating Committee

David Bach  
 Evelyn Browne  
 Sandy Culpepper  
 Ray Dillon  
 Katie Fox  
 Chad Johnson

## Foundation Board

Lynn Broaddus	Marnie Peichel
Kaitlin Hallett-Pugh*	Isabel Quast*
Ingrid Moe*	Dale Schwie*
Philipp Muessig	
Vicky Nier*	

*\*New Candidate to this role, requires a vote of the congregation*

# RECOMMENDATIONS FROM THE NOMINATING COMMITTEE

**Note:** Isabel Quast is a returning member of the Foundation Board, but due to her joining the Foundation Board outside of the normal cycle, we are including her bio and photo here.

## FIRST UNIVERSALIST FOUNDATION BOARD



**Kaitlin Hallett-Pugh** has been attending First U since the Christmas Pageant of 2015, when her son, Griffith, turned to her and said “Mom, this place has everything you’ve been looking for in a church!” She was involved with creating curriculum for first grade Our Whole Lives and teaching OWL. Most recently she was a facilitator for Visionary Goals workshops and was a mentor in the Coming of Age program. Kaitlin was a lawyer for many years and then became a social studies teacher. Her primary hobby is reading (yes, she’s a nerd) and hanging out with her husband Andy, two kids (Lillian and Griff) two cats (pippa and Monty) and one dog (Otis).



**Ingrid Moe** has been attending First U since 2004, and has recently participated in several small groups as well as a Habitat build. She taught college in the state university system in Georgia and has served as a volunteer tutor for at-risk students in the Saint Louis Park school district. She enjoys hiking, biking around the city lakes, and gardening. She is excited to leverage the paralegal and budget coordination skills she has developed in the workplace in the service of the First Universalist Foundation Board.



**Vicky Nier** is a life-long UU who joined First U when she moved to town in 2018. At church, she has served as an usher, volunteered at the front desk, and helped to coordinate congregational care efforts. She's greatly enjoyed getting to know fellow members through small groups and Sunday services. A full-time writer now, Vicky's previous professional life was as a project manager at an educational non-profit in Washington, D.C. In her free time, Vicky is an avid gardener, knitter, and hiker. Her maltipoo, Alfie, loves to join in the hiking fun from his doggie backpack.



**Dale Schwie** has been a member of First U since 1971. He has served on the Arts Committee, the Building and Grounds Committee, and as a mentor for a Coming-of-Age youth. He and his late wife Kay enjoyed participating in photography pot luck groups. Dale recently co-facilitated a workshop on Thoreau’s Walden, with Rev. Arif. Dale is grateful for the opportunities the church has provided for him to develop these interests, and he has received, grown, and given where he could. It is in this spirit that he looks forward to serving on the Foundation Board. His goal is to apply his personal interest and experience in philanthropy to its mission.



**Isabel Quast** and her family started attending First U in the early 90's and she grew up within the church's RE program. After graduating high school she served on the AUW's board for three years and continued to stay active within the church community. In 2019 Isabel co-shared the Holiday Giving Campaign and made a 5-year commitment to continue this work while partnering with BLUU. Isabel has been a mentor for Coming of Age teens three times. Isabel joined the Foundation Board in December of 2021 and became Board Chair in 2022. Outside of church, Isabel has her own small business and works/lives in North Minneapolis with her English Bulldog.