

FIRST UNITARIAN SOCIETY OF MILWAUKEE CONGREGATIONAL RECORD

Senior Minister Position Description:

1. Services

The Senior Minister (SM) of the First Unitarian Society of Milwaukee (FUSM) shall have freedom of the pulpit. While the SM shall recognize and encourage participation by others, s/he will remain in charge of all regular and special services at FUSM, *except* those in which the Associate Minister (AM) presides or those held during the SM's vacation or absence. The SM will collaborate with the AM on determining responsibilities for services. (Historically the AM has preached 2/5 of the services during the "church year" and five to six services during the summer, when our previous SM took vacation.) After the initial year, occasional pulpit exchanges shall not be considered as one of the SM's "off" Sundays, provided the SM makes all necessary arrangements and there are no more than three such occasions per year. The Senior Minister has responsibility for supervising the Associate Minister and mutually building a cooperative and collaborative working relationship, including negotiation of specific portfolios of ministry.

2. Administrative Duties

The SM will serve as head of the paid staff and will hold regular meetings with staff members in order to administer and coordinate their activities. The SM will also attend meetings of the Board of Trustees and meet with members of the Board outside of regular Board meetings as is appropriate or necessary. The SM is expected to provide advice, counsel and direction to all committees and functions of FUSM. Final decisions on matters of policy and procedure will remain with the Board and the congregation as provided in the By-laws.

3. Reports to the Congregation and the Board

The SM will make an annual report on the "State of the Society" at the conclusion of each fiscal year, which report may be given to the congregation at our annual meeting held each May. The SM will bring to the attention of the congregation and the Board matters concerning the welfare of FUSM and is expected to make a verbal report to the Board at each regularly scheduled Board meeting.

4. Rites of Passage

There will be no charge for funerals, memorial services, and dedication of children of members. The SM may charge non-members for her/his services, and members for weddings, according to the UUMA Guidelines. The SM may retain income received from these sources.

5. Office Hours

The SM will maintain regular and posted daytime or evening office hours at least three days per week, with other times available by appointment, and will also be available within reasonable parameters by email.

6. Pastoral Care and Counseling

The SM will provide pastoral care and counseling services in a manner commensurate with her/his skills and time.

7. Community Relations

The SM is encouraged to take part in community activities that s/he feels serve their concern for social responsibility. The SM's participation in such activities shall be personal and shall not entail or constitute sponsorship or authorization by FUSM, although it is recognized that a portion of the SM's professional time will be given to community relations. The SM will speak as a representative of FUSM only when specifically authorized to do so by the Board or the congregation.

8. Denominational Relations

The SM is expected to represent FUSM within the Unitarian Universalist Association to the best of her/his ability in conjunction with our lay representatives.

Starting Date: Summer 2016 (exact date to be negotiated)

Full Time/Part Time: Full Time

Is the minister expected to occupy a parsonage? No

Number of Adult members: 786

Average Sunday attendance: 396

Children & Youth Enrollment: 204

Average children and youth attendance: 86

Total Operating Expenses: \$962,549 (FY ended 6/30/15)

Total Pledge Income: \$710,219

Number of Pledging Units: 505

How many Sunday Services? From September to May we hold two services each Sunday, at 9:00 a.m. and at 11:00 a.m. During the summer we hold one service each Sunday at 10:00 a.m.

Are there other services during the week? No

How many months during the church year is the church at full operating capacity? Twelve

Describe the character of the surrounding community:

Milwaukee is a city of neighborhoods. FUSM can be found in the East Town Neighborhood, close to Downtown's thriving central business district. We are only 15 minutes' walk from the extraordinary Lake Michigan, on a peaceful, tree-lined residential street. There's a charming Irish Inn and Pub a block away, as well as other historic churches, a couple of art deco hotels, coffee shops, and local restaurants - including a few James Beard Award winners! Amidst older cream city brick homes, apartment buildings mix with newer lofts and condos. Nearby green spaces include Juneau Park, named for one of the city's founders, on the bluff overlooking Lake Michigan, and Cathedral Park Square, which hosts a farmers' market plus free "Jazz in the Park" concerts all summer and the popular Bastille Days Festival in mid-July.

Transportation:

East Town's dense, narrow, and intimate streets are very walkable, but can make parking a challenge. FUSM does not have a parking lot, so we rely on street parking. The Lincoln Center of the Arts, a Milwaukee Public School, allows our members to use their parking lot on Sundays. This is located one block west of the church and can be easily found by its large, colorful mural. Some members bike to church using The Oak Leaf Trail, which meanders more than 100 miles in and around the city. Others walk or use public transportation. Two Milwaukee County bus routes stop right outside our building. This past spring, the Common Council also approved plans for a new Milwaukee streetcar, which will include stops on Ogden Avenue outside our church. Groundbreaking is expected by early next year, with full operation in mid-2018.

Culture:

We are so much more than beer, brats, and bowling! (Although we do those very well, thank you.) Milwaukee is experiencing significant growth and revitalization, with many new residential, retail, and commercial projects planned or underway, and has been referred to as "the Portland of the Midwest." We have a vibrant performing arts community, including professional theatres, opera, ballet, and our own symphony orchestra, all performing within close proximity to FUSM. The Milwaukee Art Museum houses more than 35,000 works of art and boasts a soaring, landmark addition designed by renowned architect Santiago Calatrava. Quarterly Gallery Night events highlight our thriving community of local artists. Downtown Milwaukee's lakefront hosts more than a dozen annual outdoor summer celebratory and ethnic festivals, including a massive 12-day music festival known as Summerfest. Outdoor adventurers can boat, kayak and canoe the Milwaukee River through downtown and into the harbor, run a marathon along the Lakefront, or bike the Hank Aaron State Trail from downtown into the suburbs. Sports fans cheer for numerous local professional sports teams: the Brewers (baseball), the Bucks (basketball), the Admirals (hockey), and the Wave (indoor soccer), and let's not forget the nearby Green Bay Packers, a perennial favorite. Milwaukee is also home to a number of respected institutions of higher learning, including Marquette University, the University of Wisconsin-Milwaukee, Milwaukee School of Engineering, and the Milwaukee Institute of Art and Design.

Racial Issues:

While Milwaukee continues to evolve economically and culturally, valuing knowledge and innovation, we would be remiss not to mention Milwaukee's well-publicized problems of racial segregation and income inequality. Indeed, the very large "Black Lives Matter" banner on the side of our church building has been torn down twice (don't worry, we'll

keep replacing it!). While these problems are indisputable, from the ground level we see numerous peaceful and racially diverse neighborhoods in the Metro area and huge numbers of concerned citizens - including many members of our congregation - coming together to try to solve these problems. It is heartening and exciting to see so much energy and good work galvanizing around these issues, though there is still much work to be done.

UUA District: Mid-America Region

UUA District Executive: Lisa Presley

APF Contribution: \$28,500 (72% of requested amount)

Fair Share? No

Ministerial Settlement Rep: Emmy Lou Belcher

Compensation Consultant: Douglas Kaufman-Dickson

Profile of the Minister you seek:

To paraphrase a UUA consultant, a minister must possess at least three skills - the priestly, the pastoral, and the pragmatic. Our ideal senior minister will be exceptional in two - the priestly and the pragmatic - and excellent in the remaining one - the pastoral.

By priestly we mean that we are searching for an individual possessing outstanding skills in designing and delivering meaningful and thought-provoking worship services (especially the sermon) and deepening our understanding of our relationship with ourselves and our relationships with others, as well as our relationship to the larger social and economic challenges in our community, nation, and the world. We need and want an inspirational leader who can help us remain inspired and engaged with this beautiful, frustrating, and infinitely complicated life. Our ideal candidate will also have exceptional pragmatic skills, evidenced by his or her ability to effectively manage and lead a large organization with a budget of almost \$1 million. Finally, we seek an individual with excellent personal and pastoral skills, evidenced by his or her ability to connect with others with integrity and warmth.

How should our ideal minister interact with the members of the First Unitarian Society of Milwaukee? We seek someone who will fill our Sunday mornings with thought-provoking sermons and services that engage us intellectually, foster our spiritual growth, and call us to be our best selves. We hold a broad range of beliefs, so we seek someone who can speak to the full range of our theological diversity. We seek a person who will begin their time with us by listening widely and with empathy in order to get to know us and all of our passions and talents and quirks. We want a minister who will then move deliberately and collaboratively to guide our community and, eventually, get involved in Milwaukee's interfaith, social action, environmental, and anti-racism/anti-oppression efforts. We are not interested in hiring someone who brings a preconceived agenda. We are looking for a person with an impeccable character who is highly professional, able to communicate clearly, and is self-assured enough to help empower us to develop our own leadership potential. We will value the breadth and depth of our new minister's scholarship.

How should our ideal senior minister interact with our staff? We seek someone who will work collegially with our esteemed Associate Minister, Rev. Dena McPhetres, and who will respect the professionalism and experience of our highly competent staff. We also seek a person who will collaborate with and nurture our three beloved and incredibly talented musicians (who primarily work outside the church building). Our ideal minister will also be able to prioritize and delegate effectively.

How should our ideal minister interact with our governance and organizational structure? We seek a person with experience in managing change who can continue the process of reviewing how we run our organization begun by our interim minister, The Rev. Elaine Peresluha. We will value someone with knowledge of financial management and a willingness to engage in fundraising so we can dependably fund our staff and programs and use our resources as wisely as possible.

How should our ideal minister interact with him or herself? We expect our new minister to be confident, steady, and cognizant of (and able to attend to) her or his personal needs. Integrity, humility, and authenticity are fundamental character traits we seek. We want a minister who is not afraid to take risks or to admit mistakes.

Our choral selection on a recent Sunday was titled “The Sound of Our One Voice.” After 28 years with one senior minister, FUSM no doubt has institutionalized practices and preferences. Our interim period has allowed us to take a deep, fresh look at ourselves. Now we need to continue the process of reflection, analysis, and creative visioning of our future. We need to find a balance of spirituality and activism, tradition and adaptation, growth and connectedness. We seek a minister who can lead us to sing with one even stronger and more joyful voice.

Congregational Profile:

At its heart, the First Unitarian Society of Milwaukee is a community of dedicated individuals who come together with a sense of mutual ease and joy to create a spiritual home in which we can search and question in an accepting atmosphere. We value openness and inclusivity and strive to be a welcoming place for all those exploring their spiritual identity. We are inspired by our Sunday services, especially the sermon and the music, to examine what is important, to make sense of our lives, and to come to terms with not having answers to all our questions. We serve others in our community and work to erase injustice. We could search, question, make sense, and struggle for justice individually, but we believe at our core that we are better and stronger by being together.

The most accurate and recent source of information to describe ourselves demographically is a survey completed in September 2015 by 36% of our congregation. While our members live throughout the Milwaukee County metropolitan area, the largest clusters of our members live in a handful of close, older suburbs of Milwaukee or Milwaukee neighborhoods within 20 minutes of our building. Nearly 70% of the survey respondents are over 50 years old; less than 5% are under 30. Two-thirds of respondents are female. Eighty-six percent of us report being heterosexual. We are predominantly white, college-educated, and mid- to -upper class. Half of the respondents have school age (K-12) children. About 75% have been members for 6 years or more.

We are a dynamic, active congregation emerging from a period of dramatic growth. Under the 28-year tenure of our previous Senior Minister (now Minister Emeritus), The Reverend Drew Kennedy (who retired in 2014), we grew from 269 to 800 members. Our response was to embark on two important and well-funded strategic plans (Vision 2000 and Vision 2010, adopted in 1995 and 2003, respectively), which facilitated updates to our beautiful, historic building and additions to our staffing necessary to transition to a large congregation. Most significantly, we added a second service and expanded our DRE position to full-time in 1996; remodeled our lower level into efficient classroom space and our upper level chapel into a beautiful, functional meeting space in 2001, and added a second minister, created three new staff offices and expanded to three services (for several years) in 2006. Since the retirement of our choir director and organist after 25 years of service in 2011, we have evolved to a music program featuring three talented professional musicians (whose hours together add up to an 88% FTE), plus collaborative guest musicians. The quality and variety of musical styles and performers is a much-beloved component of our Sunday services.

Our congregation is far from static. The roster of committees and affinity groups has shifted in response to changing needs and interests. We now have affinity groups for all age groups and also for parents, in addition to several Chalice Circles, a Buddhist Study Group, and a Pagan Celebrations group. The Social Justice Council is gradually moving from standing committees to action groups that commit to goals within a specific time period. A recent Board of Trustees initiative resulted in the formation of a Leadership Enhancement Committee to identify and train new lay leaders. We have also established a reliable, monitored network of trained volunteer members to provide pastoral care and practical assistance (meals, rides, etc.) to members during difficult periods of their lives.

We are striving to collaborate more closely with the UUA. One of our explicit financial goals is to increase our contribution to the UUA from our 72% contribution in 2014-2015 to the full amount requested. We are connecting our social justice efforts with the Standing on the Side of Love movement and we have a group working on the current Congregational Study/Action Issue, escalating inequality. We have taken advantage of off-site participation in General Assembly and, as part of our leadership initiative, have begun covering a portion of the cost for members to attend the UUA Midwest Leadership School. Last year we held our first discussion of a UUA Common Read book. We will continue to take advantage of the excellent resources and curricula of the UUA.

Most recently, in September 2015, we adopted a streamlined new mission statement: “Nurture the Spirit, Engage the Mind, Inspire Action.” Our history of accomplishments gives us the confidence to look toward the future with a strong sense of optimism and excitement. When our Interim Transition Team asked about our dreams for the future during Appreciative Inquiry sessions in fall of 2014, those dreams coalesced around building on our current strengths to achieve even more: more spiritual growth, more social justice action, more youth involvement, more connectedness within our congregation and to the community outside our doors. Our desire is to become an even more active, vibrant, and generous, beloved community.

How and when was the church founded?

The First Unitarian Society of Milwaukee was started in 1842 with assistance from the Rev. James Huntington of the First Unitarian Society of Chicago. By 1849 services were sporadic and the Society was without a building or minister. The Rev. William G. Eliot of St. Louis helped resurrect the Society in the mid-1850s. By the end of 1856, we had called a minister, the Rev. N.A. Staples of Lexington, Massachusetts, a strong abolitionist, and by February 1857 had completed a new building. Our current building was completed in 1892. In 2017 we will celebrate our 175th anniversary!

Note the three or four most significant events in the church’s history:

1. The 1856 re-establishment of the church after it had essentially disbanded, and the construction of our present building, completed in 1892.
2. The decision, in the mid-1960s, to stay in the city and commit to growth by building the Common Room and RE classrooms at the height of “white flight” from the downtown area; at this same time we helped launch two new congregations in the western and northern suburbs.
3. Our next commitment to growth, in the mid-1990s, when we accomplished major components of our “Vision 2000” by expanding to two services and doubling RE classes, and began preparation for a 1.5 million dollar building renovation that was completed in 2001. Yet another commitment to growth was articulated in “Vision 2010,” adopted in 2003.
4. Taking a prominent role in community social justice activities: FUSM actively supported an abortion clinic defense league during the 1970s and 1980s. We provided weeks of emergency winter shelter in our building in 1996-99. In 2013, FUSM was the first UU congregation in the country to approve a board resolution pledging to divest our funds from fossil fuels. Congregational leaders were instrumental in getting a fossil fuels divestment business resolution passed at General Assembly in 2014.

Listing most recent first, list all

(i) ministers who have served since 1950;

(ii) all ministers of great importance and

(iii) all interim ministers since 1980:

Name	Date Arrived	Date Departed	Reason for Departure
Elaine B. Peresluha	2014	still active	Interim Senior Minister
Dena McPhetres	2009	still active	Associate Minister

Andrew C. Kennedy	1986	2014	Retired as Senior Minister - now Minister Emeritus
Craig D. Schwalenberg	2006	2009	"Hire to call" vote failed to call
Matthew Cockrum	2001	2002	Intern
Cynthia Landrum	1999	2000	Intern
Neil H. Shadle	1986	1986	Interim
Dale W. Robison	1982	1985	Negotiated resignation
Raymond J. Baughan	1981	1982	Interim
John W. Cyrus	1956	1981	Died 2/9/81
Ralph E. Bailey	1935	1956	Retired

Current Clergy and Church Staff (include all paid staff):

Position	Date of Hire	%FTE/hours per week	Health Plan eligible?	Retirement Plan eligible?	Supervisor	Member of FUSM?
Interim Senior Minister	Aug 2014	full-time	yes	yes	n/a	No
Associate Minister	Aug 2009	full-time	yes	yes	Senior Minister	No
Dir. Religious Ed	Aug 2001	full-time	yes	yes	Senior Minister	Yes
Dir. of Administration	Aug 1998	full-time	yes	yes	Senior Minister	Yes
Membership Dev. Coord	July 2015	full-time	yes	yes	Senior Minister	No
Communications Coord	June 2015	full-time	yes	yes	Dir. of Admin	No
Facilities Manager	July 2014	50%	yes	yes	Dir. of Admin	No
Lead Music Dir	Aug 2007	55%	yes	yes	Senior Minister	No
Office Assistant	Sept. 2015	60%	yes	yes	Dir. of Admin	No
RE Admin Assistant	May 2015	60%	yes	yes	DRE	No
Youth Program Coord	July 2014	46%	yes	no	DRE	Yes
Resident Artist	Sept 1996	15%	no	no	Lead Music Dir.	No
Choir Director	March 2013	18%	no	no	Lead Music Dir.	Yes
Facilities Assistant #1	Nov. 2012	42%	no	no	Facilities Mgr	No
Facilities Assistant #2	October 2015	42%	no	no	Facilities Mgt	No
Maintenance Worker	n/a	20%	no	no	Facilities Mgr	No
Nursery Coordinator	ca. 2000	Sunday a.m.	no	no	DRE	No
Preschool Coordinator	ca. 2000	Sunday a.m.	no	no	DRE	No

Does the Congregation have a mission – not a mission statement, but a glowing coal at its center – and if so, what is it?

Our oft-repeated mantra is that FUSM is “a place where freedom, reason, spirituality, community, and social justice all come together.” Similarly, our newly-adopted mission statement declares our purpose is to “nurture the spirit; engage the mind; inspire action.” So what really binds us together as a congregation is our underlying desire to gather in a haven... in a place, together... to nurture, engage, and inspire our inner lives through thought-provoking, engaging sermons and open, friendly conversation, while working collectively to help others and achieve social justice. Gathering together every Sunday within our Society of like-minded yet unique individuals provides a shelter from the world and refuels our spirit for another week -- another week of responsibility, social activism, and love and support for our diverse neighbors, community, and world.

Congregational Strengths:

The First Unitarian Society of Milwaukee (FUSM) is a large, active congregation with rich and diverse programming. For example, each Sunday between services we host a well-attended lecture series called "Forum" which brings in members of the Milwaukee community to speak on a wide array of current social, cultural, and political topics. Our highly regarded, and well-supported, religious education program is complemented by an active Parenting Group, and our annual Youth Service is second only to Ingathering Sunday in the numbers who crowd into our sanctuary to attend. In addition to our numerous active affinity groups (such as YANKS for young adults, SWANS for older single women and our Chronologically Gifted group for, well, the chronologically gifted!), we have many more spiritually oriented groups, such as an active Chalice Circle program, a Book Discussion Group, a Buddhist Study Group, and a Pagan Celebrations Group. Our strong sense of community and inter-connectedness is nurtured through our Circle Suppers program, which brings members together in small groups for potluck dinners in members' homes four times a year.

The FUSM music program is outstanding and much beloved, contributing enormously to our Sunday services experience. Our hugely talented and dedicated Lead Music Director, Artist-in-Residence, and Choral Director carefully choose a wide range of music which enhances and deepens the messages of our sermon each Sunday. They also make good use of our numerous talented members (we have our own most excellent House Band!), as well as the rich and diverse Milwaukee artistic community. It is not unusual for many to linger in the sanctuary after services to listen and applaud after the Postlude.

We have a long and proud history in Milwaukee (we will be celebrating our 175th anniversary in 2017!) and are housed in a gorgeous, well maintained, historically significant, and debt-free building with adjacent meeting and activity rooms and offices, built by our congregation in 1892. Our immediate neighborhood is attractive and largely residential, and is centrally located just blocks from downtown Milwaukee and Lake Michigan.

Under the direction of our Interim Minister, we have recently completed a year-long discernment process culminating in a congregational vote and adoption of a new mission statement: "nurture the spirit, engage the mind, inspire action." We look forward to working with our new Senior Minister to put flesh on these words through meaningful discussion and action.

We are resilient and united, managing numerous changes over the past decade with a minimum of acrimony, all while experiencing significant growth. For example, in just the past decade, we added an Assistant Minister through a "hire to call" process (2006); transitioned from two services to three services (2007); walked together through, and emerged wiser as a result of, a failed "hire to call" vote at the end of our Assistant Minister's second year of service (2008); added our well-regarded Associate Minister through the traditional call process (2009); and moved back to two services from three services (2012). During this period our membership grew by over 20%.

Congregational Challenges:

Our congregation has been transformed in the past decade by significant growth and the addition of a second minister. Though we have consistently met every financial challenge presented along the way, we are currently funding a gap between income and expenditures with a portion of a generous unrestricted bequest. We need to figure out how to bridge this gap in a sustainable way.

We also need to figure out how big we want to be. Concerns that our beautiful and historic (but unfortunately non-expandable) sanctuary was becoming too crowded to be welcoming to visitors led us to expand from two services to three services. However, after trying varying formulations for several years, we found that we could not sustain a successful third Sunday service. While this question is undoubtedly linked to the financial issue discussed above, it deserves consideration on its own.

A perennial question for our congregation is how to create and maintain meaningful social justice activities beyond the regular volunteer services we have historically provided to support local shelters. Though our congregation is a member of (and many of our members are extremely active in) Common Ground, a congregation-based community organization with several active campaigns, members continually express the desire for, but have not yet been able to create and sustain, social justice activities which carry a bigger footprint.

We need to continue and accelerate our efforts to grow, broaden, and nurture the lay leadership of our congregation. Recent efforts have included formal leadership training programs utilizing the UUA Harvest the Power leadership curriculum and increased sponsorship for members to attend the week-long UUA Midwest Leadership School, but there is much more that needs to be done in this area to ensure that our vibrant, lively church community remains strong into the future.

We would like to increase the diversity of our membership, but have not really created an organized effort to do so.

What Congregational issues are likely to be most pressing over the next few years?

We need to develop and implement a sustainable plan for funding 100% of our operating expenses and our UUA fair share payment without drawing on reserves. In 2011 we received an unexpected \$570,000 unrestricted bequest from a former member. Ten percent of this bequest was used soon thereafter to fund five social justice grants to groups serving Milwaukee. Many members hoped that a significant part of this bequest could be used to fund a major, transformational initiative of some sort and are disappointed that it has otherwise been used to bridge our operating deficit. Our members tell us they love the ministers, music, children's religious education, and all the other activities FUSM offers. We need to figure out how to fund all of the things we value - the people, programs, and our UUA fair share - to ensure that our church thrives.

What Congregational issues are likely to be most pressing over the next ten years?

Membership growth was an explicit goal of our congregation during our previous senior minister's tenure. While we are certainly already a healthy size, we have historically aspired to be a religious home for spiritual seekers in the Milwaukee area. Being very near capacity in our sanctuary and children's RE space, we tried holding three Sunday services between 2007 and 2012. However, the third service had persistent low attendance, so we went back to two services and added 24 seats at the back of the sanctuary. Since our Sunday attendance has dipped since 2012, accommodating more Sunday worshipers is not an immediate pressing need. Our focus has shifted to nurturing membership engagement, but we may see increasing attendance as our new senior minister gets established and if our social justice actions become more visible in the community. If we do grow in absolute numbers as well as in age, racial, socioeconomic, and theological diversity, we will have to face the challenge of our limited space.

Another challenge we must meet over the next decade is to welcome a generational membership shift. We need to define and fill all our members' need for spiritual growth, fellowship, social justice work, and family support. How can we hold our beloved UU traditions and yet appeal to others who would be nourished by our message but need to hear it in a style that is closer to their own faith tradition? How can we best blend face-to-face experience at church with a vibrant social media presence? What configuration of church services and activities will meet the needs of millennials and young families?

What Congregational issues may never be resolved?

We have no parking lot or dedicated on-street parking. We do have access on Sunday mornings to a middle school and a social service agency lot a few blocks away, but parking remains a concern, especially for elderly and disabled members and families with young children.

Becoming a truly diverse congregation racially, educationally, and socioeconomically may require radical shifts in the way we worship and nurture ourselves within our church walls and the way we engage ourselves in the community.

To what degree does the congregation possess a dominant theology?

In our September 2015 congregational survey, members responded to the question “What faith traditions, other than UUism, are important to your religious development?” (multiple responses allowed). The three most popular responses were: Humanism (72%); Buddhism (61%); and Christianity (49%). Judaism and Taoism were both selected by 22%, followed by Other (18%), Islam (15%) and Hinduism (14%). These responses affirm our desire for positive messages from all faith traditions while not embracing a specific creed; they also reflect the strong Humanist history and tradition at FUSM. It should be noted, however, that our Interim Minister has told us that when she has experimented with using Christian terms or source materials in our services, a few members have told her they have found it comforting, while others expressed resentment. We do not believe the congregation would, in general, be comfortable with Christian messages in our services on a weekly basis.

Describe the role music and the arts play in the life of the congregation:

Music is an integral part of every Sunday. Just as we can learn from Jesus, Buddha, and Mohammed, so too can we learn from J.S. Bach, John Coltrane, and Joan Baez. Whether it’s the whole congregation singing with accompaniment from our recently restored and refurbished 1917 Steinway B grand piano or impressive pipe organ, our Chancel Choir, our house band, or any number of solo and ensemble performers, music is a vitally important spiritual resource for our community. Our three dedicated music program leaders and many congregation members are active professionals in the local music community and share their love and passion for music with the rest of the congregation.

Visual arts, while not as integrated into our formal rituals as music, are also ever present in our surroundings. The church houses the Leenhouts Gallery (Google it!) on site, which showcases a new local painter, printmaker, photographer, or other visual artist every six weeks. All our Sunday coffee hours are held in the gallery, with engaging conversation amid engaging visuals.

We pass on this love of the arts to our next generation, as the children’s RE program incorporates arts, crafts, and music into their spiritual growth.

Describe the religious education programs for children, youth and adults:

FUSM is very proud of our strong and vibrant Religious Education program, which offers a variety of classes and activities for children and teens. Our RE staff includes (i) a full-time Director of Lifespan Religious Education; (ii) a 23 hour per week RE Administrative Assistant; (iii) an 18 hour per week Youth Program Coordinator whose focus includes OWL, YRUU, a Jr. Youth Group, Mission Trip support and starting a bridging group with Young Adults; and (iv) Nursery and Early Childhood Coordinators who work primarily on Sundays with our littlest children.

The children’s RE program served slightly more than 200 children last year. We offer classes grouped by school grade from nursery and kindergarten through eighth grades at 9:00 a.m. on Sunday mornings. In addition, both a Jr. Youth Group (Pillars) for ninth graders and the Young Religious Unitarian Universalist (YRUU) Youth Group for 10-12th graders meet for approximately two hours, beginning at 9:00am each Sunday. Our RE program during the 11:00 a.m. service is smaller, with classes offered through sixth grade. Every year we offer the Our Whole Lives (OWL) sexuality education program to our eighth graders. This year there are 17 OWL participants. During the summer months, RE programs are held for children in kindergarten through sixth grades, though like many UU churches, summer RE attendance is sporadic. Plans are in the works for adding options for summer youth programs as well.

Over 100 adult volunteers staff the programs for children and youth as lead teachers, assistants, youth advisors, Children’s RE and Youth Steering committee members, and others.

Until the current church year, children participated in the first portion of our sanctuary worship services on the second Sunday of each month and were additionally included for the full services during five fully multi-generational services throughout the year. Beginning in September 2015, children have been included at the beginning of most services, with the exception of a monthly "First Sunday," when themed inter-age activities and children's worship take place in the RE program, and the Pillars/YRUU groups hold extended "check-in." The jury is still out on this immersion experiment with many parents and RE volunteers expressing deep gratitude, while others have expressed dissatisfaction. Meanwhile, the three services produced by RE - the YRUU group's annual Youth Service, the multigenerational Holiday Service and the "RE Sunday" Service - are among the most well attended and beloved services of our church year.

There are many additional exciting programs and initiatives through our RE program. Seventeen people participated in a series of Anti-Racism/Anti-Oppression (ARAO) dialogues in 2014-2015, which led to the development of an ARAO "winterim" planned for January 2016, as well as Parent and Volunteer educational opportunities and training. The "First Sunday" program, mentioned above, is a new initiative that purposely combines children of various ages to build community and go deeper into social justice and/or "big questions." For the past 12 years our teens have participated in an annual week long "Mission Trip" to Michigan where they volunteer for Habitat for Humanity. Initiatives to bridge the generations have included a regular children's display as part of the church's art gallery, a "Question of the Month" bulletin board aimed at people of all ages on the main floor, and worship services that include speakers/presentations from multiple generations.

Our Adult RE program was robust up until two years ago, but committee burnout is taking its toll and the Adult RE Committee is considering taking a hiatus in the year ahead, with the Interim Senior Minister's blessing. Class offerings in the past have ranged from the popular "BYOT"(Building Your Own Theology) class to classes in philosophy, evolution, time management, meditation, guest presenters from other religious traditions, and two ongoing yoga classes.

In practice, are responsibilities for governance widely shared or confined among relatively few members? Provide some examples.

First Church uses a policy-based governance practice, which became more intentional in June 2015 after a Board of Trustees retreat and under the guidance of our Interim Minister, Rev. Elaine Peresluha. Under this structure, governance responsibility ultimately lies with the nine-member Board, but the congregation makes the overarching decision as to what our mission will be. The Board then makes decisions about establishing some desired end results and related measurable goals intended to enable our congregation to realize our mission. Decisions about the work to accomplish those goals are delegated to the staff and member teams who join those efforts. The process of implementing this governance practice is in its infancy - note that our new mission statement was just adopted by the congregation in September 2015.

The Board is definitely not intending to be a managing board; our governance practice is definitely not intended to be a strict implementation of the Carver model of policy governance. Our aim is to operate with practices consistent with many of Carver's principles, but adapted to our particular needs and situation.

In October 2015 the Board began developing its first list of ends and related goals in response to the adoption of our new mission statement. Of special interest is the establishment of an Income Oversight Committee to develop annual income plans and strategies. In addition, a task force has been named to engage in a much-needed updating and restructuring of Board-sanctioned committees and ministry teams to reflect our growth from a moderate to large-sized congregation. It is hoped that a proposal will be presented by the task force to the Board in April, to be followed by congregational approval at our Annual Meeting in May.

A consensus of the whole is not required for Board decisions. However, there is an objective to reach consensus and most often this happens. In the end, after robust discussion, majority vote prevails.

The Board and other committees have 3-year terms so that each member has the opportunity to learn, contribute, and model behavior and decision-making during their tenure. The Board has a one-term limit on service, so there is good turnover. Many committees, however, do not strictly adhere to term limits and often have less turnover, which in some cases leads to lack of new ideas and volunteer burnout.

Describe the process you used to complete this form.

The Senior Minister Search Committee worked collaboratively to complete this form, though we used information gathered from a variety of sources to inform our work. Specifically, we: (i) reviewed the Congregational Record prepared in 2008 for the search which resulted in the call and hiring of the Reverend Dena McPhetres, our Associate Minister; (ii) in September 2015 our congregation was invited to complete a survey which utilized a portion (but not all) of the standard UUA ministerial search survey (36% of our congregation completed the survey); (iii) interviewed our Interim Minister, Associate Minister, Director of Administration, Director of Religious Education, Music Director and Artist-in-Residence; (iv) held three facilitated “Town Hall” meetings open to any interested members of the congregation and (v) worked with heads of committees and members of staff to supply the required historical data. An early draft of the job description portion of this form was shared and discussed with our Interim Minister, Elaine Peresluha, and our Associate Minister, Dena McPhetres.

Name the committees that have recently had the greatest success:

Committees that are identified as successful in accomplishing their goals include the following:

- Interim Transition Team led us through the first year, gathering input for a church timeline, creating the process for choosing the Senior Ministerial Search Committee, and doing the work for the mission statement.
- Nominating Committee had strong involvement in choosing the SMSC as well as embracing committee reorganization.
- Feast for Funds, an event-based committee in its fifth year, has exceeded its fundraising goal four out of the five years.
- The Forum Committee and Pulpit Guest Committee serve a vital role in identifying and scheduling regular Forum speakers during the church year and helping with speakers for the summer services.
- Pastoral Care Associates is not a committee but is a team of ten trained lay ministers led by Associate Minister Dena McPhetres. They are the only group of lay volunteers to be interviewed, vetted, and to go through a 30-hour training program. They serve three-year terms to help our ministers provide important active listening pastoral support to our large congregation.
- There are many affinity groups at FUSM that also engage members through various activities, with the most successful including: (i) the Chronologically Gifted Affinity Group (a new group which seems to have hit upon a need with 75 -100 people showing initial interest); and (ii) the Buddhist Affinity Group (steady participation of around 25 people twice a month for over 7 years).

Name the committees that have recently had the least success:

Some committees and action groups ebb and flow and even go on hiatus now and then, which we believe is normal. However, because it seems that we constantly pull from the same small pool to fill roles every year, with little new blood and then burnout, sustainability has become an issue for some committees.

Committees that have been described as less successful include the following:

- Stewardship has some work to do in educating members about what it takes to support our church and its activities.

- Leadership Enhancement Committee has potential for growth in educating members about becoming leaders in our community. However, after a promising start, the committee is on hiatus this year.
- Fewer people are signing up for Adult Religious Education classes, and the number of class offerings are down, leading the committee to reconsider its offerings and to consider taking a hiatus next year.

List the dollar amounts of the ten largest operating pledges given in the most recently completed fiscal year:

\$15,000; \$12,000; \$11,875; \$10,450; \$10,000; \$9,400; \$8,580; \$7,800; \$7,800; \$7,500

Give the dates of the last two capital fund drives and the funds raised (a) by contribution and (b) by debt:

(2005) Vision 2010 “Thrive Drive” - \$923,000 raised by contribution (0 debt)

(1999) Vision 2000 - \$1.3 Million raised by contribution (0 debt)

Smaller drives:

2009: Sustain Our Society-Energy Conservation Drive - \$91,600 raised by contribution (0 debt)

2010-2011: Piano Restoration Fund Drive - \$30-35k raised by contribution (0 debt)

What is the condition of the church buildings and what funds may need to be raised in the future? (Note accessibility issues)

Our beautiful church, erected in 1892 and listed on the National Register of Historic Places, is in very good condition.

Solar panels and a passive cooling system for our sanctuary were added in 2010 through the Sustain our Society fund drive. A complete assessment of facility maintenance needs over the coming ten years was completed in 2012 and is being refreshed this church year. It includes the rental apartments located in the three-story building immediately adjacent (and connected) to our main church building, the first floor of which houses staff offices and our kitchen. The needs assessment covers areas visible to our members (painting and new carpeting were installed in the Common Room this summer) as well as structural components such as plumbing, heating, and electrical systems. Funds for all ten years of the plan have been designated within our operating reserves.

Note the process by which the minister will be called:

We will employ the traditional call method to call our new Senior Minister.

Describe the process by which the Ministerial Search Committee was chosen:

A six-member Logistics Team was charged by the Board of Trustees (BOT) to develop the process for (i) getting nominations from the congregation for members of the Senior Minister Search Committee (SMSC); and (ii) assessment of the various nominees and development of a final slate of 7 people who, when approved by the BOT, would comprise the SMSC. Every member of the church received a mailing explaining the process, listing qualities and skills needed, and enclosing a Nomination Form. Members could nominate themselves or others. Representatives of the Interim Transition Team, Nominating Committee, and BOT reviewed and ranked the nominations. A slate of seven nominees was first approved by the BOT and then by the members of the congregation at its Annual Meeting on May 17.

Ministerial skills and enthusiasms most needed by the Congregation

4 - Crucial; **3** – Significant; **2** – Modest; **1** – Of less consequence [Use no numeral other than “1” more than 4 times]

2	Administration
1	Adult Religious Education
1	Children’s Religious Education
1	Committee Work
3	Community Building
2	Denominational Activities

1	Facilitation
4	Stewardship
1	Home Visitation
1	Hospital Calling
3	Leadership Development
1	Membership Growth
2	Music and Liturgical arts
1	Personal counseling
4	Preaching
3	Scholarship
2	Social Action
4	Spiritual Guidance
3	Staff Relations
4	Worship
1	Youth Work

Assess the capacity of the congregation to exercise forbearance and nurture in assisting a minister’s development:

The new Senior Minister will come to FUSM with a great deal of built-in goodwill and forbearance. Members tell us they are excited for a new settled Senior Minister who will lead us as we discover and create the next stage of our journey. Members tell us constantly that they fully support the search process and the search committee to find the best match in a new Senior Minister for FUSM. Our congregation is optimistic about welcoming a new leader and looks forward to getting to know the person while the new minister gets to know us. During Town Hall meetings, our members told us that if the new minister is an active listener and communicator with a focus on transparency, then they will know what to expect and will trust in the process and fully support the new minister’s tenure at FUSM.

We are fully committed to the development of a new Senior Minister and will determine a method to provide structured feedback as we continue to nurture our relationship together.

What expectations, however silent, may there be about the new minister's family and personal life?

We do not believe the congregation has any specific expectations about our new minister’s family. We also believe the congregation fully expects and supports our new minister in taking proactive care to ensure a healthy personal life.

Describe the worst mistake your new minister could make:

At our Town Hall meetings, members told us that the worst mistake the new minister could make would be to come to FUSM with a pre-set agenda of what we need or what the new minister thinks is best and not take the time to get to know the congregation, culture, staff, and history of FUSM before making big changes.

Membership, Attendance, and Pledging (Every five years since 1975 and annually for the last five years)

Year Ending 6/30	Adult Members	Ave. Sunday Attendance	Children & Youth Enroll.	Ave Children & Youth Attend.	Number of Pledge Units	Total Operating Pledges	Operating Pledge Per Unit
2015	786	386	204	86	505	\$710,219	\$1,406
2014	800	397	220	94	499	\$725,078	\$1,453
2013	772	414	215	114	484	\$641,693	\$1,326
2012	779	421	226	114	454	\$618,461	\$1,362
2011	792	447	255	119	455	\$641,618	\$1,410

2010	758	577	231	118	521	\$570,883	\$1,095
2005	650	347	195	111	424	\$ 443,378	\$ 1,045
2000	540	320	153	77	315	\$ 291,479	\$ 925
1995	423	192	133	58	265	\$ 175,470	\$ 662
1990	360	183	108	57	234	\$ 122,361	\$ 522
1985	385	not known	85	not known	178	\$ 90,379	\$ 507
1980	403	not known	116	not known	not known	\$ 66,737	not known
1975	414	not known	154	not known	280	\$ 57,865	\$ 206

Sources of Operating Income (Every five years since 1975 and annually for the last five years)

Year Ending 6/30	Total Operating Pledges	Other Contributions	Fundraising Events	Endowment Investment Income	Building Rentals	Other Income	Total Income	Total Endowment
2015	\$710,219	\$25,144	\$45,632	\$17,977	\$22,775	\$34,565	\$856,312	\$1,070,177
2014	\$725,078	\$39,253	\$47,575	\$49,151	\$26,735	\$53,952	\$941,744	\$1,238,419
2013	\$641,693	\$36,994	\$46,684	(\$30,763)	\$28,185	\$190,578	\$913,371	\$1,201,702
2012	\$618,461	\$24,636	\$35,251	\$16,320	\$22,428	\$107,690	\$824,786	\$1,249,258
2011	\$641,618	\$23,527	\$31,405	\$21,108	\$25,238	\$136,051	\$887,669	\$1,365,581
2010	\$570,883	\$20,925	\$28,488	\$13,721	\$16,726	\$264,373	\$915,116	\$805,925
2005	\$ 443,378	\$ 34,788	0	\$ 10,575	\$14,309	\$21,400	\$528,160	\$ 338,639
2000	\$ 291,479	\$ 26,097	0	\$ 31,298	\$31,789	\$14,675	\$ 440,798	\$ 329,475
1995	\$ 175,470	\$ 4,498	\$ 12,048	\$ 13,514	\$ 18,148	\$ 0	\$ 223,678	\$ 295,305
1990	\$ 122,955	\$ 3,406	\$ 11,132	\$ 18,491	\$ 5,367	\$ 0	\$ 161,351	\$ 284,469
1985	\$ 90,379	\$ 0	\$ 10,239	\$ 16,232	\$ 7,388	\$ 0	\$ 124,238	\$ 0
1980	\$ 66,737	\$ 0	\$ 161	\$ 5,328	\$ 5,459	\$ 9,934	\$ 87,619	\$ 0
1975	\$ 57,865	\$ 6,871	\$ 985	\$ 6,756	\$ 5,726	\$ 2,130	\$ 80,333	\$ 0

Operating Expenses (Every five years since 1975 and annually for the last five years)

Year Ending 6/30	Bldgs, Grnds & Utilities	Ministers & Other Staff Comp	Ministers Benefits & Prof. expenses	RE	Debt Service	Other current expenses	Total Expenses	Total Debt
2015	\$68,401	\$673,116	\$37,494	\$5,855	\$0	\$177,683	\$962,549	\$0
2014	\$72,250	\$583,375	\$54,803	\$6,800	\$0	\$175,806	\$893,034	\$0
2013	\$73,567	\$553,041	57,370	\$6,197	\$0	\$217,030	\$907,205	\$0
2012	\$70,813	\$556,160	\$59,765	\$6,800	\$0	\$127,407	\$810,945	\$0
2011	\$68,909	\$544,626	\$56,771	\$6,200	\$0	\$155,829	\$832,335	\$0
2010	\$64,362	\$541,428	\$45,946	\$6,898	\$0	\$221,569	\$880,303	\$0
2005	\$65,306	\$276,884	\$21,210	\$4,427	\$0	\$161,445	\$529,271	\$0
2000	\$31,527	\$225,191	\$19,504	\$6,267	\$0	\$129,919	\$412,408	\$0
1995	\$41,556	\$106,694	\$16,677	\$4,568	\$5,000	\$63,062	\$237,557	\$8,000
1990	\$35,642	\$81,824	\$12,552	\$2,075	\$0	\$32,668	\$164,761	\$0
1985	\$41,950	\$63,960	\$10,920	\$2,281	\$0	\$20,847	\$139,958	\$0
1980	\$18,033	\$39,648	\$3,363	\$6,155	\$10,000	\$15,491	\$92,690	\$0
1975	\$12,051	\$33,602	\$2,761	\$3,215	\$11,464	\$12,358	\$75,451	\$0

Explanation of anomalies in any of the above three charts is welcome:

Please note that the "Endowment Fund" column in the "Sources of Income" chart shows the aggregate amount in three different funds - our Memorial Trust Fund, which is restricted; our Mortar Fund, which is also restricted; and our Operating Reserves, which are not restricted (though certain funds, such as funds for capital maintenance, have been "designated" within these reserves). As of the end of fiscal year 2014, the approximate amounts in each of these three funds was: Memorial Trust Fund: \$317,000; Mortar Fund: \$84,000; and Operating Reserves: \$790,000.

Please note also that in the "Sources of Income" chart, the Building Rentals column includes apartment rental income and Other Income includes transfers from reserves.

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