

**First Unitarian Universalist Church of Austin
Board of Trustees Meeting
Agenda of Meeting
Tuesday December 15, 2009, 6:30 P.M.**

I.	Call to Order	Nell Newton	5 minutes	6:30
II.	Adopt Agenda	All	5 minutes	6:35
III.	Reading	Rev. Janet Newman	5 minutes	6:40
IV.	Visitors Forum		10 minutes	6:45
V.	Consent Agenda Items (& Relevant Discussion)		10 Minutes	6:55
	A. New Members/Resignations			
	B. November Meeting Minutes (page 2)			
	C. Reports:			
	i. Interim Minister: Janet Newman (page 9)			
	ii. Executive Director: Sean Hale (page 11)			
	iii. Director of Religious Education: Lara Douglass (page 15)			
	iv. Director of Music Programs: Brent Baldwin (page 20)			
	v. Treasurer: Luther Elmore (page 22, includes items submitted by Chair of the Finance Committee)			
	vi. Bridge Builders Action Plan Update: Margaret Borden (will be sent later)			
	vii. BB A-Team Report: Chris Jimmerson (page 51)			
VI.	Discussion and Action Items			
	A. Committee on Ministries Proposal	Eric Hepburn	5 Minutes	7:05
	B. Nominating Committee Policy Update (page 54)	Chris Jimmerson	5 Minutes	7:10
	C. Congregational Meeting Wrap-Up	Sheila Gladstone/Chris Jimmerson	15 Minutes	7:15
	D. Interim Minister Evaluation Process	Janet Newman	10 Minutes	7:30
	E. Audit Request	Luther Elmore	10 Minutes	7:40
			Break and Snacks	15 Minutes 7:50
	F. Board Covenant (page 56)	Janet Newman/Nell Newton	40 Minutes	8:05
VII.	Adjourn			8:50

**First Unitarian Universalist Church of Austin, Board of Trustees Meeting Minutes
Tuesday, November 17, 2009 at 6:30 p.m.
First UU Church of Austin, 4700 Grover, Austin, TX 78756 in the Gallery**

In Attendance:

Trustees: Nell Newton, President; Eric Stimmel, Vice-President; Luther Elmore, Treasurer; Chris Jimmerson, Secretary; Sheila Gladstone, Immediate Past President (Ex-Officio); Margaret Borden; Derek Howard; Jeff Hutchens; Aaron Osmer, Youth Trustee; Brendan Sterne; Michael West; Laura Wood.

Executive Team: Janet Newman, Interim Minister (Ex-Officio); Sean Hale, Executive Director (Ex-Officio);

Staff: Brent Baldwin, Director of Music, Lara Douglas, Director of Religious Education

Visitors Present: Bill Edwards, Chair of Stewardship Committee

Call to Order

The President called the meeting to order at 6:35 p.m.

Adoption of Agenda

Motion: Luther Elmore – adopt the agenda (Appendix A).
Second: Brendan Sterne
Discussion: None
Vote: All Affirmative

Reading and Lighting of the Chalice

The Interim Minister read the opening words and the President lit the chalice.

Visitor's Forum

There were no visitors other than those scheduled to present for an agenda item later in the meeting.

Consent Agenda Items

Minutes from the Prior Meeting: The Trustees had reviewed the minutes from the October 2009 meeting prior to this meeting (Appendix B).

New Members and Resignations: The Secretary reported that the following had become new members since the last meeting: Suzanne Chambers, Daniel Chambers, Carolyn Lindell, Emily Sorensen, Kim Sorensen, Peg Frederick Frey, Brandon Labash, Kirsten Clay, Veronica Miller, Stephanie Mayoral Armond, Jacob Hodges, Emily Hodges, Jerry Perkins, Alice Morrow Harris, Ruby Edmond, Bonnie Nieves, Jose Nieves and Daniel Lillie.

The Secretary reported that two members had resigned since the last meeting, Mark Skrabacz, who is now in Kerrville, and Jane Laessie, who had written a very nice note wherein she had said that she had come to the realization that she is a Quaker.

The Secretary reported that the following members had not made a pledge in the last 18 months and had not responded to a letter the church had sent them requesting that they contact the church if they wished to remain members; thus, they were being considered as having resigned: Moriarty, Thomas; Edwards, Leslie; Reynolds, Claire E.; Quarles, Kim; Quarles, Rob; Bostick, Bruce; Soto, Jo; Bottler, Carolyn; McAfee, Sean; Sosa, Jennifer; Doggett, Lisa; Williams, Don; Garland, Mathew; Robinson, Colleen; Fajkus, Michelle; Couvillion, Marion; Couvillion, Shirley; Garza, Bianca; Kaulfus, Jack; Nada Brahmananda, Swami; Ford, Chris.

Reports: The Trustees had reviewed the consent agenda items prior to the meeting. These included:

Executive Director: Sean Hale (Appendix C)

Director of Religious Education: Lara Douglass (Appendix D)

Director of Music Programs: Brent Baldwin (Appendix E)

Treasurer: Luther Elmore (Appendix F – also see Finance Committee Reports Appendix K)

Bridge Builders Action Plan Update: Margaret Borden (Appendix L)

BB A-Team Report: Chris Jimmerson/Brendan Sterne (Appendix G)

A Trustee requested information on what was included in the potential contract from the Bridge Builders Action Team report. The Team reported that there was not yet a contract; however, after screening several candidates, two had submitted excellent proposals in terms of proposed work scope and procedures. Of the two, one was much more cost-effective and seemed best suited to the needs of the church. A Trustee asked why actual pledge collections thus far this year were going so well compared to prior years. The Treasurer commented that the reason was unknown. Several trustees noted that this might be due in part to the efforts of the Executive Director to collect credit card pledges on cards that had expired and such. The Treasurer also commented that the special Spring Campaign had contributed. The Treasurer pointed out that there had been a positive trend in plate collections for September and October.

Motion: Michael West – accept the Consent Agenda Item Reports.

Second: Brendan Sterne

Discussion: None

Vote: All Affirmative

Discussion and Action Items

Stewardship Update: The Chairperson of the Stewardship Committee gave an update, noting that total pledges through November 16, 2009 had been \$436,194 (see full report attached as Appendix M). He recommended a resolution (Appendix H) to rescind the July 2010 resolution the board had made to present a balance budget for 2010, as there is a need to build the congregation and future pledges and the budget cuts necessary to achieve a balanced budget might well make building the congregation and future pledges extremely difficult.

2010 Budget Discussion: The Trustees began a discussion of proposed changes to the budget based on recommendations and further discussions that had occurred since the presentation of the draft balanced budget (Appendix N) presented to the members of the congregation at the Pre-Congregational Meeting that had been held on November 8, 2009.

Resolution to Rescind Prior Resolution to Present a Balance Budget for 2010

They began with a discussion of the proposed resolution noted above to rescind the July 2010 balanced budget resolution. The Treasurer noted that the calculations for moving funds to the Memorial Savings Fund would be done at the end of the year and that there would be enough funds held in the Schwab Accounts by the operating fund that a withdrawal from the Memorial Savings Fund to finance any deficit would not be needed.

Motion: Michael West – Approve the proposed resolution amending the second bullet point to state that any shortfall would be financed from the Operating Fund Reserve rather than the Memorial Savings Fund.

Second: Derek Howard

Discussion: A trustee noted that the third bullet point would also have to be changed and that the discussions of the budget to be held later in the meeting might also alter the specifics of the proposed resolution; thus, all that was needed to proceed was a motion to rescind the July 2009 balanced budget resolution.

Michael West withdrew his motion.

Motion: Brendan Sterne – Rescind the July 2009 resolution requiring a balanced budget in 2010.

Second: Margaret Borden

Discussion: There was no further discussion

Vote: Affirmative – 8, Negative – 1, Abstain – 1 (Aaron Osmer)

Potential Changes to Budget Proposal -- Income

The Trustees then began a discussion of several changes to the proposed 2010 budget (Appendix O) that had been discussed at and since the Pre-Congregational Meeting, beginning with new revenue projections. Based upon current pledges, the Trustees felt comfortable increasing budgeted pledge revenue from \$400,000 to \$450,000. Also, based upon current year miscellaneous income, the Trustees also felt comfortable increasing budgeted miscellaneous income for 2010 by \$500.

Motion: Chris Jimmerson – Increase budgeted pledge income for 2010 by \$50,000 and budgeted miscellaneous income for 2010 by \$500.

Second: Margaret Borden

Discussion: There was no further discussion.

Vote: Affirmative – 9, Negative – 0, Abstain – 1 (Aaron Osmer)

Potential Changes to Budget Proposal – Expenses

Church Closure – The Trustees discussed the proposal to budget for closing the church during the summer of 2010 to achieve approximately \$50,000 in expense savings. Given the discussion of this at the Pre-Congregational meeting and the need

to rebuild the church, several Trustees felt that this was not realistic or advisable.

Motion: Chris Jimmerson – Do not include a proposal to close the church during the summer of 2010 in the budget the Board of Trustees (BoT) recommends to the congregation.

Second: Margaret Borden

Discussion: There was no further discussion.

Vote: Affirmative – 7, Negative – 2, Abstain – 1 (Aaron Osmer)

Reduce Overall Earnings Package in Next Minister's Contract by \$5,000 – This would in effect treat the next Minister the same as all other church staff, as church contributions to the UUA pension plan for staff had been cut from the 2010 proposed budget.

Motion: Luther Elmore – reduce the compensation package in the next Minister's contract by \$5,000.

Second: Michael West

Discussion: There was no further discussion.

Vote: Affirmative – 8, Negative – 1, Abstain – 1 (Aaron Osmer)

Increase the Director of Music's Salary – this increase would be to balance this salary against the loss in total salary and benefits this employee would receive if the church were to switch to the UUA recommended health benefit, which is to pay 80% of the costs for staff and 50% for their dependents (currently the church pays 100% for staff but 0% for their dependents). The Trustees noted that the decision as regards what benefit policy to enact was now under the authority of the Executive Team; however, the Executive Team did not object to this particular policy change recommendation. The Treasurer noted that he supports the idea of the policy change but thought it should be delayed one year to allow further examination.

Motion: Brendan Sterne – Increase the Director of Music's salary to offset the increased costs he will incur due to having to pay 20% of the costs of his health insurance.

Second: Margaret Borden

Discussion: There was no further discussion.

Vote: Affirmative – 8, Negative – 1, Abstain – 1 (Aaron Osmer)

Restore \$12,000 to the Religious Education (RE) Budget – This would restore \$10,000 in previous personnel reductions and \$2,000 in other expense reductions for RE, leaving \$5,000 in proposed cuts that RE would draw from their restricted fund to cover.

Motion: Chris Jimmerson – Restore \$12,000 in expenses that had been cut from the proposed RE budget.

Second: Margaret Borden

Discussion: Cutting RE would harm future church growth as RE is an area of the church that is currently experiencing large growth.

Vote: Affirmative – 9, Negative – 0, Abstain – 1 (Aaron Osmer)

Restore \$20,000 in budget expenses for building repairs and maintenance – in prior discussions, the BoT had thought this was a budgeted line item for emergency building repairs and thus might better be taken from long-range savings; however, this has been an ongoing yearly expense and thus would be more properly considered an ongoing operating expense.

- Motion:** Derek Howard – Restore \$20,000 in building repairs and maintenance expenses to the proposed 2010 budget.
- Second:** Brendan Sterne
- Discussion:** There was no further discussion.
- Vote:** Affirmative – 9, Negative – 0, Abstain – 1 (Aaron Osmer)

Increase budgeted utilities for 2010 by \$4,000 and increase budgeted gift/donation/contributions by \$350 – these were recommendations from the Finance Committee to reflect a more accurate projection of likely utilities expenses and to add line items for gifts to a) partner church of \$150, b) UU Service Committee of \$100 and c) UU United Nations Office of \$100.

- Motion:** Derek Howard -- Increase budgeted utilities in the proposed 2010 budget by \$4,000 and increase budgeted gift/donation/contributions by \$350.
- Second:** Brendan Sterne
- Discussion:** There was no further discussion.
- Vote:** Affirmative 8, Negative – 1, Abstain – 1 (Aaron Osmer)

Split the Plate – The current 2010 budget proposal eliminated split the plate for a cost savings of \$15,000. Other options such as restoring one Split the Plate per month (an expense increase of \$7,500 to the proposed budget) or restoring it back to twice per month (an expense increase of \$15,000 to the proposed budget) had been discussed.

The Trustees discussed the proposal with some Trustees reasoning that 2010 was a difficult financial year requiring the church to concentrate its resources internally in order to rebuild. Other Trustees expressed concern that Split the Plate is an important part of our social action for many in our church and cutting it entirely might distract from rebuilding; thus, restoring at least one per month might be worth the additional deficit amount it would create.

- Motion:** Luther Elmore – suspend Split the Plate for 2010.
- Second:** Jeff Hutchens
- Discussion:** There was no further discussion.
- Vote:** Affirmative – 5, Negative – 4, Abstain – 1 (Aaron Osmer)

The motions as approved above would result in the proposed budget for 2010 containing an approximately \$32,050 deficit.

Transfer of \$2,400 from the Caring Fund to continue paying a custodial benevolence to Victor Gonzales – this would be a transfer on the balance sheet and would not effect revenue as regards the operating budget.

- Motion:** Chris Jimmerson -- The First UU Board of Trustees approves the use of \$2,400 (\$200/mo) in payment of custodial benevolence to Victor Gonzalez during the year 2010.
- Second:** Michael West
- Discussion:** There was no further discussion.
- Vote:** Affirmative – 8, Negative – 1, Abstain – 1 (Aaron Osmer)

The Trustees then discussed the need to vote on a motion to present to the congregation a 2010 budget as amended by the above votes.

- Motion:** Chris Jimmerson – Present to the congregation a 2010 recommended budget as amended by the prior approved motions with an approximately \$32,050 deficit.
- Second:** Luther Elmore
- Discussion:** One Trustee noted that they would vote against the motion based upon concerns over the effect of eliminating Split the Plate on congregational members. Another noted that they would vote against it because they believe that the congregation must have a greater debate over the consequences of running deficit budgets when pledges are not enough to cover expenses.
- Vote:** Affirmative – 7, Negative – 2, Abstain – 1 (Aaron Osmer)

Congregational Meeting Planning: The Secretary noted that final versions of the following documents would be needed for the December Congregational Meeting:

- The budget proposal as amended by the prior motions.
- A document “redlining” the proposed minor changes to the Financial Assets Management Policy (FAMP).
- A document showing the proposed policy level changes to the FAMP
- A document showing the proposed changes to the bylaws to match the above changes to the FAMP.
- A document showing the Membership Committee’s proposed changes to the bylaws.

The Executive Committee will prepare before the meeting to ensure that mechanisms exist to fairly ensure that the Rules of Procedures as adopted at the beginning of the meeting are followed.

Contract Signing Authority: The Finance Committee and Executive Director had agreed to leave this policy as is until they consider a larger revision to financial policies and procedures early next year.

Director of Religious Education (DRE) and Director of Music (DoM) Reporting: The Interim Minister had proposed the policy as contained in Appendix I. The Trustees discussed whether the last sentence (noting that these positions would report to the Settled Minister once he or she has been hired) was needed or could be addressed at the time a Settled Minister is hired. Since this had always been the intent for the organizational structure of the church, the Trustees believed the sentence could be left as presented. Another Trustee recommended that the clause containing a projected time period for the ministerial transition period be removed from the first sentence of the proposed policy, as this time period could vary.

- Motion:** Brendan Sterne – Adopt the proposed policy as amended by the suggestion to remove the clause on a projected time period for the ministerial transition period. (The policy would now read: *“During the Church’s ministerial transition period, the Director of Music (DoM) and Director of Religious Education (DRE) shall report directly to the Board. Although they are expected to collaborate and work collaboratively with the Interim Minister(s), the Interim Minister(s) will work with them as a colleague, not as a supervisor. Once the Church hires a new Settled Minister, this paragraph shall become null and void and the Director of Music and Director of Religious Education shall report directly to the Settled Minister.”*)
- Second:** Luther Elmore
- Discussion:** There was no further discussion.
- Vote:** All Affirmative.

Board Covenant: The Interim Minister facilitated a discussion on developing a covenant of right relationship among board members. She noted that the reasons to have covenants included:

- 1.) They make the rules for interacting explicit,
- 2.) They serve as guidelines to help new people coming in to know what is expected of them and what they can expect from others and
- 3.) They provide guideposts for reviewing right relationships from time to time.

She provided some examples of covenants (Appendix J).

The Interim Minister facilitated brainstorming among the trustees on when they had felt meetings they have attended went well and why, stressing what behaviors had resulted in the success. She listed the results on an easel pad. The Interim Minister and President agreed to work together to consolidate this list and bring back suggestions that could serve as the basis for developing a board covenant.

With no further business, the President adjourned the meeting at 9:25 p.m.

Respectfully Submitted,

A handwritten signature in black ink, appearing to read "Chris Jimmerson". The signature is fluid and cursive, with a long horizontal stroke at the end.

Chris Jimmerson
Secretary

REPORT ON THE INTERIM MINISTRY FOR THE BOARD OF TRUSTEES
First UU Church of Austin October 16 – December 11, 2009

During the above interval, I participated in the following areas of church and community life.

CHURCH EVENTS: I prepared and preached the sermon seven Sundays. I recruited a guest minister, Rev. Dr. David Jones, for the Sunday when I was out of town. I provided the story for Younger UU's once. I developed and led a ceremony to thank the members of the Worship Services Committee. I organized the Program Staff for the multi-generational service, and I provided guidance to the lay leaders for almost every service.

I participated in the following meetings and activities: Board of Trustees (x2), Management Staff meetings (x5), Social Justice Committee, Membership Committee, Executive Committee (x2), Transition Team (x2), Bridge-Builders, Forum Planning Committee, and with the chair of the Committee on Ministries. I participated in the Meet and Eat (x4), in which I also provided leadership, the Pre-Congregational meeting, and the Leadership Seminars (x2). I attended meetings of the Women and Transition Covenant Group and the Young Adults Dinner and meeting, and in both cases I provided guidance on creating a covenant of healthy relations. I became the supervisor of the newsletter editor, Linda Taylor, and worked with her as usual every week on the order of service as well as on the newsletter.

I worked with Nell to distill information the Board gave for its covenant of healthy relations. With the Transition Team, I set up the time-line in the foyer, provided materials, and later transcribed the results of the responses on the time-line. I kept in touch with the Trans Team between meetings. The Team and I are planning a worship service in January in which they will present perspectives on the material from the time-line.

I attended two events sponsored by Adult Religious Education: a two-part Family Systems workshop led by David Jones, and a seminar on depression led by two local psychologists.

I counseled with the YRUU after they found out about Ruth Marie's death. Congregants visited me in the office about 10 times, and staff many more times. I made 7 home visits to congregants and one hospital visit. I hosted 6 meetings over lunch with members. I continue to pay my pledge of \$500 per month.

COMMUNITY ACTIVITIES: I attended a continuing education seminar at Greenlights on financial management. I arranged and conducted the memorial service for Ruth Marie. I attended the benefit concert for the North Central Caregivers in which the 1st UU choir did brilliantly. I attended the concert of the Texas Choral Consort directed by Brent Baldwin. I am a subscriber and supporter of the latter organization.

DENOMINATIONAL PARTICIPATION: I wrote letters of recommendation for two students who are studying for the UU ministry from a former church, and a letter for Ron Phares for his internship search. I hosted the UU ministers of the Southwest Conference here twice.

I traveled to Ottawa, Ontario, to participate in the Convocation for UU ministers, where I took responsibilities as requested in the music and the worship services. In addition, I arranged to attend the Ceremony of Installation of the called minister to the First Unitarian Congregation of Ottawa, a congregation I served as Interim Minister in 2007-08.

By the time you read this, I will have written a report for the semi-annual congregational meeting which will give more guidance into the Interim Ministry guidelines and goals for the congregation's edification.

Respectfully submitted,

Janet E. Newman, Accredited Interim Minister

Executive Director's Report to FUUCA Board of Trustees November 13 – December 11, 2009

The office team has begun getting ready for our busiest time of year. During the next 45 days, we aim to complete the following special projects (in addition to our routine work):

- enter 2010 pledges into the system
- purchase a new Church Management System
- set up and begin using a new set of financial books
- set up all automatic pledge payments (credit cards and bank transfers)
- close the books for 2009
- Issue annual tax documents (1099s, W2s, 940)
- Set up ongoing facilities reservations for 2010

Fortunately, we have a good team of staff and volunteers helping us out in a variety of important capacities.

Office & Staff

- Weekday Volunteers – Ann Edwards, Nancy Groblewski, Kathryn Govier, and Mary Jane Ford continue helping us regularly during the week as well. We're very grateful for their help. Other individuals continue to play important volunteer roles as well outside of the office.
- Sunday Volunteers – Barbara Denny, Betty Howard, Susan Bethke, Susan Mestier, and Mary Jane Ford continue to volunteer regularly in the mailroom. Barbara and I are in the process of discussing the long-term benefits of this volunteer program versus the challenges in recruiting and maintaining a full team (ideally 8-10 people).
- Financial Volunteer – Kae McLaughlin is lending us a hand this month with a variety of financial duties. This support has come at just the right time, as Sandra and I have a lot of this kind of special work to do that only comes around once every year.
- Staff Covenant – the management team is discussing the development of a staff covenant. This would likely take place early in 2010.

Finances & Data

- COMS Data – Joseph Hunt and Nancy Groblewski continue to keep COMS up to date for us and to extract the information we need for the voting list, stewardship mailings, and more. They're also playing a big role in getting the 2010 pledge data into COMS.
- Church Management System – David Matthis and I are nearing the end of our deliberations on a new Church Management System. The final decision may well come down to whether or not we go with a less-expensive mid-level system now (then possibly having the expense of upgrading in five years) or a more expensive system that will grow with us and still work well in ten or twenty years (thus saving the expense of retraining and data transfer). Natalie Freeburg and Joseph Hunt are helping us to test drive the top contenders. Each of the systems under consideration includes a facility scheduler and

online calendar option. Although we will make the new CMS purchase by the end of the year, we will likely wait to begin fully using it until the summer (to permit time for training and the like).

- Recruiting Canvassers – in addition to my regular interactions with the stewardship committee (still much less than the level of support I'd like to eventually provide), I helped to recruit canvassers for the final push. By making personal requests, I got about a half-dozen canvassers to agree to pick up a little more work as we entered the home stretch.
- Bank of America – bookkeeping errors had kept the BoA account on our balance sheet for several months after we'd closed it. We have now made the necessary adjustments to remove it from the books.
- New Financial Reports & Fund Accounting – we remain on track to set up a new set of books for 2010. Stephan Windsor has done a good deal of preliminary setup and testing. I will continue his work next week. I expect that we will have to spend some extra time in January and February working out the bugs, but that by spring things should run smoothly.
- Pledges by credit card and automatic debit – we've begun setting up auto-pay pledges in the system for 2010 and expect to have this wrapped up by next week. This puts us far ahead of 2009, when some didn't get set up until February!
- Personnel Expenses – in the financial report, this particular piece of data represents a serious error and it is distorting the expenses of our departments, making them appear artificially high. We have made correcting it a top priority. This error does not impact the bottom line (total expenses).

Facility & Hardware

- Security Upgrades – I have signed a contract with Cothrons to make some small security upgrades to the facility. They will install a lock on the double doors between Howson Hall and the foyer, which will prevent unauthorized people from wandering into the sanctuary and other spaces when there's nobody around. The Sanctuary's exterior back door will get a device that will make a loud noise when opened (thus alerting staff should any unauthorized person try to break in that way during the day). The foyer exterior doors will also receive new hinges (the current ones have worn out).
- The Big Loud Speakers (formerly stored in Howson Hall) – Tom Martin and some of his team meet with Gary Cook over the Thanksgiving Holiday. Gary, a UU from the Dallas area who Nell Newton helped us to meet, is going to model the acoustics on his computer so we can get a sense for the audio impact of different placement options. They expect to soon involve an architect so they can also take esthetics into consideration in decision making.
- Sanctuary Garden – Elizabeth Gray, Paige Hill, and David Matthis continue to work on the Sanctuary Garden. Some new plants have been installed, and Lynn Adams has donated three large, beautiful flower pots.
- Folding Walls – John Payne has arranged for the installation of new folding walls in the Gallery and room 13, which will likely take place in January.
- Solar Panels – Marcus Barnes has evaluated the first seven months of data from the solar system for us (May-Nov). We generated 10,822 kwh over that time, totaling 14% of our

total energy usage. We use Austin Energy's levelized accounting system, which means that our annual bill is averaged out evenly over every month to prevent price spikes. So we pay \$850 every month, based on our consumption in 2008. In January, they will evaluate our usage over 2009 and set a new rate for us for 2010.

- Dave Parker – Dave has joined the facilities committee. Dave brings good skills to the job of helping us maintain the facility. In the past, he's helped out with Paradox Players construction and with the creation of the new mailroom and library.
- Butterfly Memorial – Rose Ann Reeser reports that we have 6 new butterflies on the memorial. She is also working with Natalie to develop a smooth system for acknowledging memorial donations.
- Network Firewall – Dale Whiteaker-Lewis reports that we have a new firewall installed on our computer network. In addition to improving security, this piece of hardware may make it possible for wireless computer users to access the office network.
- Room Usage – Natalie reports that over the last six months, the church's culture towards use of the facility has changed. People are using the forms to make reservations and most are making their reservations well in advance (rather than asking at the last minute or just showing up and taking over an empty room without asking). This culture change is making operations run more smoothly and resulting in increased staff time for other important activities.
- Playground Safety – one of our long-term renters, the Monday Morning Homeschooler Coop, has raised serious concerns regarding the playground safety. Although a few of the concerns are small and more related to changes in code and usage over the decades (like the appropriate distance between swings), many are legitimate (e.g. exposed wires in radial tires, insufficient mulch or sand for children to fall on, and the like). The Coop has told us that they will not renew their contract if we have not committed, by Monday, December 15, to resolving their major concerns. I am working to get reliable figures for materials and labor, and will work with John Payne to see if we can make this commitment using funding from the facilities budget.
- Howson Hall Lighting – we have signed a contract to install improved stage lighting in Howson. Hall. This has been driven and financed by Paradox Players.

Other

- Vacation – I will take a trip with my family to Costa Rica from January 31 to February 9.
- Piano Tuning – John Sanders has for many years helped us keep the 8 pianos here tuned. He tells me that he no longer has the physical condition to continue to provide us this service. From what I understand, the Music Program intends to keep the two in the Sanctuary tuned. As to the 6 upright pianos (all of which I'm told belong to John), John tuned them in 2008 and he says they can generally go 5 years between tunings.

No Update this month

- Keys & Alarms
- Cry Room Repair
- Security Task Force
- Credit Card Bounces

- Uncollected 2009 pledges
- Webteam
- Davidson's books

Some of my other regular activities (Reports for these usually appear elsewhere)

- Finance Committee
- Board of Trustees
- Board Executive Committee
- Stewardship Committee
- Bridge Builder Action Team (A-Team)
- Volunteer recruiting and coordination
- Management Team

Respectfully submitted by Sean Hale. December 11, 2009.

Religious Education Report to the Congregation December, 2007

Lara Douglass, Acting Director of Religious Education

First Unitarian Universalist Church of Austin

The following are examples of how our Religious Education (RE) programs for children, youth, and adults have carried out the mission and vision of our congregation during the past six months.

Vision Statement

As an inclusive religious and spiritual community, we support each individual's search for meaning and purpose and join together to help create a world filled with compassion and love.

Inclusiveness: Adult Religious Education (ARE) offers classes, which reflect the inclusive nature of First Church. For example, Yoga and Tai Chi classes are offered to the church and the wider community on a weekly basis. Yew Grove CUUPS recently received word from the UUA, that the Independent Affiliate (AI) status of CUUPS, along with 16 other AIs, would be discontinued. RE worked closely with Yew Grove, as they re-organized into the Yew Grove Pagan Interfaith.

Building community: RE held and participated in several events in the last six months, which strengthened our community. A Farewell party for Betty Skwarek, in honor of her service and retirement, was held at Central Market on Sunday afternoon, June 3. The children decorated white tablecloths for Betty. The children drew pictures and put their sentiments on the cloths. The party was well attended by the children, their parents, and the entire congregation.

RE again offered the Harry Potter Camp experience for 60 campers, 12 junior counselors. The weeklong event was held from July 30 to August 3. The camp was open to church members and to the community. We had many volunteers from both the church community and the wider community.

In August, RE worked with the Fellowship Committee in support of the Watermelon Thump. We worked with the Board and the Intern Committee to help host a farewell party for Jack Harris-Bonham, as he completed his tenure as intern, and then contract minister.

In October, the annual Halloween Party was held for the children. Yew Grove Pagan Interfaith, along with the Children's Programming Committee helped make this a very fun event for the church community and the surrounding community.

Teaching compassion and love: RE children have participated in several Social Action projects, which teach love and compassion for all. Every Sunday, the children bring food to be donated to Caritas when they come forward for the children's story during both worship services.

During the summer, the children used the curriculum Stewardship, The Joy of Giving. The curriculum culminated with a Hunger Banquet, which demonstrated the inequalities in food distribution and other vital resources. This event was very moving for the children.

The Hunger Banquet was held on Sunday, Aug. 19 for grades K-5. It was a very enlightening experience for the children. The week before the activity (August 12) the children discussed and looked at a map to see different parts of the world where people experience food shortages to the point of living hungry.

On the day of the hunger banquet, children drew table numbers that determined which table they would eat from at the banquet. There were 3 tables set up.

Table one represented the more affluent countries. Their banquet included meat, fresh fruit, bread, vegetables, etc.

Religious Education Report to the Congregation December, 2007

Lara Douglass, Acting Director of Religious Education

First Unitarian Universalist Church of Austin

Table two represented more impoverished countries. Their meals consisted of rice and beans, but there was enough food so that all the children could eat.

Table three represented the most impoverished countries. At this table there was only rice and not enough to go around, so the children had to decide how to share their meager food.

The teachers reported that some of the children were profoundly affected by this demonstration. Many parents were also moved to the point of suggesting this would make a wonderful church-wide event.

Mission Statement

- **Create and sustain a joyful, caring, involved church community.**

As previously mentioned, RE sponsors and co-leads many church events, birthday celebrations, and retirement parties.

Teachers in children's and youth programming recognize and greet their students by name.

- **Promote intimacy, support and fellowship to foster the individual spiritual and emotional growth of our members.**

The Adult RE program, continues to provide programs which both inform us and nurture us. The Sunday morning book groups and the philosophical discussion group continued to meet all summer. The attendance is growing, as we add more chairs each Sunday.

These groups are open and inviting to visitors and new members.

- **Offer inspirational and challenging worship services.**

The Children's Programming Committee decided to fund the start-up of two children's choirs, with some of the funds remaining from the Sparkle Plenty Auction. These choirs will continue to function, under the guidance of the Director of Music. The primary choir includes children from preschool to grade 3 and the Secondary Choir, children from Grades 3 and up.

These choirs have performed twice during worship services. The feedback from congregants was very enthusiastic and they reported being inspired by both the performance of the children and the fact that this church now has professional music instruction for the children.

- **Provide ritual and ceremony for rites of passage**

In the last six months, the Minister and the DRE have led 3 child dedications during the Sunday morning services. The Child Dedications introduce infants and new child church members to the congregation. These dedications serve as an opportunity for the church congregants, as well as the other children to understand the very important role we all play in the integration of children into our church community.

- **Provide progressive religious education for all ages**

Religious Education is provided to children based upon developmentally appropriate curricula. Fortunately, the church has a wealth of curricula written by professionals and purchased by RE through the UUA and directly through the curriculum authors.

Religious Education Report to the Congregation December, 2007

Lara Douglass, Acting Director of Religious Education

First Unitarian Universalist Church of Austin

We are currently using a rotation system of curricula. We offer curricula based upon our sources (Judaism, Christianity, World Religions) in the Fall. In the Spring we offer curricula based upon our UU identities and history.

In the summer we focus on ethics and social action.

As recommended by most religious education professionals, we provide separate programming in five categories, preschool, kindergarten to grade 2, grade 3-5, middle school, and high school.

As mentioned earlier, we used the Stewardship curriculum in the summer. The Fall curricula are:

Preschool: Chalice Children

Kindergarten – Grade 2: Picture Book of World Religions

Grades 3-5: Kingdom of Equals

Middle School: Neighboring Faiths

Our Whole Lives (OWL) the UU human sexuality program is currently offering classes for middle schoolers. Bill Douglass facilitates this program.

The Adult RE programs offer Sunday morning classes, as well as classes during the week and special topic explorations.

- **Enrich our community through music, drama, and the arts**

As mentioned previously, The Children's Choirs were launched in September. Brent Baldwin, Director of Music and I have been working together to provide the children of the church with an opportunity to have professional children's choir instruction. The choirs are practicing between Sunday morning services/classes from 10:45 to 11:20.

The Children's Christmas Pageant will be presented again this year after the Meet and Eat on Wednesday, December 19 at 7 pm. Dr. Loehr will be our narrator this year.

- **Empower and encourage members toward social and civic leadership.**

Earlier in the Fall, the Board inquired about the Youth Membership category of church membership. Upon researching this, it was discovered that we do have a youth membership and that a youth may join the church if they are between the ages of 12 and 17.

This knowledge was shared with the youth and their Advisor, Ron Phares. The youth were tasked with discussing this option and making some recommendations to the DRE. Within six weeks, the youth had formulated some recommendations for youth membership and the financial commitment, as well as the other stewardship commitments.

On November 18, 2007, twelve of our youth signed the book and became the first youth members of our church. Dr. Loehr recognized the youth and the importance of their commitment during the second service.

- **Share our values and gifts with the larger community.**

The class offerings of the adult RE program continue to attract members of the wider community. Ongoing classes such as Yoga, Tai Chi, Dance Groups, and the Writer's Workshop make it possible to share our values and talents with the larger community.

Religious Education Report to the Congregation December, 2007**Lara Douglass, Acting Director of Religious Education****First Unitarian Universalist Church of Austin**

Our Summer Harry Potter Camp Program attracted many children and adults from the wider community, as well as church members.

The Fifth Annual Distinguished Speakers series, which will feature Meg Barnhouse, is in the planning stages. This series, which often attracts attendees from the wider community, will be held on May 2-3.

- **Strive to create a more diverse church community.**

The High School Class, which meets Sunday morning at 11:30 and Sunday Evening at 6, continues to attract a growing number of UU teenagers and their friends. In addition to the increased attendance, the group is becoming more diverse, with different ethnic groups and gender identities. This diversity was quite apparent during the youth membership recognition ceremony.

Ron Phares, the Youth Assistant to the DRE continues to provide innovative, relevant programming, motivation, and direction for the high schoolers both on Sunday morning and at the Sunday evening YRUU meetings.

Contact Information

If you would like to know more about our Religious Education Programs or to discuss Religious Education in our church, please contact me (Lara Douglass, Acting DRE) or any of the RE staff or committees. You may contact me at (512) 452-6168, ext. 12 or email, lara@austinuu.org.

We invite you to contact a committee member or attend a meeting of the Religious Education Committees.

Children's Program Committee: Meets the first Wednesday of each month in room 9 from 7pm to 9pm. Gillian Redfearn, gillian.redfearn@simonandschuster.com, is the Chair of this Committee. Phil Hastings is the immediate past chair.

Adult Religious Education Committee: Meets the second Thursday of each month in room 9 from 7pm to 9pm. Luther Elmore, lelmore@austincc.edu, is the Chair of this committee. Susan Thomson is the immediate past chair.

Respectfully submitted by:
Lara Douglass
Acting Director of Religious Education
First UU Church of Austin
December 2, 2007

November 2009 Attendance Summary							
November Monthly Totals				November Weekly Totals ALL			
CLASS	9:45	11:30	TOT	DATE	9:45	11:30	TOT
Nursery	52	32	84	1-Nov	34	35	69
PRE-K	19	32	51	8-Nov	46	47	93
K-2	49	22	71	15-Nov	27	42	69
3rd - 5th	24	28	52	* 11/22/2009	12	18	30
Middle School		33	33	29-Nov	25	35	60
High School		11	11	Monthly Total			321
YRUU		19	19				
Choir	0	0	0				
TOT	144	177	321				

Breakdown by RE Class							
Nursery	9:45	11:30	TOT	3-5 Grade	9:45	11:30	TOT
1-Nov	8	3	11	1-Nov	8	10	18
8-Nov	15	8	23	8-Nov	6	7	13
15-Nov	8	9	17	15-Nov	5	6	11
22-Nov	12	6	18	* 11/22/2009			0
29-Nov	9	6	15	29-Nov	5	5	10

Pre-K	9:45	11:30	TOT	6-8 Grade		11:30	
1-Nov	5	5	10	1-Nov			10
8-Nov	9	6	15	8-Nov			8
15-Nov	3	8	11	15-Nov			7
* 11/22/2009	0	5	5	* 11/22/2009			
29-Nov	2	8	10	29-Nov			8

K-2	9:45	11:30	TOT	High School	11:30	YRUU	TOT
1-Nov	13	4	17	1-Nov	3	0	3
8-Nov	16	6	22	8-Nov	5	7	12
15-Nov	11	7	18	15-Nov	0	5	5
* 11/22/2009			0	* 11/22/2009		7	7
29-Nov	9	5	14	29-Nov	3	0	3

Choir	1st	2nd	TOT
1-Nov	12	6	18
8-Nov	12	7	19
15-Nov	12	6	18
* 11/22/2009	11	7	18
29-Nov	0		0

* 11/22/2009
Intergenerational Service. K-12 in Sanctuary. Well attended and enjoyed by all.

Director of Music Report to the Congregation

December 2009

It has been an exciting year of music and spirituality in the FUUCA Music Program. Despite the turbulence and change of the past year, the program continues to grow and thrive. Below are some highlights from 2009:

FUUCA Adult Choir

The FUUCA Adult Choir has undertaken a number of exciting and ambitious projects this year. In addition to our large-scale chamber orchestra collaborative works (Bach "Der Herr denket an uns" in June and our recent Buxtehude/Vivaldi holiday celebration on December 6th), we've had numerous collaborations with our Children's Choirs, premiered a brand-new work by FUUCA choir member Dave Jellison, and celebrated in music many holidays (Passover, Easter, Yom Kippur, Thanksgiving, Mother's Day, Black History Month, Christmas, etc).

While we lost a number of key music program volunteers in the wake of the dismissal, the group really pulled together as a community in the face of challenging times. I am so very proud of them and the work they've done this year.

FUUCA Children's Choirs

Since its initiation in 2007, the FUUCA Children's Choirs continue to grow in terms of membership and musicality. It has been an extremely rewarding couple of years, and the program has proved to be a vital bridge between the RE and Worship areas. Many thanks to all of the kids, their dedicated parents, the supportive folks in RE, and of course our highly credentialed and experienced choir teachers Danielle Solan (Primary Choir Director) and Kelan Latimer (Youth Choir Director).

Many thanks are due to our parent coordinators Chris Heidel and Vicki Almstrum. Their organization help has been invaluable to the growth and success of the program.

Given the budget shortfall for next year, the program will once again be partially funded for 2010 (\$5000 compared to 2008's funding level of \$9000). I am concerned that a second year of half-funding will quickly become the established funding level for Children's Choir for future years - with the expectation that fundraising cover the other half. Many sources will say that funding staff positions in this manner is ill-advised and ultimately unsustainable -- it is therefore my hope that we can do far better for this important church program in 2011.

Musical Guests

FUUCA services were enhanced by appearances by numerous guest musicians throughout the year. Among our special guests were:

Joe Jencks; Jim Scott (in collaboration with the Adult Choir); Chuck Pyle; Roy Zimmerman; Paula Held; 1001 Nights Orchestra; Bob Livingston; Conspirare soloist

Gitanjali Mathur (who was most recently featured in Conspirare's PBS special); Michelle Schumann; Kay Race; Central Texas Viola Society; Texas Choral Consort.

When we are not graced with the presence of guests such as these are continue to enjoy the in-house talents of staff pianists John Sanders and Bryan Uecker.

Featuring this caliber of guests in 2010 will be challenging in face of budget cuts, but I will to work hard to continue bringing in these folks who enrich our worship experience.

Austin Chamber Music Center – FUUCA's Artists-in-Residence for 2009-2010

In August 2009, the FUUCA Music Program entered into an artistic partnership with the Austin Chamber Music Center. Their entire 2009-2010 season occurs at the church, with vastly discounted tickets (half-price) available to our membership. They will also lend their world-class musical talents to our services. I've long desired for such a musical partnership, but never imagined the first one would be with a program as prodigious as the APMC. I consider us very lucky to be working so closely with them, and look forward to their continued musical gifts in the new year.

Outreach

On December 4th, the FUUCA Adult Choir participated in the annual North-Central Caregivers Christmas Concert, alongside 11 other area choirs.

A small vocal ensemble from FUUCA was invited to sing and play for services at the Unitarian Universalist Fellowship of Waco on August 20th. We were featured in a service focusing specifically on music and spirituality in collaboration with UUFW music program. It was a lot of fun!

Music Library Overhaul

For the past year, our music librarians and I have been going through our extensive musical archives to a) make better use of limited storage space, b) weed out outdated holdings, and c) make room for more recent acquisitions. This work would not have been possible without the creative energies of our librarians, Barbara Tuttle and Douglas Manger.

10 years!

August marked my 10-year anniversary of serving as FUUCA's Director of Music. As difficult as it is to believe it's been that long, it has been a pleasure working for you all!

Respectfully submitted,

Brent D. Baldwin

Director of Music

FIRST UU CHURCH – AUSTIN, TEXAS
TREASURER’S REPORT TO CONGREGATION DECEMBER 13, 2009
MONTHLY REPORT NOVEMBER 2009

Income and Expenditures:

Total income for the month of November 2009 was \$65,460.29 and total expenses were \$41,021.14. Pledge collections for the month totaled \$40,869.43. Sunday plate collections totaled \$7,359.02. Rental income continues to be high for 2009. As of 11-30-09 rental receipts for the year total \$50,597.04. This is \$9,274.62 or 22 percent more than had been collected through November 2008. Due to increased pledge and plate contributions during October and November, we are no longer running a deficit for the year. If contributions continue at the current rate for December, we should end 2009 with a surplus, instead of the anticipated \$43,788.00 deficit.

In 2009 our process of selling HEB scrip cards was discontinued.

To make purchase of food and supplies for the kitchen easier, we began a process of purchasing HEB gift cards for use by staff. This allowed them to purchase needed items without having to pay for them and wait for reimbursement and also slightly reduced the time required by office staff.

Split the Plate Recipients:

People’s Community Clinic (11-1-09): \$585.00

Trinity Center “Woman to Woman Project: (11-15-09): \$351.68

For the year through November we have contributed \$10,922.86 to 22 agencies.

Endowment Accounts:

As of 11-30-09 the amount held in the four Schwab funds was \$603,733.14, reflecting a gain for the month of November of \$16,983.03. In addition, the balance in the Hartford annuity is \$10,888.47. The balance in the four Schwab accounts as of 1-1-09 was \$563,951.41 and fell to a low of \$491,752.95 as of the end of February. So the gain since January has been \$39,781.73. The Permanent Endowment Fund, which had fallen to \$77,793 last November, has recovered losses and as of 11-30-09 stands at \$101,334.10.

Stewardship Campaign:

As of November 11 the Stewardship Campaign had received \$424,574 in pledges for 2010 from 256 pledging units. This compares to the end of October 2008 totals of 259 pledges totaling \$468,027.

Finance Committee:

During 2009 the Finance Committee recommended and the Board of Trustees approved the new position of Internal Auditor. Eugene Balaguer was appointed as Internal Auditor.

The Chair of the Finance Committee recommended and the Treasurer agreed to close the Bank of America checking account and transfer the daily operations to the Texas Health Credit Union next door. The decision to use THCU could not have worked out better. They have been responsive to every request and have provided excellent service.

Facilities Committee:

The primary facilities projects for 2009 were the completion of the installation of the solar panels on the roof, the replacement of the twenty-eight year old air conditioning unit in the foyer at a cost of \$11,789 (however, we reimbursed by our insurance company for \$11,488) and new room dividers in the Gallery and in room 13 at a total cost is \$7,050.

For the year Facilities will not spend its total allocation of \$35,000, but should spend less than \$25,000.

In an effort to further reduce costs and provide savings in a time of tight budgets, the grounds maintenance contract has been cancelled as of the end of November and will be rebid.

Membership:

As of the end of November we have a total of 568 members. Since January 1, 2009, we have had 50 new members “sign the book” as members with 24 of those joining the church during October and November. In addition, 45 members resigned or were deleted from membership due to lack of financial contributions and participation.

Luther Elmore, Treasurer

Balance Sheet
 As of November 30, 2009

Balance Sheet	<u>Nov 30, 09</u>
ASSETS	
Current Assets	
Checking/Savings	
Credit Union Checking	33,143.52
Savings	
THCU Savings	4,016.40
Total Savings	<u>4,016.40</u>
Total Checking/Savings	37,159.92
Accounts Receivable	
Accounts Receivable	(9.80)
Total Accounts Receivable	<u>(9.80)</u>
Other Current Assets	
Payroll Asset	(38.40)
Petty Cash Office	7.35
Petty Cash Kitchen	175.25
Due (To)/From Schwab Accts	
Due from LRF - Capital Campaign	
Due from LRF-Architects,fees	1,182.92
Due from LRF - Capital Campaign - Other	10,000.00
Total Due from LRF - Capital Campaign	<u>11,182.92</u>
LRF Equity	66,088.42
Due from Memorial/Endowment	57,352.52
Due (To)/From Schwab Accts - Other	46,139.15
Total Due (To)/From Schwab Accts	<u>180,763.01</u>
Total Other Current Assets	<u>180,907.21</u>
Total Current Assets	218,057.33
Fixed Assets	
Furniture and Fixtures	19,111.42
Organ	36,062.04
Church Building	
Old Building Cost	119,160.00
New Building Cost	553,072.75
Total Church Building	<u>672,232.75</u>
Accumulated Depr'n	(396,606.00)
Total Fixed Assets	<u>330,800.21</u>
TOTAL ASSETS	<u><u>548,857.54</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	

Balance Sheet
As of November 30, 2009

Balance Sheet	Nov 30, 09
Accounts Payable	6,157.96
Total Accounts Payable	<u>6,157.96</u>
Other Current Liabilities	
Key Deposits	10.00
Direct Deposit Liabilities	286.56
Rental Deposits	40.00
Payroll Liabilities	11,036.01
Total Other Current Liabilities	<u>11,372.57</u>
Total Current Liabilities	<u>17,530.53</u>
Total Liabilities	17,530.53
Equity	
Capital Campaign Donation	10,000.00
Transfer from M/E	1,298.37
Retained Earnings	68,380.74
Mem/Endowment Fund (closed)	125.00
BoT Designated LR Fund	66,088.42
Fund Balances	
Mid-Week Gathering	557.02
Religious Education Fund	
Camp UU Expenses	(95.45)
Other Income	918.67
Recycling Project	778.71
Camp UU - Hogwarts	5,179.35
Religious Education Fund - Other	3,086.13
Total Religious Education Fund	<u>9,867.41</u>
Adrienne & Miriam Murr Fund	1,160.10
Adult RE Fund	
Adult RE Owl	495.00
Facilities Rental	5,530.41
Distinguished Lecture Series	330.43
Adult RE Fund - Other	3,093.86
Total Adult RE Fund	<u>9,449.70</u>
Bookstore Fund	2,706.06
Caring Fund	5,981.22
Denominational Affairs Fund	70.02
Facilities Emergency Fund	2,923.63
Flowers Fund	329.34
Green Sanctuary	1,586.55
Internet Ministries	2,797.67
Junior High Fund	3,707.72
Library Fund	350.59
Media Team	1,703.66
Paradox Players	26,724.67
Music Fund	

Balance Sheet

As of November 30, 2009

Balance Sheet	<u>Nov 30, 09</u>
Children's Choir	4,337.52
Music Fund - Other	518.19
Total Music Fund	<u>4,855.71</u>
Sabbatical Fund, Minister	51.00
Senior High Fund	5,087.29
Social Action Fund	1,472.75
Voyager	211.39
YARN	208.24
Yew Grove Pagan Interfaith	155.04
Fund Balances - Other	50.00
Total Fund Balances	<u>82,006.78</u>
Opening Balance Equity	280,169.57
Net Income	23,258.13
Total Equity	<u>531,327.01</u>
TOTAL LIABILITIES & EQUITY	<u><u>548,857.54</u></u>

**First Unitarian Universalist Church of Austin
 Profit & Loss Budget vs. Actual**

	<u>Jan - Nov 09</u>	<u>Budget</u>	<u>% of Budget</u>
Ordinary Income/Expense			
Income			
Pledge Income			
Pledge Income 2010	6,650.00		
Spring Canvass	49,889.00		
Pledge Income 2009	394,624.86	525,000.00	75.17%
Pledge Income 2008	5,542.50		
Credit Card Fees	(2,537.07)		
Pledge Income - Other	5.00		
Total Pledge Income	<u>454,174.29</u>	<u>525,000.00</u>	<u>86.51%</u>
Contributions Income			
Unrestricted Contributions	39,294.79	60,000.00	65.49%
Restricted Contributions			
Split the Plate Rec'd	11,491.95		
Split the Plate Paid	(9,608.74)		
Restricted Contributions - Other	4,110.00		
Total Restricted Contributions	<u>5,993.21</u>		
Contributions Income - Other	9,173.48		
Total Contributions Income	<u>54,461.48</u>	<u>60,000.00</u>	<u>90.77%</u>
Transfer from ME Fund	14,282.51	15,581.00	91.67%
Transfer from Restricted	16,902.73	500.00	3,380.55%
Rental Income	50,597.04	35,000.00	144.56%
RE Fundraiser	125.00		
Special Event Income	944.23		
Paradox Players (net)	9,703.02	3,500.00	277.23%
Unrest. Invst Income			
Interest Income	81.13		
Total Unrest. Invst Income	<u>81.13</u>		
Misc Income			
Sunday Kitchen Donations	2,695.35	4,000.00	67.38%
HEB Scrip Income	(834.90)	1,500.00	(55.66%)
Misc Income - Other	4,570.33	1,400.00	326.45%
Total Misc Income	<u>6,430.78</u>	<u>6,900.00</u>	<u>93.2%</u>
Total Income	<u>607,702.21</u>	<u>646,481.00</u>	<u>94.0%</u>
Expense			
Reconciliation Discrepancies	(5,847.92)		
Interim Minister Package			
Moving Expenses - Interim	2,971.50		
Professional Expenses	706.14		
Total Interim Minister Package	<u>3,677.64</u>		
Ministry, Outreach, Pastoral Care			
Helping Hands	0.00	100.00	0.0%

First Unitarian Universalist Church of Austin
Profit & Loss Budget vs. Actual

	<u>Jan - Nov 09</u>	<u>Budget</u>	<u>% of Budget</u>
Ministerial Consultants	3,953.94		
Settled Minister-Sal/Housing			
Salary	41,599.03	48,000.00	86.67%
Housing	21,392.12	27,000.00	79.23%
Total Settled Minister-Sal/Housing	<u>62,991.15</u>	<u>75,000.00</u>	<u>83.99%</u>
Settled Minister--Other			
Health Insurance	3,422.44	3,700.00	92.5%
Pension-UUA	658.33	7,500.00	8.78%
Disability Insurance	579.88	900.00	64.43%
Professional Expenses	0.00	14,000.00	0.0%
Total Settled Minister--Other	<u>4,660.65</u>	<u>26,100.00</u>	<u>17.86%</u>
Intern Minister			
Salary	9,600.00	14,031.00	68.42%
Payroll Tax	734.40	1,073.00	68.44%
Professional Expenses	0.00	300.00	0.0%
Health Insurance	3,738.21	5,497.00	68.01%
Moving Expense	0.00	1,000.00	0.0%
Total Intern Minister	<u>14,072.61</u>	<u>21,901.00</u>	<u>64.26%</u>
Minister Expenses	533.61		
Other Ministers			
Pulpit Honoraria	5,750.00	1,000.00	575.0%
Total Other Ministers	<u>5,750.00</u>	<u>1,000.00</u>	<u>575.0%</u>
Advertising	2,762.87	2,500.00	110.52%
Social Action Committee I	2,138.71	2,000.00	106.94%
Austin Area Interreligious Min.	0.00	1,000.00	0.0%
Total Ministry, Outreach, Pastoral Care	<u>96,863.54</u>	<u>129,601.00</u>	<u>74.74%</u>
Worship Services			
Music Salaries			
Children's Choir Directors	4,700.00	5,000.00	94.0%
Music Salaries - Other	50,220.78	54,426.00	92.27%
Total Music Salaries	<u>54,920.78</u>	<u>59,426.00</u>	<u>92.42%</u>
Music P/R Taxes	4,201.50	4,546.00	92.42%
Pension-UUA	6,562.13	4,641.00	141.4%
Music Professional Expenses	537.51	1,000.00	53.75%
Medical Insurance	5,543.11	5,016.00	110.51%
Music Program Expenses	5,080.79	8,000.00	63.51%
Worship Supplies	122.98	150.00	81.99%
Total Worship Services	<u>76,968.80</u>	<u>82,779.00</u>	<u>92.98%</u>
Religious Educ. and Programs			
RE Teachers Wages	15,726.03	6,240.00	252.02%
Administrative Expense	0.00	550.00	0.0%
RE Assistant	35,015.97	34,644.00	101.07%

First Unitarian Universalist Church of Austin
Profit & Loss Budget vs. Actual

	Jan - Nov 09	Budget	% of Budget
RE Salaries	41,899.30	46,900.00	89.34%
RE Payroll Taxes	6,211.70	6,716.00	92.49%
Pension-UUA	4,690.08	4,690.00	100.0%
Professional Expenses	2,170.74	2,500.00	86.83%
Nursery/Childcare Wages			
Nursery Supplies	490.08	100.00	490.08%
Nursery/Childcare Wages - Other	12,406.08	11,460.00	108.26%
Total Nursery/Childcare Wages	12,896.16	11,560.00	111.56%
Nursery/Childcare P/R Taxes	1,278.92	877.00	145.83%
Programs & Supplies			
Children Program Expenses	870.95	1,000.00	87.1%
Youth Program Expenses	372.09	1,000.00	37.21%
Adult Religious Education	1,383.45	500.00	276.69%
YRUU	0.00	500.00	0.0%
Total Programs & Supplies	2,626.49	3,000.00	87.55%
Religious Educ. and Programs - Other	8.64		
Total Religious Educ. and Programs	122,524.03	117,677.00	104.12%
General Operations			
Administrator's Salary	53,461.52	60,000.00	89.1%
Transfer Operations	0.00		
Wages (Office)	79,490.89	70,600.00	112.59%
Pension-UUA	3,610.95	7,830.00	46.12%
Payroll Taxes (Office)	9,034.35	9,991.00	90.43%
Professional Expenses	222.50	500.00	44.5%
Medical Insurance	17,044.65	18,245.00	93.42%
Worker's Comp Insurance	3,396.00	4,700.00	72.26%
Computer Expenses	3,638.60	7,500.00	48.52%
Computer/Equip Repair & Maint	185.16		
Newsletter	4,610.56	5,500.00	83.83%
Telephone	3,789.62	3,500.00	108.28%
Office Equip Lease	15,473.85	15,000.00	103.16%
Office Supplies	3,753.11	5,000.00	75.06%
Postage and Bulk Mail	2,784.34	4,500.00	61.87%
Miscellaneous Expense			
Safety Deposit Box Rental	50.00	50.00	100.0%
Other Fees/Dues	1,070.48	2,000.00	53.52%
Bank Fees	452.22	1,980.00	22.84%
Miscellaneous Expense - Other	613.78	1,470.00	41.75%
Total Miscellaneous Expense	2,186.48	5,500.00	39.75%
Total General Operations	202,682.58	218,366.00	92.82%
Facility and Grounds			
Security Program	5,097.89	5,549.00	91.87%
Janitorial Contract	15,739.00	15,000.00	104.93%
Event Team	14,117.31	15,000.00	94.12%

**First Unitarian Universalist Church of Austin
 Profit & Loss Budget vs. Actual**

	Jan - Nov 09	Budget	% of Budget
Pension-UUA	508.75	555.00	91.67%
P/R Taxes (Events Tm, Security)	1,426.32	1,572.00	90.73%
Custodial Benevolence	2,860.00	3,120.00	91.67%
Custodial Supplies	0.00	550.00	0.0%
Building Maint/Repairs			
House Repairs	7,735.00	23,000.00	33.63%
Grounds	8,408.72	12,000.00	70.07%
Building Maint/Repairs - Other	43.19		
Total Building Maint/Repairs	16,186.91	35,000.00	46.25%
Utilities			
Utility Drainage Fee	2,644.18	2,863.00	92.36%
Electricity and Water	15,671.99	13,422.00	116.76%
Gas	1,098.68	1,415.00	77.65%
Utilities - Other	1,268.54	1,300.00	97.58%
Total Utilities	20,683.39	19,000.00	108.86%
Insurance	7,721.00	8,400.00	91.92%
Facility and Grounds - Other	3,765.00		
Total Facility and Grounds	88,105.57	103,746.00	84.92%
Denominational Affairs			
U.U.A. Dues	12,500.00	12,000.00	104.17%
S.W.U.U.C. Dues	6,718.19	11,000.00	61.07%
Other Programs			
Leadership school	0.00	500.00	0.0%
Partner Church	300.00	150.00	200.0%
Total Other Programs	300.00	650.00	46.15%
Total Denominational Affairs	19,518.19	23,650.00	82.53%
Memb. Support and Programs			
Fellowship	363.10	2,000.00	18.16%
Board/Council	394.70		
Pamphlets	0.00	200.00	0.0%
Sunday Kitchen Costs	3,574.68	5,000.00	71.49%
Canvass and Finance	3,122.24	4,500.00	69.38%
Media Committee	584.14	1,250.00	46.73%
Forum	(53.00)	500.00	(10.6%)
Membership Committee	1,193.63	1,000.00	119.36%
Paradox Players	117.80		
Memb. Support and Programs - Other	84.90		
Total Memb. Support and Programs	9,382.19	14,450.00	64.93%
Payroll Expenses			
Payroll Expenses Other	0.00		
Payroll - Salary	(1,875.00)		
Payroll - Hourly	(33,431.65)		
Payroll Taxes	111.89		

First Unitarian Universalist Church of Austin

Profit & Loss Budget vs. Actual

	<u>Jan - Nov 09</u>	<u>Budget</u>	<u>% of Budget</u>
Payroll Expenses - Other	5,764.22		
Total Payroll Expenses	<u>(29,430.54)</u>		
Total Expense	<u>584,444.08</u>	<u>690,269.00</u>	<u>84.67%</u>
Net Ordinary Income	<u>23,258.13</u>	<u>(43,788.00)</u>	<u>(53.12%)</u>
Net Income	<u><u>23,258.13</u></u>	<u><u>(43,788.00)</u></u>	<u><u>(53.12%)</u></u>

Fund Balances - Schwab Accounts **As Of 11-30-09**

Long Range Fund (LRF)

Schwab Account Balance	\$114,822.27
Due to MS Gain	(2,102.25)
Due to Operating Fund--Held for Capital Campaign	(10,000.00)
Due to Operating Fund--Architects, Fees	(46,139.15)

LRF Balance	\$56,580.87
	=====

Murr Fund

Schwab Account Balance	\$35,985.43

Murr Fund Balance	\$35,985.43
	=====

**Memorial Savings Fund (MSF)
(Formerly Memorial Endowment)**

Schwab Account Balance	\$351,631.34
Due from LRF - Gain in LRF Fair Value+Interest, Dividend	2,102.25
Due to Operating Fund - Stock donations	(54,859.84)
Due to Operating Fund - Memorial Sculpture (1)	(16,097.64)

MSF Schwab Account Balance	\$282,776.11
Add Annuity Balance	
Hartford Ins. Annuity, formerly London Pacific	10,888.47

MSF Balance	\$293,664.58
	=====

Permanent Endowment Fund (PEF)

Schwab Account Balance	101,334.10
	=====
Total Value, 5 Funds	\$487,564.98
	=====
Change from last month	\$17,021.00
Change from this time last year	\$96,464.75

Footnote (1):
 Contributions Received for Memorial Butterflies \$5,100.00
 Percentage of Cost of Sculpture 31.68%

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Contribution Income

Budget vs. Actual

1999 to present 1999 2000 2001 2002 2003 2004 2005 2006 2007 2008 2009

BUDGET \$20,000 \$18,000 \$18,000 \$32,800 \$53,000 \$60,000 \$50,000 \$55,500 \$62,178 \$65,000 \$60,000

Collected as of:

January \$1,145 \$1,461 \$2,188 \$4,795 \$4,793 \$5,611 \$3,062 \$7,506 \$4,092 \$5,661 \$4,851

% of year 8.33% 8.33% 8.33% 8.33% 8.33% 8.33% 8.33% 8.33% 8.33% 8.33% 8.33%

% of budget 5.72% 8.12% 12.16% 14.62% 9.04% 9.35% 6.12% 13.52% 6.58% 8.7% 8.09%

February \$4,200 \$2,963 \$4,232 \$8,777 \$11,786 \$9,627 \$7,768 \$12,918 \$8,096 \$11,856 8,006

% of year 16.67% 16.67% 16.67% 16.67% 16.67% 16.67% 16.67% 16.67% 16.67% 16.67% 16.67%

% of budget 21.00% 16.46% 23.51% 26.76% 22.24% 16.04% 15.54% 23.54% 13.00% 18.20% 13.34%

March \$5,703 \$4,120 \$5,995 \$14,425 \$15,965 \$14,265 \$12,476 \$18,217 \$11,404 \$16,579 \$10,059

% of year 25.00% 25.00% 25.00% 25.00% 25.00% 25.00% 25.00% 25.00% 25.00% 25.00% 25.00%

% of budget 28.52% 22.89% 33.31% 43.98% 30.12% 23.77% 24.95% 32.82% 18.34% 25.50% 16.76%

April \$6,892 \$5,369 \$8,359 \$17,321 \$20,049 \$18,313 \$21,381 \$24,725 \$17,124 \$20,178 \$12,868

% of year 33.33% 33.33% 33.33% 33.33% 33.33% 33.33% 33.33% 33.33% 33.33% 33.33% 33.33%

% of budget 34.46% 29.83% 46.44% 52.81% 37.83% 30.52% 42.76% 44.55% 27.54% 31.04% 21.45%

May \$7,909 \$7,074 \$13,058 \$21,561 \$24,542 \$23,006 \$25,608 \$29,323 \$21,423 \$23,284 \$15,707.25

% of year 41.67% 41.67% 41.67% 41.67% 41.67% 41.67% 41.67% 41.67% 41.67% 41.67% 41.67%

% of budget 39.55% 39.30% 72.54% 65.73% 46.31% 38.34% 51.22% 52.84% 34.45% 35.82% 26.18%

June \$8,997 \$8,135 \$14,809 \$25,922 \$32,494 \$26,506 \$31,304 \$33,256 \$27,804 \$28,012 \$17,380

% of year 50.00% 50.00% 50.00% 50.00% 50.00% 50.00% 50.00% 50.00% 50.00% 50.00% 50.00%

% of budget 44.99% 45.19% 82.27% 79.03% 61.31% 44.18% 62.61% 59.92% 44.72% 43.10% 29.00%

July \$10,019 \$9,325 \$16,795 \$28,809 \$34,233 \$28,910 \$33,756 \$38,142 \$32,714 \$31,588 \$21,858

% of year 58.33% 58.33% 58.33% 58.33% 58.33% 58.33% 58.33% 58.33% 58.33% 58.33% 58.33%

% of budget 50.09% 51.81% 93.31% 87.83% 64.59% 48.18% 67.51% 68.70% 52.61% 48.60% 36.40%

August \$11,201 \$10,590 \$18,666 \$31,568 \$38,502 \$33,778 \$37,638 \$41,452 \$36,397 \$36,320 28,408

% of year 66.67% 66.67% 66.67% 66.67% 66.67% 66.67% 66.67% 66.67% 66.67% 66.67% 66.67%

% of budget 56.00% 58.83% 103.70% 96.24% 72.64% 56.30% 75.28% 74.69% 58.54% 55.88% 47.35%

September \$12,582 \$11,915 \$21,394 \$39,649 \$45,614 \$38,362 \$45,788 \$45,579 \$42,958 41,015 \$30,564.00

% of year 75.00% 75.00% 75.00% 75.00% 75.00% 75.00% 75.00% 75.00% 75.00% 75.00% 75.00%

% of budget 62.91% 66.20% 118.86% 120.88% 86.06% 63.94% 91.58% 82.10% 69.09% 63.09% 50.94%

October \$14,248 \$13,838 \$25,304 \$43,731 \$49,310 \$44,542 \$51,985 \$51,078 \$48,092 44,228 \$35,653

% of year 83.33% 83.33% 83.33% 83.33% 83.33% 83.33% 83.33% 83.33% 83.33% 83.33% 83.33%

% of budget 71.24% 76.88% 140.58% 133.33% 93.04% 74.24% 104.00% 92.03% 77.35% 68.80% 59.42%

November \$15,740 \$20,634 \$28,629 \$48,386 \$54,111 \$49,926 \$59,880 \$53,395 \$52,510 \$49,401 \$54,461

% of year 91.67% 91.67% 91.67% 91.67% 91.67% 91.67% 91.67% 91.67% 91.67% 91.67% 91.67%

% of budget 78.70% 114.63% 159.05% 147.52% 102.10% 83.21% 119.80% 96.20% 84.50% 76.77% 90.80%

December \$17,128 \$23,860 \$35,477 \$55,899 \$66,415 \$56,053 \$66,698 \$64,349 \$63,497 56,492 \$54,461

% of year 100.00% 100.00% 100.00% 100.00% 100.00% 100.00% 100.00% 100.00% 100.00% 100.00% 100.00%

% of budget 85.64% 132.56% 197.10% 170.42% 125.31% 93.42% 133.40% 115.90% 102.12% 86.91%

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PLEDGE INCOME

1999 to present	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
BUDGET	\$310,000	\$350,000	\$355,000	\$355,000	\$390,000	\$430,000	\$437,368	\$480,000	\$450,000	\$530,000	
MonthCollected											
January	\$25,046	\$47,751	\$38,522	\$28,685	\$29,641	\$33,993	\$43,232	\$46,540	\$22,909	\$53,384	\$38,528
% of year	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%	8.33%
% of budget	8.08%	13.64%	10.85%	8.08%	7.60%	7.91%	9.88%	9.70%	5.09%	10.10%	7.34%
February	\$39,754	\$73,846	\$56,735	\$54,265	\$60,416	\$71,860	\$78,844	\$95,687	\$63,295	\$91,325	\$73,742
% of year	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%	16.67%
% of budget	12.82%	21.10%	15.98%	15.29%	15.49%	16.71%	18.03%	19.94%	14.07%	17.20%	14.04%
March	\$78,720	\$108,071	\$89,902	\$89,208	\$89,028	\$105,592	\$128,300	\$145,372	\$104,250	\$140,146	\$123,373
% of year	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%	25.00%
% of budget	25.39%	30.88%	25.32%	25.13%	22.83%	24.56%	29.33%	30.29%	23.17%	26.44%	23.50%
April	\$115,053	\$150,775	\$128,307	\$128,093	\$131,194	\$137,877	\$161,288	\$183,250	\$153,694	\$179,565	\$200,775
% of year	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%	33.33%
% of budget	37.11%	43.08%	36.14%	36.08%	33.64%	32.06%	36.88%	38.18%	34.15%	33.88%	38.24%
May	\$132,222	\$181,298	\$165,059	\$151,360	\$165,861	\$169,320	\$198,313	\$224,980	\$192,022	\$210,628	\$237,974
% of year	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%	41.67%
% of budget	42.65%	51.80%	46.50%	42.64%	42.53%	39.38%	45.34%	46.87%	42.67%	39.74%	45.33%
June	\$157,123	\$204,732	\$192,275	\$173,722	\$196,640	\$196,306	\$235,285	\$261,778	\$226,928	\$249,393	\$273,123
% of year	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%	50.00%
% of budget	50.68%	58.49%	54.16%	48.94%	50.42%	45.65%	53.80%	54.50%	50.43%	47.10%	52.00%
July	\$175,519	\$226,490	\$218,376	\$203,761	\$223,155	\$221,874	\$269,968	\$294,974	\$260,330	\$283,449	\$302,103
% of year	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%	58.33%
% of budget	56.62%	64.71%	61.51%	57.40%	57.22%	51.60%	61.73%	61.50%	57.85%	53.48%	57.50%
August	\$195,148	\$248,130	\$242,323	\$224,531	\$266,350	\$260,826	\$310,675	\$329,938	\$294,279	\$329,823	331,122
% of year	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%	66.67%
% of budget	62.95%	70.89%	68.26%	63.25%	68.29%	60.66%	71.03%	68.74%	65.40%	62.23%	63.07%
September	\$216,387	\$289,417	\$272,522	\$249,957	\$290,168	\$294,452	\$349,719	\$365,330	\$332,405	371,039	\$373,478.00
% of year	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%	75.00%
% of budget	69.80%	82.69%	76.77%	70.41%	74.40%	68.48%	79.96%	76.10%	73.87%	70.00%	71.14%
October	\$234,373	\$321,182	\$302,103	\$276,629	\$311,486	\$341,447	\$383,682	\$414,898	\$361,890	409,433	\$413,305
% of year	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%	83.33%
% of budget	75.60%	91.77%	85.10%	77.92%	79.87%	79.41%	87.70%	86.44%	80.42%	77.25%	78.72%
November	\$256,345	\$338,947	\$329,705	\$307,203	\$340,864	\$374,639	\$410,313	\$446,710	\$394,175	\$444,912	454,174
% of year	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%	91.67%
% of budget	82.69%	96.84%	92.87%	86.54%	87.40%	87.13%	93.81%	93.10%	87.60%	83.95%	86.50%
December	\$279,732	\$361,972	\$367,711	\$342,584	\$371,787	\$422,460	\$468,866	\$502,453	\$430,683	\$489,319	
% of year	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	
% of budget	90.24%	103.42%	103.58%	96.50%	95.33%	98.25%	107.20%	104.70%	95.71%	92.32%	

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	OPERATING FUND RESERVE CALCULATION as of 11-30-09								(FAMP, p. 4)				
2													
3	Total Operating (and Restricted) Fund Assets												
4	OPERATING FUND CASH (and cash equivalent assets)												
5								47,571.49					
6								144.20	Operating				
7									Fund				
8									cash				
9								15,581.00	balance				
10								54,859.84					
11								10,997.64					
12													
13								46,139.15					
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39													
40													
41													
42													

Rows 5 to 13

175,293.32 Operating Fund Cash Balance

(9.80)

Funds
Restricted
and
Fixed Assets

Back out Restricted Funds and
Fixed Assets

Operating
Fund
Liabilities

Rows 5 to 13, plus Row 15, plus Rows 27 to 32

153,539.10 Operating Fund Net Worth

141,283.87

2010 Budgeted Expenses: 607,406
1/12 of Budgeted Expenses: **50,617**

Therefore, **90,667** should be swept into the
Memorial Savings Fund

According to the FAMP, the Operating Fund should hold
at most one month's expenses in reserve.

Schwab Account	INVESTMENTS Name	Symbol	Date Acquired	Current # shares	per share Basis	Cost (incl. comm.)	30-Nov-09		31-Oct-09	
	Parnassus Equity Inc Fund Investor Sh	PRBLX		1,381.4840	\$ 23.43	32,368	\$ 32,824	9%	\$ 31,056	9%
3295-0559	iShares MSCI Emerg Mkt Index Fund	EEM	Dec'04	373.0000	\$ 22.27	8,305	\$ 15,114	4%	\$ 14,014	4%
Mem.	iShares Russell Midcap Index Fund	IWR	Dec'04	350.0000	\$ 79.53	27,837	\$ 27,461	8%	\$ 26,184	8%
Savings	iShares Tr Lehman Bond Fund	SHY	Feb '08	687.0000	\$ 83.59	57,430	\$ 57,935	16%	\$ 57,722	17%
Account	iShares Tr Lehman Bond Fund	TLT	Feb '08	152.6514	\$ 93.24	14,233	\$ 14,751	4%	\$ 14,573	4%
	iShares Tr Lehman TIPS Bond Fund	TIP	Dec'04	364.0000	\$ 106.21	38,659	\$ 38,791	11%	\$ 37,860	11%
	IShares Tr MSCI EAFE Index Fund	EFA	Dec04/Feb08	674.1278	\$ 60.65	40,887	\$ 37,340	11%	\$ 35,931	10%
	iShares Tr S&P Small Cap 600 Index Fund	IJR	Dec'04	580.0000	\$ 54.48	31,597	\$ 29,412	8%	\$ 28,664	8%
	Rydex ETF Trust S&P 500 Equal Wt Index Fund	RSP	Dec'04	1,678.0000	\$ -			0%		0%
	Exxon Mobil Corp.	XOM	Nov '08/Dec'08	15.0000	\$ -	1,044		0%	\$ 1,075	0%
	Johnson & Johnson	JNJ	Dec '08	85.0000	\$ -			0%		0%
	Schwab Value Advantage Money Fund	SWVXX			\$ 1.00		\$ 98,014	28%	\$ 95,073	28%
	CASH				\$ 1.00		\$ (10)	0%	\$ 1,602	0%
MSF SUB-TOTAL						252,359	\$ 351,631	100%	\$ 343,752	100%

Mo. to Mo. % Change 2% -1%

Hartford Annuity \$ 10,888 \$ 10,851

Mo. to Mo. % Change 0.35% 0.34%

Schwab Account	INVESTMENTS Name	Symbol	Date Acquired	Current # shares	per share Basis	Cost (incl. comm.)	30-Nov-09		31-Oct-09	
	Parnassus Equity Inc Fund Investor Sh	PRBLX		834.1680	\$ 23.43	\$ 19,545	\$ 19,820	17%	\$ 18,752	17%
3295-0560	iShares MSCI Emerg Mkt Index Fund	EEM	Feb '08	84.0000	\$ 43.79	\$ 3,678	\$ 3,404	3%	\$ 3,156	3%
Long	iShares Tr Lehman Bond Fund	SHY	Feb '08	109.0000	\$ 83.70	\$ 9,123	\$ 9,192	8%	\$ 9,158	8%
Range	ishares Tr Lehman Bond Fund	TLH	Feb '08	86.0000	\$ 108.76	\$ 9,242	\$ 9,742	8%	\$ 9,546	9%
Account	iShares Tr Lehman Bond Fund	TLT	Feb '08	100.0000	\$ 94.17	\$ 9,338	\$ 9,663	8%	\$ 9,578	9%
	IShares Tr MSCI EAFE Index Fund	EFA	Feb '08	225.0000	\$ 68.41	\$ 15,392	\$ 12,463	11%	\$ 11,993	11%
	iShares Tr S&P Small Cap 600 Index Fund	IJR	Feb '08	150.0000	\$ 61.12	\$ 9,167	\$ 7,607	7%	\$ 7,413	7%
	Mid Cap SPDR Trust	MDY	Feb '08	63.0000	\$ 144.18	\$ 9,083	\$ 7,852	7%	\$ 7,536	7%
	SPDR Trust Unit Ser 1, exp 1/22/2118	SPY	Feb '08	54.0000	\$ 133.53	\$ 7,211	\$ 5,937	5%	\$ 5,592	5%
	Schwab Value Advantage Money Fund	SWVXX			\$ 1.00		\$ 29,143	25%	\$ 28,322	25%
	CASH				\$ 1.00			0%	\$ 739	1%
LRF SUB-TOTAL						\$ 91,779	\$ 114,822	100%	\$ 111,784	100%

Mo. to Mo. % Change 3% -1%

Schwab Account	INVESTMENTS Name	Symbol	Date Acquired	Current # shares	per share Basis	Cost (incl. comm.)	30-Nov-09		31-Oct-09	
	ishares IBOXX \$ Investop Corp Bond Fund	LQD	Jun '04	110.3529	\$ 106.34	\$ 11,735	\$ 11,835	33%	\$ 11,662	33%
9125-2123	iShares Russell Midcap Index Fund	IWR	Jun '04	51.3535	\$ 74.06	\$ 3,803	\$ 4,029	11%	\$ 3,842	11%
Murr	iShares Tr Lehman Bond Fund	SHY	Jun '04	93.9469	\$ 81.81	\$ 7,686	\$ 7,923	22%	\$ 7,893	23%
Account	iShares Tr MSCI EAFE Index Fund	EFA	Jun '04	60.9389	\$ 49.54	\$ 3,019	\$ 3,375	9%	\$ 3,248	9%
	iShares Tr Russell 2000 Index Fund	IWM	Jun '04	61.5996	\$ 61.60	\$ 3,670	\$ 3,578	10%	\$ 3,470	10%
	Russell 3000 Value Index Fund	IWW	Jun '04	60.7341	\$ 76.88	\$ 4,669	\$ 4,493	12%	\$ 4,261	12%
	Schwab Investor Money Fund	SW2XX	Jun '09		\$ 1.00		\$ 752	2%	\$ 685	2%
	CASH				\$ 1.00			0%	\$ (5)	0%
	MF SUB-TOTAL					\$ 34,582	\$ 35,985	100%	\$ 35,056	100%

Mo. to Mo. % Change 3% -2%

Schwab Account	INVESTMENTS Name	Symbol	Date Acquired	Current # shares	per share Basis	Cost (incl. comm.)	30-Nov-09		31-Oct-09	
3289-9947	iShares MSCI Emerg Mkt Index Fund	EEM	Dec '04 / Aug '09	430.0000	\$ 32.09	\$ 13,800	\$ 17,424	17%	\$ 16,155	17%
Perm.	iShares Russell Midcap Index Fund	IWR	Dec '04 / Aug '09	194.5949	\$ 77.24	\$ 15,031	\$ 15,268	15%	\$ 14,558	15%
Endow.	iShares Tr Lehman Bd Fund	SHY	Sep '08	120.0000	\$ 83.60	\$ 10,031		0%		0%
Account	iShares Tr Lehman Bd Fund	TLT	Sep '08	1.0189	\$ 103.41	\$ 105		0%		0%
	iShares Tr Lehman TIPS Bond Fund	TIP	Dec '04	140.0000	\$ 106.21	\$ 14,869		0%		0%
	iShares Tr MSCI EAFE Index Fund	EFA	Dec '04	294.3386	\$ 53.16	\$ 15,646	\$ 16,303	16%	\$ 15,688	16%
	iShares Tr S&P Small Cap 600 Index Fund	IJR	Dec '04 / Aug '09	293.7191	\$ 52.81	\$ 15,511	\$ 14,895	15%	\$ 14,516	15%
	Rydex ETF Trust S&P 500 Equal Wt Index Fund	RSP	Sep '08	585.0000	\$ 39.11	\$ 22,878		0%		0%
	SPDR Trust Unit SR 1	SPY	Feb '09	340.5444	\$ 78.44	\$ 26,713	\$ 37,439	37%	\$ 35,097	36%
	CASH				\$ 1.00	\$ 145	\$ 5	0%	\$ 177	0%
	PEF SUB-TOTAL					\$ 134,730	\$ 101,334	100%	\$ 96,191	100%

Mo. to Mo. % Change 5% -3%

	30-Nov-09	31-Oct-09
TOTAL of 4 ACCOUNTS (and Annuity)	\$ 614,662	\$ 597,634

Change in Value \$ 17,028 \$ (9,296)

Mo. to Mo. % Change 3% -2%

FUUCA ASSETS MATRIX

November 30, 2009

November 30, 2009 Church Funds	Operating	BoT Restricted	Long Range	Memorial Savings	Murr Music	Permanent Endowment	Financial Inst. Accounts TOTAL
Tx Health Credit Union	47,571.49						47,571.49
Schwab Acct. 3295-0559 (Memorial Savings)	15,581.00 54,859.84 16,097.64 (5,100.00)	81,337.06		351,631.34 (81,337.06) (15,581.00) (54,859.84) (16,097.64) 5,100.00	BoT restricted funds annual transfer co-mingling stock donations butterfly memorial sale of butterflies		351,631.34
Hartford Annuity (Memorial Savings)				10,888.47			10,888.47
Schwab Acct. 3295-0560 (Long Range)	46,139.15	10,000.00	114,822.27 (10,000.00) (2,400.39) (46,139.15)	capital campaign donation co-mingling architects fees			114,822.27
Schwab Acct. 9125-2123 (Murr Music)					35,985.43		35,985.43
Schwab Acct. 3289-9947 (Permanent Endowment)						101,334.10	101,334.10
Church Funds TOTAL	175,149.12	91,337.06	56,282.73	202,144.66	35,985.43	101,334.10	662,233.10

petty cash / other 144.20
Op. Fund Cash Balance 175,293.32 (Unrestricted)

	A	B	C	D	E	F	G	H	I						
1	FUUCA OPERATING FUND INCOME & EXPENSE STATEMENT														
2															
3	<table border="1"> <thead> <tr> <th></th> <th>Jan - Nov '09</th> <th>Jan - Oct '09</th> <th>Nov only</th> <th>Budget</th> <th>% of Budget</th> </tr> </thead> </table>										Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
	Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget										
4	INCOME														
5															
6	Pledge Income														
7	Spring 2009 Canvass														
8		49,889.00	49,889.00	0.00											
9		400,954.86	360,410.43	40,544.43	525,000	76.37%									
10		5,542.50	5,542.50	0.00											
11		5.00													
11	Credit Card Fees														
12		(2,537.07)	(2,537.07)	0.00											
12	Total Pledge Income														
13		453,854.29	413,304.86	40,549.43	525,000	86.45%									
14															
15	Contributions Income														
16	Unrestricted Contributions														
17		39,294.79	31,935.77	7,359.02	60,000	65.49%									
17	Restricted Contributions														
18				0.00											
18		12,947.16	10,540.27	2,406.89											
19		(10,545.42)	(8,677.21)	(1,868.21)											
20		4,110.00	1,362.00	2,748.00											
21	Total Restricted Contributions														
22		6,511.74	3,225.06	3,286.68											
22	Contributions Income - Other														
23		9,173.48	491.69	8,681.79											
23	Total Contributions Income														
24		54,980.01	35,652.52	19,327.49	60,000	91.63%									
25	Transfer from Memorial Savings Fund														
26		14,282.51	12,984.10	1,298.41	15,581	91.67%									
26	Transfer from other restricted funds														
27		16,902.73	16,902.73	0.00	500	3,380.55%									
28	Rental Income														
29		50,497.04	47,828.54	2,668.50	35,000	144.28%									
29	rental expenses														
30		125.00		125.00											
31	RE Fundraiser														
31		944.23	210.23	734.00											
32	Special Event Income														
32		9,703.02	9,286.02	417.00	3,500	277.23%									
33	Paradox Players (net)														
33		81.13	57.68	23.45											
34	Unrestricted Investment Income (interest)														
34	Misc Income														
35		2,695.35	2,612.04	83.31	4,000	67.38%									
36		(834.90)	(834.90)	0.00	1,500	(55.66%)									
37		4,570.33	4,238.10	332.23	1,400	326.45%									
38	Total Misc Income														
39		6,430.78	6,015.24	415.54	6,900	93.2%									
39	TOTAL INCOME														
40		607,800.74	542,241.92	65,558.82	646,481	94.02%									
41															
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	A	B	C	D	E	F	G	H	I
	EXPENSE				Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
58	Ministry, Outreach, Pastoral Care								
59	Ministerial Consultants				3,953.94	3,953.94	0.00		
60	Minister-Salary / Housing								
61	Salary				43,859.03	37,079.03	6,780.00	48,000	91.37%
62	Housing				22,017.12	20,142.12	1,875.00	27,000	81.55%
63	Total Settled Minister - Salary / Housir				65,876.15	57,221.15	8,655.00	75,000	87.84%
64	Minister - Benefits								
65	Medical Insurance				3,422.44	3,422.44	0.00	3,700	92.5%
66	Pension-UUA				658.33	658.33	0.00	7,500	8.78%
67	Disability Insurance				579.88	579.88	0.00	900	64.43%
68	Moving Expenses				2,971.50	2,971.50	0.00		
69	Professional Expenses				1,239.75	706.14	533.61	14,000	8.86%
70	Total Minister - Benefits				8,871.90	8,338.29	533.61		
71	Minister Total				74,748.05	65,559.44	9,188.61	101,100	73.94%
72									
73	Spring Intern								
74	Salary				9,600.00	9,600.00	0.00	9,600	100.0%
75	Payroll Tax				734.40	734.40	0.00	734	100.05%
76	Medical Insurance				3,738.21	3,738.21	0.00	3,054	122.4%
77	Professional Expenses / Other				0.00	283.61	(283.61)	300	0.0%
78	Spring Intern Total				14,072.61	14,356.22	(283.61)	13,688	102.81%
79	Fall Intern								
80	Salary				0.00	0.00		6,400	
81	Payroll Tax				0.00	0.00		490	
82	Medical Insurance				0.00	0.00		2,443	
83	Moving Expense				0.00	0.00		1,000	
84	transfer to Victor Gonzales							(2,120)	
85	Fall Intern Total				0.00	0.00		8,213	0.0%
86	Total Intern Ministers				14,072.61	14,356.22	(283.61)	21,901	64.26%
87	Minister Sabbatical				(51.00)	(51.00)	0.00		
88	Pulpit Honoraria				5,750.00	5,750.00	0.00	1,000	575.0%
89	Advertising				2,762.87	2,762.87	0.00	2,500	110.52%
90	Social Action / Social Service								
91	Social Action / Social Service C				639.83	639.83	0.00	3,000	21.33%
92	transfer to Victor Gonzales							(1,000)	
93	Social Action Cmt. Total				1,638.71	639.83	998.88	2,000	81.94%
94	A A I M				0.00	0.00	0.00	1,000	0.0%
95	Hands on Housing				500.00	500.00	0.00		
96	Helping Hands							100	0.0%
97	Other				0	926.12	(926.12)		
98	Total Social Action / Social Service				2,138.71	2,065.95	72.76	3,100	68.99%
99	Total Ministry, Outreach, Pastoral Care				103,375.18	94,397.42	8,977.76	129,601	79.76%
100	Music and Worship								
101	Music Personnel								
102	Director of Music				38,302.28	27,387.68	10,914.60	41,100	93.19%
103	Pianists				12,418.50	8,398.06	4,020.44	13,326	93.19%
104	Children's Choir Directors				4,200.00	4,200.00	0.00	5,000	84.0%
105	Music Personnel Total				54,920.78	39,985.74	14,935.04	59,426	92.42%
106	Music P/R Taxes				4,201.50	3,058.98	1,142.52	4,546	92.42%
107	Medical Insurance				6,566.55	5,543.11	1,023.44	5,016	130.91%
108	Pension-UUA				9,010.96	3,867.40	5,143.56	4,641	194.16%
109	Music Professional Expenses				537.51	537.51	0.00	1,000	53.75%
110	Music Program Expenses				6,766.52	4,930.79	1,835.73	8,000	84.58%
111	Worship Supplies				122.98	122.98	0.00	150	81.99%
112	Music and Worship Total				82,126.80	58,046.51	24,080.29	82,779	99.21%

	A	B	C	D	E	F	G	H	I
					Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
113									
114				Religious Educ. and Programs					
115				R E Personnel					
116				DRE Salary	41,899.30	31,076.20	10,823.10	46,900	89.34%
117				Pension-UUA	4,690.08	3,908.40	781.68	4,690	100.0%
118				Professional Expenses	2,170.74	1,283.74	887.00	2,500	86.83%
119				RE Assistants (3)	36,670.68	31,743.55	4,927.13	34,645	105.85%
120				RE Teachers (4)	15,726.03	4,743.09	10,982.94	6,240	252.02%
121				RE Payroll Taxes	6,211.70	4,543.55	1,668.15	6,715	92.51%
122				Nursery/Childcare Wages	12,815.84	9,354.41	3,461.43	11,460	111.83%
123				Nursery/Childcare P/R Taxes	1,278.92	575.13	703.79	877	145.83%
124				R E Personnel Total	121,463.29	87,228.07	34,235.22	114,027	106.52%
125				Programs & Supplies					
126				Administrative Expense	0.00	0.00	0.00	550	0.0%
127				Nursery Supplies	490.08	338.43	151.65	100	490.08%
128				Children Program Expenses	870.95	493.40	377.55	1,000	87.1%
129				Youth Program Expenses	372.09	372.09	0.00	1,000	37.21%
130				Adult RE Expenses	1,383.45	1,383.45	0.00	500	276.69%
131				YRUU	0.00	0.00	0.00	500	0.0%
132				Other	8.64	8.64	0.00		
133				Programs & Supplies Total	3,125.21	2,596.01	529.20	3,650	85.62%
134				Total Religious Educ. and Programs	124,588.50	89,824.08	34,764.42	117,677	105.87%
135									
136				General Operations					
137				G O Personnel					
138				Executive Director's Salary	53,461.52	39,615.38	13,846.14	60,000	89.1%
139				Book Keeper's Salary	39,224.55	28,030.09	11,194.46	33,700	116.39%
140				Office Assistants' Wages (2)	42,948.56	30,689.67	12,258.89	36,900	116.39%
141				Pension-UUA	3,610.95	2,110.95	1,500.00	7,830	46.12%
142				G O P / R Taxes	9,034.35	6,801.44	2,232.91	9,991	90.43%
143				Professional Expenses	222.50	222.50	0.00	500	44.5%
144				Medical Insurance	18,613.11	15,755.75	2,857.36	18,245	102.02%
145				Worker's Comp Insurance	3,396.00	3,396.00	0.00	4,700	72.26%
146				G O Personnel Total	170,511.54	126,621.78	43,889.76	171,866	99.21%
147									
148				Supplies / Miscellaneous Expense					
149				Computer Expenses	3,884.54	3,522.65	361.89	7,500	51.79%
150				Computer / Equip. Repair & Mai	185.16	185.16	0.00		
151				Newsletter	5,160.56	4,610.56	550.00	5,500	93.83%
152				Telephone	4,085.71	3,765.13	320.58	3,500	116.74%
153				Copier Lease	16,573.85	14,373.85	2,200.00	15,000	110.49%
154				Office Supplies	3,976.82	3,311.24	665.58	5,000	79.54%
155				Postage and Bulk Mail	2,940.34	2,784.34	156.00	4,500	65.34%
156				Miscellaneous Expense					
157				Safety Deposit Box Rental	50.00	50.00	0.00	50	100.0%
158				Other Fees / Dues	1,163.47	1,032.74	130.73	2,000	58.17%
159				Bank Fees	452.22	452.22	0.00	1,980	22.84%
160				Miscellaneous Expense - Other	613.78	613.78	0.00	1,470	41.75%
161				Supplies / Miscellaneous Expense Tot	39,086.45	34,701.67	4,384.78	46,500	84.06%
162									
163				Total General Operations	209,597.99	161,323.45	48,274.54	218,366	95.99%
164									
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	A	B	C	D	E	F	G	H	I
					Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
169									
170				Facility and Grounds					
171				F & G Personnel					
172				Sexton	5,359.75	4,648.97	710.78	5,549	96.59%
173				Event Team	14,857.83	12,890.91	1,966.92	15,000	99.05%
174				Pension-UUA	508.75	462.50	46.25	555	91.67%
175				P/R Taxes (Event Team + Sexton)	1,426.32	1,010.17	416.15	1,572	90.73%
176				F & G Personnel Total	22,152.65	19,012.55	3,140.10	22,676	97.69%
177									
178				Bldg / Grounds Maint / Repairs					
179				Building Maint / Repairs	8,467.95	8,011.66	456.29	30,000	28.23%
180				Grounds	9,059.72	7,667.02	1,392.70	5,000	181.19%
181				Other	43.19	43.19	0.00		
182				Bldg / Grounds Maint / Repairs Total	17,570.86	15,721.87	1,848.99	35,000	50.2%
183				Utilities					
184				Utility Drainage Fee	2,644.18	2,385.60	258.58	2,863	92.36%
185				Electricity and Water	16,971.08	14,384.76	2,586.32	13,422	126.44%
186				Gas	1,098.68	1,067.70	30.98	1,415	77.65%
187				Utilities - Other	1,385.76	1,151.32	234.44	1,300	106.6%
188				Utilities Total	22,099.70	18,989.38	3,110.32	19,000	116.31%
189									
190				Victor Gonzales	3,120.00	2,860.00	260.00	3,120	100.0%
191				Janitorial Contract	15,739.00	14,335.00	1,404.00	15,000	104.93%
192				Custodial Supplies	0.00	0.00	0.00	550	0.0%
193				Building / Liability Insurance	7,721.00	7,000.00	721.00	8,400	91.92%
194				Other	3,765.00	60.00			
195				Total Facility and Grounds	92,168.21	77,978.80	10,484.41	103,746	88.84%
196									
197				Denominational Affairs					
198				U.U.A. Contribution	12,500.00	11,500.00	1,000.00	12,000	104.17%
199				S.W.U.U.C. Contribution	6,718.19	6,718.19	0.00	11,000	61.07%
200				Other Programs					
201				Leadership School	0.00	0.00		500	0.0%
202				Partner Church	300.00	300.00	0.00	150	200.0%
203				Denominational Affairs Total	19,518.19	18,518.19	1,000.00	23,650	82.53%
204									
205				Member Support and Programs					
206				Fellowship	363.10	194.61	168.49	2,000	18.16%
207				Board / Council	394.70	394.70	0.00	0	
208				Sunday Kitchen Costs	3,574.68	2,644.73	929.95	5,000	71.49%
209				Stewardship & Finance	3,122.24	3,122.24	0.00	4,500	69.38%
210				Media Committee	584.14	584.14	0.00	1,250	46.73%
211				Forum	(53.00)	0.00	(53.00)	500	(10.6%)
212				Pamphlets	0.00	0.00	0.00	200	0.0%
213				Paradox Players	158.21				
214				Membership Committee	1,415.72	1,053.76	361.96	1,000	141.57%
215				Other	84.90	289.20	(204.30)		
216				Member Support and Programs Total	9,644.69	8,283.38	1,203.10	14,450	66.75%
217									
218				Reconciliation Discrepancies	(5,847.92)	5,818.20	(11,666.12)		
219				Payroll Expenses not included above					
220				Salary	4,329.88	24,819.52	(20,489.64)		
221				Hourly	(33,257.00)	(4,589.23)	(28,667.77)		
222				P/R Taxes	1,069.59	3,855.96	(2,786.37)		
223				Other	6,091.86	5,146.66	945.20		
224					(21,765.67)	29,232.91	(50,998.58)		

	A	B	C	D	E	F	G	H	I
225									
226					Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
227									
228	TOTAL EXPENSE				613,405.97	543,422.94	66,119.82	690,269	88.87%
229									
230	Net Income Year-to-Date				(5,605.23)	(1,181.02)	(4,424)	(43,788)	12.8%
231									
232	Pledge Income 2010				<u>6,650.00</u>	0.00	6,650.00	450,000	1.48%
233					<u>1,044.77</u>				
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	A	B	C	D	E	F	G	H	I
273	SUMMARY				Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
274	INCOME								
275				Pledges	453,854	413,305	40,549	525,000	86.45%
276				Contributions (Net)	54,980	35,653	19,327	60,000	91.63%
277				Rental	50,497	47,829	2,669	35,000	144.28%
278				R E Fundraiser	125				
279				Special Event Income	944	210	734		
280				Transfer from Mem. Sav. Fund	14,283	12,984	1,298	15,581	91.67%
281				Transfer from other restricted funds	16,903	16,903	0	500	3,380.55%
282				Paradox Players	9,703	9,286	417	3,500	277.23%
283				Unrestricted Investment Income	81	58	23		
284				Miscellaneous	6,431	6,015	416	6,900	93.2%
285	INCOME TOTAL				607,801	542,242	65,434	646,481	94.02%
286	EMPLOYMENT EXPENSES								
287	Payroll Expenses								
288				Payroll - Salary	322,739	246,664	76,075	337,460	95.64%
289				Payroll - Hourly	70,622	52,935	17,687	63,360	111.46%
290				Payroll Taxes	22,887	16,724	6,164	24,925	91.82%
291				Payroll Expenses Total	416,248	316,323	99,925	425,745	97.77%
292				Benefits					
293				Insurance					
294				Medical	32,340	28,460	3,881	30,338	106.6%
295				Disability	580	580	0	900	64.43%
296				Workers' Comp	3,396	3,396	0	4,700	72.26%
297				UUA Pension	18,479	11,008	7,471	25,216	73.28%
298				Professional Expenses	7,142	6,005	1,137	19,300	37.01%
299				Benefits Total	61,937	49,448	12,489	80,454	76.99%
300				Payroll Expenses not included above	(21,766)	29,233	(50,999)		
301				EMPLOYMENT EXPENSES TOTAL	456,420	395,004	112,415	506,199	90.17%
302									
303				NON-EMPLOYMENT EXPENSES					
304				Facilities / Grounds					
305				Maintenance / Repairs	17,571	15,722	1,849	35,000	50.2%
306				Utilities	22,100	18,989	3,110	19,000	116.31%
307				Janitorial / Custodial	15,739	14,335	1,404	15,550	101.22%
308				Building / Liability Insurance	7,721	7,000	721	8,400	91.92%
309				Other	3,765	60	0	0	
310				Facilities / Grounds Total	66,896	56,106	7,084	77,950	85.82%
311				Program Expenses / Supplies					
312				Ministry					
313				Consultants	3,954	3,954	0		
314				Minister Sabbatical	(51)	(51)	0		
315				Pulpit Honoraria	5,750	5,750	0	1,000	575.0%
316				Advertising	2,763	2,763	0	2,500	110.52%
317				Music	6,890	5,054	1,836	8,150	84.53%
318				R E	3,125	2,596	529	3,650	85.62%
319				Office	39,086	34,702	4,385	46,500	84.06%
320				Kitchen	3,575	2,645	930	5,000	71.49%
321				Other	85	289	(204)	0	
322				Program Expenses / Supplies Total	65,177	57,701	7,475	66,800	97.57%
323									
324									

	A	B	C	D	E	F	G	H	I
325	SUMMARY CONTINUED								
326									
327	NON-EMPLOYMENT EXPENSES CONTINUED								
328					Jan - Nov '09	Jan - Oct '09	Nov only	Budget	% of Budget
329	Gifts / Donations / Contributions								
330					12,500	11,500	1,000	12,000	104.17%
331					6,718	6,718	0	11,000	61.07%
332					3,120	2,860	260	3,120	100.0%
333					0	0	0	1,000	0.0%
334					300	300	0	150	200.0%
335					500	500	0	0	
336					0	0	0	100	0.0%
337					23,138	21,878	1,260	27,370	84.54%
338									
339	Committees								
340					3,122	3,122	0	4,500	69.38%
341					1,639	1,566	73	2,000	81.94%
342					363	195	168	2,000	18.16%
343					1,416	1,054	362	1,200	117.98%
344					584	584	0	1,250	46.73%
345					395	395	0	500	78.94%
346					158		158		
347					(53)	0	(53)	500	(10.6%)
348					7,624	6,915	708	11,950	63.8%
349									
350					162,834	142,601	16,528	184,070	88.46%
351									
352	MISCELLANEOUS EXPENSES								
353					(5,848)	5,818	(11,666)		
354									
355					(5,848)	5,818			
356									
357									
358					613,406	543,423	69,983	690,269	88.87%
359									
360									
361					(5,605)	(1,181)	(4,424)	(43,788)	12.8%
362									
363					<u>6,650.00</u>	0.00	6,650.00	450,000	1.48%
364					<u><u>1,044.77</u></u>				

FUUCA BALANCE SHEET SUMMARY

	November 30, 2009	October 31, 2009	Mo. to Mo. Change
Small Restricted Funds	91,337	84,118	7,219
Memorial Savings Fund	184,847	199,608	(14,761)
Long Range Fund	56,283	56,283	(0)
Murr Fund	35,985	35,763	222
Permanent Endowment Fund	101,334	99,212	2,122
Total of All Restricted Funds	469,787	474,984	(5,197)
(Unrestricted) Operating Fund	153,539	153,367	172
Fixed Assets			
Land	1,508,930	1,508,930	0
Buildings	672,233	672,233	0
Furniture / Fixtures	157,935	157,935	(1)
(approx.) Accumulated Depreciation	(477,332)	(477,332)	0
Total Fixed Assets	1,861,765	1,861,766	(0)
TOTAL NET WORTH	2,485,091	2,490,117	(5,026)

ASSETS

30-Nov-09

OPERATING FUND

CASH

Texas Health Credit Union		
checking, other	43,555.09	
savings	4,016.40	
TOTAL Checking / Savings		47,571.49

Operating Fund Assets Held in Schwab Accounts

Due from Long Range Fund		
Phase 1 Architect fees	46,139.15	
Due from Memorial Savings Fund		
Stock Donations	54,859.84	
Memorial Sculpture	16,097.64	original cost
Memorial Sculpture	(5,100.00)	received from sale of memorial butterflies
Annual Transfer from Mem. Sav.	15,581.00	entire year
TOTAL Assets held in Schwab Accounts		127,577.63

Payroll Asset		(38.40)
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Petty Cash, Office & Kitchen		182.60
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OPERATING FUND (Unrestricted) Cash Balance	175,293.32
-----------------------------------------------------	-------------------

Accounts Receivable

30-Nov-09

Loan Receivable - Intern Minister	0.00	
Loan Receivable	0.00	
Accounts Receivable	(9.80)	
PayPal Receivable	0.00	
Other	0.00	
TOTAL Accounts Receivable		(9.80)

Accounts Payable		(6,157.96)
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Other Current Liabilities

Direct Deposit Liabilities	(286.56)	
Key Deposits	(50.00)	
Deferred Expenses	0.00	
Payroll Liabilities, Other	(14,749.90)	
Retirement Accounts	(500.00)	
Payroll Liabilities - Other		
TOTAL Other Current Liabilities		(15,586.46)

NOTE: 2009 Expense Budget 690,269 1/12 = 57,522

OPERATING FUND: ASSETS Less LIABILITIES	153,539.10
------------------------------------------------	-------------------

RESTRICTED FUNDS

BoT Restricted Funds Balance (includes Capital Campaign donation)	91,337.06
MEMORIAL SAVINGS Fund Balance (includes Hartford Annuity)	184,847.22
LONG RANGE Fund Balance	56,282.73
MURR MUSIC Fund Balance	35,985.43
PERMANENT ENDOWMENT Fund Balance	101,334.10

FIXED ASSETS

Land		<u>1,508,930.00</u>
Church Buildings		
Old Building	119,160.00	
New Building	<u>553,072.75</u>	
Total Church Buildings		<u>672,232.75</u>
Other Fixed Assets		<u>157,934.50</u>
Accumulated Depreciation (see p.5 Schedule)		<u>(477,331.77)</u> (Approx.)

Total Fixed Assets	1,861,765.48
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TOTAL ASSETS LESS LIABILITIES	2,485,091.12
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EQUITY

		November 30, 2009	October 31, 2009	
			Previous month's Balances	Mo. to Mo. Change
Small Restricted Funds				
Religious Education Fund				
Other Income	918.67		918.67	0.00
Recycling Project	778.71		778.71	0.00
Camp UU	5,083.90		5,083.90	0.00
RE Fund - Other	3,031.13		3,086.13	(55.00)
Total Religious Education Fund		9,812.41	9,867.41	(55.00)
Adult RE Fund				
Adult RE Owl	495.00		495.00	0.00
Activity Fees	5,530.41		5,530.41	0.00
Distinguished Lecture Series	330.43		330.43	0.00
Adult RE Fund - Other	3,093.86		2,982.86	111.00
Total Adult RE Fund		9,449.70	9,338.70	111.00
Adrienne & Miriam Murr Fund		1,160.10	1,160.10	0.00
Mid-Week Gathering		557.02	557.02	0.00
Bookstore Fund		2,706.06	2,560.06	146.00
Caring Fund		5,981.22	5,981.22	0.00
Denominational Affairs Fund		70.02	70.02	0.00
Facilities Emergency Fund		2,923.63	2,923.63	0.00
Capital Campaign Donation		10,000.00	10,000.00	0.00
Green Sanctuary		1,586.55	1,586.55	0.00
Flowers Fund		329.34	329.34	0.00
Internet Ministries		2,797.67	2,797.67	0.00
Junior High Fund		3,707.72	3,707.72	0.00
Library Fund		350.59	350.59	0.00
Media Team		1,703.66	1,479.65	224.01
Paradox Players		26,620.75	26,169.58	451.17
Children's Choir		4,337.52	3,637.52	700.00
Music Fund - Other		518.19	518.19	0.00
Senior High Fund		5,087.29	5,087.29	0.00
Social Action Fund		1,012.95	442.75	570.20
Voyager		211.39	211.39	0.00
YARN		208.24	208.24	0.00
Yew Grove Pagan Interfaith		155.04	155.04	0.00
Other		50.00	50.00	0.00
Small Restricted Funds		91,337.06	88,029.58	3,307.48
Memorial Savings Fund		184,847.22	177,594.28	7,252.94
Long Range Fund		56,282.73	56,282.73	0.00
Murr Fund		35,985.43	35,055.98	929.45
Permanent Endowment Fund		101,334.10	96,190.81	5,143.29
HEB Script				
RESTRICTED FUNDS		469,786.54	453,153.38	16,633.16
UNRESTRICTED FUNDS (Unrestricted)		90,763.59	96,662.41	(5,898.82)
RETAINED EARNINGS (Unrestricted)		68,380.74	68,380.74	0.00
NET INCOME YTD (Unrestricted)		(5,605.23)	(1,181.02)	(4,424.21)
FIXED ASSETS		1,861,765.48	1,861,765.48	0.00
TOTAL EQUITY		2,485,091.12	2,478,780.99	6,310.13

30-Nov-09

FUUCA	DEPRECIATION SCHEDULE			Date Plac.in Serv.
	BASIS	DEPRECIATION	NET VALUE	Deprec. Method
Church Buildings				
Old Church Building	119,160.00			
Accumulated Depreciation		(119,160.00)		
New Church Building	553,072.75			Jan. 1, 1988
Accumulated Depreciation		(294,038.81)		39 1/2 yr. SL
Total Church Buildings	672,232.75	(413,198.81)	259,033.94	
Other Fixed, Depreciable Assets				
Furniture & Fixtures	19,111.42			various
Accumulated Depreciation		(19,111.42)		10 yr. SL
Organ	36,062.04			Nov. 1, 1996
Accumulated Depreciation		(36,062.04)		10 yr. SL
Butterfly Memorial	16,097.64			Nov. 1, 2006
Accumulated Depreciation		(4,829.29)		10 yr. SL
Office Printer	1,500.00			July 1, 2007
Accumulated Depreciation		(750.00)		5 yr. SL
2008 Metal & Composition Shingle Roofs	22,875.00			January 1, 2009
Accumulated Depreciation		(1,143.75)		?
2009 A/C Unit	11,200.00			January 1, 2009
Accumulated Depreciation		(1,000.00)		?
2009 PV Solar Panels	37,458.40			July 1, 2009
Accumulated Depreciation		(936.46)		?
2009 A/C Unit	13,630.00			October 1, 2009
Accumulated Depreciation		(300.00)		?
Total Other Fixed Assets	157,934.50	(64,132.96)	93,801.54	
DEPRECIATION TOTALS				
	830,167.25	(477,331.77)	352,835.48	

Bridge Builders Action Team (BB A-Team) Report
December 11, 2009

We are off! (OK, no comments about individual members of the team). We are off toward moving to policy governance and connecting with our fellow congregation members to build an exciting future year for our church.

We will begin early next year with work on a covenant of right relationship for the congregation as a whole. While not directly the work of the BB A-Team, we believe it will be a great lead in to the values/purpose/vision and policy governance work that we will begin shortly afterwards.

Near the end of February 2010, the BoT and a few other church leaders (such as board member nominees for the next board year if known) will receive training on policy governance.

In March, we will hold a training meeting for facilitators and board members on conducting sessions to work with the congregation to connect more deeply and identify values and purpose. In late March or early April through April to early May, those sessions with church members will be held.

At the board retreat in June, the data from the above sessions will be used to articulate the values we have heard, a new purpose (mission) statement for the church and a set of preliminary ends statements that will describe our church's vision for our future.

Through the Fall, these will be reflected back to the congregation and revised as needed and then we begin writing our new policies for policy governance.

That is a lot! We believe though that it will be well worth the work we will do. Many of us have experienced similar processes in the past and it is amazing how beneficial and engaging they can be. We believe our work will build community and deeper connections in the church, will inspire people and provide a sense of fulfillment and will likely result in increased engagement, pledges, etc.

We would like to ask our fellow board members to work with us to promote and encourage participation in these activities. We appreciate the amount of work this creates – we are already all attending the policy governance training and you will soon be getting another request to attend a training workshop on how we will conduct the values and purpose sessions with the congregation. After that, the sessions themselves will require one facilitator and one board member for each group of around 15 persons.

We know this is asking a lot. We believe it will be an extremely gratifying experience for all of us though, because it will allow us to deeply connect with members of our congregation and listen to their dreams for our church and how we as a board can move the church in the direction of those dreams.

The following pages will provide a few more of the details for the training meetings and the values and vision sessions.

We look forward to an exciting and successful 2010!

Policy Governance Training:

This educational opportunity for the board and other leaders will provide a broad overview of policy governance and the theory behind it, as well as the “nuts and bolts” of how it will work. Case examples from other churches will be provided, and by the end of the session we will have developed an initial governance transition plan. Some topics that will be covered:

- Values, Mission, Ends as the basis for governance
- Policy based governance (PG) overview and case studies
- Accountability and who is accountable for what. Why accountability and authority must be paired together
- Board linkage with the larger congregation
- How will we know it is going well? Monitoring and indicators of governance excellence
- Before and after PG example of board meetings
- PG terminology
- Examples of mission and ends statements
- Examples of PG style policies
- The types of policies used in PG
- Transitioning to PG

Training on How to Conduct the Values and Purpose Sessions:

The training serves three purposes: 1) to allow the Board and facilitators to participate and have their input included in the process; 2) to orient the Board to their role in the process; and 3) to train the facilitators for their role. The general agenda outline is as follows:

- A) Full values and purpose session facilitated by Joe Sullivan. Our chance to participate! (2 hours and 20 to 30 minutes)
- B) Orient the Board to their role (20-30 minutes)
- C) Walk facilitators through the values and purpose session script, provide key pointers, and address their questions (30-45 minutes)

Values and Purpose Sessions:

Sessions will last about 2 to 2.5 hours depending upon whether it is one group of 10 to 15 or a larger group that is then split into sub-groups of 10 to 15 people. The general agenda outline is as follows:

- A) Intro & Overview of the session (20 minutes): includes providing context for what this process means for the church, why Appreciative Inquiry, how the Board will use the results, introduction of the Board member and his/her role, a brief overview of the session process, and a brief check-in warm-up exercise for people to introduce themselves.
- B) Interviews on the core questions (45 minutes): interviews are done in pairs. This includes a brief overview of the questions and the interview process.
- C) Groups of four share interview highlights and explore connections and commonalities (75 minutes including a 10-minute break at the beginning): in this part two pairs will come together. Each person will share highlights of the interview with their partner. The group-of-four then will explore values that connect their stories and commonalities in their visions of future possibilities. Finally, all participants will come together and a

spokesperson from each group-of-four will share, in about a minute, their group's common values and visions. If it's a small gathering of say 8-16 people, then this last step of part C will take less than 10 minutes. If it's a larger gathering of say 40, then it could take 15 minutes.

D) Wrap-up (10 minutes): saying "thank you" and a bit about what will happen with the results and by when.

Nominating Committee Policy & Procedure Entry (proposed)

Purpose

The nominating committee has two main functions:

- to recruit, train, and sustain church leaders
- to prepare a slate of candidates to fill positions of responsibility in the church

Primary Responsibilities

According to the bylaws:

- The Nominating Committee shall submit to the Secretary of the Board of Trustees the following slate of candidates ***to be voted on by the congregation*** at the spring meeting.
 1. Officers and members of the board of trustees (Article IX, Section 2A). These nominees must be voting members (Article 6, Section 2). Specifically,
 - a. the President, Vice-President, Treasurer, and Secretary, to each serve one-year terms (Article VI, Section 2B).
 - b. two trustees to serve three-year terms (Article VI, Section 2A).
 2. One member of nominating committee to serve a three year term (Article IX, Section 1 and Article IX, Section 2C). This nominee must be a voting member (Article IX, Section 1).
- The Nominating Committee shall submit to the Secretary of the Board of Trustees the following slate of recommended candidates ***to be appointed by the board***. The congregation will be informed of the board's appointments at the spring meeting.
 1. Committee chairpersons for church committees as listed in the current policies and procedure manual except nominating committee (Article IX, Section 2B). Committee chairs must be voting members (Article X, Section 2).

~~According to~~ the nominating committee shall:

- Identify, cultivate, and motivate new potential leaders and ensure that they have the skills to flourish.
- Identify the best candidates for elected leadership by, among other things, determining participants' strengths and weaknesses.
- Include training in communication, running effective meetings, volunteer recruitment, delegation, visioning, etc.
- Emphasize that all church members have a responsibility to participate.
- Create an influx of new leadership to help prevent burnout and to increase leadership's credibility and strength.

Additional responsibilities include:

- Making nominations for open committee chair positions that may arise.
- Publicizing its existence and informing the congregation of vacancies and how to become a candidate.
- Maintaining complete and permanent confidentiality of sensitive information received during its interviews.

Committee Composition and Function

As per the bylaws:

- The Nominating Committee shall consist of five voting members of the church, two appointed by the Board of Trustees, and three elected by the congregation (Article IX, Section 1).
- The three elected members will serve staggered three-year terms, with one member elected at each spring meeting of the congregation (Article IX, Section 1). The Nominating Committee is responsible for making a recommendation for this position (Article IX, Section 2C).
- The Board of Trustees will appoint two members at the April Board meeting to serve one-year terms (Article IX, Section 1). Nothing in the bylaws indicates input from the nominating committee on these positions.
- In the event of a vacancy on the Nominating Committee, the Board of Trustees shall select a replacement (Article IX, Section 1).
- The committee shall elect its own chair (Article IX, Section 2).
- The nominating committee may appoint sub-committees and task forces (Article X, Section 1).
- Meetings of the nominating committee are closed (Article IX Section 2).
- In order to carry out its responsibility, the Nominating Committee will receive from the Treasurer a current list of voting members (Article IX, Section 2).
- No recommendations or nominations should occur without consent of the person nominated or recommended (Article IX Section 2).

Important Details

Board specific information

- Every voting member has the right to present his or her name or that of any other voting member to the Nominating Committee as a candidate for the board of trustees (Article IX, Section 2).
- Nominations for Trustees and Officers may be made by petition if (1) the nominee consents to serve if elected, (2) the nomination is signed by at least five voting members and (3) is filed with the Board Secretary at least 14 days before the spring annual meeting (Article IX, Section 2).
- No person may serve more than six consecutive years without an absence of one year. This six-year term limit applies only to the time spent serving on elected, full terms as officer or other Board member. Time spent finishing out another individual's uncompleted term does not count toward the six-year limit (Article VI, Section 3). The nominating committee shall honor this restriction when making its nominations.
- Board of Trustees vacancies occurring between annual meetings shall be filled by a majority vote of the Board of Trustees after consultation with the Nominating Committee (Article VI, Section 3).

Committee specific information

- Nominations for Nominating Committee members may be made by petition if (1) the nominee consents to serve if elected, (2) the nomination is signed by at least five voting members and (3) is filed with the Board Secretary at least 14 days before the spring annual meeting (Article IX, Section 2).

As servant leaders of the congregation, we the Board covenant with one another to:

- ~Engage with one another and our work by
being present and participating,
listening to one another,
and supporting one another's leadership.

- ~Work well together in our meetings by
having a clear agenda,
staying on that agenda,
coming prepared,
and starting on time.

- ~Frame our agendas and discussions being mindful of the church's mission and vision.

- ~Conduct ourselves openly and respectfully in times of agreement and disagreement by
avoiding triangulation,
keeping confidentiality when it is requested,
upholding each other's dignity,
and agreeing to be called back into covenant.

- ~Communicate clearly by
seeking to understand each other's viewpoint,
asking for clarification as needed,
and, at the end of our discussion, speaking with one voice.

- ~Encourage our personal and collective health by
showing compassion and support of one another,
respecting our own and other's personal boundaries and limits,
and enjoying each other's good humor.



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Home > Leaders > Ministry & Professional Leadership > Interim Ministry > Appraisal

Interim Progress Appraisal

Please submit your Interim Progress Appraisal by completing the form below.

If your browser is not showing this page as a **secure site** (*info.ssl.com/article.aspx?id=10068*) , you may **switch to our secure server** before completing this form.

Congregation Information

Name of Congregation:

City and State/Province:

Name of Interim Minister:

Date Interim Ministry Began:

Date of Appraisal:

Your Email Address:

Evaluation Details

This appraisal is (check either "A" or "B"):

A) by the governing board or its designee

Convener:

Daytime Phone:

Email Address (to which a copy of this completed appraisal form should be sent upon submission):

Were others involved in the appraisal process in addition to the governing board? (e.g. *Transition Team*)

Brief description of the process:

Note to convener: Please seek to arrive at a consensus appraisal, in which the assessments of the individual appraisers are blended into statements with which all can agree.

B) by the interim minister

This evaluation is (check one):

at mid-term or:

at the end-of-ministry:

Have you shared this appraisal with your partner in leadership? (i.e. has the leadership shared its appraisal with the interim minister and vice-versa)

Yes:

No:

Appraisal

The purpose of this appraisal is to provide a picture of the congregation's progress to date toward its interim goals. The lay leadership and minister are each asked to complete an appraisal independently, to discuss the completed appraisals with one another, and to submit both to the Transitions Office. The Transitions Office will share the appraisals with the District and with the successor ministerial candidate. For the sake of the greatest possible candor, distribution of these appraisals is restricted to those authorized to receive them.

Instructions: In connection with each of the interim tasks, please appraise the congregation's progress to date. Where progress is less than satisfactory, please note the steps to be taken, and by whom, to get up to speed?

1a. The congregation has claimed and honored its past. Progress to date:

Excellent: developmental task completed:

Well on track:

Satisfactory:

Lagging:

Unsatisfactory: serious concern here:

Comments:

1b. The congregation has engaged and acknowledged its griefs and conflicts. Progress to date:

Excellent: developmental task completed:

Well on track:

Satisfactory:

Lagging: Unsatisfactory: serious concern here:

Comments:

2. The congregation recognizes its unique identity and its strengths, needs, and challenges. Progress to date:

Excellent: developmental task completed: Well on track: Satisfactory: Lagging: Unsatisfactory: serious concern here:

Comments:

3a. The congregation has a clear understanding of the appropriate leadership roles of minister(s), church staff, and lay leaders.

Excellent: developmental task completed: Well on track: Satisfactory: Lagging: Unsatisfactory: serious concern here:

Comments:

3b. The congregation has successfully navigated the shifts in leadership that may accompany times of transition.

Excellent: developmental task completed: Well on track: Satisfactory: Lagging: Unsatisfactory: serious concern here:

Comments:

4. The congregation makes appropriate use of District, UUA, and other outside resources.

Excellent: developmental task completed:

Well on track:

Satisfactory:

Lagging:

Unsatisfactory: serious concern here:

Comments:

5. The congregation is in proud possession of a renewed vision and strong stewardship, prepared for new growth and new professional leadership, ready to embrace the future with anticipation and zest.

Excellent: developmental task completed:

Well on track:

Satisfactory:

Lagging:

Unsatisfactory: serious concern here:

Comments:

6. Is the interim minister capably ministering—as preacher, pastor, and teacher—to the congregation? Have there been difficulties with or constraints put upon the minister's ability to do so?

7. Has the interim minister been attentive to self-care and to a spiritual practice of choice?

8. Is the interim minister courageously raising the needful issues in the congregation?

9. Is the interim minister gaining the cooperation of the church leadership in addressing those issues?

10. Are there other areas in which the leadership has specifically requested assistance from the interim minister, either as the ministry began or later on? If so, please describe the requests and appraise the progress to date on each.

11. What progress has the congregation made in reaching beyond the dominant culture to include the multicultural world in social service and social justice?

12. In your perception, how fully did the leadership inform the congregation about the Interim Ministry Program before the interim minister arrived?

13. Please comment on the Interim Ministry *Program* (as distinct from the interim minister) as you have experienced it so far.

14. *If a mid-term evaluation:* What would you like to see happen during the remaining months that differs from what is now occurring?

15. Recognizing that congregational leadership is in its truest sense a shared undertaking, what other satisfactions and dissatisfactions do you, as minister or as lay leaders, have about your role in leading the congregation during the interim period?

After clicking on the "Submit" button, you will be taken to a web page showing what you typed above. We recommend you print that page for your records.