

# Unitarian Universalist Church of Bloomington, Indiana

*Seeking the Spirit, Building Community, Changing the World*



## Approved Board Minutes (v2)

April 17, 2013

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**Attending:** Deb Hutton, John Lawson, Carol McCord, Kathleen Sideli, Drew Schrader (via Skype), John Summerlot, Von Welch

**Ex-officio:** Reverend Mary Ann Macklin

**By invitation of the Board:** Shari Woodbury (for a portion of the meeting).

Submitted by Von Welch, Secretary

## **A Call to Order**

Call to order by Kathy Sideli, President, at 7:04pm. Chalice lighting and reading by John Lawson. Attendance and check-in.

Changes to the agenda: Some changes in order as indicated in the minutes.

## **B Consent Calendar**

### **B.1 Approval of March 2013 Board Minutes**

Motion: Approve the March 2013 Board of Directors Meeting minutes by Deb Hutton. Seconded by John Summerlot. Vote: approved unanimously.

### **B.2 Executive Minister's Report**

Reverend Macklin reporting.

The new roof on the church is almost finished. Likewise, the solar panels are near completion but the last few panels are delayed to give the roofers room to complete their work. The hope is the work will be completed by the end of the week.

This Sunday is the Earth Day celebration worship service. We will have a prayerful moment at beginning of the service for victims of the Boston bombing. Rev. Macklin read aloud a letter she plans on sending to the congregation on behalf of the ministers and the Board.

The results of the Stewardship seem very positive so far. There will be a meeting to sort pledge cards and make follow-up calls at the Church on Sunday at 2:30; the Board is encouraged to attend.

The unified service on April 7<sup>th</sup> went well and we have received a lot of positive feedback. A hallmark of successful churches is that they are willing to take risks, which the unified service was!

Rev. Macklin attended the recent Heartland District meeting in Muncie. Amy Taylor did an amazing job running the meeting, which resulted in a vote to Regionalize. There is one more District left to vote on this topic. [Secretary's note, see the following URL for more detail <http://www.midamericauua.org/regionalization>]

She plans to re-invigorate the Ushers program. Currently the program is not organized such that we are guaranteed to have an usher every week, the absence of which puts a burden on the ministers and Board member of duty. A recent benign but disconcerting incident with a stranger asking disturbing questions between services was briefly described.

Rev. Macklin is also reconvening the campus ministry advisory program and noted that she has asked John Summerlot, who will be finish his Board term this summer.

She notes that with Rev. Breeden being on sabbatical, his email has been suspended and email to him will bounce back as undeliverable. This makes it clear to people emailing him that he is not reading email.

She is working to get exterior signage completed and installed.

Rev. Macklin suggested it would be a good idea to have a Planned Giving committee report at upcoming congregational meeting. This group has recently formed and has been waiting for the stewardship drive to end before undertaking their own communications.

She noted that it is important that the Planned Giving effort be connected to the Special Purpose Fund (SPF) committee, as the two are very related, however the SPF committee has some innate challenges; there is no written description on how the committee functions and this causes a lack of continuity when there is turnover in the committee membership. She is working on a description for the SPF chair. The suggestion was made to look to other UU congregations for best practices with similar committees

The question was raised about how Board committees report to the Board as, outside the SPF committee, there seems to be no formal reporting structure. Rev. Macklin noted that each committee has a staff member liaison which reports to her.

## **C Discussion Calendar**

### **C.1 Old Business**

#### **C.1.1 Stewardship Results to date**

This was covered in the Minister's report.

#### **C.1.2 Ministerial Evaluation Process**

Following up on an agenda topic from March with regards to providing Rev. Macklin with an evaluation, Kathy Sideli reported she contacted Rev. Presley regarding how ministerial evaluation is normally done. We seem to have two options: (1) evaluating the entire ministerial and administrative structure of the church, rather than individuals; or (2) following UUA guidelines with regards to leadership assessment. Rev. Macklin's report in March used the UUMA guidelines as a template for a self- evaluation, meaning the Board could use it as the basis for an evaluation in line with the second option.

The Board discussed these options and decided that given the transitions we are going through the first choice didn't seem to make sense and hence decided to proceed with the second option. It was noted this needed to be completed by June to have continuity with the current Board members.

The question was raised if in the future we would also evaluate Rev. Breeden's replacement under this process or if that would fall to Rev. Macklin in her Executive

Minister role. This is unclear and was tabled for future discussion. It was noted it may be something the Interim Minister could help us decide.

Also, as discussed in March, the UUA will conduct exit interviews for Rev. Breeden on his departure. Those interviews will be conducted by the UUA, though the Board and others will participate. Rev. Breeden will decide how the results from those interviews are disseminated.

### **C.1.3 Report on advice from Rev. Presley**

Shari Woodbury arrived at this point and this topic was deferred.

## **C.2 New Business**

### **C.2.1 Request to sponsor Shari Woodbury**

Shari Woodbury first presented a report [attached to these minutes] to the Board in her role of Young Adult and Campus Ministry (YACM) coordinator.

She reports that in the Fall she will be beginning her internship in Columbus and will be stepped down as YACM coordinator. She will be staying involved and be available to help her successor.

Q: Is Campus Ministry Assistant a volunteer? No, she was paid. Unfortunately she will be stepping down as well.

Q: Under future opportunities, what is a “Lucy booth”? The term is taken from the cartoon strip “Peanuts” and refers to a booth staffed by a minister allowing people to ask them questions.

Q: Are there times when all the ministers on campus of different denominations come together? Yes, CaRLA and other events.

Q: Do the youth participating in the YACM program attend services? Yes, some come more to services than YACM activities. Do we have a count? No, it’s hard to get a good count; we have a Facebook group and email list, but not everyone who is a member of those groups is a YACM member (e.g., John Summerlot indicated he is a member to stay in touch with campus activities related to his professional role).

Q: Does YACM have any tie to the Leadership Cultivation Committee? No.

Q: Does YACM help with retaining youth who grow up in the UU church and then go to college? It isn’t clear.

Shari then turned to her request for Congregational Sponsorship of her as a Ministerial Candidate. She presented two documents to the Board, both attached to these minutes: information on the sponsorship process and a chart showing the ministerial formation process and her current progress.

Sponsoring the candidate involves completing a form and returning it to the UUA, which indicates a statement of support from our congregation that the candidate shows potential as a minister. It is one step in many of the process. Shari suggested it could be voted on at the June congregational meeting. John Summerlot suggested

this request to the congregation be accompanied with a short (5 minute) presentation on what Shari has accomplished to date to provide context for our support. He will contact Shari for her biography and other information.

Q: On the chart, why is “Fall” in quotes? Because those classes are held in January. Shari departed at this point.

John Summerlot motioned that the Board support the sponsoring of Shari Woodbury and do so by taking it to the congregation for a vote. Seconded by Carol McCord. Vote: approved unanimously.

## **C.2.2 Report on advice from Rev. Presley**

Kathy Sideli presented Rev. Presley’s explanation of UUMA guidelines. The Board discussed the topic but concluded a plan could not be formed by the June congregational meeting.

## **C.2.3 Monitoring Policies**

### **C.2.3.1 Annual Budgeting**

Discussion of this topic was moved to Executive session.

### **C.2.3.2 Financial Condition**

John Lawson, Treasurer, presented a report on cash flow dated March 31, 2013 to the Board [attache to these minutes]. He indicated we are in great shape with significant funds in the bank and the shortcoming in pledge payments from last year has all but been made up for.

The question of online pledge payments and donations was raised. This is now possible, but few take advantage of it. We should be doing a better job of communicating this option.

### **C.2.3.3 Communication and Board**

With regards to monitoring this policy, no one saw any issue here meriting discussion.

### **C.2.3.4 Finance Committee Report**

John Lawson indicated the Finance Committee has not seen the draft budget yet and that they will present a report once they have, hence this topic was deferred to a later date.

## **C.2.4 Town Hall Meeting plan?**

Kathy Sideli suggested we not plan for a Town Hall meeting as the Congregational Meeting will be soon enough.

The Board briefly discussed the process of planning the congregational meeting. Kathy and Carol McCord, as vice president, will draft an agenda and discuss with Rev. Macklin during their regular monthly meeting. The next Board meeting on May 15<sup>th</sup> will cover planning for the meeting.

## **C.2.5 Board Training plan?**

It was noted we will have three new Board members joining after the June congregational meeting and we need to provide orientation and training to these

individuals. We have two more meetings, May 15<sup>th</sup> and June 12<sup>th</sup>, until these members officially start their terms. It was agreed to invite new members to attend the June 12<sup>th</sup> meeting as guests and to provide training immediately before or after that meeting.

## **D Executive Session**

The board met in executive session at 8:56pm. Rev. Macklin was invited to stay for the start of the executive session. Drew Schrader departed part way through the session.

## **E Adjournment**

Motion to Adjourn by John Summerlot, and seconded by Deb Hutton. Vote: approved unanimously. The meeting adjourned at 9:45pm.

AGENDA  
 April 17, 2013, 7:00 p.m.  
**UU Church of Bloomington, Board of Directors**  
*Seeking the Spirit, Building Community, Changing the World*

<u>Time</u>	<u>Topic</u>	<u>Reporting</u>
7:00 p.m.	I. Call to Order/ <b>Welcome*</b> Attendance/ Determination of Quorum	Kathleen Sideli, President
	II. Chalice Lighting/Reading	John Lawson
	III. Check-in	
7:15	IV. Consent Calendar	
	A. Approve March 2013 minutes	All
	B. Staff Report (w/New Business)	Shari Woodbury
	C. Minister's Report	Executive Minister
7:30	V. Discussion Calendar	
	A. Old Business	
	1. Stewardship Results to date	
	2. Ministerial Evaluation Process	
	3. Report of advice from Rev. Presley	
8:00	B. New Business	
	1. Request to sponsor Shari Woodbury	All
	2. Monitoring Policies	
	a. II. D1 Annual Budgeting Proposed Annual Budget	Executive Minister
	b. II. E Financial Condition Report of cash flow	Executive Minister
	c. II. H Communication and Council to the Board re: communications	Board
	d. III.F Standing Committee Written report	Finance Committee
	<b>SEE: <a href="http://www.uubloomington.org/uucb/govt/boardpolicies2013.pdf">http://www.uubloomington.org/uucb/govt/boardpolicies2013.pdf</a></b>	
	3. Town Hall Meeting plan?	
	4. Board Training plan?	
8:45	1. Executive Session	
8:55	VI. Check-out	All
9:00	VII. Adjourn	Kathleen Sideli

SEPARATELY: Sign-up Sheets

Von Welch

*The primary role of the Board shall be to care for the temporal and spiritual health of the congregation. The Board shall set policy with end objectives and executive limitations, and shall monitor compliance.*

Distribution:

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**Congregational Sponsorship of a Candidate for the UU Ministry  
Information for UUCB Board  
4-17-13**

What is Congregational Sponsorship?

- A step in the credentialing process for Unitarian Universalist ministers (see chart).
- Sponsorship tells the national credentialing body (MFC) that a congregation with personal familiarity with the Candidate believes that person has promise to become an effective minister.
- The MFC makes the final determination, through a thorough process that includes many other considerations; but in light of our denomination's congregational polity, they look to see support at the local level for future leaders.

What would we have to do to sponsor a ministerial Candidate?

- Submit the sponsorship form to the UUA. A good way to go about this would be for the board to present a sponsorship recommendation for vote at a congregational meeting.
- Nothing else is specifically required. Congregations often do play a greater role but it all depends upon their relationship with the candidate and their resources.
- Our congregation has already supported me in a number of ways that are likely to continue as I carry on: providing opportunities for me to help plan worship services and preach; supporting me as a delegate at district and GA; and Rev. Macklin's enthusiastic mentorship, both in my work with campus ministry this year and well beyond it.

What's in it for the congregation?

- Satisfaction in having nurtured a member into professional leadership within our movement.
- The opportunity to learn more about how UU ministers are prepared to serve congregations.
- The mutual benefits of supporting my ministerial formation: periodic preaching (free), sharing of fresh learning with staff (for example, on ritual), and as time permits, translating prior vocational skills to a congregational setting (e.g., planned giving). (Note that these benefits are not contingent on congregational sponsorship.)

To honor my longstanding relationship with this congregation, I have chosen to seek sponsorship from you. This community has been an important part of my spiritual journey and UU identity. You know me better than any other.

Thank you for your consideration.

*Shari Woodbury*

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## MEMORANDUM

**TO: UU Ministers and Congregations & People Preparing for UU Ministry**

**FROM: Rev. David Pettee, Ministerial Credentialing Director  
UUA Ministry and Professional Leadership Staff Group**

**RE: Congregational Sponsorship of Students and Others Preparing for Fellowship as  
UU Ministers**

All persons preparing for fellowship as Unitarian Universalist ministers, whether pursuing parish ministry, ministry of religious education or community-based ministry, are required to obtain sponsorship by a Unitarian Universalist congregation. Because your congregation may be asked for sponsorship by a person intending to seek UU fellowship, this memo has been prepared so you will understand the policies, procedures and intentions which comprise this requirement.

As with any new and policy, we have not been able to anticipate every concern. In the pages that follow, however, we will try to answer the most frequently asked questions about congregational sponsorship. For instance...

*What is the purpose of this requirement?*

The purpose of this requirement is to ensure familiarity on the part of new ministers with UU congregational life, and encourage congregations to take a responsible role in the recruitment, preparation and assessment of our future ministers. Our congregations, our ministries and our religious movement all stand to gain if we can work together creatively to identify and support potential leaders.

*When does sponsorship occur?*

A person should request sponsorship from their congregation when they have been granted Candidate Status by the Regional Sub-Committee on Candidacy (RSCC), and not before. We think it best for the RSCC to make the first official decision regarding a person's fitness for ministry since they will have input from a number of different sources.

*Who should decide who is or isn't sponsored?*

In most instances, sponsorship will be decided by a vote of the congregation or its representative body, such as the Board of Trustees. If your congregation has a minister, he or she may have a recommendation, but it is not the minister's role to make the final decision.

*Is some kind of documentation required?*

Documentation of congregational sponsorship should be provided using the appropriate form in the *Information for Candidates* booklet which is mailed to all students and transfer candidates. It can also be obtained from the Ministerial Credentialing Office at the UUA. A person must have congregational sponsorship before they are considered for an appointment to meet with the Ministerial Fellowship Committee. Sponsorship forms call for the signature of the president or chair of the congregation's governing board.

*What are we saying when we sponsor someone?*

At the most basic level, congregational sponsorship indicates confidence in the person's potential and suitability for UU ministry. The MFC and the Ministerial Credentialing Office will regard sponsorship as evidence that the person seeking fellowship is actively committed to the Purposes and Principles of the UUA and the institutions which uphold them. By sponsoring someone, you are not indicating that the person is presently ready for ministry; you are saying that with further education he or she has a good chance of developing the traits necessary for successful ministry. The final decision to grant fellowship to a candidate is made by the Ministerial Fellowship Committee after careful consideration of written materials, evaluations and a personal interview.

*What are the other requirements for UU ministry?*

The general qualifications, as stated by the Ministerial Fellowship Committee, are these:

All applicants must be college graduates or have had an equivalent education; must have a strong motivation and good potential for our ministry; and must have a balanced and healthy personality, a capacity for self-understanding, a concern for others, intellectual ability and the kind of ministerial leadership ability expected by our societies. The committee will further require that the applicant be well informed on the history and development of Unitarian Universalism, familiar with the Bylaws of the UUA and fully committed to the purposes and objectives of the Association. An applicant for the ministry shall also have a Master of Divinity degree or its equivalent from a theological school approved by the Committee or have had an equivalent educational experience. In examining every applicant's qualifications, the Committee may consider any evidence which it deems relevant to assessing them and may reject any application.

The basic requirements for UU ministry are:

1. Successful interview with the RSCC
2. Sponsorship by a UU Congregation
3. Master of Divinity degree or it's equivalent;
4. Career assessment program at a career center approved by the Ministerial Fellowship Committee (a list of approved centers is towards the end of this packet;)
5. Approved internship;
6. Basic unit of Clinical Pastoral Education;
7. Completion of the Reading List
8. Interview with the Ministerial Fellowship Committee

*Doesn't this requirement have the potential for creating an uncomfortable situation in the congregation if we're not enthusiastic about sponsoring a particular candidate, especially if they're a long-term member, big contributor, etc.?*

Yes; this is an important concern which needs to be dealt with carefully. It is especially important, however, not to back away from the challenge of providing the person with honest feedback. Chances are, if you have severe reservations about a person's potential for ministry, he or she will not be well-served in the long run if falsely encouraged.

The time to express your reservations about a potential candidate is prior to their RSCC interview. This can be done confidentially by contacting the chair of the appropriate regional sub-committee. We are not recommending that you risk serious conflict in your congregation over the matter of sponsorship. In expressing reservations to a candidate, try to stress that you are concerned for their well-being and success in employing their unique gifts, which might not necessarily be for ministry. If you come to an impasse or don't know what to do, please call the Ministerial Credentialing Director in the UUA Ministry and Professional Leadership Staff Group.

*In what ways might we support a ministerial candidate?*

Depending on their interests, resources, and the needs of the candidate, congregations will choose to support the people they sponsor in a variety of ways. Nothing in particular is required.

One of the major concerns for theological school students is their high level of debt; financial assistance can sometimes make the critical difference between staying in school and dropping out. A congregation and student may want to work together to raise money in any number of ways, including special fund-raisers and help with locating grant money or with direct backing from generous parishioners. People who are looking for opportunities to donate money tend to believe that contributing to the education of our future leaders is a good and worthwhile investment.

Please consider the possibility of contributing to the cost of the career assessment program. It is important for persons aspiring to the ministry to do this as early as possible in their preparation. Congregational support and encouragement to do career assessment will benefit the individual and our ministry as a whole. The cost of the program can be considerable.

Valuable support can be offered in less tangible ways as well. Candidates may benefit from opportunities to preach or lead other forms of worship. They may need experience working with committees and the financial aspects of running a church. They might be asked to be leaders in the religious education program, or organize a social action project.

Candidates could be encouraged (and supported financially) to participate in UUA district and continental events. A particularly worthwhile opportunity, especially for people who are relatively new to UUism and/or concerns of the larger association, is attendance at the UUA General Assembly. Consider the sponsoree for delegate status from your congregation.

In many instances, a church will be asked for sponsorship by a person who is away at school or simply moved away for other reasons. If the person is reasonably well known within the congregation, it is certainly appropriate to consider sponsorship. You may want to recognize her aspirations through, for example, newsletter articles, announcements, and invitations to participate in congregational activities when she is in the area. You could invite him to write a newsletter article sharing with the congregation some of the excitement of his journey.

If your congregation has a minister, his or her relationship with students or ministerial candidates in your congregation is an important one. He or she may be a mentor, role model, teacher and spiritual guide of considerable influence. The minister may also have mixed feelings about the candidate or the role that person is playing within the congregation. In any case, it is important to be sensitive to the possibilities and pitfalls inherent in the relationship and include the minister when developing policies regarding congregational response to ministerial aspirants.

*Who's supposed to be providing all this support?*

Again, congregations will respond to this opportunity in a variety of ways. Some will be able to offer little support at all and will simply deal with requests for sponsorship at the board level on a case by case basis. If this is apt to be the scenario in your congregation, it is still important to have a

policy in place which will guide your response to possible inquiries. For example: Who decides on sponsorship? What criteria are important? Will you want to interview the candidate? What happens if someone tries to block sponsorship? What if the board and the minister disagree? Some simple guidelines ahead of time could serve you well in the future.

If there is more interest and energy within your congregation for working with ministerial candidates, the board might, for example, recruit a sub-committee to develop policies, explore possibilities, and relate to candidates and their needs for support.

*There's a UU theological school nearby and we're liable to be deluged by requests for sponsorship. What should we do, especially when we don't know the person very well?*

If your congregation is near a theological school attended by many UU students, it will be particularly important to develop your policies regarding sponsorship as soon as possible. Chances are, you already have certain understandings about how to welcome, integrate and support ministerial students and value their presence. Your challenge may simply be to become more intentional about your relationship with them.

If a person you don't know well asks for sponsorship, it's perfectly acceptable to expect that person to become involved in the life of the congregation for a period of time before considering sponsorship. You may also want to ask for a reference from a UU minister or other mutually acceptable person who knows him or her.

All candidates coming before the Ministerial Fellowship Committee are expected to have been actively involved with a UU congregation for at least two years before consideration for fellowship. For people who decide to be UU's during theological school or for ministers who want to transfer from another denomination, this requirement may seem like a difficult obstacle. Though this may be true, the Ministerial Fellowship Committee firmly believes that people aspiring to professional leadership positions in our association need to have grounding in, and understanding of, UU congregational life. Congregational sponsorship may not guarantee this understanding, but it is meant to encourage, facilitate and underscore its importance.

*Is sponsorship like having a ministerial intern?*

Congregational sponsorship and ministerial internships are very different. A ministerial intern has contracted with the congregation and the minister for supervision as a learner for an agreed upon length of time. The intern is acting in a professional ministerial capacity, even though ministerial credentials have not yet been granted. Interns are evaluated and held accountable in a structured way that is not appropriate for someone the church sponsors. A sponsored candidate in your congregation who is not an intern will participate as a layperson, not a minister. If your congregation has an intern or field education student, it will be important for both minister and congregation to be clear about the distinction so the intern's position of authority is not jeopardized or confused.

*Does a person need to be a member for congregational sponsorship?*

While it is important for a candidate to indicate their institutional commitment by membership in a UU congregation *somewhere*, it is not necessary for them to be members of the sponsoring congregation. It would be important to consider this issue on an individual basis.

*This seems like a big responsibility. What's in it for us?*

What's in it for congregations is feeling good about the role you've played in promoting responsible, well-prepared leaders for our religious communities and Unitarian Universalism in general.

Our initial experience with congregational sponsorship does not indicate that it will be a burdensome requirement. In fact, both congregations and candidates have expressed pride and enthusiasm about the opportunity to claim one another.

Those of us who work with people preparing for UU ministry *thank you* for your help!

**For more information about sponsorship or a person requesting sponsorship contact the Ministerial Credentialing Office at the UUA phone number is (617) 948-6403.**

**STATEMENT OF CONGREGATIONAL SPONSORSHIP**

One of the requirements for Fellowship as a Unitarian Universalist minister is sponsorship by a UU congregation. The purpose of this requirement is to ensure familiarity on the part of our UU ministers with UU congregational life, and encourage congregations to take a responsible role in the recruitment, preparation and assessment of our future ministers.

Sponsorship of a Candidate indicates confidence in the person's potential and suitability for UU ministry. The Ministerial Fellowship Committee and the UUA Ministry and Professional Leadership Staff Group will regard congregational sponsorship as evidence that the person seeking fellowship is actively committed to Unitarian Universalism and the institutions which uphold our faith tradition.

In most instances, sponsorship of a Candidate will be determined by vote of the congregation or its representative body.

\* \* \* \* \*

With the above in mind, we, the \_\_\_\_\_  
(name of Congregation)

are pleased to sponsor \_\_\_\_\_  
(name of Candidate)

as a Candidate for fellowship in the UU ministry.

Signed \_\_\_\_\_  
(congregation president or board chair)

Please type name \_\_\_\_\_

\* \* \* \* \*

**PLEASE PRINT:**

Name of Candidate \_\_\_\_\_

Name of Congregation \_\_\_\_\_

Address of Congregation \_\_\_\_\_

***THANK YOU***

# UU Ministerial Formation Process

## Education

(Meadville Lombard model)

### *Community Studies*

- 1 year internship in Community Agency w/integrating seminar
- Intensive Classes – Summer, “Fall” and Spring

### *Congregational Studies*

- 1<sup>st</sup> year of ½-time internship in Teaching Congregation w/integrating seminar
- Intensive Classes – “Fall” and Spring

### *Leadership Studies*

- 2<sup>nd</sup> year of ½-time internship in Teaching Congregation w/integrating seminar
- Intensive Classes – Summer, “Fall” and Spring

**M.Div. Degree**

## Credentialing

(a UUA service to congregations)

### ***Aspirant***

Career Assessment

Regional Sub-Committee on Candidacy (RSCC)

### **Candidate**

Chaplaincy Internship (CPE)

Congregational Sponsorship

Ministerial Fellowship Committee (MFC)

### **Preliminary Fellowship**

**Final Fellowship** (3 yrs later)

## Ordination

(a power held by congregations)

can happen anytime

typically happens after M.Div.

**Ordained**

*I am here*





**As of March 31, 2013**

**2012-13 Operating Budget**  
**(\$ in thousands)**

<b>Income</b>		<b>Outlays</b>	
<b>Budget</b>	<b>Actual</b>	<b>Budget</b>	<b>Actual</b>
<b>\$530.6</b>	<b>\$428.7</b>	<b>\$530.1</b>	<b>\$383.1</b>

The operating cash position of the church is well above the amount of cash necessary to meet current obligations.

Pledge payments for three quarters of the fiscal year are excellent. Total income is above the previous three-year average. This number does not include the additional late payments of 2011-12 pledges, an additional \$23.5K. Expenses are below the three-year average. The result is a net income for the first half of the fiscal year of \$45.7K, considerably higher than the last five years.

YRE and YRUU programs have expended slightly over the budgeted level for the fiscal year, but the total Religious Education program is within budgeted level. The over expenditure was caused by effort to keep 2011-12 costs down because of the drop in pledge payments in the final quarter. Anticipate a small RE over expenditure for 2012-13, but below the bylaw level that requires congregational approval.

Pledge payments for 2011-12 after the end of the fiscal year have reduced the shortfall for that fiscal year from \$26.9K to \$3.4K. Normally prior year pledge payments stop at the second quarter of the following year. This year these payments have continued through the third quarter of the 2012-13 fiscal year.

Revenue and Expenses - as of: March 31, 2013			
	<b>Revenue</b>		
Category	Budget	Actual	Notes
Pledges and Grants	\$453,478	\$352,805	Pledge payments are at 77.8% of total pledges for the year, well above the three year average..
2013 Pledges new	3000	3700	
Bazaar	9000	9059	
Other fundraising	1000	5631	
Facilities use	8000	5064	
Grant for Campus Min Asst	1077	1077	
Interest income	50	0	
Investment income	2000	1357	
Kroger-Marsh	8000	5000	
Sunday plate	27,000	20,597	
Talent Auction	12,000	0	
Misc	2500	903	
Prior year pledges	<u>3500</u>	<u>23,541</u>	recovered 87% of 2011-12 deficit
<b>Totals</b>	<b>\$530,605</b>	<b>\$428,734</b>	total income is slightly above the 3 yr average (not including prior year pledges received)
	<b>Expenses</b>		
	<b>Budget</b>	<b>Actual</b>	
Campus-young adult	\$5,629	\$4,273	
Childcare	10,033	6645	
Committees	15,400	5565	
Denomination & MCUM	43,030	30,900	
Ministry	137,730	103,960	
Music	35,169	25,446	
Office	97,859	68,240	
Plant	114,134	84,206	t-acct: Maint - \$4081; Cap - \$10502
Religious Education	<u>70,142</u>	<u>53,826</u>	
<b>Totals</b>	<b>\$529,126</b>	<b>\$383,061</b>	expenses are 2.5% below the three-year average
<b>Net operating</b>	<b>\$1,479</b>	<b>\$45,673</b>	includes prior year pledges - without the \$23,541 the balance is \$22,132