



Town Hall

March 17, 2024





Welcome!

Agenda

- Cottage Conversations
- Pledge Drive
- Church Year Calendar
- Vision Fund
- General Assembly
- Q & A





Cottage Conversations

What We Learned

- We generally feel good about where we are and hopeful for our future
- Rev. Craig is a great asset to us, and can help us become better in many areas
- We need to “get out more”
- We need to grow Faith Formation (Welcome, Molly!)



What You'd Like

- More social action and social outreach
- To welcome new members and families
- To enjoy more social activities and events
- A stronger outside presence



What's Next?

- The BOT will dive deeper into the data to
 - Determine where to best direct our energies, and,
 - Prepare for a zero-based budget
- We all have a part in creating SUUS's future!





Pledge Drive

From Conversation to Action: Your
Pledges Fuel Our Mission

Pledge Drive

- **Cottage Conversations** guide focusing of our resources.
- Pledges = Our single **largest** income source.
- Your pledge = direct way to **show your support** for our community.
- A gentle reminder that an annual pledge is a **requirement of membership**.



Pledge Drive: Nuts & Bolts

- ▶ We will soon kick off our **Annual Pledge Drive**. Some key info:
 - ▶ Kicks off **April 7 with a luncheon** after the service
 - ▶ Pledge Drive occurs over two weeks – **April 8 through April 21**
 - ▶ The Board will provide **a goal for total pledge \$** - to be announced at the launch luncheon



Pledge Drive

Thanks!

For generously giving your **time,**
energy, and financial support!





Church Year Calendar

Church Year Calendar

June

- June 2: Annual Meeting
 - Budget, Leadership, GA
 - Vision Fund Charter revisions
 - 50% quorum
- June 16: last regular service
- June 23: General Assembly service
- June 30: Annual Report due
 - Simplify



Church Year Calendar

July

- Services suspended

August

- Lay-led and guest speaker service

September

- No Labor Day service
- Regathering: the 1st Sunday after Labor Day





Vision Fund

Proposed amendments to Charter to
better suit our needs

Vision Fund

- Formed in 2022
- Operates according to VF Charter rules
- Now want to update Charter after two years
- **Change annual disbursement calculation**
- *(and tweak specifics on conditions for dissolving fund....tba)*



What SUUS Needs From VF

- SUUS needs reasonable and consistent income from VF; (4% of Fund Value (FV) is typical for endowments)
- Current Charter calculation gives inconsistent and usually low income
- \$33k(4.8%), \$13k(2%), \$13k (2%)
- We used a large part of Exception Disbursements to make up the difference



Current VF Calculation

- Is a prescribed calculation; no Custodial latitude (except to reduce amount)
- Uses change in average end-of-year FV over last 3 years
- % change determines % disbursement
 - If $> 3\%$ then disbursement is 1% less (6% max)
 - If $< 3\%$ (incl. negative), disbursement is 2%



UUCEF Method

- Commonly-used method
- avgFV is average of most recent 13 Qtly FV
- Uses 13 figures, not 3, to average 3 years, so better represents FV fluctuations
- Disbursement based on % of avgFV (2%-6%) instead of on difference in performance
- SMOOTHS disbursement amount year-to-year



Proposed New VF Method

- Custodians calculate avgFV based on 13 Qtly figures at beginning of year (Feb)
- Choose a suitable % to disburse for upcoming FY with 4%–5% strongly preferred (2%–6% allowed)
- Aim to disburse quarterly throughout year to minimize “damage” to fund
- Test run: Custodians selected 5% avgFV - calculates as \$30k compared to \$13k using “old” method





General Assembly

Representation for Article II Vote

General Assembly

- June 20 -23
- Virtual only
- “Love Unites, Stories Ignite”
- Vote on Article II Proposed Revision



Article II Revision Overview

Current

- C-2.1: Principles
 - Includes 6 Sources
- C-2.2: Purposes
- C-2.3: Inclusion
- C-2.4: Freedom of Belief

Proposed

- C-2.1: Purposes
- C-2.2: Values and Covenant
- C-2.3: Inspirations
- C-2.4: Inclusion
- C 2.5: Freedom of Belief

New language throughout the proposed Article II

Article II Revision - Principles

- The proposed Revision replaces the 7 Principles with 6 Shared Values supporting the centering value of Love.
- It also has new language regarding the 6 sources.



Shared Values



Article II Revision – Principles

- ▶ Rev. Carolyn Patierno from All Souls shared with Rev Craig a chart she put together that compares the proposed values with the existing principles.



PROPOSED VALUES

Interdependence

We honor the interdependent web of all existence. With reverence for the great web of life and with humility, we acknowledge our place in it.

We covenant to protect Earth and all beings from exploitation. We will create and nurture sustainable relationships of care and respect, mutuality and justice. We will work to repair harm and damaged relationships.

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#2 Justice, equity, and compassion in human relations

#7 Respect for the interdependent web of all existence of which we are a part.

PROPOSED VALUES

Pluralism

We celebrate that we are all sacred beings, diverse in culture, experience, and theology.

We covenant to learn from one another in our free and responsible search for truth and meaning. We embrace our differences and commonalities with Love, curiosity, and respect.

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#3 Acceptance of one another and encouragement to spiritual growth in our congregations

#4 A free and responsible search for truth and meaning

PROPOSED VALUES

Justice

We work to be diverse multicultural Beloved Communities where all thrive.

We covenant to dismantle racism and all forms of systemic oppression. We support the use of inclusive democratic processes to make decisions within our congregations, our Association, and society at large.

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#2 Justice, equity, and compassion in human relations.

#5 The right of conscience and the use of the democratic process within our congregations and in society at large.

#6 The goal of world community with peace, liberty, and justice for all.

PROPOSED VALUES

Transformation

We adapt to the changing world.

We covenant to collectively transform and grow spiritually and ethically. Openness to change is fundamental to our Unitarian and Universalist heritages, never complete and never perfect.

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#3 Acceptance of one another and encouragement to spiritual growth in our congregations;

#4 A free and responsible search for truth and meaning

PROPOSED VALUES

Generosity

We cultivate a spirit of gratitude and hope.

We covenant to freely and compassionately share our faith, presence, and resources. Our generosity connects us to one another in relationships of interdependence and mutuality.

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#7 Respect for the interdependent web of all existence of which we are a part.

PROPOSED VALUES

Equity

We declare that every person has the right to flourish with inherent dignity and worthiness.

We covenant to use our time, wisdom, attention, and money to build and sustain fully accessible and inclusive communities

CURRENT PRINCIPLES

We covenant to affirm and promote ...

#1 The inherent worth and dignity of every person

General Assembly

- SUUS can have 2 member delegates
- No volunteers yet
- Without delegates, we have no vote
- SUUS will pay the registration fees
- Molly Nolan attending in her capacity as DFF



Delegates

- Delegates represent the congregation
- Gather info about the Article II revision
- Meetings and discussions with members
- Make recommendation to the congregation
- Congregation vote at Annual Meeting



Article II Revision – Resources

- Final Proposed Article II Revision
 - <https://www.uua.org/uuagovernance/committees/article-ii-study-commission/final-proposed-revision-article-ii>
- Article II Study Commission
 - <https://www.uua.org/uuagovernance/committees/article-ii-study-commission>



Article II Revision – Resources

➤ FAQ's

- <https://www.uua.org/uuagovernance/committees/article-ii-study-commission/blog/faq>

➤ Pros & Cons Articles

- <https://mail.google.com/mail/u/0/?tab=rm&ogbl#inbox/FMfcgzGwJmHpnnZLVgDhmrSVXxtJSjWR?projector=1&messagePartId=0.1>
- <https://savethe7principles.org/a-pro-con-review-and-analysis/>





Q & A



Thank You