

Unitarian Universalist Association, General Assembly 2025

Workshop Presented by Stewardship For Us, Consultants

Create Your Living Our Vision Fund!

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Additional Resources

Our blog is worth searching (see the Search box on the page) if you are looking for ideas or information: www.stewardshipforus.com/blog

You can also sign up on that page to get our email blasts and invitations to our regular web gatherings

Materials from Mountain Vista UU, Tucson, AZ

2022-2023 pledge drive information, includes their Sustainability Fund:

<https://mvuu.org/stewardship2022-2023/>

The Sustainability Fund content starts at 26:32

Note the video on the page, that has Rev. Samantha Willson talking about the why and how of their fund. Note: Rev. Samantha was the interim minister. They now have a new settled minister at MVUU

Here is the document about the Sustainability Fund that was shared with the MVUU members:

https://docs.google.com/document/d/1pSPGgVVasq_YqEMt1LRGF6OaZfWdgs5/edit?tab=t.0

Material from Eno River UU Fellowship, Durham, NC

Letter from the Senior Minister about a challenge grant to help refuel their Strategic Initiatives Fund:

<https://www.eruuf.org/news/good-news-from-rev-brett.html>

From the UU Congregation of Cleveland, OH

The Sue McKimm Fund for Congregational Advancement

<https://uucleveland.org/about-mckimm-fund/>

FAQs about the fund: <https://uucleveland.org/prior-phases/faq/>

Search the web for more UU special funds!

And let us know if you need help with your financial planning, endowments, planned giving programs or other stewardship projects

team@stewardshipforus.com

Below, please find excerpt from the policy manual of the Edmonds UU Congregation (WA) related to their *Living Our Vision Fund*

Living Our Vision Fund Policy Outline:

- Name
- History of EUUC long term funds
- Purpose of the fund - connecting to History
- Guidelines for Use of Fund
- Management of Fund
- Growth of Fund

Name:

Living Our Vision Fund

History of EUUC long term funds

In **1979**, the first EUUC endowment Fund was established by Maybelle Chapman in memory of her husband, Stuart W. Chapman. They were among the founders of EUUC. The fund was known as the **Stuart W. Chapman Memorial Fund**. The value of the fund as of 1987 was \$26,240.70, and that amount was defined as the original principal by the Board in 2016. Maybelle Chapman established, as among the of the intents of the fund, to provide loans to students preparing for the UU ministry. She and Stuart both believed deeply in the importance of the continuation of Unitarian Universalism and the support of the development of our ministers.

In **March of 2022** the Board voted to discontinue the fund's ministerial student loan program (which had only been used a handful of times in the 45 years of the fund) and give \$25,000, representing the original corpus of the Stuart W. Chapman Memorial Fund, to support the initiation of a **Unitarian Universalist Seminary Scholarship fund through DRUUMM** (Diverse Revolutionary Unitarian Universalist Multicultural Ministries). This new fund at DRUUMM is intended to support Unitarian Universalist ministerial candidates who are Black, Indigenous and/or People of Color with their theological school expenses. This gift from the congregation to DRUUMM reflected the spirit of Maybelle Chapman's intent in the establishment of the Stuart W. Chapman Memorial Fund.

On December 14, 2024, the Board voted to establish a new long term fund, **the Living Our Vision Fund**, with monies from the sale of two properties owned by the congregation, and, continuing in the spirit of our founders, Maybelle and Stuart Chapman, decided to roll the Stuart W. Chapman Memorial Fund into the newly formed fund with the intent that it will continue to support Unitarian Universalist ministerial formation through EUUC becoming established as a Teaching Congregation and making a commitment to host ministerial interns on a regular basis.

Purpose of the Living Our Vision fund

The purpose of the **Living Our Vision Fund** is to support and enhance the mission of the Edmonds Unitarian Universalist Congregation – Gathering Together, Nurturing the Spirit, and Living Our Vision of a Just and Sustainable World – for as long as the congregation exists. This fund is intended to be adaptable to changing circumstances – taking advantage of opportunities and contributing to current needs in the congregation, the community, and the world. These opportunities and needs may include but are not limited to: supporting a growing family ministry, contributing to support intern ministers, maintaining facilities to reflect our values, supporting our members in participating in congregational activities, contributing to and supporting the outside community, and supporting the operating fund.

Guidelines for Use of Fund

Annual Board Recommendations: Each year, as part of the annual budgeting process, the Board of Trustees will make recommendations for use of up to 5% of the funds from the Living Our Vision Fund to be voted on by the congregation, as part of the annual budget, during the annual meeting. Members of the congregation will have an opportunity to discuss these recommendations with members of the Board prior to the annual meeting.

Uses Beyond 5% If the Board determines it is appropriate to use more than 5% of the total of the Living Our Vision Fund in any given fiscal year, then a separate discussion and vote would be required during the annual meeting or the Board may call a special meeting as directed in our bylaws to vote on use of funds if it is deemed necessary.

Financial emergencies: The Board may approve any level of necessary expenditures from the Living Our Vision fund to mitigate operational or other financial emergencies that put the long-term health of EUUC at risk regardless of the principal value of the Fund.

Management of Fund: The investment of the monies in the fund will be managed by the Finance Committee as directed by the Board in alignment with our Unitarian Universalist values.

Growth of Fund: The Stewardship Team will develop a strategy for educating and enlisting members to contribute to the fund.
