

BUUF Congregational & Financial Sustainability Task Force Charge

At its annual retreat in August of 2024, the BUUF Board of Directors created a Board Annual Vision for Ministry for the 2024-2025 Board year. That vision was summarized as follows:

Create a long-term, strategic, financial management framework using the lens of these guiding, essential questions:

How might we adapt to the changing demographics in church attendance (including how we nurture the next generation of church participants)?

How might we respond to demands for social justice work that also requires honest examination of privilege and power and leverage that privilege and power for collective liberation and the common good?

To this end, the BUUF Board approved the creation of a Task Force to research and analyze data related to this vision and to provide a report and recommendations for action to the Board. The Congregational & Financial Sustainability Task Force's charge is described below:

The Congregational & Financial Sustainability Task Force's will review BUUF's internal data using a holistic perspective to endeavor to understand the current financial and demographic trends within our church to enable us to make educated projections for the future and to create an overall financial strategy toward sustainability. Some issues the Board would like to better understand are:

- What are our current demographics and how have they changed over time. Can we predict how they might change in the future?
- What are our annual giving trends in terms of number of giving "units", average giving amounts, year over year giving trends by household, etc. Why have we lost giving "units" and who demographically are we losing and gaining?
- Analyze donations that are outside of annual giving to identify trends and how such monies are being tracked and spent. Are there differences in trends between restricted funds and non-restricted funds? Is it possible to make predictions about future giving?
- Review how our funds and cash reserves are invested and make recommendations as to how to best manage those to benefit our mission priorities.
- Assess our endowment fund and make recommendations regarding the following questions: should we reevaluate the current endowment policy? How can we get the endowment balance to be over the \$250K threshold? Should we be promoting more donations to the endowment fund?
- Analyze BUUF's budget to assess how the budget is allocated toward our mission priorities. Identify ways to better account for staff time spent on each area of our priorities. Recommend ways that the Annual Giving Drive can be tied to our mission priorities. Can programming be better funded outside of the operating budget?

- What should our overall financial strategy be given these facts? Provide clarity around how we should be directing our financial attention.

Task Force responsibilities may include:

- Engagement with the congregation as necessary to collect data pertinent to their charge.
- The Task Force will provide the Board with monthly progress updates. Upon completion of their research, the Task Force will provide a comprehensive report containing final recommendations for action to the Board.
- The Task Force will provide a final written summary report of their findings for the congregation.
- The Task Force will conduct its works between July 1, 2025 and March 1, 2026, with the goal of presenting a final report to the congregation at the 2026 Annual Congregational Meeting, Sunday, May 17, 2026.

Interested members can apply by completing this short questionnaire:

<https://forms.gle/pibhHvSqae79fMkn8>.

The application period is from May 15 to June 10, 2025, and the Board will notify Task Force members after June 20, 2025.