

Procedure for Use of Annual Distribution Funds (Submitted for trial use and evaluation)

The Funds are for use for purposes delineated in the Endowment Policy. Those uses are the following:

- A. Capital improvement or repairs to the building and grounds not included in the Operating Budget or the Capital Reserve Fund
- B. Outreach to the community, such as grants to UU camps and conferences, theological schools, local social service agencies or institutions
- C. The wider mission of the Unitarian Universalism, such as grants to the UUA for new church development, professional leadership, world missions, etc.
- D. UU related leadership conferences or other such training experiences that allow members of this congregation to grow in faith and service to Unitarian Universalist
- E. Ministerial and staff training and development.

Note: 4% of the value of the Endowment Fund is calculated at the end of the calendar year preceding the beginning of the next calendar year. Available from the 4% distribution in the three previous years is:

4% distribution 2023	\$ 54,939
4% distribution 2024	\$ 60,162
4% distribution 2025	\$ 65,000 estimate

1. Requests will be sent to the Endowment Committee members, Barbara Lund will be the contact.
2. The request may be sent electronically or in writing. If sending in writing please notify Jermain and Barbara electronically and put into the Endowment Committee Mailbox in the office.
3. The Endowment Committee will review the request and may ask for additional clarification.
4. The Endowment Committee will send to the impacted BUU Committee for their review and comment.
5. The Endowment Committee will inform the Coordinating Committee of the request for their information
6. The Endowment Committee and the Requestor will forward to the Board for discussion, possible revision and approval
7. The Board will inform the Requestor and the Endowment of their decision or non-decisions.

This process will begin with a timeline determined by the requestor and the impacted committees and board.

The process will be a trial and will be continually evaluated for improvement.