



# THE BEACON

A MONTHLY NEWSLETTER OF

THE UNITARIAN UNIVERSALIST  
SOCIETY OF CLEVELAND

Volume 63, Issue 1

July 1, 2011

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## UPCOMING SERVICE INFORMATION

*Musical Prelude at 10:45 a.m. \* Service at 11:00 a.m.*

*July 3, 2011, 11:00 a.m.*

### **American Creed**

*Service Leader:* Steve Doell

*Musician:* Karin Tooley

English writer G. K. Chesterton described America as the only nation that is "founded on a creed," one identified "with theological lucidity in the Declaration of Independence." What is the American Creed? How does it reflect and inform our Unitarian/Universalist tradition? How does it affect us in 2011?

*July 10, 2011, 11:00 a.m.*

### **Put Your Troubles on the Bus**

*Service Leader:* Thomas Beck

*Musician:* Karin Tooley

Our Seven Principles include the phrases "inherent worth and dignity of every person," "compassion in human relations," and "acceptance of one another." These elements of the Seven Principles focus on empathy and compassion but where does one begin in understanding the complexities of human nature in order to extend empathy and compassion to another person? Guest speaker Tom Beck will explore this concept in a sermon titled "Put Your Troubles on the Bus."

#### **On Facebook?**

If so, check out the Society's Facebook page. A link to it can be found on our website at [www.uucleveland.org](http://www.uucleveland.org).

#### **UUSC Podcast**

Listen to Sunday services online, and more. Visit: <http://uucleveland.podbean.com>.

#### **Wheelchair Available**

The Society has a wheelchair available for use during congregational events.

*July 17, 2011, 11:00 a.m.*

### **Saved by Our Children**

*Service Leader:* Ellen Carvill Ziemer

*Musician:* Karin Tooley

Practicing being the people we want to be can be hardest with those closest to us. As parents (as in other close relationships and caretaking roles) we're often far from our best selves, as our children are so, so good at poking all our buttons. Yet, in these same moments there are great possibilities for healing and actually becoming our best selves.

*July 24, 2011, 11:00 a.m.*

### **The Road to Phoenix**

*Service Leader:* David J. Petras

*Musician:* Karin Tooley

The 2010 UUA General Assembly made a commitment to go to Phoenix in 2012; to bear witness to injustice and live out our UU values by standing on the side of love. Weaving together threads of personal history, immigration, economic justice and the future of our UU movement, OMD Board Member David Petras will speak about the Ohio Meadville District's Phoenix Witness Project.

*July 31, 2011, 11:00 a.m.*

### **The More We Learn, The Less We Know**

*Service Leader:* Amy Collins, CLL

*Musician:* Karin Tooley

When we begin our lives, we are completely dependent on our parents or caregivers. Later, we rebel against them. As we age we become them, and eventually we lose them. This service we will explore how we may negotiate this inevitable, precious journey with grace and insight.

## Notes from our Minister

In my June Beacon article I noted that the annual meeting revealed divisions within our congregation around issues of growth, how the investment portfolio should be used and the mission/purpose of the congregation. This month's article is the second in a series addressing these divisions. I hope that the series will provoke discussion between members of the congregation. I have already heard from a few of you about my last column. I hope to hear from more of you in the coming months. I am hopeful that through dialogue we can resolve some of the differences of opinion within the congregation.

This month I want to discuss the differences of opinion that exist around how the congregation should use its investment portfolio (which some people mistakenly call an endowment). Several years ago the congregation received a generous gift totaling more than \$1,000,000 from the estate of Frank Colson. At the time the Society had a part-time minister and approximately 30 people attended the congregation's regular worship services. When Rev. Peggy Clason decided to retire in 2005 members of Society voted to use this money to call a full-time minister and grow the congregation. Since then the congregation has grown (see my June column on the Society's numerical growth in the last few years).

Since then there have also been two opinions about how the congregation should be spending the money in its investment portfolio. One position, which I will term the endowment position, holds that the principal of the congregation's investment portfolio should not be spent. Even though the congregation does not technically have an endowment--an endowment has legal restrictions around how the money within it can be spent, there are no legal restrictions around how we can spend our money--the endowment position wants to treat the congregation's investment portfolio as if it were an endowment. Under this scenario the congregation would spend 5% of its portfolio each year--3.5% towards supporting the operational budget and 1.5% towards capital expenses. The principal in the investment portfolio would not be touched. It would be preserved in perpetuity.

The second position, which I term the venture capital position, holds that the congregation should spend as much as necessary each year from the investment portfolio to grow the congregation. I term this position the venture capital position because venture capital is money invested in a project or business in the hopes of winning a greater return. It is risky. The hope is that the long term returns on the investment will ultimately be greater than the returns that would be received if the money had been invested more conservatively. In the business world a lot of venture capital is often spent before investors see a significant return.

Let's examine how the two scenarios would impact the Society. Former member Emily Tuzson created a forecasting tool using Microsoft Excel that allows us to generate various scenarios for congregational growth and examine how those scenarios impact the congregation's investment portfolio. We will examine the impact of the endowment position on the congregation first.

### Endowment Scenario

The Society's total budget for the 2011-2012 fiscal year is \$197,000. The congregation's income from pledges is forecast to be \$61,400 and from non-pledge sources it is forecast at \$14,800. The remaining \$120,900 is to be taken from the investment portfolio. As of the end of April, the congregation had approximately \$1,021,000. 3.5% of this amount is \$35,700. So, if the congregation were to treat our investment portfolio as an endowment we would immediately need to slash the budget by about \$85,200 to about \$112,000.

Reducing the congregation's budget from roughly \$197,000 to \$112,000 would have a substantive impact. The basic costs of running the facilities are about \$22,000 a year and the basic administrative costs total about \$41,000 (these include the Office Administrator, office supplies,

## Notes from our Minister

bookkeeping, UUA and OMD dues). These costs total \$63,000 and while they might be able to be reduced slightly through the use of volunteers it is unlikely that they could be reduced significantly. This means that after paying for the basic infrastructure of the congregation (administration and facilities) the congregation would have \$49,000 left in its annual budget. This is not enough to support the current level of staffing the congregation has. If the congregation spent its money on nothing else, this \$49,000 might allow for the hiring of a 3/4 time minister. Realistically the congregation would only be able to afford a 1/2 time minister (at a cost of about \$40,000 a year), with the balance of the \$49,000 being spent on things like religious education (but probably not a part-time Director of Religious Education), music for Sunday services, guest speakers and committee work.

So, how would the congregation fare with a 1/2 time minister? Would it continue to grow at the rate it is growing? Would it grow at all? Would it lose members? We actually have historical data from the congregation's past that provides some answers to these questions. We know, for example, that between 1972 and 2005 the congregation did not have a full-time minister. And we know that during that time the congregation consistently declined in membership (from 300 in 1972 to 59 in 2005). Based upon this data it is probably a reasonable assumption that if the congregation were to return to part-time ministry it would begin to decline again. How much it would decline and how quickly is open to speculation. The big declines in the congregation's membership were in 1973 (when it went from 300 to 221 members) and 1976 (when it went from 202 to 98 members). The years 1996 to 2005 present a more typical pattern. Between these years the congregation went from 95 to 59 members and lost an average of about 4 members a year.

If the congregation returned to half-time ministry it would probably return to at least this rate of membership loss. In five years the Society might have 68 members and in ten years it might have 48 members. A decline in membership would probably mean a decline in pledge income as well and it is possible that the congregation would not be able to afford even a 1/2 time minister a decade from now. It is hard to know whether or not the Society could survive at all without even a half-time minister. Some small congregations are able to stabilize themselves with part-time or no clergy. Others go extinct. Whatever happens, the principal in the investment portfolio would be preserved.

### Venture Capital Scenario

Having examined the long-term impact of the endowment scenario let us now turn to the venture capital scenario. Under the venture capital scenario the congregation spends as much money from the investment portfolio as is necessary to maintain the current size of the budget and hopefully grow. Because membership has grown since the congregation decided to adopt this approach to its investment portfolio, it is a reasoned assumption that continuing along the current path will result in further growth. As I note in my last column, the congregation has grown steadily in the past five years. The real questions with the venture capital model are: Can the congregation grow fast enough that it can reach a point where it can support itself primarily upon pledges before it runs out of funds in the investment portfolio? And, how much of the investment portfolio can the congregation spend, and how much should it preserve?

Let's look at a couple of different trajectories. The congregation's current membership is 87 and we have 55 pledge units (or an average of .6 pledge units per member). As I mentioned above, the Society's total budget for the 2011-2012 fiscal year is \$197,100. Let's assume that in real dollar terms (i.e. holding inflation to 0%) the congregation's expenses increase by an average of 1% a year (they actually decreased by 2%, from about \$201,000 to about \$197,000, from 2010-2011 to 2011-2012). Let's also assume that the average pledge in the congregation remains static at about \$1,115 per pledge unit and that our investment portfolio manages a return of about 7% (a figure approximate to the historic norm). With these assumptions in mind, where will the congregation be financially in five years, ten years and twenty years?

## Notes from our Minister

The congregation's current trajectory suggests that we can expect a net membership growth of about 5 members a year, or 3 pledge units per year. If we continue to grow at this rate in five years (2016) we will have 118 members and 71 pledge units. Our total budget will be about \$207,000, our pledge income will be about \$77,500 and our investment portfolio will stand at about \$700,000. In ten years (2021) will have 143 members and 86 pledge units. Our total budget will be about \$218,000, pledge income will be about \$94,000 and our investment portfolio will stand at about \$280,000. Under this scenario the congregation would spend all of the money in its investment portfolio by 2023 (twelve years from now) when it reached about 150 members and 90 pledge units. Almost all congregations with 150 members are able to balance their budgets with pledge and non-investment income. That means that under this scenario the congregation would reach long-term viability (i.e. be able to retain a full-time minister and a growth trajectory) about the same time it ran out of money.

Two final notes about the venture capital scenario. First, there are several scenarios by which the congregation will not spend all of the money in its investment portfolio. These include: adding a net of 12 members per year and keeping the average amount per pledge the same; adding a net of 10 members per year and increasing the average pledge by 1% per year; and adding a net of 5 members per year and increasing the average pledge by 3% per year. Second, all of the scenarios suggest that the congregation will spend most of its investment portfolio before it reaches a point where it can support itself primarily off pledge income.

That is ultimately the choice that the congregation faces. It can spend its money and try to grow or it can preserve its capital funds and face stagnation and decline. For my part, I hope that the Society and its members will choose growth. After all, I believe that the world is better off for all the strong Unitarian Universalist congregations in it.

love,  
Colin

## RE-VIEW

Dear Congregants,

As many of you have heard by this point, I have resigned as Director of Religious Education effective as of September 11th. This decision was incredibly difficult but I will be leaving to work full time as I finish my teaching degree. I've loved my time here at the Society working with our Religious Education program and, with your help, it will continue to grow.

Just because I've resigned as DRE doesn't mean that I'll be leaving the congregation. I thank you all for your good wishes and your support. I look forward to my continued relationship with the congregation and with all of you.

Thank you,  
Nathan Staples

## TREASURER'S REPORT

May's pledge contributions of \$4,845 bring our year-to-date total to \$53,045, representing 81% of the UUSC's annual pledge amount of \$65,594. We were 92% (11/12) through the fiscal year as of May 31. Collections in May brought in \$436 in non-pledge contributions to the general fund. The Society also brought in \$2,341 in other income during the month of April.

## From our President

### THE ONLY LASTING TRUTH IS CHANGE

As we enter a new program year, there will be new faces on the board and on many committees. As the new board chair, I have some methods and some goals that are different than last year. We have a new Long Range Plan and are working on a new Congregational Covenant.

If you have not yet read UUA President Peter Morales' column on p. 5 of the summer issue of the UU World, I recommend it. Rev. Morales speaks of the 50<sup>th</sup> anniversary of the merger of Unitarians and Universalists, and points out that "Everything changes". The way we envision our movement is different than either Unitarian or Universalist ways of being 50 years ago.

The UU Society of Cleveland is also changing. New paint and carpet downstairs will give a different feeling to that space. Working with the Industrial Areas Foundation's Greater Cleveland Congregations will sharpen our understanding of how we want to be in relation to our greater community. Our children learn and grow, and our Religious Education programs will change along with them. A very concrete way to watch change is the community garden by our parking lot, which matures with the summer.

One innovation on the board itself is the creation of the position of "process observer". In order to identify instances in which we unconsciously function non-inclusively, and in order to improve ways of relating to each other, the process observer is specifically tasked with critiquing board activity, as well as congregational functioning. The UU Society is officially recognized as a Welcoming Congregation, due to a series of activities meeting certain guidelines specifically regarding LGBT issues, but broadly working to break down stereotypes in many areas of life. But things change. That was some years ago. The persons within the congregation who participated in that program are now only a small portion of the congregation. Issues within the broader society have become more complex. Much work has occurred within UU circles, and the understanding of concepts related to privilege has evolved. We still have work to do, and I am hopeful that the process observer can help move us forward.

I invite conversation about Change.

Mary Schatzman

## OMD Hiring Social Justice Coordinator

### Social Witness Coordinator

Ohio-Meadville District of the UUA  
Stipend Position Approx. 12 hrs/month

The Social Witness Coordinator promotes communications about and awareness of district, regional and national Unitarian Universalist social justice efforts, and works with the District Executive to create and coordinate congregational opportunities for social justice learning and action. The Coordinator will assist in district efforts to enable congregations to deepen their social witness in the world and grow Unitarian Universalist social outreach in the district and region. A Stipend of \$2000 will be paid quarterly. For detailed information visit the OMD website at: <http://www.ohiomeadville.org/news/omdsjc.html> or call Rev. Van Becelaere at 303-641-5896 if you have questions. To apply, send cover letter, resume and contact information for 3 references to Rev. Joan Van Becelaere, District Executive, at [jvanbecelaere@uua.org](mailto:jvanbecelaere@uua.org). The deadline is August 1, 2011.

## Membership Coordinator

Recently I began surveying new members (with a join date since October 2010) to ascertain not only what brought them to UUSC, but also why they ultimately joined. The purpose of these surveys is to enlighten us as to what works with newcomers and what doesn't, and where we need to improve or refocus our efforts. Responses are still coming in, and once they're compiled, I will submit a report based on the data. The questions are below:

1. What brought you to UUSC for your first visit?
2. How many weeks (if any) went by between your first visit and your next?
3. How long after you attended your first service did you decide to follow the path to membership?
4. What made you decide to follow the path to membership?
5. Did a staff member or congregant tell you about Newcomer Orientations?
6. If you answered "yes" to question 5, about how much time passed between your first visit and learning about Newcomer Orientation?
7. Did Newcomer Orientation answer the questions you had about becoming a member of this congregation?
8. Did you join on the same day you attended Newcomer Orientation?
9. Why did you ultimately join UUSC?

This is the first in a series of surveys I want to take among the membership to determine how our process is working for us.

Zelda MacGregor, Membership Coordinator • 216-640-6180 • zeldamacgregor@gmail.com

## UUSC News/Announcements

**First Sunday Potluck—July 3:** We will be having a First Sunday Potluck after service on July 3rd downstairs in the Fellowship Hall. If you don't bring a dish, the cost is \$3 per person or \$5 per family. First time guests are free.

**Next Circle Supper—July 9:** Come to our Circle Suppers and get to know other members of our congregation. Suppers are generally held on the second Saturday of each month. Contact Ken Nightingale at father.nature@sbcglobal.net or call 216-470-7643.

**Question Box Sermon—August 7:** Rev. Bossen's annual Question Box sermon will be August 7th. If you have a question about religion, theology, congregational life or anything else you'd like him to try to answer, e-mail him at minister@uucleveland.org by Thursday, August 4th. Alternatively, you may place your question on a slip of paper in the question box on the table in the sanctuary.

**Earth Day Volunteers Needed:** Established in 1990, Earth Day Coalition's mission is to provide education, inspire leadership, and encourage action for a healthy environment. Earth Day Coalition's year-round programs include: Student Environmental Leadership, Clean Transportation, Neighborhood Action, and EarthFest which is Ohio's largest environmental education event and the longest running Earth Day celebration in the nation. For volunteer opportunities contact Chris Trepal @ 216-281-6468 ext. 227 or ctrepal@earthdaycoalition.org.

**Participants Needed for Long-Term Research Project:** Krissie Wells is currently recruiting people to help with a long-term research project at her organization, the Housing Research & Advocacy Center. The research project is social justice oriented in nature and pays a stipend to participants. Participants must be available a few hours a week and have a car. Contact her at kwells@thehousingcenter.org or 216-361-9240 if you are interested.

**It's Summer Institute Time!—July 10-16:** This year's Summer Institute welcomes Rev. John Buehrens as theme speaker on "This is the House That UU's Built!" Summer Institute will take place at Kenyon College in Gambier, OH on July 10-16, 2011. Visit [www.omdsi.org](http://www.omdsi.org) for more info.

# July 2011

<b>Sun</b>	<b>Mon</b>	<b>Tue</b>	<b>Wed</b>	<b>Thu</b>	<b>Fri</b>	<b>Sat</b>
					<b>1</b>	<b>2</b>
<b>3</b> 1st Sunday Potluck 1 pm	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b> Shifting Gears 1:30 pm  Joseph Campbell RT 7:30 pm	<b>8</b>	<b>9</b>  Circle Supper 6:30 p.m.
<b>10</b>	<b>11</b>	<b>12</b>	<b>13</b>	<b>14</b>	<b>15</b>	<b>16</b>
<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>
<b>24</b> <i>Beacon Deadline</i> Movie Night 5 pm	<b>25</b>	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>
<b>31</b>						

**THE UNITARIAN  
UNIVERSALIST  
SOCIETY  
OF CLEVELAND**

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Rev. Colin Bossen  
Minister

Tues. 9:00 - 11:15 a.m., Wed. 9:00. - 3:15 p.m.  
Thurs. 9:30 a.m. - 5:30 p.m.

Shirley Nelson  
Administrator/Beacon Editor

Tues. 9 a.m. - 3 p.m., Wed. 9 a.m. - 3 p.m.  
Thurs. 9:30 a.m.- 5:30 p.m.

Amy Collins  
Commissioned Lay Leader

Nathan Staples  
Director of Religious Education

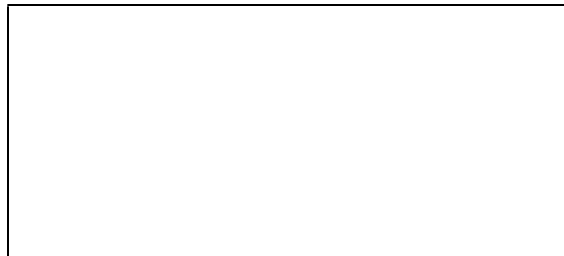
Thurs. 10 a.m. - 4 p.m. and  
Sun. 10 a.m. - 2 p.m.

Zelda MacGregor  
Membership Coordinator  
Thurs. 4 p.m. - 6 p.m.  
Sun. 1 p.m. - 3 p.m.

William Shorter  
Custodian

Barbara Boyd  
Choir Director

Rev. Peggy C. Clason  
Minister Emerita



**UUSC DEADLINES:**

**Beacon Articles:** Deadline for August is July 31st.

**Order of Service/Announcements:**

Wednesday a.m. before the Sunday Service

**Board Reports:** Tuesday a.m. before the Board Meeting

**Birthdays and Anniversaries**

*This is only a partial list, to make it complete, send your special dates to the Office at office@uucleveland.org or just call and leave a message on the machine. Thanks!!*

*July*

Rachel Webb	4
Rev. Clason & Don Anniversary	6
Rev. Bossen & Sara Anniversary	7
Wes & Muriel Senseman Anniversary	20
Emma Bossen-Wong	24
Nathan Staples	29
Krissie Wells	29
Lisa Bohlander	31



**UUSC Board of Trustees \***

Linda Coulter  
Ben Faller  
Amy Harmon  
Mary Schatzman  
Sarah Thuerk  
Melissa Vandergriff  
Wendy Wills  
Karin Tooley                      Treasurer

*Board Meetings are held on the 4th  
Thursday of the month at 7:00 p.m.*

\* Officers elected at the June 30th  
Board meeting