



Southeast Unitarian Universalist Summer Institute

Board Meeting Minutes

9am-5pm Eastern, November 8, 2025

In-person: Raleigh NC

Present: Stacie Vecchietti (President), Misty Lewis (Vice President), Andrew Diamond (Treasurer), Bethany Cecere (Secretary), Erin Lieb (Trustee), Stephen Shanahan (Trustee), Jenian Taynton (Trustee), Pooja Jhunjunwala (Trustee), Mia Lazar (Trustee), Anthony Quandt-Judd (Trustee), Claire Nutt (Senior Youth Representative), Maren Merkel (Junior Youth Representative), Amy Edge (Risk Manager), Ivy Breivogel (Board Administrator), Chris Breivogel (Director), Rebecca Wald (Director Elect)

Joining us: Core Staff [Kim Breivogel (Assistant to the Director), Rik Schell (Communications Director), Rachel Bevins (DEIA Co-Director), Ron Echols (Logistics Director), Nicole Tearnio (Intergenerational Director), Tim Warner (Nature Director), Arpie Maros (Nightlife Director), Kimi Reigel (Nurture Co-Director), Cindy Landrum (Nurture Co-Director), Zoltan Lazar (Registrar), Brian Cooley (Finance Director), Alex Winner (SUUSI Services Director), Wilson Farrell (Technology Director), Tami McKay (Volunteer Director), Beth Nicholson (Workshops Director)], Joyce Munro (SUUSI Foundation Treasurer), Cate Farrell (Community Member)

Opening

- Chalice Lighting
- Call to order 9:00am

Opening

- Opening Words and Chalice lighting
- Welcome and thank you!
- Goals and how we will be together this weekend
- SUUSI 2026 location and dates; status of contract

Team Building Activity

Consent Agenda

- 2025-07-25 SUUSI Board Meeting Minutes
- 2025-11-8 Officer & Committee Reports (in Appendix)
- HeaRT Board Report 2025 (*confidential*)

→ **Motion to approve the consent agenda**, seconded, approved unanimously

Treasurer Officer Appointment

→ **Motion to appoint Andrew Diamond as Board Treasurer for the next fiscal year**, seconded, approved unanimously

SUUSI Foundation Check-In with Core Staff

- Board and Financial Overview
 - Officers re-elected: President Nicole Tearno; Vice President Rev. Michael Tino; Treasurer Joyce Munro; Secretary Ian Hochberg
 - Financial snapshot:
 - Operating Reserve: \$85,000 (reflects SUUSI's strong year-end balance).
 - Endowment: \$161,000 as of October (steady investment growth).
 - \$171,000 includes the unrestricted \$10,000 grant from the Marianne Vakiener Giving Fund.
 - SUUSIship Reserve: \$11,000 remaining after \$18,000 in awards and \$8,000 in donations.
 - \$21,000 after the \$10,000 the SUUSI Board approved to contribute.
 - New unrestricted \$10,000 grant from the Marianne Vakiener Giving Fund proposed for the endowment.
- Fundraising and SUUSIship Initiatives
 - Developing a SUUSIship Named Donation Program to encourage larger and legacy gifts (\$20,000–\$25,000 minimum).
 - Using the \$10,000 unrestricted grant as a nucleus gift to launch an endowment campaign.
 - Target: Grow endowment to \$250,000 to support a sustainable 4–5% annual draw for SUUSI operations/SUUSIships (TBD).
 - Andrew: Present proposal to the SUUSI Board for a 50/50 surplus split between reserves and SUUSIships.- SUUSI Board approved 11/08/25
 - Committee Chairs:
 - Fundraising: Ian – to plan donor engagement and outreach.

- SUUSIship: Michael – to refine scholarship processes and naming program.
- Financial Policy Development
 - Drafting clear fund management policies with Joyce and Nicole:
 - Establishing triggers for transfers between operating reserves, endowment, and SUUSIships.
 - Proposed trigger: Once a TBD percentage of the total SUUSI budget is in the operating reserves, it would initiate a transfer of funds to the endowment (e.g., 50% of a \$500k SUUSI budget would set the trigger amount at \$250,000)
 - Long-term goal: \$500,000 endowment, matching SUUSI's annual budget for long-term stability.
- Administrative and Governance Updates
 - Domain Management: Retaining only
 - thesuusifoundation.org and suusifoundation.org.
 - Annual Donor Report: Joyce to design an annual report template highlighting Foundation impact and results.
- Summary

The SUUSI Foundation continues to:

 - Strengthen financial transparency and sustainability,
 - Expand donor engagement and named SUUSIship opportunities, and
 - Build a strong alignment with SUUSI's mission to sustain an intergenerational community for years to come.

Budget Discussion with Core Staff

Break for Lunch

Upcoming Bylaws and Policy Work

- Committee has broken into Working Groups for different types of policy/bylaw updates
 - Policies related to minors – Youth (including Middlers), Teen, and Co-op
 - Streamline policies related to principles, expectations, guidelines and codes of behavior
 - Guardianship policy
 - Waiver - Policy match
- We are getting back into relationship with the UUA to align with best practices – the interactions so far feel very supportive and positive.

Board Visibility Discussion

- Lunch with the Board was effective, but small numbers.
- Discussed suggestions and ideas for increasing visibility and knowledge of the Board, recognizability of members, understanding of the difference between Board, Core Staff, and Foundation.

SUUSI Statement

- Crafting a proclamation from the SUUSI Board that states our commitment to action against authoritarianism, which will be explicit, comprehensive, and actionable, and which will include a charge to the SUUSI Staff and the larger SUUSI community.
- Agreed to return with proposed language to vote on after dinner.

Resolution on Finances

- Given that substantial progress has been made in restoring the balance of the SUUSI Foundation Operating Reserve account
- Given financial resources for SUUSIships are currently constrained

→ **Motion that the current 2025 excess surplus funds from SUUSI returned to The SUUSI Foundation be transferred 50% to the Operating Reserve and 50% to the SUUSIship fund,** seconded, approved unanimously

Board Closing

- Next Board meetings:
 - February 1, 2-4pm, zoom
 - April 25, 9am-5pm, zoom
 - July 18, 3-5pm, Radford University
 - July 24, 12-2pm, Radford University
- Core Staff Meeting sign-ups
- Reflection on board meeting experience

Non-returners Survey Discussion with Core Staff

- Non-returners Survey Report (in Appendix)

Outreach & Marketing Discussion with Core Staff

Closing

- Technology training (SOLIS, G-suite, ScanLily) via Zoom, to come in December
- Dates of future Core Staff meetings

Break for Dinner

SUUSI Statement, continued

- Proposed SUUSI Statement (in Appendix)

→ **Motion to adopt the SUUSI Statement Against Rising Authoritarianism**, seconded, approved unanimously

Minutes recorded by: Ivy Breivogel, Board Administrator, 11/8/2025

A handwritten signature in black ink, appearing to read 'Ivy Breivogel', is positioned below the minutes recording line.

2025-11-8 SUUSI Board Officer & Committee Reports

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Board President

October, 2025

As I head into my last year serving on the SUUSI Board, I have found myself feeling reflective and a little tender. Over the course of the year, you will likely notice that Misty and I are doing almost everything in tandem and it has been an absolute pleasure so far. The work that the board has put into intentional succession planning is paying off and the Executive Committee is committed to making next year's board leadership transition as smooth as possible.

We held two board meetings during SUUSI week. During these meetings we appointed and elected new board members, elected our officers for 2025-2026, appointed a Director-Elect, voted on some policy changes, reviewed and updated our Board Covenant, said good-bye to board members that were rolling off of the board, and welcomed new board members.

Since SUUSI, your Executive Committee [EC] planned and hosted the OnBOARDing: Orientation for New Board Members to provide new members with foundational information related to SUUSI board expectations, responsibilities, and culture, SUUSI financials and fiscal matters, SUUSI by-laws and policy, Robert's Rules of Order, and an introduction to our Board Google Drive. We loved it when seasoned board members joined us when they could to add their voice and experiences to the conversation.

Misty and I worked with the Board Administrator, Ivy, to assign all board members to their committees for the 2025-2026 year and supported board chairs in getting their work kicked off. Additionally, we have worked to onboard our new Risk Manager, Amy Edge. Edge has jumped

right into the work and will be at the in-person meeting in Raleigh so you all can begin to get to know her, too, if you don't already.

We want to thank everyone for engaging in the process of following up with SUUSI participants who had indicated that they wanted to be contacted by a board member post-SUUSI 2025. We collected some meaningful feedback from folks as a part of that process and it has been passed along to the Director team to go to the appropriate staff.

Finally, the EC has been hard at work with the Director team to plan the agenda for the fall retreat/meeting in Raleigh where we will put the finishing touches on SUUSI 2025 and start dreaming about and planning for SUUSI 2026 [and beyond!].

It is hard to express how grateful I am to all of you for your hearts and the work that you are already digging into to make SUUSI 2026 the best it can be. Each of you has a special and important role to play on the board and I look forward to working with this amazing group over the next 9 months.

SUUSI Director

Submitted by Chris Breivogel, SUUSI 2025-2026 Director on 10/24/2024

2025 Budget

The budget for the 2025 year appears to be surplus for the second time since 2019. Currently the balance is \$48,431.80. The primary remaining expenses for 2025 are the joint board/core staff meeting Nov 7-9 which is expected to cost no more than \$8000 in total, a Nature check-out weekend, insurance and storage unit payments. I anticipate that 20254 will end with a surplus in excess of \$30,000.

The budget projected a surplus of \$13,800 based on 570 registrants (there were 572 in 2024). Because registration numbers were lower by nearly 10% from expected, there was concern that there would be a deficit for 2025. The revenue from the additional 51 registrants would have been near \$49,000 (if all were paying the adult rate), but the bill from Radford came in about \$70,000 less than the estimate. We used about 10 fewer staff credits than budgeted, saving another \$9750, giving a combined net decrease in spending of \$30,000. Staff did an amazing job spending less than budgeted with nearly every department coming in under budget often by \$1000s (Services, Communications, Intergen, Nightlife, Technology, DEIA, Registration, Core Staff meetings & EA, Board and Board meetings). The only areas that went over budget were Community Time (\$126), Director (\$19) and Nurture (\$426). Sales did well, with the Books & Bazaar having a deficit of \$2800, but that was less than predicted by \$600. Common Ground and un-BBQuusi had surpluses of \$469 and \$517 (though both were projected to lose money in the budget) and Mugbook had a deficit of only \$46. Workshops had a surplus of \$7750 (\$3500 more than budgeted), while Pair-a-dice had a deficit of \$432 and Nature had a deficit of \$13,420, but that was less than budgeted by \$3,155.

2026 Budget

The work on the new budget has not yet begun, but I am advocating for keeping departmental budgets, staffing levels and the cost of registration essentially the same as spent (not as much as was budgeted) for 2025. We have already identified a few places where additional savings could be achieved.

- reducing staff credits for the Books and Bazaar from 7 to 6
- reducing staff credits for Nurture by not giving ½ X for a 24-hour shift as Minister of the Day, since they don't actually work anywhere near 20 hours for a 24-hour shift
- reducing staff credits and other expenses for Nature (the new Director, Tim has plans to reduce costs using a multi-pronged approach)
- continuing to use "free" spaces as much as possible to avoid using spaces for which we are charged extra rent (classrooms, dance studios, theaters and auditoriums, etc.)

- using the credit cards for staff that we got last spring to save on charges associated with pre-paid cards
- not having Serendipity on Sunday night again (but making improvements to the Sundae Social)

2026 Location and Dates

The location for the next SUUSI is going to be Radford University July 19-25, 2026. We received a draft contract on Oct 16, and are only waiting to get a corrected copy that shows the correct dates. I spoke with Lee Blackwell, Radford's Conference Services today (Friday, Oct 24, 2025) to explain the issue with the contract and he said he'd fix it and send it back on Monday.

SUUSI Staff and meetings

Most people that served on core staff for 2025 are planning to return for those positions for 2026 except for Tim Warner is the new director for Nature, Nicole Tearno who is the new Intergenerational Director, and Rebecca Wald is the Director-Elect while Sarah Gonzalez is done being Director-emerita. The age-related program coordinators are no longer referred to as "core staff" but are part of "key staff" that includes core staff and a few other key positions that are invited to attend the monthly staff meetings via Zoom. Changes to staff for the age-related programs includes that Jenn Blosser will lead Youth and Middlers (for the last few years, she led only Middlers). It made sense to re-combine these two programs since SUUSI is now smaller than when they were combined several years ago. New staff include Nate Brors as YA Coordinator and Liz Burdette as Medians Coordinator.

The staff has met three times since SUUSI virtually on Sept 17, Sept 23 with the Board to review the 2025 SUUSI Survey, and Oct 15. We will meet again Nov 7-9 in person (again with the Board) in Raleigh, then November 17 via Zoom 6:30-8:30 pm, then every second Monday from 6:30-8:30 pm December 8, 2025-May 12, 2026. A site visit is scheduled for the weekend of June 5-8, 2026 that will include only staff that need to be there to see and make decisions about locations.

Risk Manager

November 2025

Amy Edge - Risk Manager

SUUSI 2025: Risk Manager Amy Nordeg and I met at SUUSI regarding my possible service as the SUUSI Risk Manager beginning in the late summer/fall of 2025. I have attended SUUSI since 2010, missing 2019 and 2024. My professional background is as a NC licensed attorney since 1995, with 10 years as a general practice attorney, and 20 years as in-house counsel (plus other duties) at Tar River Land Conservancy. Following the meeting, I communicated to both the Board President and Amy N. that I was willing to serve.

TRANSITION OF POSITION: Following my pre-planned travel in August 2025, the Board President, Board Vice-President, Amy N., and I began the process of transitioning the duties of Risk Manager.

- Amy N. drafted a Risk Manager Manual that is a work in progress. This is a step towards operationalizing the duties and procedures related to the Risk Manager position. I will update the manual during this year.
- The Board President, Board Vice-President, Amy N., and I met twice via Zoom to review the duties of the risk manager, to transfer information, and to provide an update on current issues.
- I have been reviewing existing policies and procedures to enhance my understanding, and I joined the Policy Committee meeting in October to further this goal

SPECIFIC DUTIES COMPLETED:

- I reviewed the contract with Radford for 2026 and provided my opinion about the execution of the contract to the Board President

PENDING ITEMS:

- Review of waivers to determine if any of the documents can be consolidated to make signing easier
- Working with the Bylaws and Policy Committee to review a Guardianship question

Finance Committee
SUUSI and SUUSI Foundation

		16-Sep-24	End of Year 2024	30-Sep-25	YTD Change
SUUSI					
	Fidelity Account - Zxxx9370	\$81,582.04	\$74,490.25	\$91,543.64	\$17,053.39 *1
	Wells Fargo	\$2,986.65	\$3,125.30	\$3,943.76	\$818.46
	PNC Bank	\$0.00	\$0.00	\$0.00	
	Prepaid Cards	\$0.00	\$917.80	\$308.84	(\$608.96)
	PayPal Account	\$0.00	\$0.00	\$0.00	\$0.00
		\$84,568.69	\$78,533.35	\$95,796.24	\$17,262.89
	Less Liabilities	\$0.00	\$1,100.78	\$0.00	(\$1,100.78) *2
	Net Equity SUUSI	\$84,568.69	\$77,432.57	\$95,796.24	\$18,363.67
SUUSI Foundation					
	Fidelity - Operating Account (xxx990)	\$7,920.01	\$27,898.50	\$30,514.21	\$2,615.71
	Fidelity - Operating Reserve (Zxxx035)	\$68,482.05	\$49,595.78	\$84,524.12	\$34,928.34 *3
	Fidelity - Endowment (xxx916)	\$144,510.39	\$141,327.31	\$154,661.97	\$13,334.66
	PayPal Account	\$0.00	\$0.00	\$0.00	\$0.00
		\$220,912.45	\$218,821.59	\$269,700.30	\$50,878.71
	Less Liabilities	\$0.00	\$0.00	\$0.00	\$0.00 *4
	Net Equity Foundation	\$220,912.45	\$218,821.59	\$269,700.30	\$50,878.71
	Aggregate for Both SUUSI and Foundation	\$305,481.14	\$296,254.16	\$365,496.54	\$69,242.38

Treasurer's Report 2025Q3

*1: 29,000 txfr'd to Foundation, incl. 113866.36 due to Radford paid 10/5

*2: 6,013 Due from SUUSI to Foundation

*3: 29,000 transferred from SUUSI

*4: 17,828 Due from Foundation to SUUSI for SUUSIShip Registrations

Income Summary - to Date

Registration, Housing, & Meals	207,406
Earned Credits for Staff	142,828
Programming Income	38,339
Sales Income	31,859
Other Income	5,766
Interest and Donations	426,197

Expense Summary - Top Expenses

Host and Dining Costs	225,238
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Non Rev Program and Support Expenses	50,699
Programming Expenses	43,005
Sales Expenses	30,176
Other Expenses	2,212 Service Project
Corestaff, Board & Corporate	<u>56,233</u>
	407,564
2024 to date Surplus/(Deficit)	18,633

Foundation Notes

To SUUSI Foundation From SUUSI surplus 2024	-29,000
Foundation Payment of Reg/Housing SUUSIShip	17,828 Settled Oct 2025
SUUSIShip and other collections to Foundation	-6,013 Settled Oct 2025
Return of 2025 SUUSI surplus funds to Foundation	<u>0 TBD</u>
	-17,185

Accounting Software

- 2025 Expense reimbursement and accounting completed using Google Sheets. We will look again at Zoho Books expense app for iPhone and Android for next year.
- Ledger continues to be performed in parallel between Zoho Books and Google Sheets. New format sheets are working well and precisely parallel our budgeting process.

Taxes and Government

- Joyce and I have initiated work towards performing tax preparation internally as we experienced a substantial expense with outsourcing it last year.
- We are planning for completion and filing of IRS Form 990 by the 11/15/2025 deadline.
- BOI Verification is due this year. Completion date TBD

Risk Management

- Amy Edge is taking over as Risk Manager.

Banking

- Chris and Brian have implemented and issued the Charity Charge cards for expenditures this year.

Financial Outlook

- I anticipate SUUSI2025 will land in a range between a \$10k surplus to \$5k deficit this year based on the budget and current financial results.

- Our plan to return an additional \$20,000+ to the Foundation in late 2025 / early 2026 will be impacted by this and I expect that between zero and \$10,000 will be returned to the Foundation for 2025.
- In the foundation, we are expecting our investments to perform less well than they have in recent years. The Foundation is working on increasing donations/contributions this year.

Elections & Nominations Committee

There are no updates to report at this time.

During SUUSI this year, our appointed adult board members were Misty Lewis for a second term and Jenian Taynton for a first term. The elected adult board member was Pooja Jhunjhunwala, and the elected youth representative was Atlas Merkel. We also welcomed Rebecca Wald as our incoming director elect. Congratulations and thank you to all of the new board members!

Policy & Bylaws Committee

The Bylaws and Policy Committee met on October 20, 2025 to discuss the priorities for the upcoming year. We have identified and set up subcommittees to address the following areas:

- Policies related to minors
 - Youth(including Middlers)
 - Teen
 - Co-op
- Streamline policies related to principles, expectations, guidelines and codes of behavior
- Guardianship policy
- Waiver - Policy match

Additionally, members of the committee along with core staff members related to youth and teens met with Eric Bliss from the UUA to hear about best practices and share SUUSI 2025 experiences. The intention of these meetings is to develop a relationship with the UUA and hear best practices that may be beneficial to SUUSI.

Site Selection Committee

Submitted by Chris Breivogel

SUUSI 2025-2026 Director/Chair of the Site Selection committee

10/24/2025

Radford has already sent a draft contract for SUUSI 2026 that should be updated, received, signed by the Board President and submitted by next week (ahead of the Nov 8 Board meeting). Zoltan Lazar has recently agreed to take on the role of chair of the Site Selection committee, and is currently waiting to hear if the other members of that committee currently listed have been approved by the Board and/or if changes need to be made. Who won the Virginia Governor's race? Once that is settled, he will schedule a meeting to discuss other potential locations should Radford be unable to host us in the future.

Outreach Committee

The Outreach Committee met on October 16, to brainstorm ways to re-engage SUUSI attendees, reach new audiences, and maintain year-round connection with the SUUSI community. Below are the ideas. I plan to have a more fleshed out plan for the Board by our Board meeting.

Participants included Pooja (Outreach Lead), Erin, Daniel, Rebecca, and Rik, sharing perspectives from long-time attendees, board members, communications staff, and medians (young adult group).

Themes that emerged:

- **Reconnect lapsed attendees and strengthen year-round engagement**
- **Build bridges to new and underrepresented audiences**
- **Use both digital and physical outreach tools**
- **Lighten workload through shared volunteer effort**
- **Expand creative outreach (events, content, partnerships)**

Outreach Ideas for SUUSI 2026

1. Year-Round Virtual Connection

- **Monthly “SUUSI Pop-Up Workshops”** via Zoom: casual online gatherings such as book clubs, cooking sessions, “Less Meat for Breakfast,” or value-based discussions.
- Goal: maintain the *magic of SUUSI* throughout the year and connect people across generations and interests.
- Could be volunteer-led, rotating hosts, free, and publicized on SUUSI Friends and email lists.
- Erin is leading a book club soon, in a few weeks. Other thoughts for workshops included workshops on prison ministry, zentangles, “Live your values,” Social Justice in Sci Fi or The Dreaded Potluck

2. Congregational Engagement

- Encourage **“SUUSI Nights” or “SUUSI Sundays”** at UU congregations — with provided slides, flyers, and handouts.
- Distribute **physical media kits** (postcards, posters, brochures, QR codes) for congregations to display or hand out.
- Offer **digital versions** for congregations to customize.

3. Postcard & Handwritten Letter Campaign

- Continue physical outreach via postcards — especially to:
 - Past attendees (haven't come in 2–5 years)
 - Congregations in the region
- Two rounds:
 - Fall (save the date / early info)
 - Spring (early bird registration reminder)
- Handwritten or personalized notes if possible.

4. Referral & Incentive Programs

- **“Bring a Friend” Discount** – both referrer and **new** attendee get a small (\$25–\$50) discount.
- **Recruit-a-Friend Raffle** – entries for each person you bring back or recruit, prize could be a free SUUSI registration.
- Encourage everyone to “invite one person you wish came back”

5. Reconnecting Lapsed and Specific Audiences

- Re-engage **medians (young adults)** and those who stopped attending post-COVID by targeted messages, discounts, and social posts.
- **Outreach to families with trans children** — SUUSI as a safe, affirming space; potential collaboration with LGBTQ+ and peace groups and Facebook communities.
- Connect with **former TWOB (teens who aged out)** — perhaps a “TWOB Reunion / Anniversary Celebration” at SUUSI 2026.

6. Digital Presence & Storytelling

- **More frequent, friendly communication** between October–February (mini newsletters, spotlight stories, staff updates).
- **Videos & Testimonials:**
 - “Why I Go to SUUSI” video series (expand from previous years)
 - Short reels highlighting SUUSI energy and community.
- **Video + photo documentation at SUUSI 2025** for promotional use.
 - Daniel volunteered to help with communications, videography, and editing.
- **Updated website** (WordPress move in progress) with media-rich content and clear calls to action.

7. Data & Feedback

- Review and analyze **“Why People Don’t Return”** survey data.
- Identify trends (cost, safety, community dynamics) and tailor outreach to address these.
Track metrics for future campaigns: open rates, postcard signups, re-engagements.

Next Steps

Immediate (Fall 2025)

- **Analyze attendee feedback survey** and share with Outreach Committee & Board (by Nov 7–9 meeting) - Rebecca
Finalize SUUSI 2026 announcement postcard design and mailing.
- **Send round of postcards by EOY**
- **Draft digital media kit** and physical materials for congregation distribution.
- **Organize small team (Erin + Rachel + others)** to pilot monthly virtual workshops; Rik will send out the NUUS
- **Coordinate with Daniel** to produce short videos / reels / testimonials for early promotion.

Winter–Spring 2026

- Launch **“Refer a Friend” incentive or raffle program.**
- Run **second postcard campaign** before early bird registration deadline.
- Promote **congregational SUUSI Sundays** with supplied kits and slides.
- Begin **consistent monthly digital updates** (newsletter or social posts).

Summary Quote

“We need to make SUUSI part of people’s lives year-round, not just one week in July.”

Foundation Board

The SUUSI Foundation, Inc.

October 2025

The SUUSI Foundation Board President Fall Report



The SUUSI Foundation Board of Directors consists of 7 individuals who are passionate about SUUSI and its future. The Board meets several times per year and coordinates all fundraising efforts for SUUSI, including The Endowment Fund and SUUSIships. Here, you can meet our members and also find links to the meeting minutes, [policy manual](#), and [bylaws](#).

Nicole Tearnio: Foundation Board President nominee (“at large” appointee)

Joyce Munro: Foundation Board Treasurer nominee (“at large” appointee)

Michale Tino: Foundation Board Member, VP nominee (“at large” appointee)

Ian Hochberg: Foundation Board Member (“at large” appointee)

Misty Lewis: Board Member (SUUSI Board appointee)

Andrew Diamond: Foundation Board Member (SUUSI Board appointee)

Mia Lazar: Foundation Board Member (SUUSI Board appointee)

Annie Vogt: Community Volunteer

Kimi Riegal: Community Volunteer

Dear SUUSI Organization Board,

As President of the SUUSI Foundation Board, I am pleased to share an update on our progress over the past year and our goals for the year ahead.

This year marked significant growth in the Foundation’s visibility and engagement within the SUUSI community. Through our expanded presence and outreach efforts at SUUSI, we successfully increased the number of SUUSI Sustainers—those who make recurring contributions to support the Foundation—and saw an overall rise in charitable giving both during and after SUUSI.

In preparation for our upcoming fundraising campaign to build and sustain the SUUSI Endowment, we distributed a survey to 177 SUUSI stakeholders. This survey helped us better understand current levels of awareness about the Foundation, perceptions of our mission, and the community's willingness to support our long-term vision. The results are helping guide our next steps as we plan an inclusive and effective campaign.

We are especially proud to share that the Foundation supported 30 individuals through the SUUSIship program this year, totaling \$17,827.58 in SUUSIship awards. These funds directly helped families and individuals attend SUUSI who otherwise may not have been able to do so—a testament to the impact of our donors and the importance of this program.

Looking ahead, the Foundation Board is focused on strengthening communication and transparency with our community. We plan to implement meaningful donor engagement strategies, including an annual report and quarterly updates, to share our progress, financial stewardship, and the stories behind our impact.

We will also discuss the Endowment Fund's long-term purpose and goals—specifically defining what a “fully funded” endowment means and exploring how it can best serve SUUSI's mission. One vision under consideration is using the endowment to help offset registration costs, making SUUSI more affordable and accessible to more families and individuals. In addition, we will be developing clear, transparent policies governing the management of the SUUSIship Fund, operational reserves, and the Endowment to ensure accountability and trust.

On behalf of the SUUSI Foundation Board, I want to thank the SUUSI Organization Board for your ongoing collaboration and shared commitment to sustaining the spirit and accessibility of SUUSI for generations to come. We look forward to continued partnership and dialogue as we move forward in our shared mission.

Warm regards,

Nicole Tearno

President, SUUSI Foundation Board of Directors

[Mission](#)

The SUUSI Foundation strives to ensure the long-term health of the Southeast Unitarian Universalist Summer Institute, also known as SUUSI. The SUUSI Foundation is charged with managing and growing the SUUSI Endowment Fund and funding SUUSI's scholarship program, SUUSIships.

Primary Functions

- Maintain a separate 501c3 and act in tandem with the SUUSI organization to support long-term community goals.
- Manage and invest the foundation and endowment funds.
- Oversee the SUUSIship selection process and pay the SUUSI organization the cost of these scholarships from an account that is earmarked for SUUSIships
- Maintain a website that the community can use to read our meeting minutes, attend our upcoming meetings, learn about our mission, and make donations.
- Lead fundraising campaigns to ensure financial stability for generations to come.
- Approve grants to the SUUSI organization as their operating funds become depleted so they can continue to pursue their mission.
- The Foundation Board President is invited to attend SUUSI organization board meetings and should attend as often as possible.
- The Foundation Board President shall be informed of timelines and deadlines set by the SUUSI Core Staff for newsletters and communications to the SUUSI community.
- The SUUSI Foundation Board meets ***at least*** three times per year, and committees may meet more often to work on specific initiatives.

Committees

The SUUSI Foundation Fundraising Committee:

- This committee is charged with generating fundraising ideas.
- We are grateful to have a SUUSI Community volunteer, Annie Vogt, to consult with us about how we can increase our donations in the coming year.
- Committee members: TBD

The SUUSIship Committee:

- This committee is charged with proposing revisions of [Sec. 6 of The SUUSI Foundation Board policy manual](#)
- For SUUSI 2024 and 2025, we did not hire a SUUSIship coordinator. Instead, this committee takes responsibility for administering SUUSIships. This saved us the cost of a staff credit.
- More involvement from other Foundation Board members is needed to administer SUUSIships for SUUSI 2025.
- Committee members: TBD

Thank you!

SUUSI Non-Returners Survey

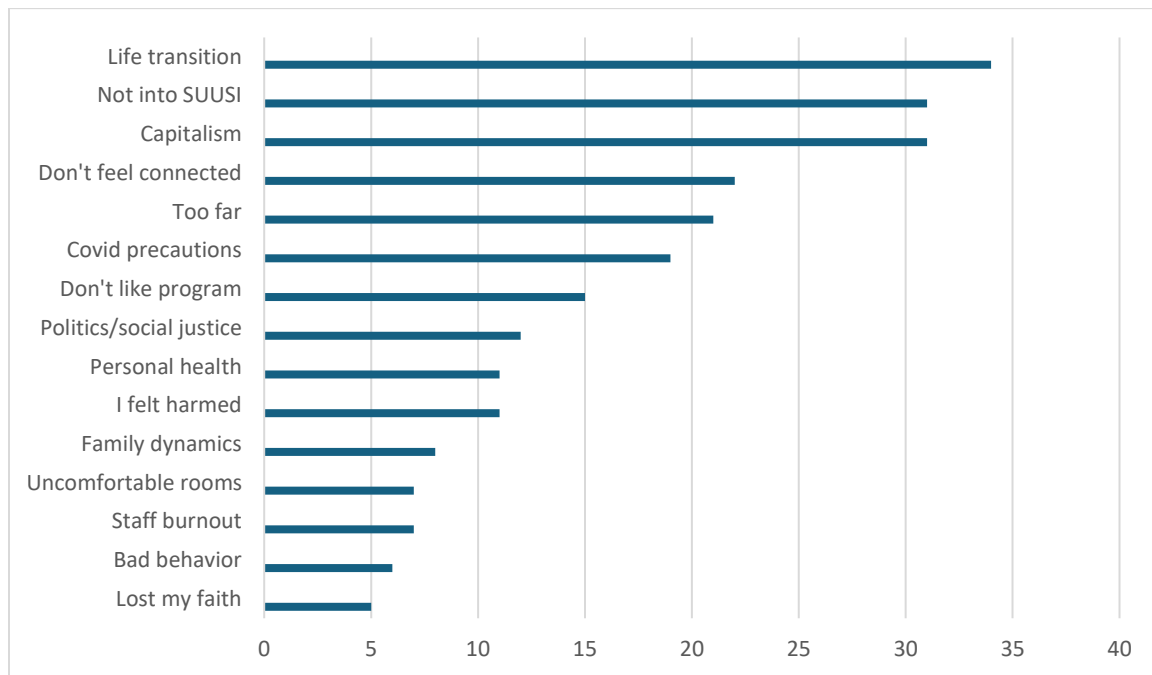
Search criteria: Attended SUUSI at least three times between 2007-2021
At least 14 years old the last time they attended
Haven't attended since we were back in person (2022-2025)
Initial SOLIS search produced 1006 names

Inclusion criteria: Currently under age 78, have an email in SOLIS
817 people received an email invitation to participate
Survey link was also shared in SUUSI Friends Facebook group

131 people (16%) responded to the survey.

Respondents were asked two questions: ***Why did you stop going to SUUSI? What might encourage you to go back?*** The majority of people listed multiple reasons, so the total number of mentions listed below adds up to more than 131.

Q1: Why did you stop going to SUUSI?



*****The majority of people listed multiple reasons***

- 1. Life transitions (34 mentions):** The most common reason people stop coming is because they hit a transition point in their own life: children growing up, a job change, a marriage, etc.

I feel like I aged out of it in a way. I went in the 80s and early 90s as a kid because my mom took me. I have many fond memories, I will always think well of SUUSI, but as a teenager and young adult I associated it with "kid stuff" that my mom took me to. (Typical teenager - and I also left the church after completing YRUU.) I went one more time with my spouse around 2000, but it didn't feel the same, so I never went back after that.

We came when our daughter was young. She is an adult now and there isn't the same appeal there once was for us. We're retired and have different interests.

- 2. Capitalism (31 mentions):** Many people report that they can't afford SUUSI or they don't get enough paid time off.

Post-COVID life was too busy and I wasn't making enough to feel secure in attending SUUSI. I was considering attending last year, but seeing that the price has gone up to over \$1,000, I decided not to.

COVID happened right as I graduated high school - once we were back in the swing of SUUSI, I've had jobs/internships/etc. that just don't afford me the time off to go away for a whole week. I hope to be back in the future!

- 3. "I'm just not that into you." (31 mentions):** Many people have just found other things they like better.

Mostly due to taking more travel vacations both abroad and at home.

We'd been there several times and felt like there were new adventures we wanted to take. So will not be attending in the future.

- 4. Lack of belonging/connectedness (22 mentions):** Some people felt a lack of community at SUUSI or felt socially excluded. Other people don't come because the people they were previously connected to have stopped coming.

I think the biggest thing, because a lot of this could have been overcome, was that we experienced SUUSI, every year we went, as very cliquish with closed established groups of people. This was true for the adults in our family, as well as the children and teens. We attended for many years, and this never changed.

Several of my friends were no longer able to go or chose not to and so it was also less worth it to go.

- 5. Distance (21 mentions):** We moved, or they moved, and logistics got more complicated.

distance when it was in North Carolina

I moved outside of the United States.

- 6. COVID precautions (19 mentions):** The majority of people who mentioned COVID thought we reopened too soon for their comfort, or think that we should require masking at SUUSI. A few people object to vaccination or to our prior mask requirements.

Medical freedoms are violated. Certain medical mandates are a violation to my personal choices that best suits the needs of my family. So many new rules that exclude so many people.

I also feel that the covid precautions in place are not enough to keep at risk community members safe. As a parent to young children, I can't in good faith allow them to grow up in a community designed for the more privileged and where marginalized people are not a priority, or taken care of.

- 7. Don't enjoy the programming (15 mentions):** Several people mentioned the lack of variety in programming or the fact that many program items recur every year.

but also after attending for 10 years we felt we had done all the workshops and activities and were ready for something new.

1) Workshop programming, used to be some that were ""mind"" focused. 2) worship not as robust, used to attract deeper thinkers / preachers

- 8. Political or social justice factors (12 mentions):** Some people think that SUUSI is “too woke.” Other people think that we have failed our marginalized attendees.

The median program was the only safe space for trans people (i literally had someone in the community laugh in my face about pronouns), but it seems like SUUSI put them on a shoestring budget and doesn't think the program is necessary or useful. Allowing cops to roam the dorm hallways was an insult to the Trans and BIPOC folks who understandably have trauma and feel less safe when they see a police officer.

When I discovered UUism over 30 years ago I was delighted to find a community that valued debate and respectful discussion of differences. That is gone. I attended SUUSI for over 25 years but the last couple of times it was obvious that anything right of political extremism would absolutely not be tolerated.

- 9. Sense of having been harmed or betrayed from SUUSI leadership (11 mentions):** This category was relatively small but deep hurt was expressed here. A frequent theme was the idea that leaders hold themselves and their friends to a different standard.

It was a combination of things -.. I've been in board meetings where we have all agreed that public drunkenness at SUUSI is not OK. The president of the board empowered us as community leaders with language to call this behavior out. And hours later, the same board president was a drunken mess at BBQUSI. The hypocrisy was hard to swallow

I also do not feel safe at suusi in the ways that people who cause harm to others in the community were not held accountable for their actions. Many instances of sexual assault where swept under rugs. In the years that I would attend I would fill out the survey after and ask that a board member reach out to me to discuss these issues and none ever did

- 10. Personal health reasons (11 mentions)**

It has been several years (2014?) since I attended SUUSI and a lot has happened since. My first thought, as a person with limited mobility, I struggled with the amount of walking required. I used the golf cart service a lot, but still found my own abilities limiting

- 11. Family dynamics (8 mentions):** Some people stop coming because of factors related to family members.

While SUUSI has aspects enjoyable to both me and my partner, tensions in our relationship became very high both during and after SUUSI. I thought it best to take a break from SUUSI for a little while. I haven't technically stopped going. I had previously taken a 15 year break, and then started returning. Perhaps this will happen again.

- 12. Issues related to staff positions or staff burnout (7 mentions):** People who commit a lot to SUUSI can get burned out. People who have to be on staff to afford SUUSI sometimes don't feel like they're getting much of a vacation.

life got busy, and I burned myself out on core staff/full time staff/serving on the board spent most of the programming time working and too tired at night to socialize. It didn't feel like a vacation or a social event anymore, just another job.

13. SUUSI is physically uncomfortable (7 mentions): Some people were not made for dorm life.

The dorm beds were very uncomfortable. And there was no comfortable chair in the room. As a retirement age person, these things mattered a lot.

14. Community entitlement or bad behavior (6 mentions): Some people are embarrassed about being associated with SUUSI.

it was hard seeing the community unable to behave respectfully to our host university and to each other. I believe the instability of SUUSI's location indicates some hard truths about our community's sense of entitlement around those who are serving us.

15. Losing my religion (5 mentions): Some people stop coming to SUUSI because they stop identifying as UUs or because they leave their local congregation.

The immediate cause was a traumatic event in my home congregation that caused me to have a break with UUism

Q2. What might encourage you to go back?

1. "It's not you, it's me" (37 mentions): For many people, the reasons why they don't come now and the reasons that might lead them to return aren't under SUUSI's control.

It may become a family vacation option when our children have children.

Unfortunately just good timing, I tend to need to work all summer and it's difficult to schedule time off

2. I might come back if logistical aspects were changed (37 mentions): In this category, people mentioned lower costs, more comfortable accommodations, different locations, and the ability to attend for a partial week.

Having better accommodations than just students rooms. And having a larger selection of foods, including vegan and vegetarian.

"Half week registration option (4 days) ? But this seems like it would be a logistical nightmare for an already overworked volunteer SUUSI staff, honestly.

Lower cost options and sliding scales for those in poverty like myself.

3. It would take substantive policy changes, or I would need reconciliation to happen with SUUSI leadership (15 mentions)

A complete overhaul on how privilege plays into the protocols at suusi, transparency on protocols for people who cause harm in this community and focus on the victims. Better covid safety in place. Public apologies for the past treatment of marginalized people (people of color, trans people, disabled people) and transparency on how going forward these communities will be taken care of and their safety will be a priority.

more robust system for holding abusers accountable and supporting victims of assault

4. It would take better community building (15 mentions): Several people expressed real wistfulness about wanting to recapture the sense of community they used to feel at SUUSI. Others felt that we've never been very good at being inclusive.

As my kids get older, I could see myself bringing them back for the same type of SUUSI youth experience that I treasured so much myself, if I get the sense that the community would be similarly welcoming and supportive for them as it was for me.

Encourage people to respect the staff and space we're in and be a welcoming space for all, not just a place for the long time attendees.

5. I might be enticed by program changes or specific activities (13 mentions)

a median program with actual funding

New activities and musical guests

6. Nothing would bring me back (20 mentions):

Unfortunately, I'm not sure. Our family prioritizes spending our limited vacation time together and SUUSI doesn't fit as an opportunity for us to connect as a family.

Not sure I would come back at this point.

7. I'm already halfway back in my heart (18 mentions):

I still love SUUSI and talk it up right before registration opens.

Bringing it back to VA makes it more appealing to me for sure.

Thinking about next year

SUUSI Statement Against Rising Authoritarianism

We, the SUUSI Board, are committed to the core values of justice, equity, transformation, pluralism, interdependence, and generosity, all centered around love. Our Unitarian Universalist faith affirms the inherent worth and dignity of every individual.

These values are currently under attack by rising authoritarianism across the United States, driven by government officials. Authoritarian regimes threaten our fundamental values as Unitarian Universalists by undermining free expression, suppressing dissent, and discriminating against vulnerable peoples.

We stand on the shoulders of courageous freedom fighters. SUUSI was founded in 1950 to promote connection, training, and renewal for Unitarian and Universalist civil rights activists in the South. We honor that history and know that it is time to recommit to it now.

The Board charges the 2026 Core Staff to create programming that helps attendees understand and meet the needs of the current moment.

The Board charges the SUUSI community to honor human rights, to support marginalized communities, and to foster a culture of compassion and inclusion, as our UU values call us to do.

In the midst of chaos and fear, we dedicate ourselves to love, justice, and shared responsibility. **In community, we will live our faith and make SUUSI a source of hope and strength in these difficult times.**