

Unitarian Universalist Association Budget Overview Current Operations	FY08 Results	FY09 Budget 03/05/08	FY09 2nd Qtr Forecast	FY10 Budget 03/04/09	FY11 Budget 03/04/09	Percent Inc/Dec 09 to 10
INCOME						
Income for General Support						
Fundraising	8,892,851	9,241,004	8,879,386	8,199,016	8,995,502	-11.3%
Administration Fees	767,081	755,485	727,706	678,149	657,305	-10.2%
General Investment Income	2,213,889	2,229,192	2,229,192	1,978,548	1,890,676	-11.2%
Other Current Fund Income	2,634,576	2,756,978	2,657,366	2,615,475	2,597,375	-5.1%
Total Income for General Support	14,508,397	14,982,659	14,493,650	13,471,188	14,140,858	-10.1%
Income for Designated Purposes						
Handing on the Future Income	238,925	569,500	561,900	390,995	267,370	-31.3%
Campaign for Unitarian Universalism	843,674	216,450	224,200	201,788	105,689	-6.8%
Now is the Time Campaign	2,618,853	3,731,464	2,190,636	1,837,018	1,973,874	-50.8%
UUCSR Veatch Grants	1,910,361	2,128,525	2,157,052	2,204,567	1,989,620	3.6%
Grants and Scholarships	774,797	865,225	831,098	804,057	795,062	-7.1%
Ministerial Aid Funds	420,164	480,000	480,000	480,000	480,000	0.0%
Holdeen and International Trusts	1,616,426	1,431,835	1,458,989	1,378,430	1,365,383	-3.7%
Income for Other Purposes	2,580,379	2,307,092	2,317,676	1,984,708	1,323,780	-14.0%
Total Inc for Designated Purposes	11,003,579	11,730,091	10,221,551	9,281,563	8,300,778	-20.9%
General Assembly - net	0	0	0	0	(0)	0.0%
Total Income	25,511,976	26,712,750	24,715,201	22,752,751	22,441,636	-14.8%
EXPENSES						
Board & Volunteer Leadership	810,090	747,873	761,568	656,807	660,705	-12.2%
Programs						
Advocacy and Witness	2,343,813	2,100,669	2,080,398	2,079,573	1,980,000	-1.0%
Congregational Services	3,000,522	3,073,694	1,881,201	1,009,241	1,024,651	-67.2%
District Services	2,951,909	2,745,754	2,685,456	2,695,720	2,671,904	-1.8%
Identity Based Ministries	780,843	1,044,671	963,017	869,037	869,850	-16.8%
Lifespan Faith Development	1,101,042	1,421,701	1,264,949	1,476,969	1,444,457	3.9%
Ministry and Professional Development	2,871,375	3,941,963	3,728,204	3,345,229	3,218,526	-15.1%
UU Funding Program	956,086	1,026,525	1,029,052	1,224,567	1,029,620	19.3%
Crisis Relief & Misc. Programs	494,997	413,281	571,442	377,016	373,697	-8.8%
Total Programs	14,500,587	15,768,259	14,203,718	13,077,351	12,612,704	-17.1%
Communications						
Communications	2,702,096	3,090,921	3,066,844	2,949,439	2,978,189	-4.6%
Total Communications	2,702,096	3,090,921	3,066,844	2,949,439	2,978,189	-4.6%
Administration	1,502,830	1,698,931	1,474,682	1,532,127	1,857,038	-9.8%
Infrastructure						
Stewardship and Development	2,559,965	2,682,332	2,507,490	2,105,200	2,051,139	-21.5%
Information Technology Services	1,028,629	1,236,359	1,211,821	1,016,888	1,063,286	-17.8%
Internal Services	2,370,047	1,488,074	1,489,076	1,414,938	1,416,115	-4.9%
Total Infrastructure	5,958,641	5,406,766	5,208,387	4,537,026	4,530,540	-16.1%
Total Expenses	25,474,244	26,712,750	24,715,201	22,752,751	22,639,176	-14.8%
Expenses (over) under Income	37,732	0	(0)	0	(197,540)	

	B	C	D	E	F	G	H	I	J	K	L
1			Unitarian Universalist Association	FY07	FY07	FY08	FY08	FY09	FY09	FY10	FY11
2	Detail	Center	Budget Summary	Budget	Results	Budget	Results	Budget	2nd Qtr	Budget	Budget
3	Page #	FY03+	Current Operations Expenses	10/19/06		10/17/07		03/05/08	Forecast	03/04/09	03/04/09
4											
5	6		Board & Volunteer Leadership								
6		100	Board of Trustees	215,000	202,226	215,000	215,150	215,000	230,000	200,000	200,000
7		110	Board Committees	108,302	125,559	108,365	119,091	124,923	123,500	92,151	96,037
8		115	Board Task Forces	112,325	132,155	92,000	88,988	39,000	50,000	29,000	29,000
9		120	Moderator	20,000	33,458	29,000	32,293	25,000	30,000	30,500	30,500
10		130	Nominating Committee	20,000	16,679	20,000	14,418	20,000	20,000	20,000	20,000
11		150	Commission on Appraisal	35,000	44,170	35,000	54,563	35,000	35,000	34,000	34,000
12		160	Ministerial Fellowship Committee	181,500	203,517	210,000	198,695	210,000	200,000	186,206	186,218
13		170	APF Continental Committee	34,700	30,843	35,950	29,555	35,950	30,068	23,950	23,950
14		190	Commission on Social Witness	47,000	58,264	43,000	57,337	43,000	43,000	41,000	41,000
15			Total Board & Volunteer Leadership	773,827	846,871	788,315	810,090	747,873	761,568	656,807	660,705
16											
17			Programs								
18	8		Advocacy and Witness								
19		210	Advocacy Programs	579,268	581,643	666,264	697,387	718,834	721,408	1,003,143	916,616
20		236	International Office	212,095	192,240	252,425	389,062	212,201	244,715	207,466	194,419
21		237	Holdeen International Partners	467,181	478,835	456,119	461,776	375,500	325,500	135,500	135,500
22		238	Holdeen India Program	775,892	773,271	795,401	795,588	794,134	788,774	733,464	733,464
23			Total Advocacy and Witness	2,034,436	2,025,989	2,170,209	2,343,813	2,100,669	2,080,398	2,079,573	1,980,000
24											
25	10		Congregational Services								
26		400	Director's Office	275,943	273,028	273,068	276,489	347,946	345,296	194,828	194,754
27		405	Congregational Growth	539,403	690,479	2,037,384	1,700,258	1,622,927	491,534	93,750	96,750
28		418	Congregational Justice Making Resources	112,450	98,617	110,450	100,438	113,950	114,950	102,200	108,700
29		420	Young Adult and Campus Ministry Director	436,406	462,382	378,776	316,522	342,015	293,739	0	0
30		425	Office of Congregational Stewardship Services	466,199	426,579	479,551	478,163	516,582	508,264	514,333	520,292
31		435	Services to Large Congregations	113,193	120,436	123,528	128,652	130,275	127,418	104,129	104,155
32			Total Congregational Services	1,943,594	2,071,521	3,402,757	3,000,522	3,073,694	1,881,201	1,009,241	1,024,651
33											
34	14		District Services								
35		440	District Services	1,950,233	1,903,080	2,288,076	2,277,033	2,040,898	1,980,600	1,990,695	2,015,701
36		440	District APF Grants	644,453	644,452	674,876	674,876	704,856	704,856	705,025	656,203
37			Total District Services	2,594,686	2,547,532	2,962,952	2,951,909	2,745,754	2,685,456	2,695,720	2,671,904
38											
39											
40	16	450	Identity-Based Ministries	665,285	653,629	915,145	780,843	1,044,671	963,017	869,037	869,850
41			Total Identity-Based Ministries	665,285	653,629	915,145	780,843	1,044,671	963,017	869,037	869,850
42											

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1			Unitarian Universalist Association	FY07	FY07	FY08	FY08	FY09	FY09	FY10	FY11
2	Detail	Center	Budget Summary	Budget	Results	Budget	Results	Budget	2nd Qtr	Budget	Budget
3	Page #	FY03+	Current Operations Expenses	10/19/06		10/17/07		03/05/08	Forecast	03/04/09	03/04/09
43	17		Lifespan Faith Development								
44		454	Director of Lifespan Faith Development	211,135	202,987	225,715	209,279	310,209	309,747	327,266	302,146
45		456	Curriculum Development	449,366	405,998	578,419	436,850	610,863	543,011	564,829	554,935
46		458	Youth Office	282,517	289,269	373,008	384,080	448,629	362,408	0	0
47		459	Youth Council	61,011	60,217	61,543	51,638	0	0	0	0
48		460	Youth Programs	27,200	32,810	27,200	19,195	52,000	49,784	0	0
49			Young Adult and Campus Ministry Director	0	0	0	0	0	0	584,874	587,375
50			Total Lifespan Faith Development	1,031,229	991,281	1,265,885	1,101,042	1,421,701	1,264,949	1,476,969	1,444,457
51											
52	19		Ministry and Professional Leadership								
53		466	Director of Ministry and Professional Leadership	261,209	263,001	277,903	263,659	962,234	772,679	374,518	354,429
54		468	Director of RE Credentialing	131,483	126,255	150,829	137,129	154,840	138,593	137,276	140,026
55		470	Director of Ministerial Credentialing	183,290	188,061	202,984	196,520	257,136	305,547	196,015	196,070
56		472	Director of Transitions	206,014	200,004	237,552	245,791	248,974	253,673	240,111	233,085
57		474	Office of Church Staff Finances	344,417	348,689	282,392	267,967	281,166	251,405	329,865	313,210
58		475	Office of UUA Health Plan			159,477	148,695	197,751	196,334	186,298	186,275
59		476	Director of Professional Development	150,594	192,787	155,692	165,527	164,502	166,448	159,943	159,987
60		477	Director of Worship and Music Resources	0	0	0	0	86,684	96,576	99,836	99,863
61		478	Scholarships and Ministerial Ed Grants	360,667	706,499	425,813	370,010	374,683	375,191	451,418	375,331
62		478	Continuing Education	70,000	48,974	70,000	69,875	70,000	66,400	74,516	67,890
63		478	Aid Funds	514,000	457,269	524,000	453,164	524,000	524,000	525,698	522,625
64		478	Panel on Theological Education	615,325	603,895	656,151	553,038	619,992	581,357	569,735	569,735
65			Total Ministry and Professional Development	2,836,999	3,135,434	3,142,794	2,871,375	3,941,963	3,728,204	3,345,229	3,218,526
66											
67	23	495	U U Funding Program	946,944	970,509	958,485	956,086	1,026,525	1,029,052	1,224,567	1,029,620
68		498	Crisis Relief & Misc. Programs	48,230	1,694,680	50,705	494,997	413,281	571,442	377,016	373,697
69			Total Programs	12,101,401	14,090,575	14,868,932	14,500,587	15,768,259	14,203,718	13,077,351	12,612,704
70											
71	24		Communications								
72		541	Director of Communications & IPW	249,595	236,324	314,109	292,745	487,923	488,986	476,055	478,563
73		543	Electronic Communications Office	229,345	228,072	250,352	268,446	255,265	286,397	279,858	280,723
74		545	Periodicals Office	901,748	905,278	897,649	854,530	935,954	929,640	878,599	878,744
75		560	Publications Administration	502,414	513,485	587,588	560,273	595,319	596,160	581,637	581,802
76		565	UUA Bookstore	818,048	771,460	804,991	726,102	816,461	765,661	733,290	758,358
77			Total Communications	2,701,149	2,654,619	2,854,689	2,702,096	3,090,921	3,066,844	2,949,439	2,978,189
78											

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3	Page #	FY03+	Current Operations Expenses	10/19/06		10/17/07		03/05/08	Forecast	03/04/09	03/04/09
79	27		Administration								
80		625	Office of the President	376,718	416,318	387,025	362,679	372,924	365,273	342,386	342,462
81		627	Office of the Executive Vice President	338,513	353,810	357,085	389,825	425,492	425,993	403,018	394,110
82		628	Contingency Expense	348,064	111,262	361,305	205,827	369,550	168,891	325,672	346,304
83		630	Human Resources	482,157	473,008	581,826	544,499	530,964	514,526	461,051	774,162
84			Total Administration	1,545,452	1,354,398	1,687,242	1,502,830	1,698,931	1,474,682	1,532,127	1,857,038
85											
86			Infrastructure								
87	29		Stewardship and Development								
88		640	Vice President, Development	115,432	105,142	126,785	121,404	203,565	176,821	142,087	143,180
89		642	APF Campaign	129,688	130,776	141,752	139,706	144,105	144,559	140,529	196,769
90		644	Friends Campaign	463,824	503,565	598,571	467,577	438,187	418,554	308,752	374,780
91		646	Charitable Gift and Estate Planning	128,323	90,870	167,535	151,282	114,059	114,558	105,258	146,454
92		648	Comprehensive Campaign	1,641,678	1,608,968	1,758,220	1,679,996	1,782,415	1,652,998	1,408,574	1,189,956
93			Total Stewardship and Development	2,478,944	2,439,321	2,792,864	2,559,965	2,682,332	2,507,490	2,105,200	2,051,139
94											
95	31		Information Technology Services								
96		654	Information Technology Services	1,142,840	1,045,271	1,199,047	1,028,629	1,236,359	1,211,821	1,016,888	1,063,286
97			Total Information Technology Services	1,142,840	1,045,271	1,199,047	1,028,629	1,236,359	1,211,821	1,016,888	1,063,286
98											
99	32		Internal Services								
100			Finance								
101		674	Treasurer and Vice President of Finance	296,609	282,283	319,966	321,553	407,976	413,498	402,909	407,487
102		676	Financial Services	504,262	537,986	561,840	565,430	588,344	572,637	543,658	543,812
103			Total Finance	800,871	820,269	881,806	886,983	996,320	986,135	946,567	951,299
104											
105			Facilities								
106		684	Facilities - General	809,114	789,104	874,802	848,841	67,934	70,127	52,100	54,000
107		686	25 Beacon Street	120,000	133,208	124,000	131,701	0	0	0	0
108		688	41 Mt Vernon Street	229,259	247,118	219,434	213,612	0	0	0	0
109		690	Eliot & Pickett House	281,103	302,811	312,936	288,910	423,820	432,814	416,271	410,815
110			Total Operations Services	1,439,476	1,472,241	1,531,172	1,483,064	491,754	502,941	468,371	464,816
111											
112			Total Internal Services	2,240,347	2,292,510	2,412,978	2,370,047	1,488,074	1,489,076	1,414,938	1,416,115
113											
114			Total Infrastructure	7,407,584	7,131,500	8,092,131	7,461,471	7,105,697	6,683,070	6,069,153	6,387,578
115											
116			Total Expenses	22,983,962	24,723,565	26,604,067	25,474,244	26,712,750	24,715,201	22,752,751	22,639,176
117											