

## Stewardship & Development Quarterly Staff Group Report

To: The Board of Trustees of the Unitarian Universalist Association

From: Terry Sweetser, Vice President for Stewardship and Development

Date: December 14, 2007

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### Summary

<b>Unrestricted Income</b>	<b>As of 12/11/07<sup>1</sup></b>
Annual Program Fund	\$2,605,429
Friends of the UUA	\$ 503,085
Unrestricted Gifts	
Legacy Gifts	\$ 182,847
<b>Subtotal Unrestricted Income</b>	<b>\$3,291,361</b>

<b>Restricted Income</b>	
Now is the Time! Campaign	\$ 1,050,322
Campaign for UUism	\$ 69,644
Handing on the Future	
<b>Subtotal Restricted Income</b>	<b>\$ 1,119,966</b>

<sup>1</sup> Actuals through December 11; updated report through December 31 will be provided

- Association Sunday brought together 631 congregations and raised \$623,512 to date. See *Now is the Time* Campaign section for details and projections.
- The *Now is the Time* Campaign has raised \$36.5 million, with another \$25 million in negotiation
- We welcome Elizabeth Baker McClain as Manager, Friends of the UUA

### Annual Program Fund

Year to Date as of December 10:

<b>FY</b>	<b>Actual</b>	<b>Goal</b>	<b>% to Goal</b>
2008	\$2,605,429	\$7,019,739	37.1%
2007	\$2,372,066	\$6,717,684	35.3%

For a complete summary of Annual Program Fund income including breakout by region, see **Appendix 2: Annual Program Fund Statistics**

Congregation contributions to the Annual Program Fund remain steady and are nearly 10% ahead of last year's giving levels. As of December 10, 2007, contributions of \$2,605,429 have been received, representing 37.1% of our \$7,019,739 goal for this fiscal year.

Nearly 80% of member congregations have submitted their FY08 pledges. We are significantly ahead of last year in securing pledges; we currently have pledge commitments representing 87% of our budgeted income, versus 77% committed at this time last year. The APF Committee members are working diligently to secure the remaining pledges. The APF staff is collaborating with the St. Lawrence District and the Joseph Priestley District on joint pledging requests to congregations. Both districts have established a committee structure to shepherd the pledging and tracking processes for both district and APF contributions.

The Annual Program Fund Committee has been engaging in a process of stewardship education, reflection, and best practices training over the past year. This dedicated group of volunteers and representatives meets again in Boston over the weekend of April 11-13, 2008.

### Friends of the UUA

Year to date as of December 11, 2007:

FY	Actual	Goal	% Goal	Avg. Gift	Donors	Avg. per Donor	Median Gift	Largest Gift
FY08	\$ 503,085	\$1,625,000	31.0%	\$ 48	10,413	\$ 73	\$25	\$14,000
FY07	\$ 553,375	\$1,600,000	34.6%	\$ 50	11,018	\$ 71	\$25	\$14,100

Friends of the UUA has made significant progress in the last quarter with the start on October 29 of Liz Baker McClain, our new manager of the Friends program. Liz joins us with experience in direct mail and telephone fundraising at Emerson College and Boston University.

The appeal that we send to prospective donors has been rewritten, and was sent to 145,000 households in October. We are seeing strong response to the updated letter, and also seeing good response to the appeal sent to our regular donors in October. A December appeal on the theme of Peacemaking was mailed this week.

On December 12 we announced our annual Staff appeal, and should have preliminary pledge totals available by the January Board of Trustees meeting, at which we will also be conducting the annual Board of Trustees appeal. We have plans in place for a full schedule of monthly mailings for the remainder of the fiscal year,. We also plan telephone campaigns in February and June to existing donors, and plans to contact an additional 150,000 prospective donors. We are exploring ways to integrate email appeals effectively. We are confident that the campaign consisting of all of these coordinated appeals will be successful in raising our target income of \$1,625,000 for the year.

## LEGACY GIFTS

Legacy Gifts Summary as of 12/11	UUA		UU Entity	Total
	Unrestricted	Restricted		
Matured Gifts – QTD	\$147,985	\$69,643	\$ 156,719	\$374,348
Matured Gifts – YTD	\$182,847	\$69,643	\$ 156,718	\$409,210
New Gifts* - QTD	\$ 5,000	\$ 5,031	\$ 90,756	\$100,788
New Gifts* - YTD	\$20,000	\$55,031	\$232,744	\$307,776
Commitments - QTD		\$ 0	\$ 0	\$ 0
Commitments - YTD	\$ 0	\$336,668	\$120,000	\$456,668

\* New gifts listed at face value; remainder value at maturity generally will be less

We have received total bequest income totaling \$374,348 this quarter, bringing the year to date total to \$409,270, including unrestricted income of \$182, 847 (43% of the annual budgeted income of \$425,000), \$69,643 in maturities of gifts pledged to the Campaign for Unitarian Universalism (CFUU), and umbrella gifts for the benefit of UU congregations and schools of \$156,718. Of the unrestricted income, \$122,338 is from a trust established by Helen D. Pratt during her lifetime.

Three new life income gifts totaling \$100,788 were added so far this quarter, bringing the year to date total to 13 new gifts for a total of \$307,776. We anticipate several more life income gifts before December 31, and will provide an update at the January meeting. With \$323,744 designated for UU entities, almost 76% of the total given to date is designated for congregations and other UU entities.

### “NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS



A CAMPAIGN TO GROW  
UNITARIAN UNIVERSALISM

Once again, we offer our thanks to the Board of Trustees for committing to 100% participation in the *Now is the Time* campaign. Not only has this inspired the UUA’s Leadership Council and the Annual Program Committee to make similar pledges, but has also inspired many donors across the country. For example, at the LREDA conference this fall, the group decided to (for the first time in their history), take a special collection and donate it to the UUA for Association Sunday.

We are pleased to report that as of December 12, 2007, we have secured \$15,045,212 in cash and pledge gifts and \$21,460,372 in bequest gifts towards our goal of \$50 million for *Now is the Time*. Not included in these figures is an additional \$25,131,309 in negotiation. A Campaign Flash Report as of December 12, 2007 is attached to this report; an updated Flash Report is available weekly and will be distributed at the Board of Trustees meeting.

Our efforts to raise money for regional marketing campaigns continue. In collaboration with the Congregational Services Department, we are in the process of securing \$300,000

for the next regional marketing campaign in Tampa Bay (as of December 10, 2007 we have secured over \$205,000 towards this goal). An anonymous donor helped us to boost momentum by contributing a \$75,000 matching gift. In future campaigns, the ability to secure a large lead gift along with donations to create a matching fund will be critical to success. This January, we will begin fundraising for a Dallas/Fort Worth area campaign to be launched in fall 2008.

We are pleased to announce that the 2007 Association Sunday is a success!

As of this writing, Association Sunday has raised approximately \$1.1 million (includes the \$500,000 anonymous matching grant). Already, that represents a significant increase over the total raised by either Ministry Sunday or Mind the Gap Sunday.

Of the 630 congregations who signed up for Association Sunday, over 525 completed their service and sent in their contributions as of December 12, 2007. We are actively engaged in collecting contributions from the remaining congregations, and hope to have a final report in January 2008. These contributions represent 7,370 donors (830 of which were new to the UUA.)

Current projections estimate that we will bring in an additional \$200,000 by the time the dunning is completed.

Association Sunday 2008 will be held on Sunday, October 12, 2008 and funds will be raised for "Growth in Spirit." Congregations may begin signing up for Association Sunday 2008 on our website or by contacting the Stewardship & Development Department.

At the last Board of Trustees meeting, the board challenged the Stewardship & Development Department to come up with a way to be in regular communication with our donors, our board and other constituents about the state of the campaign, and about Association Sunday, in particular. We are pleased to announce that the UUA as a whole is engaging in this process under the direction of Mark Steinwinter, Director of Information Technology Services. While the staff is reviewing best options moving forward, Stewardship & Development has purchased a temporary membership to IContact.com and the first e-newsletter will launch on December 18, 2007.

In addition to new gift activity, we continue to receive payments on pledges made to previous campaigns. So far this year we have received \$165,868 in receipts for the Campaign for Unitarian Universalism (cash pledge receipts of \$13,219 and matured legacies \$152,648).

The continuing positive response to all our programs and campaigns reinforces our overall impression that Unitarian Universalists are showing tremendous generosity to the Association, our congregations, and other UU entities. It is an affirmation that the work of the Board of Trustees, the Administration, and the staff of this Association of Congregations is worthwhile and appreciated by our constituencies. It is also a blessing for our ongoing collaboration to make this a better world.

We are grateful, as always, for President Sinkford's attention to and support of our efforts to create abundance in a culture of gratitude.

## Appendix 1: Annual Program Fund Statistics

<b>FY 2008 YTD</b>		
\$6,717,684	Goal	
\$8,394,612	Total Fair Share	
1,043	Total number of congregations	
\$2,605,429	Total gifts received to date	
31.04%	Current Fair Share dollars received to date	
37.12%	Current goal dollars received to date	
\$6,154,775	Pledged dollars	
73.32%	Current Fair Share dollars pledged	
87.68%	Current goal dollars pledged	
812	Congregations that have pledged	
666	Congregations that have pledged Fair Share	
159	Congregations that have given their full pledge	
120	Congregations that are Fair Share	
<b>Fiscal Year 2008 Year to date</b>		
<b>% Fair Share Dollars Received</b>	<b>DISTRICTS</b>	<b>% Projected* Dollars Received</b>
16.0%	Ballou Channing	37.2%
27.3%	Central Midwest	38.6%
26.1%	Clara Barton	41.2%
0.0%	CLF	0.0%
36.7%	Florida	45.8%
28.5%	Heartland	41.0%
35.1%	Joseph Priestley	42.2%
30.4%	Mass Bay	43.8%
34.1%	Metro New York	46.3%
32.8%	Mid-South	40.2%
40.2%	Mountain Desert	48.9%
30.9%	New Hampshire/Vermont	43.9%
24.9%	Northeast	40.0%
25.0%	Ohio-Meadville	41.2%
33.4%	Pacific Central	38.1%
34.7%	Pacific Northwest	39.7%
36.9%	Pacific Southwest	39.8%
35.3%	Prairie Star	44.4%
31.9%	Southwest	47.1%
27.1%	St. Lawrence	69.5%
34.2%	Thomas Jefferson	37.5%

## Appendix 2: Now is the Time! Comprehensive Campaign State of the Fund Flash Report as of 12/12/07

### Campaign Income Vitals

	Income	Goal	% goal
Cash Gifts	\$ 15,045,212	\$ 20,000,000	75%
Legacy Gifts	\$ 21,460,372	\$ 30,000,000	72%
<b>Campaign Total</b>	<b>\$ 36,505,584</b>	<b>\$ 50,000,000</b>	<b>73%</b>
<i>In Negotiation</i>	<i>\$ 25,131,309</i>	-	-

### Cash Detail (including pledges)

UUA Restricted	\$ 10,522,372
UUA Unrestricted	\$ 123,722
Umbrella	\$ 4,399,117
<b>Total Cash Gifts</b>	<b>\$ 15,045,212</b>
Outstanding Pledges	\$ (4,534,839)

### Umbrella Giving Detail

UU Organizations	\$ 8,643,494
Congregations	\$ 5,881,402
<b>Total Umbrella Gifts</b>	<b>\$ 14,524,897</b>

*Includes both cash and legacy umbrella gifts  
updated 10/15/07*

### Legacy Gifts Detail

UUA Restricted	\$ 9,819,589
UUA Unrestricted	\$ 1,306,382
Umbrella	\$ 10,334,401
<b>Total Legacy Gifts</b>	<b>\$ 21,460,372</b>

### Legacy Gift Vehicles

Bequests	\$ 13,961,035	57
Charitable Gift Annuities	\$ 3,144,940	88
Deferred Gift Annuities	\$ 250,000	7
Pooled Income Funds	\$ 257,136	14
Trust Gifts	\$ 3,842,313	7
Life Insurance Policies	\$ 4,949	2
<b>Totals</b>	<b>\$ 21,460,372</b>	<b>175</b>

*Life income gifts are included at face value*

## Appendix 3: Campaign Cash Receipts

Campaign Income: Cash Receipts	New Gifts FY 08 YTD	Total Prior to 7/1/2007	Cumulative Total
Now is the Time! Campaign	\$ 1,050,322	\$ 8,645,722	\$ 9,696,044
Campaign for UUism	\$ 69,644	\$ 8,938,313	\$ 9,007,957
Handing on the Future			
Total	\$ 1,119,966	\$ 17,584,035	\$ 18,704,001

## Appendix 4: Association Sunday Metrics Summary

# Association Sunday

October 14, 2007

### Totals

**Total Raised: \$626,606**  
**Total # of Gifts: 7,148**  
**Average / Median Gift: \$87.23 / \$50.00**

No. Participating Congregations: 631  
 Total Membership of Participating Congregations: 128,912  
 No. congregations we've received gifts from: 496 / 79%  
 No. congregations reporting in full: 364 / 58%

### District Breakdown

	*Membership	No. of Gifts	Sum of Gifts	Per Member	% Given	*Estimated Grant Size
Ballou Channing	3668	334	\$ 22,218	\$ 6.06	9.11%	\$ 5,555
Clara Barton	2885	198	\$ 16,368	\$ 5.67	6.86%	\$ 4,092
Central Midwest	8439	432	\$ 36,893	\$ 4.37	5.12%	\$ 9,223
Florida	3640	383	\$ 36,514	\$ 10.03	10.52%	\$ 9,129
Heartland	5125	410	\$ 26,337	\$ 5.14	8.00%	\$ 6,584
Joseph Priestley	11745	818	\$ 68,253	\$ 5.81	6.96%	\$ 17,063
Massachusetts Bay	8364	537	\$ 66,673	\$ 7.97	6.42%	\$ 16,668
Metro New York	7227	495	\$ 61,017	\$ 8.44	6.85%	\$ 15,254
Mid-South	1402	109	\$ 7,899	\$ 5.63	7.77%	\$ 1,975
Mountain Desert	3978	335	\$ 22,916	\$ 5.76	8.42%	\$ 5,729
New Hampshire-Vermont	2235	162	\$ 11,509	\$ 5.15	7.25%	\$ 2,877
Northeast	614	34	\$ 3,002	\$ 4.89	5.54%	\$ 751
Ohio-Meadville	4086	239	\$ 15,306	\$ 3.75	5.85%	\$ 3,827
Pacific Central	5641	438	\$ 42,743	\$ 7.58	7.76%	\$ 10,686
Pacific Northwest	4849	357	\$ 26,416	\$ 5.45	7.36%	\$ 6,604
Pacific Southwest	5865	521	\$ 52,620	\$ 8.97	8.88%	\$ 13,155
Prairie Star	4090	399	\$ 23,397	\$ 5.72	9.76%	\$ 5,849
Southwest	7545	347	\$ 37,928	\$ 5.03	4.60%	\$ 9,482
St. Lawrence	3540	206	\$ 12,443	\$ 3.51	5.82%	\$ 3,111
Thomas Jefferson	7487	394	\$ 33,060	\$ 4.42	5.26%	\$ 8,265
	<b>102425</b>	<b>7148</b>	<b>\$ 623,512</b>	<b>\$ 6.09</b>	<b>6.98%</b>	<b>\$ 155,878</b>

*^ Membership does not reflect the entire district, but rather the membership of the participating congregations who have made at least one gift.*

*\* Does not include individual congregational matching gifts.*

Prepared by LStritof 12/11/2007

## Appendix 5: UUA UUSC Gulf Coast Volunteer Fund

UUSC UUA Gulf Coast Volunteer Fund Income as of 12/12/07 †			
	Volunteer	Congregations	Totals
Income FY 07	\$ 152,940	\$ 24,474	\$ 177,414
Income FY 08	\$ 22,648	\$ 3,290	\$ 25,938
Outstanding Pledges*	\$ 4,710	\$ 455	\$ 5,165
<b>Subtotal Income</b>	<b>\$ 180,298</b>	<b>\$ 28,219</b>	<b>\$ 208,517</b>
Online Credit Card Fees 5%	\$ (92)	\$ (18)	\$ (110)
Offline Credit Card Fees 3.3%	\$ (1,166)	\$ (196)	\$ (1,362)
Fundraising Expenses	\$ (31,922)	\$ (5,164)	\$ (37,086)
Outstanding Pledges	\$ (5,930)	\$ (655)	\$ (6,585)
Distributed Funds 7/13/07	\$ (114,965)	\$ -	\$ (114,965)
Distributed Funds 9/14/07	\$ (16,886)	\$ (21,626)	\$ (38,512)
<b>Subtotal Expense</b>	<b>\$ (170,962)</b>	<b>\$ (27,659)</b>	<b>\$ (198,620)</b>
<b>Net Totals</b>	<b>\$0.00</b>	<b>(\$0.00)</b>	<b>(\$0.00)</b>

\* while we count pledges in the totals, some of this we may never receive.  
† chart includes fund raised from the April Friends appeal and the General Assembly collection.

**Notes**  
- \$67,369.89 was raised during General Assembly in Portland OR.

## ***Appendix 6: Stories of Generosity***

***Gift of the Week – October 31, 2007***

**Richard (Dick) Irwin Brown**

**Who Got It:** First Unitarian Universalist in Ann Arbor and the Unitarian Universalist Association

**How it happened:**

Dick Brown is a Wisconsin native who received his doctorate in Nuclear Physics from the University of Wisconsin at Madison in 1961. His first teaching job was at the University of Sao Paulo, Brazil, where he helped establish a nuclear physics lab. He met and married his wife Marina Borriello Brown in that city.

As a member of the First Universalist congregation of Ann Arbor, Dr. Brown devoted much of his time to supporting causes in which he believed. These included nuclear disarmament, protection of the environment, energy efficiency, global warming, reproductive rights, civil rights, the United Nations, Interfaith Hospitality Network, and many more. He helped design a new religious education wing that would be energy efficient and friendly to the environment.

In addition to many gifts to Friends of the UUA and special appeals, Dick Brown recently funded two charitable gift annuities, each for \$50,000. He dedicated one to the Jackson Social Welfare Fund at First Unitarian Universalist in Ann Arbor; the other to the Unitarian Universalist Association. Dr. Brown's is a great example of living and giving one's values.

Unitarian Universalist Association  
Stories of Generosity

*Gift of the Week – November 7, 2007*

**Fox Valley UU Fellowship, Appleton, Wisconsin**

**Who Got It:** Annual Program Fund

**How it happened:**

It has been twelve years since the Fox Valley UU Fellowship has been able to achieve their full Annual Program Fund Fair Share contribution. At that time, the Fellowship had 161 members and 120 children and youth in their Religious Education Program. Since then, Fox Valley has built a new building, added staff, and expanded their membership to 565—up from 458 in 2006-2007. Senior minister Rev. Roger Bertschausen has served the congregation for seventeen years. He and congregation leaders have been working to steadily increase their APF contributions since 2000.

With such significant growth, the financial strains have been substantial. However, with an intentional commitment to growth, the FVUUF has a number of practices to attract and develop new members. They advertise weekly, use highly visible signage and banners, and are known for their non-traditional weddings. Word of mouth has drawn many guests to their doors.

The Fellowship has completed a feasibility study for a new building expansion project which will begin next spring.

During a recent visit to the Fox Valley UU Fellowship, Neil Lichtman, Central Midwest District APF Committee representative, and Laurel Amabile, APF Director, met with Rev. Bertschausen and four other members of the FVUUF staff team. Now that the congregation has grown to more than 550 members, they can choose to contribute 4.2% of their annual operating budget.

The congregation has stretched to budget and pledge its full Fair Share of \$23,805 for this fiscal year, and intends to continue to grow and prosper.

Unitarian Universalist Association  
Stories of Generosity

*Gift of the Week – November 14, 2007*

**Liberal Religious Educators' Association (LREDA)**

**Who Got It:** Association Sunday

**How it happened:**

The first annual Association Sunday was scheduled for October 14, 2007, a Sunday when most Religious Education Professionals would be attending their annual conference, and thus unable to participate with their congregations. The members of LREDA graciously accepted the UUA's apology for this scheduling conflict, as well as the offer of having a special Sunday service during their conference with Association Moderator, Gini Courter, as speaker.

The service proved a great inspiration. LREDA members took the opportunity not only to connect spiritually with our Association of Congregations on this day, but to support Association Sunday financially as well. They diligently worked to find a way to contribute to this fundraising effort, despite the fact that the conference rarely, if ever, includes a special collection. During the closing session of their conference, LREDA members chose to pool their resources in support of Association Sunday, and collected 57 checks totaling \$3,369.00.

The members of the Liberal Religious Educators' Association meeting in San Antonio, TX demonstrated their graciousness, professionalism, and commitment to all aspects of our movement. We deeply appreciate their persistent, pervasive, and inspirational leadership.

Unitarian Universalist Association  
Stories of Generosity

*Gift of the Week – November 28, 2007*

**Ronald & Janet Partin**

**Who Got It:** Unitarian Universalist Fellowship of Hendersonville, North Carolina

**How it happened:**

Ron and Janet Partin decided that they wanted to make a generous gift to their congregation by giving a gift of mutual funds, but unfortunately no one at Hendersonville had the expertise to make this transfer possible. After trying for several months to give this gift, Ron was about to give up. Eventually, he called Stewardship and Development at the UUA to find out if there was any information he could pass along to his congregation to help them to accept his gift.

Ron was delighted, instead, to find out that the UUA could easily process his \$3,800 gift through the umbrella giving program. He could make a gift to the UUA with 100% of the funds restricted for the Unitarian Universalist Fellowship of Hendersonville. A few weeks later, the transfer took place and the funds were sent directly to UUFH; the Partins were thrilled to be able to support the congregation they love with just a little bit of help from the Association.

Unitarian Universalist Association  
Stories of Generosity

*Gift of the Week – December 5, 2007*

The Tennessee Valley UU Church, Knoxville, TN

**Who Got It::** Annual Program Fund

**How it happened:** After a 15-year period of steady membership growth, prosperity, and APF Fair Share giving, the Tennessee Valley UU Church was ready to pause, take time to assess its needs and its finances. TVUUC leaders had choices to make about staffing and determined it was important to increase the Music Director's hours in keeping with their developing music program. Circumstances resulted in a reduction in APF contributions in 2006, but not for long.

The congregation decided it was a good time to take advantage of the UUA's Congregational Stewardship Services. That's when Larry Wheeler, one of the UUA's long-time consultants arrived on the scene to engage the members of the TVUUC in a process that would bring about a new understanding of their stewardship efforts.

"Larry worked very well with the Stewardship Team," reports Rev. Chris Buice, minister of the church since 1991. "He brought about a new awareness and appreciation for Fair Share giving. The process stimulated new growth and creativity in the church."

*HOW?* Part of the process was the development of a covenant among the members that clarifies the importance of active stewardship in congregation life. The covenanting process resulted in a new spirit of cooperation and generosity.

*RESULTS?* An ambitious budget was set forth and the members and friends of Tennessee Valley UU Church met the challenge. They not only contributed enough to fund their proposed budget, but exceeded their goal by \$20,000.

TVUUC's impressive generosity is also expressed in their give-away program, established to help fund their social justice efforts. The frequency increased from once a month to twice a month. They are very active in the care and support of the greater Knoxville's low income and homeless population, serving as a host organization for homeless families.

A long-range planning process is now underway and the church has resumed its Fair Share giving as one of our APF Honor Congregations.

Unitarian Universalist Association  
Stories of Generosity

*Gift of the Week - December 12, 2007*

**Edwina D. Stranahan**

**Who Got It:** Friends of the UUA

**How it happened:** Friends of the UUA recently mailed prospects outside of the UU community, searching for like-minded individuals who share our values. One of these new prospects was Mrs. Edwina D. Stranahan.

Mrs. Stranahan, who has recently gone blind, took the time to write us a two page letter to accompany her gift. In her letter she shares a story of deep spiritual and political involvement. She served for ten years as circuit minister serving as many as five congregations a week. While not a member of a UU congregation, Mrs. Stranahan felt so moved by the work of the UUA that she made a \$25 financial contribution as a gesture of appreciation for our mission.