

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: May 19, 2008

SUMMARY

Unrestricted Income	As of 5/13/08¹
Annual Program Fund	\$ 5,554,855
Friends of the UUA	\$ 1,277,576
Unrestricted Gifts	\$ 13,972 ²
Legacy Gifts	\$ 361,749
Subtotal Unrestricted Income	\$ 6,846,403

Restricted Income (Year to date FY 08)	
Now is the Time! Campaign	\$ 2,496,904
Campaign for UUism	\$ 141,426
Handing on the Future	\$ 14,063
Subtotal Restricted Income	\$2,652,393

¹ Actual income through May 13; updated report through May 31 will be provided

² Through March 31

- Association Sunday 2007 brought together 619 congregations and raised \$1,417,808.
- The *Now is the Time* Campaign has raised over \$38.6 million, with another \$16.8 million in negotiation.

ANNUAL PROGRAM FUND

Year to date as of May 13, 2008:

FY	Actual	Goal	% to Goal
2008	\$5,623,082	\$7,019,739	80.1%
2007	\$5,554,855	\$6,717,684	82.7%

For a complete summary of Annual Program Fund income including breakout by region, see *Appendix 1: Annual Program Fund Statistics*.

The APF Committee met in April for their annual spring meeting, focusing on the practices and communication strategies necessary for promoting high levels of congregational stewardship and APF giving. The staff is carefully tracking congregational giving data and providing additional support and information to congregations, as needed. The Annual Program Fund will have a visible presence at the 2008 Ministry Days and General Assembly, featuring a new Annual Program Fund brochure.

As of May 12, 2008, contributions totaled \$5,623,082, or 80% of the \$7,019,739 goal. This compares to contributions of \$5,554,855 at this time last year. It is expected that the Annual Program Fund will meet its goal of \$7,019,739 by the close of the fiscal year.

FRIENDS OF THE UUA

Year to date as of May 13, 2008:

FY	Actual	Goal	% Goal	Avg. Gift	Donors	Avg. per Donor	Median Gift	Largest Gift
FY08	\$1,026,422 ⁱ	\$1,625,000	63.2%	\$ 55	11,035	\$ 91	\$25	\$15,000
FY07	\$1,020,600 ⁱⁱ	\$1,600,000	63.8%	\$ 56	11,151	\$ 94	\$25	\$14,100

ⁱ Includes \$34,326 income for UUSC Gulf Coast funds in FY08

ⁱⁱ Includes \$55,775 income for UUSC Gulf Coast funds in FY07

Year to date Friends income has caught up with last year's "to date" income at this time. Based on returns for similar appeals at similar times in previous years, we estimate that the Friends program will bring in approximately \$1.5 million in income this fiscal year, equal to our results for last year but below our \$1.625 million goal.

An appeal based on the Green Sanctuary program was sent to over 25,000 households in April, timed to coincide with Earth Day. Initial response has been good.

In May our donors are being approached on the theme of The Washington Office for Advocacy. A "lift note" was added to the May mailing with a suggestion that UUs consider donating all or part of their "economic stimulus" tax rebate to the UUA. The economic stimulus "lift note" has also been included in our upcoming mailing to congregants who are not current donors to the Friends program. In order to spread this message to as many households as possible, the total number of households receiving this mailing has been increased to 72,000. Several gifts have already been received in response to this mailing to date.

As part of our ongoing efforts to ensure that our program is as effective as possible, we have solicited proposals from several vendors (including the incumbent) for the provision of direct mail consulting and execution. All vendor finalists have been asked to provide a proposal including Forest Stewardship Council certification and use of recycled paper.

LEGACY GIFTS

Legacy Gifts Summary as of 5/14	UUA		UU Entity	Total
	Unrestricted	Restricted		
Matured Gifts – QTD	\$ 4,916	\$ -	\$ 8,678	\$ 11,653
Matured Gifts – YTD	\$ 361,749	\$ 84,453	\$ 192,425	\$ 638,627
New Gifts* - QTD	\$ 5,753	\$ -	\$ 67,248	\$ 73,002
New Gifts* - YTD	\$ 205,875	\$ 56,031	\$ 712,940	\$ 974,846
Commitments - QTD	\$ -	\$ 355,000	\$ -	\$ 355,003
Commitments - YTD	\$ 1,509,600	\$ 901,667	\$ 823,744	\$3,235,003

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

During the fourth quarter we have received matured bequest income totaling \$11,653, bringing the year to date total to \$638,627. This includes: unrestricted income of \$361,749 (85% of the annual budgeted income of \$425,000), \$84,453 for restricted purposes, and \$192,425 for umbrella gifts that benefit other UU entities.

We have received three new subsequent life income gifts totaling \$73,002, bringing the year to date total to twenty-five new gifts for a total of \$974,846. Of this total \$205,875 is unrestricted, \$56,031 is restricted, and \$712,940 (73%) is designated for UU entities.

Bequest intentions for this fiscal year now total \$3,235,003. Of this total, \$1,509,602 is unrestricted, \$901,667 is restricted, and \$823,734 is designated for UU entities.

“NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS



**NOW IS
THE TIME**

A CAMPAIGN TO GROW
UNITARIAN UNIVERSALISM

We offer our thanks to the Board of Trustees for their continued support of the *Now is the Time* Campaign.

We are pleased to report that as of May 13, 2008, we have secured \$16,034,760 in cash and pledge gifts and \$22,617,597 in bequest gifts towards our goal of \$50 million for *Now is the Time*. Not included in these figures is an additional \$16,818,440 in negotiation. A campaign Flash Report as of May 13, 2008 is attached to this report; an updated Flash Report is available weekly and will be distributed at the Board of Trustees meeting.

The Tampa Bay Area UU Regional Marketing Campaign came to a successful close this spring. Stewardship and Development staff, along with staff from Congregational Services, will visit the Tampa area and present a final report at the end of May.

The UUA’s National Awareness Campaign is a major focus for the fundraising staff. Anecdotal reports reveal that donors are excited about the advertising in *TIME* magazine and are eager to see the next round of national marketing. To date, almost \$900,000 has been raised since January 1, 2008 to fund national awareness projects.

The Legacy department sent a postcard to 10,000 donors who would be eligible to create Charitable Gift Annuities at the UUA, to inform them of the pending rate change in June. So far, we have seen an increase in requests as a result of this postcard.

As of this writing, Association Sunday 2007 has raised approximately \$1.4 million (including the \$500,000 anonymous matching grant) from over 8,500 donors and over 630 congregations. District Growth Grant distributions (representing \$330,784.09) were mailed to districts on May 1, 2008. Some districts have accrued more in grant funding since May 1 and additional checks will be distributed in July 2008. Our final report on Association Sunday 2007 is available online at www.uua.org/associationsunday.

Association Sunday 2008 will be held on Sunday, October 12, 2008. So far, 100 congregations have signed up to participate (see attached list).

The Stewardship and Development staff group's "Giving and Generosity" e-newsletter continues to be successful. Thanks to the support of the Board of Trustees, the newsletter is getting excellent response. So far, the e-newsletter has been viewed over 29,000 times since December 2007, and has raised \$2,035.

In addition to new gift activity, we continue to receive payments on pledges made to previous campaigns. So far this year we have received \$141,426 in receipts for the Campaign for Unitarian Universalism (cash pledge receipts of \$63,376 and matured legacies \$78,050). Currently we have just four outstanding CFUU pledges.

Stewardship and Development welcomes a new staff member, Devin Letzer. Devin is a Campaign Assistant and will focus on supporting Association Sunday. Larry Stritof was promoted in January from Campaign Specialist to Coordinator of Legacy Gifts.

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

FY 2008		
\$7,019,739	Goal	
\$8,378,627	Total Fair Share	
1,047	Total number of congregations	
FY 2008 YTD		
\$5,622,034	Total gifts received to date	
67.10%	Current Fair Share dollars received to date	
80.09%	Current goal dollars received to date	
\$6,657,555	Pledged dollars	
79.46%	Current Fair Share dollars pledged	
94.84%	Current goal dollars pledged	
\$7,062,832	Projected dollars*	
84.30%	Current Fair Share dollars projected*	
100.61%	Current goal dollars projected*	
911	congregations that have pledged	
730	congregations that have pledged Fair Share	
430	congregations that have given their full pledge	
336	congregations that have given Fair Share	
FY 2008 YTD		
% Fair Share Dollars received	DISTRICTS	% Projected Dollars received*
44.5%	Ballou Channing	76.0%
59.4%	Central Midwest	74.4%
55.4%	Clara Barton	78.4%
75.0%	CLF	75.0%
77.7%	Florida	79.6%
64.3%	Heartland	72.0%
75.2%	Joseph Priestley	82.7%
64.9%	Mass Bay	80.4%
66.6%	Metro New York	68.6%
74.5%	Mid-South	76.0%
73.8%	Mountain Desert	82.0%
60.0%	Nothern New England	79.5%
55.2%	Ohio-Meadville	79.9%
75.3%	Pacific Central	79.5%
74.8%	Pacific Northwest	80.3%
80.2%	Pacific Southwest	84.9%
68.2%	Prairie Star	78.4%
73.9%	Southwest*	92.5%
72.6%	St. Lawrence*	90.2%
73.5%	Thomas Jefferson	78.1%
44.5%	Ballou Channing	76.0%
* Districts for which APF does not have complete projections		

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



Now is the Time! Comprehensive Fundraising Campaign

State of the Campaign Flash Report
Tuesday, May 13, 2008

Campaign Income Vitals

	Income	Goal	% goal
Cash Gifts	\$ 16,034,760	\$ 20,000,000	80%
Legacy Gifts	\$ 22,617,597	\$ 30,000,000	75%
Campaign Total	\$ 38,652,357	\$ 50,000,000	77%
<i>In Negotiation</i>	\$ 16,818,440	-	-

Cash Detail (including pledges)

UUA Restricted	\$ 11,374,610
UUA Unrestricted	\$ 239,682
Umbrella	\$ 4,420,468
Total Cash Gifts	\$ 16,034,760
Outstanding Pledges	\$ (4,376,762)

Umbrella Giving Detail

UU Organizations	\$ 7,930,203
Congregations	\$ 5,934,348
Total Umbrella Gifts	\$ 13,864,550

Includes both cash and legacy umbrella gifts.

Legacy Gifts Detail

UUA Restricted	\$ 8,172,849
UUA Unrestricted	\$ 5,000,665
Umbrella	\$ 9,444,083
Total Legacy Gifts	\$ 22,617,597

Legacy Gift Vehicles

Bequest	\$ 17,345,996	88
Gift Annuity	\$ 4,133,055	197
Remainder Unitrust	\$ 876,409	32
Pooled Income Fund	\$ 262,136	27
Life Insurance	\$ 1	1
Totals	\$ 22,617,597	345

Legacy gifts are included at face value

Now is the accepted time, not tomorrow, not some more convenient time...

- W.E.B. DuBois

Totals as of 5/13/2008

These figures have not been reconciled with finance.

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	\$ 2,498,904	\$ 9,004,684	\$11,503,588
Campaign for UUism	\$ 141,426	\$ 8,938,313	\$9,079,739
Handing on the Future	14,063		
Total	\$2,654,393	\$17,942,997	\$20,583,327

Appendix 4: Association Sunday 2008 Enrolled Participants

District Territory	Participant Name
Ballou Channing	First Parish Brewster Brewster Massachusetts
	First Parish UU Canton Canton Massachusetts
	Unitarian Church of Sharon Sharon Massachusetts
	Channing Memorial Church Newport Rhode Island
Central Midwest	UU Fellowship of Jefferson City Jefferson City Missouri
	Eliot Unitarian Chapel St Louis Missouri
	Fox Valley UU Fellowship Inc. Appleton Wisconsin
	First Unitarian Society of Milwaukee Milwaukee Wisconsin
	First Universalist Unitarian Church Wausau Wisconsin
	Clara Barton
	Unitarian Society of New Haven Hamden Connecticut
	Unitarian Society of Hartford Hartford Connecticut
	UU Church in Meriden Meriden Connecticut
	The Universalist Church of West Hartford West Hartford Connecticut
Florida	UU Church in the Pines Brooksville Florida
	UU Church of Fort Lauderdale Fort Lauderdale Florida
	UU Fellowship of Gainesville Gainesville Florida
	Buckman Bridge UU Society Orange Park Florida
	River of Grass UU Congregation Plantation Florida
Heartland	UU Church of Muncie Muncie Indiana
	Birmingham Unitarian Church Bloomfield Hills Michigan
	UU Church of East Liberty Clarklake Michigan
Joseph Priestley	All Souls Church Unitarian Washington District of Columbia
	UU Church of Annapolis Annapolis Maryland
	Cedar Lane UU Church Bethesda Maryland
	River Road UU Congregation Bethesda Maryland
	UUs of the Chester River Chestertown Maryland
	Unitarian Church of Harrisburg Harrisburg Pennsylvania
	UU Church of Lancaster PA Lancaster Pennsylvania
	UU Church of Delaware y Media Pennsylvania
	First Unitarian Church Philadelphia Pennsylvania
	Unitarian Society of Germantown Philadelphia Pennsylvania
	First UU Church Berks y Reading Pennsylvania
	UU Fellowship of Centre y State College Pennsylvania
	Mt Vernon Unitarian Church Alexandria Virginia
Massachusetts Bay	King's Chapel Boston Massachusetts
	First Parish in Concord Concord Massachusetts
	Melrose UU Church Melrose Massachusetts
	United First Parish Church (Unitarian) in Quincy Quincy Massachusetts
	First Parish Church in Waltham UU Inc. Waltham Massachusetts

Appendix 4: Association Sunday 2008 Enrolled Participants

District Territory	Participant Name
	UU Society of Wellesley Hills Wellesley Hills Massachusetts
	First Parish Church in Weston Weston Massachusetts
	Metro New York
	The Unitarian Church in Westport Westport Connecticut
	Morristown Unitarian Fellowship Morristown New Jersey
	First Unitarian Congregational Society Brooklyn New York
	UU Congregation at Shelter Rock Manhasset New York
	Unitarian Church of All Souls New York New York
	UU Congregation at Rock Tavern Washingtonville New York
	UU Fellowship of the Poconos Stroudsburg Pennsylvania
Mid-South	Northwest UU Congregation Atlanta Georgia
	UU Metro Atlanta North Congregation Roswell Georgia
	UU Church of Jackson Jackson Mississippi
	Mountain Desert
	First Universalist Church of Denver Denver Colorado
	UU Fellowship of Durango Durango Colorado
	Jefferson Unitarian Church Golden Colorado
	The Boulder Valley UU Fellowship Lafayette Colorado
	Prairie UU Church Parker Colorado
Ohio-Meadville	UU Congregation of Greater Canton Canton Ohio
	West Shore UU Church Cleveland Ohio
	First UU Church of Columbus Columbus Ohio
	UU Church of Blanchard Valley Findlay Ohio
	UU Fellowship of Lima Ohio Inc. Lima Ohio
	First Universalist Church (UUA) New Madison Ohio
	UU Congregation of Erie Erie Pennsylvania
Pacific Central	UU Fellowship of Los Gatos Los Gatos California
	UU Community Church Sacramento California
	UU Fellowship Stanislaus y Salida California
	First Unitarian Church of San Jose San Jose California
Prairie Star	The UU Fellowship of Salina Salina Kansas
	First Unitarian Society of Minneapolis Minneapolis Minnesota
	First UU Church Rochester Minnesota
	Unity Church Unitarian Saint Paul Minnesota
	All Souls UU Church Kansas City Missouri
	Unitarian Society of Menomonie Menomonie Wisconsin
Southwest	First Unitarian Church Memphis Tennessee
	First UU Church of Austin Austin Texas
	The First Unitarian Church of Dallas Dallas Texas
	Bay Area UU Church Houston Texas
	Northwest Community UU Church Houston Texas
	Comal y UU Society New Braunfels Texas

Appendix 4: Association Sunday 2008 Enrolled Participants

District Territory	Participant Name
	Community UU Church San Antonio Texas
St. Lawrence	Pullman Memorial Universalist Church Albion New York
	UU Congregation Binghamton New York
	UU Church of Buffalo Buffalo New York
	UU Church of East Aurora East Aurora New York
	UU Church of Hamburg Hamburg New York
	First Unitarian Church Rochester New York
	UU Church of Amherst Williamsville New York
Thomas Jefferson	UU Congregation of the Outer Banks Kitty Hawk North Carolina
	UU Fellowship of Raleigh Raleigh North Carolina
	Westside UU Church Knoxville Tennessee