

- The Financial Advisor Role
- Growth
- Resources
- Ongoing Work
- The Ledger
- Tribute to Good Stewardship
- My Annual Plea for Stronger Commitment to Growth!



Role of the Financial Advisor

- Provides the President, Board of Trustees, & General Assembly with an independent and expert evaluation of financial issues and the fiscal health of the UUA, and
- Recommends changes that will improve the quality of fiscal planning and management of the UUA

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Board of Trustees
Executive Committee
Finance Committee
Administrative Organization
& Personnel Committee
Investment Committee
Congregational Properties & Loan Commission
Committee on Compensation, Benefits & Pension
Committee on Socially Responsible Investing
Fulfilling the Promise Committee
Various ad hoc committees



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Various ad hoc committees

**Ministerial Scholarship
Committee**

**YRUU Restructuring
Task Force**



Standards (Principles & Values)

- 1. A Clear Religious Message**
- 2. A Continental Program Worthy of Support**
- 3. Strategic Planning**
- 4. Expanding Resources**
- 5. Strong Endowment Performance**
- 6. Conservative Budget Management**





Standards (Principles & Values)

7. Creative Use of Assets
8. Explicit Policies Consistently Applied
9. Risk Avoidance
10. Low Overhead
11. Quality Financial Information
12. Skilled and Knowledgeable People
13. Don't Forget Beacon Press!



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*Website
with extensive
information!*

www.uua.org/TRUS/financial/

- Financial Statements
- Annual Reports to GA
- Reports to Board of Trustees
- UUA Financial Monitor
- UUA Statistics
- Standards for Financial Performance
- Bylaws on Finances
- Information on Church Staff Finances
- Information on Church Financial Management



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Growth



Growth in Numbers

Membership Up to 155,449 in 2000:

- 0.6% higher than 1999
- 8.8% higher than 1990
- 11.6% higher than 1985



*We continue
to grow!*



Growth in Numbers

RE Enrollment Up to 61,482 in 2000:

- 0.5% higher than 1999
- 22.4% higher than 1990
- 57.6% higher than 1985



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Source: CCM Database



Growth in Numbers

RE enrollment is growing faster than adult membership!

Membership Up to 155,449 in 2000: **RE Enrollment Up to 61,482 in 2000:**

- | | |
|--------------------------|--------------------------|
| • 0.6% higher than 1999 | • 0.5% higher than 1999 |
| • 8.8% higher than 1990 | • 22.4% higher than 1990 |
| • 11.6% higher than 1985 | • 57.6% higher than 1985 |



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We continue to grow!



Growth in Numbers

Combined Up to 216,931 in 2000:

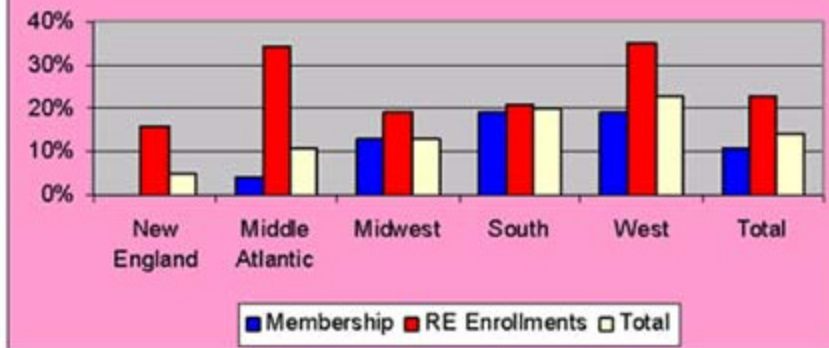
- 0.6% higher than 1999
- 12.3% higher than 1990
- 21.7% higher than 1985



We continue to grow!



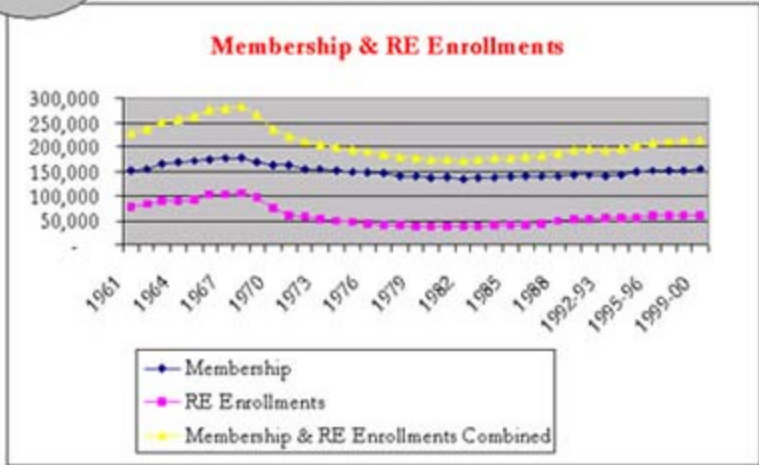
Growth in Membership & RE Enrollments 1991 to 2000



We continue to grow!



Growth in Numbers



Source: CCM Database 17

Our "market share" is very small!!!



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Resources



Growth in Giving



APF & Friends Giving Per Member Up to \$36.94:

- 5.4% higher than 1999
- 35.9% higher than 1990
- 72.3% higher than 1985

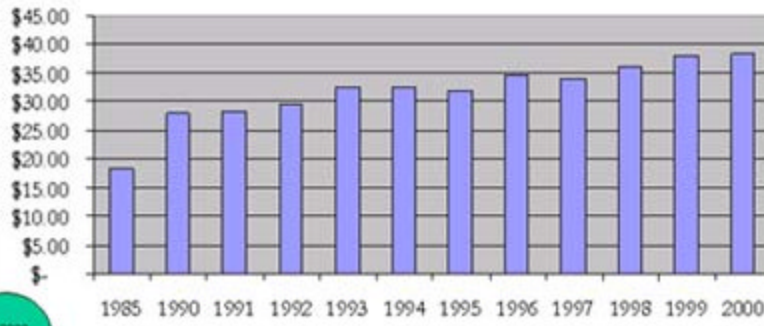


Our resources are growing!



Growth in Giving

APF& Friends Giving Per Member
(In 2000 Dollars)



In 2000 Dollars

Source: OCM Drawing 22



Other Good News:

- Budgets Balanced (*fifth year in a row!*)
- Endowment Performance Adequate (*after three very strong years*)
- Excellent Fundraising Achievement
- Improved Church Staff Compensation
- Socially Responsible Investing

Workshop
Monday 8 am
Convention Ctr.
Rm. 206



Socially Responsible Investing

- More Proactive
- New Committee
- Link to ICCR (Interfaith Center for Corporate Responsibility)
- Proxy voting, stockholder activism
- Alternative Investments
- Guidance to Local Congregations

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Workshop
Monday 8 am
Convention Ctr.
Rm. 206



Stockholder Activism

- UUA files shareholder resolution to prohibit discrimination based on sexual orientation
- Home Depot amends its policy!
- ExxonMobil is next!



Workshop
Monday 8 am
Convention Ctr.
Rm. 206



Stockholder Meeting

May 20, 2001



“ Mr. Chairman, fellow shareholders, my name is Rev. Kurt Kuhwald...I am here on behalf of the Unitarian Universalist Association and its shareholder proposal.....It gives me great pleasure to speak for the 200,000 members of our Association.....”

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Ongoing Work:



- Beacon Press
- Linking Planning to Budgeting
- Growth



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The Ledger

- We are growing.
- Giving is increasing.
- Budgets have been balanced.
- Endowment performance is adequate.
- We are pro-active in SR investing.
- Compensation is improving.
- We are not growing enough!
- Giving is not increasing enough!
- We need a strategy for Beacon Press.
- Compensation needs more improvement.

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Tribute to Good Stewardship



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John Buehrens



- Fundraising Achievement
- Financial Transparency
- Sound Fiscal Practices

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My Annual Plea for Stronger Commitment to Growth





- Unitarian Universalism is growing..
- But very slowly.
- We are stuck, between
- The “mainline” Protestant churches that continue to decline, and
- The “non-denominational” large churches that are growing very rapidly.

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“Mainline” Protestantism

- Large regional and national bureaucracies
- Much time spent on internal disputes
- Talk across denominations
- Congratulate themselves on their virtues
- Treat all congregations equally, with no special attention to the larger growing ones
- No sense of urgency for spiritual transformation
- Ask very little in terms of spiritual or financial commitment

•Evangelism is largely absent

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Growing Churches

- Clear and simple religious message
- Not affiliated, or loosely affiliated, with a denomination
- Very high expectations of their members
- Focus on spiritual transformation of members, not internal disputes over governance or policy
- Never satisfied with status quo
- Leadership is ministry to others

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Growing Churches

- Few or no committees!
- Externally focused
- Program focused: meeting the needs of their members
- High involvement with and expectations for their youth
- Knowing they have found a good thing, they want to share it with the world!

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How Can We Grow?

- Focus on growth as a strategic priority, measuring each move with respect to whether it helps us to grow
- Stop emulating, in our own behavior, the mainline Protestant denominations
- Focus more energy on the larger, growing churches in our movement
- The larger churches are 4% of our congregations but 21% of our adult members!

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How Can Your Congregation Grow?

- Externally rather than internally focused
- High expectations of members
- Meet the needs of your members
- Mission not governance
- Be truly transformational and personal
- Be worthy of our youth and young adults!

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Thank your for
the opportunity to serve!

God bless you!

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