

**Funding in Times of Scarcity**  
**A Conversation with the Panel on Theological Education**  
**May 15, 2004**

Present: Barry Andrews, chair; David Pettee; Marvin Ellison; John Weston; Ned Wight; Rosemary Bray McNatt; Bill Sinkford; Rebecca Parker; Lee Barker

Barry Andrews began the conversation by describing what he called  
“The Perfect Storm of Theological Education”

Schools are under financial constraints

Funding programs are under financial constraints

Costs of theological education are rising

- This conversation is being held in an attempt to re-vision our work to strategize in creative ways. The Panel will have less money to work with in FY '05 than in FY' 04. 13 quarters is a long time.
- I have several heretical things to say. If it were left to me to decide what really matters I would do several things. Create a continuum from student to post-graduate care. Take leadership role in funding for internships. Focus attention on Meadville Lombard and Starr King, not on Harvard Divinity. Our money could be put to better use for our own schools. Harvard is a non-UU theological school. We should invest money in scholars or energy to create money for PhD work in order to have people prepared to teach.
- We need to engage in the next step of discernment in terms of Harvard Divinity School. The needs of the three schools are so vastly different. HDS considers themselves short of funding, but realistically speaking, their needs are radically different than our schools needs.
- I want to pick up the third point. It should be a priority of this panel, and of the UUA, to support PhD study.
- The UUA capital campaign is targeting money to support the schools. There is an on-going conversation with donors in support of that kind of giving. With so many demands on the same donors it is hard to maintain a consistent queue.
- There has been a shift in donations. Now money is being given for operating budget money rather than capital campaign gift. One of the dilemmas is to build an endowment. Starr King talks about the challenge of Unitarian Universalism to invest in its institutions. Donors have asked how come there is no endowment. We are always trying to fund the operating budget. There needs to be a focus on discretionary income and value issues. The value of investing in institutions and the notion of stewardship need to form the core of the discussion in order to develop a culture of giving as a spiritual value.
- We could use the Umbrella Giving Program as a teaching tool. Encourage giving to Meadville Lombard and Starr King as a legacy. Have the UUA development staff solicit funds to UU institutions. The UUA doesn't take a cut of these gifts; all costs are absorbed by the UUA. The institution is starting to act healthier than we actually are. This is an opportunity to model generosity and commitment. We

have a 20-40 year window right now. This is the time to work with 50's generation, not in 20 years.

- There is a time lag; capital fund raising in the 1980's was only in the form of cash donations. We now have a backlog of maturing gifts. And we are putting into place relationships that we hope will create more.
- Conservative groups have no trouble funding their projects. Long term funding of operational budgets is standard for them in order to sustain development. We need to follow that lead.
- Not an issue for me. Can we fund forever this way? This could create a burden for the schools to sustain.
- I want to be clear that we cannot fund one school at the expense of the other. Conservatives fund much more strategically. We may not be prepared to do this.
- We need to pay attention to relationships, be extremely patient, take a longer view. Taking a long view in hard economic times is difficult but strategically important.
- I think a percentage of each gift should go to endowment. A commitment to the seventh generation, if you like. How can we cultivate commitment, consciousness and excitement?
- There is nothing wrong in Unitarian Universalist theological education that money cannot improve. I intend to use the umbrella fund to buy \$250,000 life insurance policy on which I will make the payments. The money would be divided between Meadville Lombard and Starr King. I think that people should not take a long term on the Panel. We need to bring more people into the conversation. I would not have included both schools had I not just done this site visit. By the way, I would welcome a soapbox at GA.
- This is a creative opportunity to maximize giving. It allows people to create a meaningful legacy with minimum funds. What a wonderful message.
- Thank you for including both the schools. Each would be less without the other; that is the message we are trying to promote.
- This emphasizes what people are capable of, instead of asking for a dollar amount. This level of giving is entirely possible. We need to cultivate a creative attitude toward resources. The Panel can exercise leadership in this arena. The policies the Panel puts into place can make a witness. The commitment to umbrella giving by the UUA Board of Trustees has made a difference already.
- There is the question of Harvard Divinity School. Is there some way the Panel can use its influence to direct students to the UU schools?
- Is there a way to encourage policies and practices to enable people to come to UU schools? Current ways of approaching the question make it more affordable to go to non-UU schools.
- People don't know we have UU schools.
- PSR costs less than Starr King, but because PSR is a member of the GTU, PSR students can take SKSM courses.
- Meadville loses one or two to CTS each year. However, Lexington Theological School provided full scholarships but that didn't increase their applications. It is not about economics. It's more about mission. People feel the obligation to keep down debt, but know that the UU schools offer more for our ministry.

- 70% of the ministers of large UU churches come from either SKSM or M/L. While the historical connection to HDS is important, the differences in need between HDS and the UU Schools is fundamental.
- Still the charter for this Panel includes HDS. It is not possible to leave it out of the mix entirely.
- I don't feel the sense of shared commitment to HDS. I don't feel that HDS is really in this for the long haul. Our own institutions have over a century committed to UU education. The difference in financial need between our schools and HDS is incredible. The order of magnitude is just huge. It's really hard for me to justify keeping funding HDS.
- HDS students are very interested in the Emerson professorship. That is something that the Panel should continue to pursue.

Barry Andrews thanked the participants for their input.