

STAFF REPORT TO THE UUA BOARD OF TRUSTEES APRIL 2010

As you know, we have made some significant structural changes since the time of the January board meeting. Those changes were influenced by budgetary concerns but also by the belief that they are timely and will provide better service to our congregations. The main changes are threefold:

- 1) the combining of the Ministry and Professional Leadership staff groups;
- 2) the creation of a new staff group that will combine much of the work currently being done by Advocacy and Witness and Identity-Based Ministries;
- 3) A move of the technical components of the Office of Electronic Communications to Information Technology Services.

We will, of course, be pleased to discuss all of this with you at your upcoming board meeting, including changes in other staff groups.

The following describes the work currently being done by the staff:

Advocacy and Witness

Standing on the Side of Love:

- 150 Congregations participated in Reimagining Valentine's Day, gathering 30 media stories. You can see a full report, including the video recap here: <http://www.standingonthesideoflove.org/blog/standing-on-the-side-of-love-day-success/>
- Did a social justice tour of San Diego. Including a trip to Tijuana, Immigration Rally in downtown San Diego, and keynoting a Social Justice UU Congregation Cluster Meeting.
- In the process of organizing a large contingent at the Immigration March for America on March 21st. We have also distributed over 5,000 cards for congress in support of Comprehensive Immigration Reform.

Congregational Advocacy and Witness:

- Working with Standing on the Side of Love and Washington Office staff, developed and implemented multi-pronged approach for UU congregational engagement on comprehensive immigration reform (CIR) including: mass mobilization and outreach for March 21st rally in DC as part of Standing on the Side of Love with Immigrant Families contingent; Cards to Congress for CIR; and in-district advocacy visits in target states. .
- Held Social Justice Empowerment Workshops and/or consultations with three congregations—Rancho Palos Verdes, CA; UU Church of Arlington, VA; UU

Church of Bloomington, IL. Began development of conflict resolution module and handbook to be completed by GA.

- Partnered with UUSC to create webinar training for UUs and others to be trained to assist at legal clinics for Haitians applying for Temporary Protected Status.

International Resources Office:

- Partnered with and celebrated the courageous BGLT conference organized by UUs in Uganda. Good multiple judicatory/organization collaboration here. Follow-up work continues.
- Completed the Holdeen India Program DVD. It features 5 incredible Holdeen partners and includes commentary from Kathy Sreedhar, John Buehrens and Abhi Janamanchi. Its available online: <http://www.vimeo.com/10032783> <http://www.vimeo.com/10032783>
- Preparations were made for visits with UU and interfaith partners in India and the Philippines during March and April

Washington Office for Advocacy:

- The 2010 interfaith Sex Ed Advocacy Training (created and co-led by the UUA) is happening March 20-23. It will be the largest and most interfaith ever: 140+ applications for 50 slots!
- The UUA-UU Ministry for Earth Partnership is strong. There are ample resources for congregations on this year's Earth Day theme "Ethical Eating: Food and Environmental Justice." In early March, the Washington Office encouraged action on stopping Mountaintop Removal Mining--a major environmental justice policy issue--and also hosted a UUMFE Board meeting.

Beacon Press

We have this spring launched The King Legacy series. *Stride Toward Freedom*, King's "chronicle of fifty thousand Negroes who took to heart the principles of nonviolence, who learned to fight for their rights with the weapon of love, and who, in the process, acquired a new estimate of their own human worth," and *Where Do We Go from Here*, his final reflections on civil rights struggles, are now available in new editions for the first time in nearly a decade. To mark the occasion, we partnered with the American Library Association to produce a "History Lives" poster of Dr. King, which is now on display in public and school libraries across the nation. The King Legacy series has already received mention in the Los Angeles Times, the New Yorker's "Book Bench" blog, NewsOne, The Root, and the Atlanta Journal Constitution in an article titled "King is living history, not ancient history," an apt characterization of our mission to bring Dr. King's prescient words to new generations of readers.

Sonia Sanchez, one of the most important writers of the Black Arts Movement, was the keynote speaker at the city of Boston's MLK Day celebration at Faneuil Hall, where she spoke of the enduring activism of Dr. King and recited from her newly published book *Morning Haiku*. Sanchez was named a Coretta Scott King fellow at the MLK program at Boston University's Howard Gotlieb Archival Research Center in November, and has tirelessly traveled the country speaking to students and communities about civil rights. This year alone she has appeared on Literary Nation as part of KABF's Tune-In to Books initiative, to which students, educators, and youth advocates from around the country listen in their classrooms and community centers; on CNN Newsroom with Dr. Dorothy Height to discuss the Smithsonian's Freedom's Sisters traveling exhibit, which features Sanchez and nineteen other African American female activists; and at Spelman College for The National Visionary Leadership Project's panel discussion and webcast *Vision To Visionaries: Women Empowered*, an intergenerational conversation on women's empowerment organized by Camille O. Cosby, Ed.D., and featuring Ruby Dee, Jasmine Guy, and Jackie Joyner-Kersey. *The Mo'Nique Show* taped the interview, which aired for Black History Month.

Many of our authors use their books as platforms for their activism. On the tenth anniversary of *All Souls: A Family Story from Southie*, author Michael Patrick MacDonald visited six Boston Public Schools to talk with students about their personal connections to his memoir. Students' responses were so powerful that MacDonald now plans to give pro-bono talks annually at public schools on All Souls Day and the following days. At the Boston Arts Academy, MacDonald met with Beacon author and Principal Linda Nathan, whose own book *The Hardest Questions Aren't on the Test: Lessons from an Innovative Urban School* presents a vision for reinventing America's schools that will drive the success of each and every student.

Author and educator Geoffrey Canada was interviewed for the new documentary "Waiting for Superman," an in-depth look at public education from the director of "An Inconvenient Truth" Davis Guggenheim. As President and CEO of The Harlem Children's Zone, Canada's pioneering work to stop the cycle of urban poverty has been so successful that President Barack Obama has vowed to replicate it in his own programs. The graphic adaptation of his classic memoir *Fist, Stick, Knife, Gun* will be published this fall, and Canada is already making plans to use it at the Harlem Children's Zone to teach his students alternatives to violence.

Recently published, David Chura's *I Don't Wish Nobody to Have a Life like Mine: Tales of Kids in Adult Lockup* gives an "inside" view of the lives of juveniles sentenced as adults under draconian laws. Chura has worked with at-risk teenagers for forty years, and is a frequent lecturer and advisor on incarcerated youth. Youth Today reviewed the book in their February issue, calling it an "anguished, incisive depiction" of adult prisons that "is not merely an indictment of the system. It's a compelling call to repair our society's brokenness." Mother Jones online excerpted *I Don't Wish Nobody to Have a Life like Mine* as part of their March Human Rights issue.

The Protest Psychosis: How Schizophrenia Became a Black Disease by Jonathan M. Metzler exposes the racialization of a biologically-based disease, starting with the civil rights era and continuing today. In her review on the Nation blog, 2009 Ware Lecturer Melissa Harris-Lacewell has called *The Protest Psychosis* “insightful, challenging, and singularly compelling . . . Metzler forces readers to reexamine our deeply held beliefs about the nature of disease, the process of medical diagnosis, and the influence of the political world on our racial ideas.” The Chronicle Review, American Journal of Psychiatry, Black Health magazine, the New Physician, and JAMA have favorably reviewed the book.

Danielle Ofri’s new memoir, *Medicine in Translation: Journeys with My Patients* introduces us to her many patients who have braved language barriers, religious and racial divides, and the emotional and practical difficulties of exile in order to access quality health care. Ofri has been interviewed by dozens of news outlets, including US News & World Report, and has made over 30 public appearances, including recently at First Parish Church in Cambridge, an event co-sponsored by Health Care For All.

In recent acquisitions, *Finding Maria Fernanda* by journalist Erin Siegal takes a close look at international adoption corruption. Siegal tells the chilling tale of a Guatemalan mother whose two-year-old daughter and newborn were stolen from her, interwoven with the story of an adoptive mother from Tennessee who began to question the practices of the agency that was placing these two girls with families in the states, potentially her own. This acquisition became especially timely in light of the adoption scandals in Haiti.

Cynthia Barnett’s *Blue Is the New Green: The Call for an American Water Ethic* investigates Americans’ “water footprint” left by the immense number of gallons used not only domestically but in generating electricity and in the manufacture of everything from hamburgers to jeans to household goods. A frequent speaker on water sustainability, Barnett describes communities and businesses that have created sustainable water management systems and practices in her call for a national water ethic that will raise citizens’ water-consciousness.

Communications Staff Group

Office of Information and Public Witness

The IPW office is gearing up for tour season, preparing to welcome as many as 1,000 Coming of Age youth to UUA headquarters this spring and summer. Each year youth and their advisors come from across the country, with many congregations returning year after year for a “Boston Pilgrimage.”

The public relations staff have been promoting the UUA President’s regional visits and planning media outreach for upcoming public witness projects, including Earth Day and the Sexuality Education Advocacy Training program to be hosted by the Washington Office for Advocacy.

The information staff is working to catalog and archive important historical print and electronic documents from the last two presidential administrations. This is a long and pain-staking process. Many of these materials will be transferred to Andover Harvard Theological Library at the Harvard Divinity School.

The entire team is responding to the recent cuts in staffing that have moved editorial responsibility for uua.org into the IPW office.

Periodicals Office

UU World launched its “UU Parenting” blog, a collaborative project with Skinner House Books, to coincide with the Spring 2010 issue. The blog, written by religious educator Michelle Richards, has already proven a tremendous success in terms of traffic to uuworld.org and comments from readers. Visit blogs.uuworld.org/parenting.

Following organizational changes in the Communications staff group, *UU World* is preparing plans to offer expanded Web coverage of the General Assembly .

We are developing a marketing plan to promote *InterConnections*, since the shift from print distribution to electronic-only distribution has cut the number of subscribers by several thousand.

Publications and UUA Bookstore

UUA Publishing News: Upcoming Titles

Tending the Flame: The Art of Unitarian Universalist Parenting, Michelle Richards. Practical and proactive advice for raising children in our faith tradition. 200 pages, \$14.00 (SH, March 2010)

Serving with Grace: Lay Leadership as a Spiritual Practice, Erik Walker Wikstrom. Leadership development with a spiritual focus. 104 pages, \$12 (SH, May 2010)

Stone Blessings, Robert Walsh. The UUA Meditation Manual for 2010. 64 pages, \$8.00 (SH, May 2010)

Story, Song and Spirit: Fun and Creative Worship Services for All Ages, Erika Hewitt. Fully-scripted services that are easy to follow and engaging for the whole congregation. 128 pages, \$12.00 (SH, May 2010)

Bless All Who Serve: Sources of Hope, Courage and Faith for Military Personnel and Their Families, Matthew and Gail Tittle, eds. Prayers, readings and songs. 2,500 copies to be distributed for free. 120 pages, \$8.00 (SH, May 2010)

The Spirit Leads: Margaret Fuller in Her Own Words, Barry Andrews, ed. Excerpts from Fuller’s writings, plus an overview of her life and legacy. 136 pages, \$16.00 (SH, May 2010)

A Child's Book of Animal Poems and Blessings, Eliza Blanchard, ed. Poems and prayers about animals from around the world. Illustrated. Ages 5–7. 32 pages, \$12.00 (SH, June 2010)

Las voces del camino (corrected printing), edited by Ken Herman, 144 pages, \$18 (June 2010) Customers who bought first printing will receive free replacement.

For more about these and other Skinner House/UUA titles, see the UUA Bookstore website: uuabookstore.org/.

Sales

For the 12 months ending February 2010, Bookstore sales revenue was \$1,060,747, down 2% from the 12 months ending one year ago. Skinner House sales revenue was \$314,638, up 4% from the 12 months ending one year ago.

Congregational Life

A major change being considered in the world of the Congregational Life team concerns *how the perspectives of congregations can more effectively be brought to bear in decisions that are made by every staff group (department) of the UUA.*

Currently, all District Executives (DEs) report to the Director for Congregational Life, currently open, but a position I held until 9/1/09 when I accepted the role of V.P. For Ministries & Congregational Support. As a reminder, in my new new role I lead the five program areas of the UUA (Advocacy & Witness, Identity Based Ministries, Lifespan Faith Development, Ministry & Professional Leadership, and Congregational Life).

Instead of promoting someone into the position of Director for Congregational Life, five temporary positions were created which we called “Regional Leads.” It’s a sort of “super DE” position with particular added responsibilities added to their usual DE roles. All District Executives and Program Consultants were invited to apply for this position. Since all district staff members are co-employed, the District Presidents were involved in conversations about this temporary role. This position was created in each of the five regions with the following job description:

- to take on a lead role within the region,
- serving as a “first call for help” to other district staff colleagues,
- coordinating collaborative efforts among their district staff colleagues, and
- ensuring best practices were shared and continuing education occurred.

It has worked so well, albeit differently in different regions, that there is a conversation occurring to make the position permanent, possibly with the same people in the roles, potentially with others in the role, or most likely some combination.

Our vision is to involve these Regional Leads in many more conversations that take place among members of the UUA's Leadership Council. Including the Regional Leads in selected conversations with the Leadership Council, the group of staff group leaders at the the UUA, further ensures that the needs of congregations are taken into account even more carefully when decisions affecting congregations are discussed.

While these Regional Leads would not be physically present at all Leadership Council meetings, they would participate by video conference in conversations that relate to life in congregations.

Nothing has been finalized, discussions are still taking place. But the conversations are occurring as part of the larger conversation of "how can UUA staff serve the mission of the Association even more effectively?"

Identity-Based Ministries

- As a cost-saving measure, the Office of Accessibility Concerns is surveying UU World on Tape subscribers to encourage them to use the available audio-version of the magazine that is now available on the UU World website.
- Plans are underway to completely update the accessibility section of the UUA website by June 30. This will be the culmination of 2 years of work.
- This year's Finding Our Way Home retreat drew more than 60 religious professionals and seminarians who identify as People of Color, Latina/o/Hispanic, and/or multiracial. This annual gathering that provides collegial support and provides professional networks and mentoring opportunities is supported through the Diversity of Ministry initiative.
- The Office of Racial and Ethnic Concerns is providing a seed grant and technical assistance to the James Reeb congregation to support a community outreach ministry that will be provided by Rev. Chris Long, a graduate of the Starr King School of Ministry.

Information Technology Services

Strategic Priorities

- Use technology to improve services to congregations, and to deepen connections among congregations, their members, Districts, and the UUA. To be effective and relevant in the online communications era, the UUA must connect with its staff, stakeholders, and the public over a broad array of channels. Systems and tools need to be both innovative and familiar to capture the interest of trailblazers and empower everyone.

- Achieve and maintain legal and regulatory data security standards. Massachusetts law, credit card industry requirements, and our own ethics oblige us to do all we reasonably can to protect the privacy and security of the personal information we keep about individuals. This applies to paper and information in transit between systems, as well as permanently stored electronic records.

Initiatives

- Website Redesign – Phase I changes were launched on February 1. Feedback has been largely positive and helpful. Another set of Phase II changes will be rolled out between now and mid-June. These will improve the “search-ability” of the site, create needed “new media” management capabilities, update aspects of the Find A Congregation feature, formalize a process for metrics-based testing of changes to the website, and make a link to the new Resources page available universally.
- Data Security Compliance – The UUA Bookstore is now in compliance with relevant Massachusetts data security laws. Stewardship and Development and the GA office are in process.
- UUA Online Directory - Last year’s UUA Directory was published as a pdf file in the familiar print format and posted online, saving enormous printing and mailing costs. The next Directory will complete the move to online by becoming an interactive, searchable database of congregations and religious professionals.
- myUUA.org - Empower church administrators to view and update the information saved in the UUA's database about the members and leaders of their congregations. To date over 600 congregations have initiated use of the system.

Internal Services

The Internal Services Staff Group consists of Financial Services and Operations and is overseen by the Treasurer. The following are highlights from the previous three months.

Office of the Treasurer

- The UU Common Endowment Fund performed very well in calendar 2009, gaining 27.1% after all fees and expenses. This placed the UUCEF in the upper 8th percentile when compared to comparable endowments. The Fund’s three and five year returns ranked in the top quartile.
- The UUA filed twelve shareholder resolutions this fall addressing climate change, excessive executive compensation, and gender identity and expression non-discrimination. Two companies have agreed to add protection based on gender identity and expression to their EEO policies as the result of the UUA’s efforts. Three other similar proposals will go to a vote at the companies’ annual meetings. Bristol Myers Squibb has agreed to allow shareholders an advisory vote on executive compensation as requested by the UUA. A productive dialogue with

Alpha Natural Resources convinced us that the company is taking substantial steps towards addressing the risks of climate change so that resolution was withdrawn as well.

- The Audit Committee considered three firms as potential auditors for FY10. After thorough due diligence and interviews, the Committee selected CBIZ-Tofias.

Financial Services

- The UUA's controller, Javier Caban, has resigned to take a position at the Union of Concerned Scientists in Cambridge, Massachusetts. A search process is nearly complete and we expect to announce the new controller by mid-March.
- The new controller will continue our efforts to revamp the chart of accounts, implement a new web-based budgeting system, and streamline financial operations.

Operations

- Mike O'Herron, director of operations, has recently negotiated a contract for electricity services that will both lower our annual cost and provide 30% of our power from renewable sources.
- Improvements to Eliot & Pickett Houses continue with new wallpaper in the 3rd and 4th floor hallways as well as several bedrooms.
- Interior redecoration on the 4th, 5th and 6th floors of #41 Mount Vernon is planned for implementation over the next couple of years.

Lifespan Faith Development

Interfaith Projects: IFYC – UUA

In partnership with the Interfaith Youth Core (IFYC), we successfully held our first Youth Interfaith Leadership Training and Service event in Atlanta January 15-18. Nineteen teams of youth and adults were trained in interfaith leadership skills to lead interfaith projects in their home communities.

We are also scheduling a number of regional events, workshops at General Assembly, and a second national training in August (details below)

Renee Ruchotzke, UU ministerial candidate, and Hannah McConnaughey from IFYC are co-authoring a curriculum to help youth understand religious pluralism and coordinate an interfaith service project. The curriculum is scheduled for completion this summer.

Upcoming Youth Leadership Development Opportunities

- Chrysalis Training of Trainers, July 10 - 14
For youth and adult advisors. A fully subsidized opportunity.
- Interfaith Leadership Summer Camp, August 1-6, Highlands, NC
Youth and adult advisors will learn how to lead from an interfaith perspective and how to lead interfaith events in their home communities. Partially subsidized.

- LDC for Youth and Young Adults of Color, August 13-17, Boston, MA
This Leadership Development Conference is designed for Youth and Young Adults of Color. Partially subsidized.

Youth Ministry Advisory Committee

The first Youth Ministry Advisory Committee (YMAC) members have been selected. They are: Katherine Allen, Sonrisa Alter, John Coakley, Michael Han, Karen Letourneau, and Rev. Liz Stevens. Staff members Erik Kesting and Rev. Dr. Monica Cummings will also participate in YMAC's work. YMAC will serve in an advisory capacity to the UUA President on associational progress in implementing the recommendations of the Youth Ministry Working Group, the future needs of Unitarian Universalist youth ministry, and the creation of a truly multigenerational faith. www.UUA.org/ymac.

Youth Grants

Responding to the recommendations of the Youth Ministry Working Group, LFD announced the new Youth Project Grant Program which gives local UU high school-aged youth opportunities to grow in faith, deepen in spirit, develop leadership and offer service to our Unitarian Universalist communities. Grants of \$200 - 2,000 will be awarded to youth who have paired with an adult advisor in a sponsoring UU congregation, district, or organization.

New Staff

The Office of Youth and Young Adult Ministries welcomed Ted Resnikoff as our part time Communications Technology Associate. Ted will be coordinating Y/YA online communications and producing short videos.

Tapestry of Faith: New Programs

Sharing the Journey: Small Group Ministry with Youth - Online

By Jessica York and Helen Zidowecki Many of our congregations have embraced the use of small group ministry or covenant groups with adults. We hope this resource will answer questions and provide encouragement for congregations seeking new ways to engage Unitarian Universalist youth.

Creative Uses of Tapestry of Faith

Congregations, districts, and religious professionals have reported on their creative uses of Tapestry of Faith programs. A cluster group of eight Houston-area congregations is using What Moves Us: Unitarian Universalist Theology as the first offering of the Houston UU Lay Theological Institute, a pilot project funded in part by a grant from funds raised through the Association Sunday campaign.

The LFD staff is piloting the use of adult Tapestry of Faith programs for online religious professional study groups using material from What Moves Us.

LFD staff are working with the district executive and Leadership Development Team of the Northern New England District to use Harvest the Power: Developing Lay Leadership as the basis of a new cluster-based model for developing strong, effective lay leadership. A UU divinity school student is using Sharing the Journey: Small Group Ministry with Youth in her chaplaincy with at-risk urban youth and reports it is dramatically successful.

Our Whole Lives Grades 7-9 and Grades 10-12 will be professionally evaluated in three and four-year longitudinal studies beginning in the fall of 2010. This long-awaited development will be observed with great interest. Judith Frediani is involved in the process.

Groundwork Training Program

While Groundwork served many well, it is time for a new approach as we move on the journey toward wholeness and justice. The program's participants have been notified and have received a gift in honor of their work. The Lifespan Faith Development and Identity Based Ministries Staff Groups are working together to provide anti-racism, anti-oppression trainings and resources that are effective and appropriate for youth and young adults. Anyone interested in hosting an AR/AO training should email araomc@uua.org. Staff is available to consult about options and LFD is developing a young adult adaptation of the new Building the World We Dream About Tapestry curriculum.

General Assembly

LFD has six events planned for GA, including four workshops (Faith Based Service Learning Opportunities for Youth, Multigenerational: More Than a Buzzword, Adult Faith Development, and Introduction to Racial/Ethnic Caucusing), a Bridging Worship Service, and a Gathering Time for Adult Program Coordinators.

Family Pages in *UU World*

Families: Weave a Tapestry of Faith, the four-page, centerfold insert to *UU World*, will complete a year of publication with the summer 2010 issue. The Family pages are now posted as pdfs on uua.org.

UUA Ministry & Professional Leadership

Director of Ministry and Professional Leadership

- Work for and with the review of ministry team and working with MPL managers on budget planning for MPL's FY11 budget.
- The search for a new Transitions Director will be complete the 2nd week in March. Nine candidates have been interviewed on the phone and the three finalists will be interviewed in person on 3/8 by a team consisting of Rob Molla, Harlan Limpert, Rob Eller-Isaacs (UUMA) Barbara Child (AIMs) and myself.
- Sarah York has accepted our offer to replace Tracey as the intake person for professional misconduct complaints beginning July 1.

Religious Education and Music Leadership Credentialing

- The Music Leadership Credentialing Committee now has a Facebook fan page.
- Preparations are underway for the RE Credentialing Committee meeting in April 2010, including the review of the materials from the six RE Credentialing candidates.

Ministerial Development

- Planned the future continuing education programs to be offered in the coming months: First Year Minister's Seminar, Transformational Leadership training and New Ministers retreat at Star Island (in partnership with UCC).
- Offered training to those in Preliminary Fellowship on MFC requirements through webinar and at Andover Newton.
- MFC meets March 17-21. Peter will meet with the Executive Committee.
- Dreaming Big had an exciting retreat in Tulsa in Feb. Their final retreat will be in April at All Souls, DC. They are exploring ways to continue as a study group on their own.

Ministerial Credentialing Office Created new web pages while organizing interviews for March 2010 MFC meeting and sending out second installment of financial aid checks.

- Working with Karen Eng on the Candidacy Working Group Agenda.

Transitions

- Supplied 45 or so summaries of the content of UUA ministry files on pre-candidates to search committees in response to committees' request.
- Counseled with search committees and ministers about the potential fruitfulness of the "fit" as the time draws near (March 15) for committees to make offers.
- 15 ministers have applied to become Accredited Interim Ministers In Training this year. The Guild will vote on these applications and those chosen will attend the annual AIMS Seminar in April. All applicants must have completed the basic training and have interim ministry experience.

Office of Church Staff Finances

Worked to finalize the details of the shift of our Life and LTD plans from MetLife to Unum and prepared for the February 2010 Open Enrollment period; Wrapped up the details of the UUA Health Plan Open Enrollment that occurred in November 2009.

- OCSF is working with Fiduciary Investment Advisors, (newly hired UUA Investment Advisor) to revision the investment platform of the UU Retirement Plan, finalize the fund offerings with both Fidelity and TIAA-CREF, and prepare for the upcoming meeting of the Compensation, Benefits, and Pension Committee (CBPC) when they will decide upon their recommended retirement plan vendor for the Board's April meeting.

Worship and Music Resource

- Launched Music Module on WorshipWeb, including first ever directory of working UU composers.
- Made significant progress posting backlog of WorshipWeb submissions and began posting CLF acquisitions.

Stewardship & Development

SUMMARY

Unrestricted Income	As of 3/9/10
Annual Program Fund	\$4,175,471
Friends of the UUA	\$732,582
Legacy Gifts	\$465,000 ¹
Subtotal Unrestricted Income	\$5,373,053

¹ Actual unrestricted Legacy income YTD \$1,111,819

ANNUAL PROGRAM FUND

Year to date as of March 8, 2010:

FY	Actual	Goal	% of Goal
2010	\$4,175,471	\$6,608,048	63.2%
2009	\$4,304,336	\$7,166,004	60.1%

Current projections indicate that APF contributions are on track for fulfilling the established income goals for the year. The APF District Representatives worked in February to gather the intended contribution figures for each congregation for our fourth quarter income projections. The work continues on the contacts focused on the congregations with the greatest capacity to increase their contributions over the next year, to build relationships and offer encouragement. The APF Committee meets twice via web-conference this year for training and support. The APF Executive Committee meets via web-conference at regular intervals. In collaboration with the staff, two special task groups have been established, one to envision a new, leaner structure for the Committee and the other to assess the APF formula and recommend changes.

FRIENDS OF THE UUA

Year to date as of March 9, 2009:

FY	Actual	Goal	% Goal	Avg. Gift	Donors	Avg. per Donor	Median Gift	Largest Gift
FY10	\$732,582*	\$1,140,968	64.4%	\$60	6,899	\$107	\$25	\$15,000
FY09	\$762,231*	\$1,650,000	48.1%	\$57	7,971	\$98	\$25	\$25,000

**excluding gifts for New Orleans Volunteer Relief Center and GNOUU*

Despite moderate improvement in the economy, fundraising from individuals continues to be a challenge. We are grateful for the support of the 22,000 donors who make up the core of the Friends program.

Steady Friends donors see the UUA as a priority and contribute accordingly. Our average amount given per donor has increased reaching a high of \$107. The average gift size is up three dollars from last year at \$60.

We are looking at innovative ways to renew lapsed donors which we hope to test during the summer months, which are normally slow months for direct mail donations. We also continue to actively work to acquire new donors from within our congregant population, and will be mailing an additional 90,000 households this spring. A Facebook page for UUA donors is in development as we explore ways to deepen engagement.

LEGACY GIFTS

Year to date as of December 17, 2009:

	UUA		UU Entity	Total
	Unrestricted	Restricted		
Matured Gifts – YTD	\$ 1,111,819	\$ 482,125	\$ 78,489	\$1,673,433
New Gifts* - YTD	\$ 43,438	\$ 45,000	\$ 229,266	\$317,704

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

The Legacy Gifts Office continues to develop planned giving resources for congregations. The latest resource is planned giving inserts which congregations can copy and paste directly into their newsletters, web sites or other publications customizing the text as necessary. The current library of inserts contains twelve different topics.

Following an unusually high number of deaths during the past year, income distributions from these estates has passed the \$1 million mark. Matured gifts for unrestricted purposes in the first three quarters of FY10 total \$1,111,819.

“NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS

Stewardship & Development submitted the report and application to request a grant of \$900,000 from the Veatch program this winter with much help and collaboration from all UUA departments. We are beginning to put out proposals to major donors outlining President Morales’ priorities for FY11 and are receiving positive feedback.

Association Sunday 2009 exceeded its goal of raising \$250,000 and, as of press time, raised \$327,390 with 547 participating congregations. We are preparing for Association Sunday 2010, on the theme of “Growth in Leadership” and will link this event to the UUA’s 50th anniversary celebration.

The team continues to work on major gifts fundraising and is working diligently in a tough environment to meet its goal of raising \$1.1 million by June 30, 2010.