



Stewardship & Development

Report to the Board of Trustees
October 2025



Agenda

Introductions and Centering (10 minutes)

The Board's Role in Fundraising Success (15 minutes)

- Review of core Board fundraising functions
- Invitation to participate in Giving Tuesday Match Challenge

Annual Program Fund (30 minutes)

- APF Performance in FY25
- Strategic Priorities for FY26 & beyond

Closing (5 minutes)

MEET OUR TEAM

Stewardship & Development



Lauren Smith



Patty Lynch



Vail Weller



Krystle Gervais

MEET OUR TEAM

Stewardship & Development



Congregational Giving (APF)

Gift Processing

Direct Marketing

Finance & Data Management

Mid-Level & Major Gifts

Faithify

Planned Giving (Legacy)



Reflection & Sharing

Think about a gift you made to Unitarian Universalism that felt especially good.

What made that gift so meaningful?



What's the Board's Role?

...in UUA Fundraising Success

(Part I)



Giving



Advocacy



**Donor
Connections**

- By personally contributing, a board member **recognizes their responsibility and demonstrates commitment.**
- A board member who is also a donor **will be more successful when asking others to make a donation.**
- Many foundations only contribute (grants, funding requests) to organizations where **every board member is a contributor.**

BoardSource

UUA Board of Trustees Monetary Impact



\$76,960

**Total Lifetime
Giving**



94%

**have given
at least one gift
to the UUA**



60%

**active monthly
donors**



\$1,500

**highest single
gift on record**

End-of-Year Giving

Goal
100%

UUA Board
Participation

Goal
\$25,000

Giving Tuesday
Match Funding

from UU leaders,
including the Board of Trustees



Stewardship

Board giving isn't about size of gift.

**It's about ownership,
credibility, and covenant.**



APF

AMPLIFYING
UNITARIAN
UNIVERSALISM

Annual Program Fund

(The Basics)



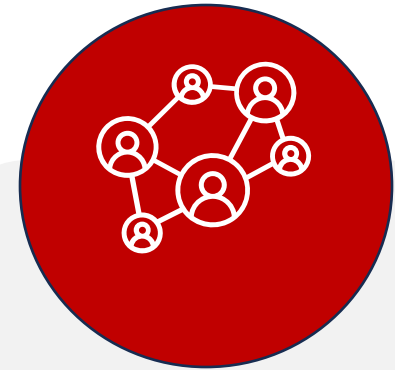
Formula

Responsive to
Congregational
Finances



Income

APF is the UUA's
largest source of
unrestricted giving



Covenant

APF giving embodies the
covenant that binds
congregations to each
other and the UUA

APF Performance in FY25



- **APF brought in \$8.8 million**, up \$110K from FY24
- **Attainment was 66%**, down 1% from FY24
- **Pacific Western Region (PWR)** had the highest giving at \$2 million, the highest attainment, at 73%, and the most Honor Congregations, 111. PWR also had the steepest drop in giving from FY24.
- **409 Congregations increased** their giving, adding \$675K to the total raised.
- **373 Congregations decreased** their giving, reducing the total raised by \$565K. Of the congregations that contributed less in FY25, 222 were Honor.
- **Wave Cohort Participants report** congregational finances, pandemic impacts, perceived value of the UUA, relational distance, and equity concerns about APF participation as factors that impact their level of giving.

APF Strategic Priorities

- ❑ Stewardship and Mitigation
- ❑ Increasing Giving
- ❑ Cultivating a Culture of Generosity

- Leadership, Honor & high generosity congregations
- High honor gap congregations
- Honor Path Congregations
- Regional Focus Areas: Pacific Western Region & Southern Region
- Ministerial Transitions/Interim & Developmental Ministries
- Ministers in formation/early ministry





Homework!

**Thank your
congregation
publicly for their
APF contribution.**



Thank you!