

UUA STAFF REPORTS OCTOBER, 2010

Beacon Press
Helene Atwan, Director

The Death of Josseline by **Margaret Regan** was selected as the first ever UUA Common Read. Gail Forsyth-Vail, the Adult Programs Director at the UUA has created a discussion guide that she describes as a “a faith development opportunity”, noting that *The Death of Josseline* was chosen as the inaugural UUA common read because “there is a whole variety of perspectives in the book... and it doesn’t just touch people cognitively but spiritually as well.” The Ministries and Faith Development staff group is working with traditional venues as well as new media outlets to encourage both youth and adults to see the book as an opportunity for spiritual growth. In enthusiastic support of project, Beacon has accelerated publication of a less expensive paperback edition of *The Death of Josseline*. The author Margaret Regan is scheduled to speak at many events throughout September, October, and November, including readings at the University of Arizona, TED Phoenix conference, the Metropolitan State University where the book is required reading for an “Immigration and the New World” course, and at the “No More Deaths” fundraiser at the Unitarian Universalist Church in Tucson. We hope to bring Regan to the UUA General Assembly in Charlotte, NC next summer.

On the topic of common read programs, *Dark Tide*, **Stephen Puleo**’s story about the Great Molasses Flood of 1919 that wreaked destruction in Boston’s North End neighborhood, was named the first ever Boston city-wide common read. *Dark Tide* won out over another Beacon title, Michael Patrick MacDonald’s *All Souls*, which was actually the runner-up. *Dark Tide* was also selected as the common read in other Massachusetts towns, including Belmont, Bridgewater, Ipswich, Beverly, Eastham, Medford, and Stoughton, and the city of Woburn. For the Ipswich “One Book” program, Puleo led a walking tour of the North End to bring the story to life. Woburn kicked off its “Woburn Reads 2010” program with a talk by Puleo and a Molasses cookie baking contest. To kick-off the Boston Common Read program Puleo spoke about *Dark Tide* at the **Boston Public Library** and engaged in a live-chat at the Boston Globe website. Puleo has discussed *Dark Tide* along with his most recent Beacon title *A City So Grand*, about the history of Boston from 1850-1900, at libraries and universities throughout Massachusetts and in media appearances including one on **Fox 25 Morning News**..

White Coat Black Hat by **Carl Elliot** is a daring investigation of the ethics surrounding clinical trials how consumer capitalism has infiltrated modern medical practices, and how this commercialization of medicine harms patients. The book has received a deluge of media attention. Before release of the hardcover, the first chapter of the book appeared in *The New Yorker* and two others were published in *The Atlantic*. Upon publication the book has received media coverage in the **Wall Street Journal**, **The Lancet**, **The Boston Globe**, **Mother Jones**, and **Reader’s Digest**, as well as coverage on ABC-TV. **The New York Times** mentioned *White Coat Black Hat* in its Health section as “Recommended Weekend Reading.”

With all of the attention focused on **Geoff Canada** by American Express's **Members Project** ad campaign, which features Canada and the Harlem Children's Zone, and with the upcoming release of David Guggenheim's documentary "**Waiting for Superman**", we have released a revised edition of *Fist Stick Knife Gun* and moved forward our long-planned graphic edition. Alongside his media appearances for "**Waiting for Superman**", Canada is publicizing both editions of the book in prominent media outlets. He has appeared on **Oprah** and the **Tavis Smiley Show**; and was prominently featured in a **Time** magazine article about the documentary as well as in **New York Magazine** and in an upcoming piece scheduled for **The New Yorker**.

Courtney E. Martin's *Do It Anyway* has been prominently featured on the *Feministing* blog, which ran video profiles of the activists profiled in the book on their front page as "featured videos". **Women's eNews**, **The National Council for Research on Women's** blog, and an adapted excerpt from the book was posted on the **Mother Jones** website. *Do It Anyway* was reviewed in **The Christian Science Monitor**, and Martin wrote an article on the blog **The Frisky** about getting to know the actress and activist Rosario Dawson, who is one of the eight profiled in her book. The **MotherJones** blog posted an adapted excerpt from the book in their culture section.

In recent acquisitions, **Jay Michaelson**, a gay rights activist and religious scholar, explores the religious case *for* gay rights. In his as yet untitled book, Michaelson underscores that the Hebrew Bible and the New Testament both emphasize the importance of love, compassion, and equality, arguing that the moral principles in these religious texts favor acceptance of gays and lesbians. By destabilizing the "God vs. Gay" polemic, Michaelson fosters a dialogue that is grounded in the recognition of a shared humanity. And in arguing that supporting gay rights is a religious imperative, Michaelson's work will profoundly alter how we think about the relationship between gay rights and religion.

Scott Korb's as yet untitled book provides an in-depth look at the inaugural year of America's first accredited Muslim four-year college, Zaytuna College in Berkeley, CA founded with the mission to unify classic Islamic texts with contemporary context. Through his examination of this pioneering school's first year, Korb unveils the facets of the American approach to traditional Islam. He also relates the stories and struggles of the first generation of Muslim Americans to come of age post- 9/11. Scott Korb is the author of *Life in One Year: What the World Was Like In First Century Palestine*. He has been widely published on the topic of religion in *Harper's*, *America*, *Commonweal*, the *Washington Post*, and *Newsweek*.

Grassroots Recovery follows the lives of community organizers and activists in six neighborhoods in post-Katrina New Orleans, from the day of the hurricane to the present, as they struggle against the hurdles of bureaucratic bungling and delay in their efforts to rebuild their homes. Living and working in New Orleans, **Tom Wooten** draws from interviews with over 100 residents and community figures in the most effected neighborhoods to tell the inside story of how the people in New Orleans have risen to the challenge of rebuilding their battered city.

Communications Staff Group

John Hurley, Director

In August, Daisy Kincaid rejoined the staff as Director of Public Relations filling the position previously held by Janet Hayes. Daisy had previously served as Public Witness Specialist in 2007-2008.

An inter-departmental staff group will begin work in October on developing a comprehensive communications plan for the work of the staff.

Office of Information and Public Witness

The public relations staff will be increasing promotion of the UUA President's visits and expand current media outreach efforts for upcoming public witness projects including the International Day of Climate Action and the Leap of Faith growth action plan.

The public witness staff is in the process of developing and sharing best practices for social media, and learning how best to disseminate information through these new channels. The IPW office is now responsible for a significant amount of editorial responsibility on UUA.org, due to staffing cuts earlier in 2010, so we are examining how to best coordinate content on UUA.org with our outreach efforts through social media and traditional media.

The information staff is working to archive historical print and electronic documents currently kept at the UUA. Documents from the last two previous presidential administrations are in the last stages of preparation before transfer to Andover Harvard Theological Library at the Harvard Divinity School.

Periodicals Office

UU World is now in the process of reorganizing its departments and moving to full-color printing throughout, which will open up new higher-value advertising spots as well as improving the print quality. The changes should go into effect with the Spring 2011 issue. The magazine's staff took responsibility for providing written coverage of the General Assembly (online and in print), replacing the team of volunteers that had been providing coverage on UUA.org in recent years.

Publications and UUA Bookstore

Selected New Skinner House/UUA Titles

[*Ayat Jamilah \(Beautiful Signs\): A Treasury of Islamic Wisdom for Children and Parents*](#), Sarah Conover and Freda Crane; [*Kindness: A Treasury of Buddhist Wisdom for Children and Parents*](#), Sarah Conover; and [*Harmony: A Treasury of Chinese Wisdom for Children and Parents*](#), Sarah Conover and Chen Hui. Full-color illustrated anthologies acquired from Eastern Washington University Press. Each book includes information on the cultural context and significance of the stories. 180-200 pages each, \$19.95 each (SH, acquired May 2010).

[*Stirring the Nation's Heart: Eighteen Stories of Prophetic Unitarians and Universalists of the Nineteenth Century*](#), Polly Peterson. Stories about Unitarian and Universalist reformers with introductory material, discussions questions, and activities for congregations and families. 216 pages, \$15 (MFD, August 2010)

Everybody Is Important: A Kids' Guide to Our Seven Principles, Jennifer Dant. Uses stories about everyday situations to help children ages 5-7 understand how to live out the seven Principles. 32 pages, \$6 (SH, October 2010)

[*Journeys of the Spirit: Planning and Leading Mission Trips with Youth*](#), Jennifer McAdoo and Anne Principe. Inspires and guides youth advisors and youth leaders to plan, lead and unpack a spiritually transformative service project. 144 pages, \$15 (MFD, October 2010)

[*A Cup of Light: All About the Flaming Chalice*](#), Pam Baxter. Explores the meaning of the flaming chalice for children ages 5 to 7. 28 pages, \$5 (SH, November 2010)

[*Elite: Uncovering Classism in Unitarian Universalist History*](#), Mark Harris. Provocative and critical look at the role of class prejudice in the development of contemporary Unitarian Universalism. 160 pages, \$10 (SH, November 2010)

[*Encounters: Poems About Race, Ethnicity and Identity*](#), edited by Paula Cole Jones. Critically acclaimed and emerging poets share their struggles to claim authentic racial and ethnic identity in American culture. 184 pages, \$14 (SH, December 2010)

eBooks

The Publications Office is working to prepare about 20 backlist Skinner House titles to be sold as eBooks through the UUA Bookstore website and Google Editions. Most new Skinner House books will also be available as eBooks. eBooks will be priced 20%-25% lower than the print editions. We expect them to become available by November 2010.

Sales

For the 12 months ending August 2010, Bookstore sales revenue was \$1,041,089 – down 5% from the previous 12 months. Skinner House sales revenue was \$317,324 – even with last year.

Marketing

Darry Madden, our marketing coordinator, has produced several videos and podcasts designed to both promote books and offer supplementary resources. These are distributed through the UUA Bookstore electronic newsletter, Facebook, and UUA and UUA Bookstore websites. The UUA Bookstore staff is producing a new video series called “[Booktalk](#)” that gives a brief overview of books carried by the UUA Bookstore. The Bookstore is also offering a new book fair program to congregations.

Department of Congregational Life
Rev. Dr. Terasa Cooley, Director

The Staff Group of Congregational Life is currently comprised by several departments: District Services, Growth Resources, Congregational Stewardship Services, Green Sanctuary, and Large Church Services.

Leap of Faith

A special project of CL is to implement the "Leap of Faith" program. Developed out of a gathering of ministers of our fastest growing congregations, this pilot program has identified 9 of our highest potential congregations and is matching them with large congregations skilled in areas of shared interest. A primary goal of the program is to develop learning communities among congregations, in which each will be inspired by the other to a higher level of vitality. Beginning with a launch conference in New Orleans, the aspiring and mentoring congregations will develop partnerships to engage with one another all year long. We have identified several measurable goals and will be enlisting an outside evaluator to help us learn from this pilot and move it into greater availability and applicability in the future.

District Services

Many of the districts and regional groupings are launching threshold programs of their own, determining proactive ways to support and encourage our healthiest congregations.

The CERG region (Metro New York, St. Lawrence, Ohio Meadville and Joseph Priestley) have begun a new regional staff configuration in which they will share three specialists (in the areas of growth, leadership development and faith formation) across the region. Mass Bay and Clara Barton have also launched a new staff sharing structure in which all four co-employed positions serve both districts. The Southland regional group (Southwest, Mid-South, Thomas Jefferson, and Florida conducted a highly successful joint summer leadership school for lay leaders grounded in theology and polity.

A few other innovative projects to highlight: Pacific Northwest has employed a "Developmental Minister" to do outreach and help develop new congregational groupings in Alaska. Thomas Jefferson District has added a social justice coordinator to their staff, and Central Midwest has developed a learning community model with its large congregations. Our district staff give extraordinary service to our congregations, and I am deeply honored to be supporting their work.

I will be developing a comprehensive evaluation process to assess the effectiveness of district functioning, which will test the impact of common core services, as well as allow for specific assessment of unique district or regional projects. Scheduled to roll out in February, this will be a survey format issued to all congregational leaders with the results available to district and UUA leaders.

As I move forward in this job, my commitment is to begin to gather hard data around all of these projects to assess effectiveness.

Congregational Stewardship Services

Congregational Stewardship Services has completed a three year, grant funded, pilot project called FORTH, developing a comprehensive approach to congregational stewardship based in spiritual values. A detailed evaluation of the project is available. The project has been able to identify key factors in developing congregation-wide investment in stewardship and promises to inform and revitalize our stewardship programs. CSS is also conducting a review of the effectiveness of all it's programs over the last several years to understand what has long-lasting impact.

Our Green Sanctuary program is more popular and well-received than ever, with programs for ongoing implementation of green principles. They have launched a blog at <http://greensanctuary.blogs.uua.org/> and many web- based programs. Some interesting statistics about numbers of congregations participating: 3 Re-Accreditation Candidacy, 130 Accredited, 120 Candidates; totaling 253 congregations.

District Presidents Association

As I began my new position, I conducted one on one interviews with each of the District Presidents, and compiled a summary report of the conversations which has been sent to you. I was extremely impressed with the skills and capacity of these leaders, and appreciate the openness of their explorations about the purpose and functioning of District Boards.

Cross-departmental Cooperation

We are working hand in hand with the new MInistries and Faith Development staff team to strengthen and support congregational leaders. I now meet with the Review Team to assess ministries whose previous settlements have been problematic, which helps bring a broader congregational perspective on ministries. A team of District Staff are working with the Transitions department to revamp ministerial transitions assistance programs. Our Program Consultants are engaged with our faith development staff in a full assessment of the Renaissance Module programs which train and support religious educators. I am working with the Treasurer's office to develop new, more streamlined and comprehensible methods of sharing expenses with District Boards for co-employed district staff.

Please be in touch with me if you have questions about these, or any other, Congregational Life matters.

Internal Services

Tim Brennan, Treasurer and Chief Financial Officer

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

- Following the market declines of 2008 and 2009, the UU Common Endowment Fund has performed well, but it has not been immune to the market volatility of 2010. Through June 30, the Fund is up 15.4% (net of fees and expenses) for the year. The Fund's one, three, and five-year returns all rank in the top third of comparable endowments tracked in a proprietary database.
- On September 21, we conducted our first conference call of the year for UUCEF investors. Approximately 30 congregations participated. On the call a partner from our investment consultant, New England Pension Consultants, presented their firm's long-term market forecast.
- The UUA filed twelve shareholder resolutions last year addressing climate change, excessive executive compensation, and gender identity and expression non-discrimination. Our proposals were accepted by three corporations and received a majority of support from shareholders at one company. In collaboration with the Committee on Socially Responsible Investing, we are planning the campaign for 2010-2011. The UUA continues to work with a broad coalition of socially concerned investors to advance UU values in the corporate sector.

Financial Services

- The FY10 audit is underway, and so far we have not encountered any impediments. Field work winds up this week, and the auditors will present their report to the Audit Committee on November 1. The new audit firm, CBIZ-Tofias, has been a pleasure to work with (yes, I said this about auditors).
- The department, under the leadership of Controller Karen Wheeler (who started in late April), is redesigning our chart of accounts in order to improve our ability to track projects. We expect to implement the new system in January 1011 as we prepare the FY12 budget.

Operations

- We continue to work on security while striving to make the Association's headquarters welcoming to visitors.

Information Technology

Mark Steinwinter, Director

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. Federal HIPAA rules, Massachusetts law, credit card industry requirements, and our own ethics oblige us 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 that permanently stored electronic records. The UUA Bookstore and the GA office are now in compliance with relevant Massachusetts data security laws. Work has begun to bring the Insurance business operations into compliance as well.

Key Initiatives

- **Communications Services** – Several projects fall into this category. One example is ongoing improvements to remote participation in UUA chapel events. We are upgrading the sound system, telephone interface, video quality, and our remote meeting management processes. Another example is an expansion of our capacity to offer live streaming video from GA and to permit interactive audio participation in events such as mini-assemblies. Note that a few congregations did broadcast the live video stream of the 2010 GA Sunday morning worship into their own sanctuaries. They were able to light their chalice, sing hymns, and conduct worship right along with the thousands of UUs in the convention center. One offsite worshipper said they were moved to attend the next GA “just for the music.”
- **Resource Sharing** – ITS has begun the planning of an online service for congregations, districts, the UUA, and others to share a variety of resources and to network with one another. The goal is to make it easy to contribute, search for, and comment on materials and dialogue that support worship, religious education, congregational business, technology best practices, and any topics of interest to UUs.

ITS Mission. We manage the technology that supports connections and information sharing among the UUA staff, congregations, stakeholders, and the general public. We provide high-availability computing infrastructure, software tools and systems, consulting services, and technical support to UUA staff located throughout the nation. We manage and safeguard the constituent data of the Association.

Ministries and Faith Development

Sarah Lammert, Director

As you may know, the former Lifespan Faith Development staff group and the former Ministries and Professional Leaders staff group have been brought together in a new collaborative staff group with the title of Ministries and Faith Development (MFD). I began work in August as the new director, and have been focusing on getting to know the staff as well as beginning the work of restructuring. On September 7th and 8th we held a staff retreat which focused on completing the past, and beginning to imagine the collaborative possibilities available in the present and future.. Our draft statement of purpose for the staff group is this: MFD serves Unitarian Universalism by creating healthy, transformative, multigenerational and diverse ministries and religious education. Our vision is to bring religious education and ministry together as a seamless whole.

Top three goals for this year:

- 1) Complete the restructuring process of this new staff group. By the end of the year we share a vision of ministry that holds religious education at the core. We are collaborating effectively as one team and exploring new possibilities for relevant, multigenerational and multicultural ministries.
- 2) Complete the Strategic Review of Ministry report and create a plan for implementation with clear priorities, time frames, and measures for success.
- 3) Create new communications tools (in collaboration with UU staff in Stew Dev and Communications) to reach our constituencies (congregational leaders, religious professionals, youth and young adults, etc.) more effectively and to gain clear feedback on the effectiveness of our work.

Ministerial Credentialing Office

- Integrated the work of the Internship Clearinghouse Coordinator and the four Regional Sub-Committee on Candidacy administrators back into our care.
- Updated the ‘Requirements for Ministerial Fellowship with the Unitarian Universalist Association,’ the Internship Manual, and the Ministerial Credentialing Office webpage to reflect the RSCC administration change
- Noting the loss of internship sites due to the slow recovery of the economy, the Internship Stipend Grant process was updated to generate more interest and we included a direct request to congregations through the August Congregational Mailing to consider offering an internship beginning in FY 2011-12.

Transitions Office

- Trained 37 ministers in July for upcoming year of interim ministry (next year the training will be moved to September)
- Revised Beyond Categorical Thinking program, on track for over 30 BCTs this year
- Met with ITS to discuss improving settlement system
- In development, Beyond Categorical Thinking for Ministers

- In development, Interpretive File summaries on congregations in search (similar to interpretive file summaries on ministers)

Church Staff Finances

- **UUA Retirement Plan:** Staff has been working closely with TIAA-CREF and our investment advisors to ensure a smooth transition when the UU Retirement Plan switches from Fidelity Investments to TIAA-CREF on November 1. Currently the plan has assets of \$166 million owned by approximately 2,800 participants.
- **Group Insurance Plans:** Long Term Disability (LTD) coverage is provided to 1,115 employees (up 13 percent since January 2010), Life to 842 employees (also up 13 percent), and Dental to another 783 individuals (including dependents). Effective October 2010, group insurance billing will be done through the same company that handles billing for the UUA Health Plan. Congregations participating in all of our insurance plans will receive a consolidated bill.
- **Health Plan:** The UUA Health Plan provides coverage to 790 employees in 310 congregations and organizations – up 40 participants and 10 congregations during the past year. Claims experience this year has been extraordinary favorable. This will likely allow the UUA Employee Trust Board to approve only a modest premium increase at their upcoming Board meeting.
- **Ministerial Assistance:** During FY10, we were able to provide approximately \$450,000 in aid funds to ministers (working and retired), survivors, and a limited number of non-ministers. During FY10, we drew down \$125,000 of the approximate \$1.1 million in reserve aid funds to meet pressing needs. **Compensation:** An “Annual Staffing Census” to identify employees not covered by benefit plans and to ensure compliance with federal non-discrimination laws will occur this year. The current Salary Guidelines will remain effective until July 1, 2011.

Ministerial Development Office

- Sponsored training at the mountain for 16 ministers in conflict management and adaptive leadership
- Hosted three receptions/orientations at GA for ministers entering preliminary and final fellowship
- Sponsored training for 24 new ministers (0-10 years) with the UCC at Star Island.
- Continued hosting monthly webinars for ministers in preliminary fellowship.
- Worked with Strategic Review of Professional Ministry task force to evaluate professional leadership and credentialing.

Resource Development Office

- Published 6 new Tapestry curricula:
Love Surrounds Us-K-1; Love Will Guide Us-2-3; Love Connects Us 4-5; Place of Wholeness (High School); Building the World We Dream About; Stirring the Nation’s Heart: Eighteen Stories of Prophetic Unitarian and Universalists of the Nineteenth Century by Polly Peterson, the fourth print book in the Toolkit Series of Tapestry resources.

- The fourth and final children's Tapestry of Faith curriculum series was launched in August
- We launched an Association-wide Common Read of *The Death of Josseline* (Beacon, 2010) to spark dialogue about immigration issues in the United States and published a Discussion Guide.
- Submitted UU World Family pages for Fall 2010. Theme: O Sparkling Web of Difference (promoting diversity) Story: Indra's Web.
- Launched a new feature in the Religious Education area of uua.org: What's New: Religious Education and Faith Development, featuring RE announcements, opportunities, stories and articles.
- The Multicultural Leadership Conference for Youth and Young Adults of Color was held August 13 – 17 at the UUA Offices in Boston, MA. Leaders Laura Spencer, Janice Marie Johnson, Jessica York, and Rev. Dr. Monica L. Cummings, and 14 youth and young adults of color created a successful event.
- A Chrysalis Training of Trainers, held July 10 – 14, 2010, trained 12 youth and adult participants to facilitate leadership and spirituality development conferences for youth throughout the country.
- In partnership with the Interfaith Youth Core, two regional interfaith youth leadership trainings were held: one at RE Week on Star Island and one at Senior High Camp at DeBenville Pines
- Melanie Davis joined our staff as Our Whole Lives Associate (part time). A lifelong UU, Melanie holds a doctorate in Human Sexuality Education
- Kayla Parker joined our staff as Campus Ministry Associate (part time). A young adult UU, Kayla comes to us from the Religious Institute.
- Erik Kesting submitted his resignation as Youth and Young Adult Ministries Director. His last day was October 6, 2010. The job description for this position has been posted and a search is underway.

Multicultural Growth and Witness

Taquienna Boston, Director

More than 100 individuals and congregations registered solidarity events, interfaith programs, worship services, and vigils in solidarity with the Muslim American community, and in support of religious freedom, surrounding the September 11th anniversary. Across the country, news media reported the role of Unitarian Universalists in living the ideal of freedom of religion, the “Standing on the Side of Love” campaign messaging was prominently featured, and UU clergy’s opinions on diversity and multiculturalism were featured in half a dozen Letters to the Editor in local papers.

A Multicultural Growth Consultation involving UU congregations doing intentional multicultural ministry will be scheduled for March 2011. Congregational participants will identify strategies and resources to assist UU congregations committed to intentional multicultural ministries. Participating congregations are:

1st Parish Cambridge MA
1st UU Church of Pittsburgh PA
UU Church of Annapolis MD
1st UU Church of San Jose CA
UU Church of Oakland CA
Mt Diablo UU Church Walnut Creek CA
UU Church of Germantown PA
UU Church of Silver Spring MD
All Souls Church Tulsa OK
All Souls Church Washington DC

The annual retreat for UU religious professionals of color, “Finding Our Way Home 2011” will take place from Wednesday, March 16 through Saturday, March 19 in Greater Washington DC.

The UU Ministry for Earth is encouraging congregations to get involved in 10/10/10 Global Work Parties for climate justice, an international day of action organized by 350.org in which people are getting to work in their own communities and asking their elected officials to do the same. The events will be held on October 10th.

Approximately \$4,000 was raised through Standing on the Side of Love to provide assistance to UUs and other persons arrested during the Day of Non-Compliance in Phoenix AZ last July. These funds, along with \$5,000 from the Shelter Rock Congregation are available for legal assistance grants that are being administered by the UU Congregation of Phoenix AZ.

A study guide for the Immigration Study/Action Issue voted at the 2010 General Assembly is being developed by MG&W staff with guidance from UUs actively engaged in immigrant rights work and the Commission on Social Witness.

The UUA is a sponsoring organization for One Nation Working Together, a coalition of interfaith, human and civil rights, youth advocacy, and labor organizations to build a grassroots

movement for education, employment, immigration reform. A march is scheduled for October 2 in Washington DC. The coalition is also engaged in voter registration and Get out the Vote efforts for the mid-term elections. The UUA is a member of Faithful Democracy which has resources and suggestions for congregational participation.

Stewardship & Development Staff Group
Terry Sweetser, Vice President for Stewardship and Development

SUMMARY

Unrestricted Income	As of 9/21/10
Annual Program Fund	\$1,155,533
Friends of the UUA	\$96,149
Legacy Gifts	\$378,742
Subtotal Unrestricted Income	\$1,630,424

ANNUAL PROGRAM FUND

Year to date as of September 20, 2010:

FY	Actual	Goal	% of Goal
FY 11	\$1,155,533	\$6,610,000	17.5%
FY 10	\$1,056,324	\$6,608,048	15.6%

The FY2011 pledge forms were sent out in June and are still coming in. The APF office collaborated with four districts (Northern New England, Ohio-Meadville, Joseph Priestley, and St. Lawrence Districts) on joint letters and pledge forms for both APF and District contributions. During this first quarter, APF contributions have been steady and ahead of last year at this time by 9.4%.

The APF District Representatives have been meeting in smaller regional groupings in three different locations this fall. Part of their time will be spent on exploring the APF giving trends in each region and opportunities for regional collaboration. The District APF Reps continue to focus their contacts on those congregations with the greatest capacity and inclination to increase their contributions over the next year, strengthening relationships and offering encouragement.

The full APF Committee will meet in Boston on the weekend of March 10-13, 2011, meeting via web-conference at least twice more for information-sharing and support. The APF Executive Committee meets via web-conference at regular intervals.

FRIENDS OF THE UUA

Year to date as of September 21, 2009:

FY	Actual	Goal	% Goal	Avg. Gift	Donors	Avg. per Donor	Median Gift	Largest Gift
FY11	\$96,149*	\$1,000,000	9.7%	\$44	1,630	\$59	\$25	\$1,500
FY10	\$176,350*	\$1,140,968	15.5%	\$46	2,701	\$65	\$25	\$20,787

*excluding gifts for New Orleans Volunteer Relief Center and GNOUU

The 50th Anniversary of the UUA is a central message for the Friends direct mail program this year. Recently, an appeal on the theme of the 50th Anniversary was mailed to 17,000 current donors and 25,000 lapsed and future donors. Future appeals in the pipeline include an appeal based on our moral values and an appeal based on religious education. The Friends program is

also working in collaboration with the UU-UNO on a fundraising appeal in support of their initiatives.

Also, the program is shifting a few tactics to respond to current trends and giving patterns including integrating our direct mail with our online communications and the overall communications strategies for the staff group, developing an online gift catalog, and creating more targeted, specific mini-proposal packages for our direct mail major donor segment (roughly 2,000 donors).

To spearhead these new tactics are a newly hired vendor, Newport Creative Communications, and Jill Sarber, recently promoted to Communications Manager. We will be hiring a Communications Assistant as well to support Friends and overall communications for the department.

LEGACY GIFTS

Year to date as of September 21, 2010:

	UUA		UU Entity	Total
	Unrestricted	Restricted		
Matured Gifts – YTD	\$ 1,111,819	\$ 36,810	\$ 62,197	\$477,729
New Gifts* - YTD	\$ 7,500	\$ 9,000	\$ 18,500	\$35,000

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

The Legacy Gifts Office has received income distributions from 7 matured gifts for unrestricted purposes in the first three months of FY11 totaling \$378,722. In addition the legacy office has processed 8 gifts totaling \$62,131 for the benefit of congregations.

The Fall/Winter Legacy Newsletter is in development and will be sent to approximately 5,000 households in November. In addition to the Legacy Newsletter, a full page ad will appear in the winter issue of UU World Magazine promoting giving to the UUA.

The legacy office is undergoing some transition with the departure of Larry Stritof. Liz Baker McClain has accepted the Legacy Manager position and the transition is well underway. Marcia Trahan has recently been promoted to Legacy Gifts Administrator and has increased her time from three to four days a week.

MAJOR GIFTS

So far in FY11, Gift Officers have conducted more than 300 private meetings with donors, securing gifts amounting to more than \$150,000 for the UUA and more than \$180,000 for congregations and other UU entities through our umbrella giving program. They also continue to promote Association Sunday with our ministers and donors; 504 congregations had signed up to participate as of August 31, 2010, more to date than in any previous year.

This year the focus of the Major Gifts Program is to leverage Unitarian Universalism’s 50th anniversary to inspire \$1.36million in donations to support UUA programs. We are continuing conversations with donors who have been generous to us in the past, but also working to identify and cultivate new prospects who will be major donors to the UUA in the years to come.