

Stewardship & Development Quarterly Staff Group Report

To: The Board of Trustees of the Unitarian Universalist Association
 From: Terry Sweetser, Vice President for Stewardship and Development
 Reports developed by Stewardship & Development staff; compiled by Pat Grimm
 Date: December 19, 2008

SUMMARY

| Unrestricted Income | As of 1/13/09 |
|-------------------------------------|----------------------|
| Annual Program Fund | \$3,130,966 |
| Friends of the UUA | \$693,586 |
| Legacy Gifts | \$426,984 |
| Subtotal Unrestricted Income | \$3,522,845 |

| Restricted Income (Year to date FY 09) | UUA | Umbrella |
|---|--------------------|------------------|
| Now is the Time! Campaign | \$1,212,922 | \$241,146 |
| Legacy Gifts | \$342,731 | \$84,137 |
| Campaign for UUism | \$425 | \$5,952 |
| Subtotal Restricted Income | \$1,556,078 | \$331,235 |

The *Now is the Time* Campaign has raised over \$50 million, with another \$16.8 million in negotiation.

ANNUAL PROGRAM FUND

Year to date as of January 13, 2008:

| FY | Actual | Goal | % of Goal |
|-----------|---------------|-------------|------------------|
| 2009 | \$3,130,966 | \$7,166,004 | 43.69% |
| 2008 | \$3,202,945 | \$7,019,739 | 45.63% |

For a complete summary of Annual Program Fund income including breakout by region, see *Appendix 1: Annual Program Fund Statistics*.

Congregational contributions to the Annual Program Fund are steady and are in line with the giving trends of the past four fiscal years at this point. As of January 13, 2009, we have received \$3,130,966 in contributions, an achievement of 44% of this year's goal of \$7,166,004. In comparison, in Fiscal Year 2008, we had received \$3,202,945 in contributions, representing 46% of goal.

Nearly 78% of member congregations have submitted their FY09 pledges. We currently have pledge commitments representing 83% of our budgeted income, compared to 88% committed at this time last year. Pledge upgrades compared to last year continue to outpace downgrades by a significant margin. The APF Committee members are working diligently to secure the remaining pledges.

The collaboration with the St. Lawrence District and the Joseph Priestley District on joint pledging requests to congregations continues for this year, after a successful pilot year in

FY08. The APF staff regularly communicates with district and congregation leaders. Several visits to districts for meetings and workshops have been scheduled to promote effective APF funding to support strategies and generosity at the congregational level.

A task group has been established to assess the current Annual Program Fund calculation formula and to determine if any changes could be made that will ensure the APF equitably and effectively meets its annual income goals in future years. The UUA Administration, Finance Committee and Board will be kept apprised of the task group's process and findings.

The Annual Program Fund Committee has been engaging in a process of stewardship education, reflection, and best practices training over the past year. This dedicated group of volunteers and representatives meets again in Boston over the weekend of March 19-23, 2009.

FRIENDS OF THE UUA

Year to date as of January 13, 2009:

| FY | Actual | Goal | % Goal | Avg. Gift | Donors | Avg. per Donor | Median Gift | Largest Gift |
|-----------|---------------|-------------|---------------|------------------|---------------|-----------------------|--------------------|---------------------|
| FY09 | \$693,586 | \$1,650,000 | 42.7% | \$60 | 7,345 | \$94 | \$25 | \$25,000 |
| FY08 | \$762,787 | \$1,625,000 | 46.9% | \$57 | 9,170 | \$83 | \$25 | \$14,000 |

Year to date Friends income continues to run slightly behind last year. We expect that the Friends program should hit the \$1.4 million mark this fiscal year. The record fundraising in support of state and federal elections most likely had an impact, especially as our donor population has proven to be very politically responsive. We also expect that the economic downturn has had an impact on income and will likely continue to cause donors to rethink giving for the rest of the fiscal year.

In the past two years we successfully grew the Friends program through a program of actively soliciting new donors. The newly acquired donors, both from internal acquisition and from rented lists, had a return rate that was what we expected (and with the industry standard return rate range.) However, the key to sustaining that growth is the conversion of those first time donors to repeat donors.

Vital Data Management, the consultants currently working with the Friends Program, have done significant analysis on the program and were able to provide several suggestions for changes to the Friends packages with the goal of strengthening the donor base by increasing retention of existing donors and conversion of one time donors.

These suggestions include a higher level of personalization of our mailings, more thoughtful use of gift arrays, different mail list segmentation and more tailored messaging. These improvements are aimed at maintaining our historically high degree of loyalty among repeat donors and more successfully encouraging first time donors to join the ranks of the repeat donors.

A previously mentioned priority is reduction of the environmental impact of direct mail. We have already shifted from a long format letter (four pages on two sheets) to a shorter format letter (two pages on a single sheet). We are also in the advanced planning stages

of a project to begin significantly shifting to a program of email and US Mail combined; reducing the number of paper pieces without reducing contact with our donors.

In the upcoming month the Board of Trustees and the Staff of the UUA will be solicited for contributions to the Friends Program. In February we plan to solicit Friends donors and all UU members using the “Stand on the Side of Love”/Marriage Equality theme. In the past this topic was well received and given the recent events in California, is more topical than ever. We are currently developing art for this appeal and hope to have the mailing arrive in households on Valentines Day.

LEGACY GIFTS

Year to date as of December 31, 2008:

| Legacy Gifts FY09 Summary as of 12/31 | UUA | | UU Entity | Total |
|--|-----------------|---------------|---------------|-------------|
| | Unrestricted | Restricted | | |
| Matured Gifts – QTD | \$ 272,702.54 | \$ 344,287.36 | \$ 63,810.12 | \$680,800 |
| Matured Gifts – YTD | \$ 478,153.43 | \$ 351,981.16 | \$ 113,593.08 | \$943,728 |
| New Gifts* - QTD | \$ 20,000.00 | \$ 9,500.00 | \$ 56,500.00 | \$86,000 |
| New Gifts* - YTD | \$ 32,156.89 | \$ 351,932.04 | \$ 141,459.99 | \$525,549 |
| Commitments - QTD | \$ 2,100,002.00 | \$ 210,000.00 | \$ - | \$2,310,002 |
| Commitments - YTD | \$ 2,190,003.00 | \$ 210,000.00 | \$ - | \$2,400,003 |

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

The legacy office has handled a large number of gift annuity maturities this quarter, a significant factor in allowing us to reach our Legacy Gifts unrestricted income goal for the year already.

Other notable activities during the second fiscal quarter included two mailings and several electronic communications. The Fall / Winter Legacy Newsletter was sent to 5,000 households with total production and mailing costs of \$4,500, and resulting in six known IRA rollover gifts totaling \$12,000. The End of Year Giving brochure was sent to 5,000 households at a cost of \$3,800, and resulted in two known gift annuities totaling \$42,000.

The 2008-2009 Charitable IRA Rollover was passed into law. Announcements about this giving opportunity were distributed using the UU-Money & UU-PlannedGiving listservs, Giving and Generosity eNewsletter, and December congregational mailing. It was also featured in the Legacy Newsletter and end of year brochure.

The Legacy Gifts office also responded to 42 congregations asking for gift planning brochures and resources to help with their gift planning program.

“NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS



**NOW IS
THE TIME**

A CAMPAIGN TO GROW
UNITARIAN UNIVERSALISM

We offer our thanks to the Board of Trustees for their continued support of the *Now is the Time* Campaign.

We are grateful to report that Unitarian Universalists continue to give generously to support the vital work that is accomplished daily by the people of our Association.

Our donors believe that Unitarian Universalism is a life-saving faith; that in times of trouble, our message of peace, justice and religious inclusiveness is needed more than ever; that the financial health of our congregations and our Association is still a philanthropic priority.

Therefore, we are proud to announce that the *Now is the Time* campaign will reach or exceed its \$50 million goal in time for General Assembly 2009.

As of December 16, 2008, we have secured \$18,097,998 in cash and pledge gifts and \$29,055,302 in bequest gifts for the Campaign. This comes to a total of \$47,153,300 – or **94% of our \$50 million goal.**

This is an increase of \$5.8 million since the last time the Board of Trustees met in October 2008.

Campaign donor participation is also at its highest level ever – doubling the number of donors in HOTF and almost 4 times as many as CFUU:

| Campaign | # Donors (as of 12/8/08) |
|-------------------|--------------------------|
| NOW (2004-2009) | 23,595 |
| CFUU (1999 -2004) | 5,895 |
| HOTF (1992-1997) | 11,239 |

A campaign Flash Report as of December 16, 2008 is attached to this report; an updated Flash Report is available weekly and will be distributed at the Board of Trustees meeting. (See Appendix 2.)

During the coming months, we will focus on closing the campaign by fundraising for several key projects, centered around the following themes:

- Cultural Diversity
- Environmental Justice
- Marriage Equality

Towards this end, the new “Love Letters” campaign launched in early December. This program allows donors to send a personalized card to the recipient of their choice when they donate to support Cultural Diversity, Environmental Justice, or Marriage Equality projects.

As of this writing, we have received several orders for holiday cards, and we expect to promote this project again for Valentine's Day, Earth Day and other related dates.
<http://www.uua.org/loveletters>

In addition to new gift activity, we continue to receive payments on pledges made to previous campaigns. So far this year, \$425 in receipts for the Campaign for Unitarian Universalism have come in, and currently we have just four outstanding CFUU pledges.

The continuing positive response to all our programs and campaigns reinforces our overall impression that Unitarian Universalists are demonstrating tremendous generosity to the Association, our congregations, and other UU entities, even during these trying economic times.

This generosity is an affirmation that the work of the Board of Trustees, the Administration, and the staff of this Association of Congregations is worthwhile and appreciated by our constituencies. It is also a blessing for our ongoing collaboration to make this a better world.

We are grateful, as always, for President Sinkford's attention to and support of our efforts to create abundance in a culture of gratitude.

ASSOCIATION SUNDAY

Association Sunday 2008 took place on Sunday, October 12, 2008. Of the 579 congregations signed up, 392 congregations have already held their services, and 157 have scheduled their services for a future date, with most ending by May 2009. As of January 12, 2009, we have received contributions totaling \$329,204.16 from members representing 441 congregations, which is on-target for the revised budget estimate of \$350,000 as announced at the October Board of Trustees meeting.

President Sinkford collaborated closely with Rev. Laurel Hallman and Rev. Peter Morales, the candidates for the UUA Presidency, to create a plan for Association Sunday 2009. All have agreed that "Growth in Diversity" will be the theme, and the target date is October 4, 2009. Already 30 congregations have signed on for 2009!

On December 9, the UUA sent an electronic survey asking for feedback on Association Sunday 2008 and asking for input for the fundraising priorities for Association Sunday 2009. The survey closes December 19, 2008. A copy of the survey questions is attached.

Appendix 1: Annual Program Fund Statistics

| FY 2009 YTD | | FY 2008 (full year) |
|--------------------------------------|---|--------------------------------------|
| \$7,166,004 | Goal | \$7,019,739 |
| \$8,873,080 | Total Fair Share | \$8,376,176 |
| 1,047 | Total number of congregations | 1,047 |
| FY 2009 YTD | | FY 2008 (full year) |
| \$3,129,034 | Total gifts received to date | \$7,039,166 |
| 35.26% | Current Fair Share dollars received to date | 84.03% |
| 43.66% | Current goal dollars received to date | 100% |
| \$5,931,511 | Pledged dollars | \$6,862,249 |
| 66.85% | Current Fair Share dollars pledged | 81.92% |
| 82.77% | Current goal dollars pledged | 97.75% |
| 818 | congregations that have pledged | 949 |
| 637 | congregations that have pledged Fair Share | 767 |
| 162 | congregations that have given their full pledge | 1005 |
| 115 | congregations that have given Fair Share | 706 |
| FY 2009 YTD | | FY 2008 (full year) |
| % Fair Share Dollars received | DISTRICTS | % Fair Share Dollars received |
| 23.4% | Ballou Channing | 60.21% |
| 31.5% | Central Midwest | 77.15% |
| 29.1% | Clara Barton | 70.94% |
| 0.0% | CLF | 100.00% |
| 42.1% | Florida | 93.56% |
| 35.1% | Heartland | 83.19% |
| 0.5% | Joseph Priestley | 94.12% |
| 43.8% | Mass Bay | 80.26% |
| 37.3% | Metro New York | 98.42% |
| 39.4% | Mid-South | 98.57% |
| 36.6% | Mountain Desert | 83.91% |
| 40.1% | Northern New England | 73.43% |
| 29.8% | Ohio-Meadville | 69.84% |
| 28.1% | Pacific Central | 94.60% |
| 47.0% | Pacific Northwest | 92.52% |
| 30.7% | Pacific Southwest | 94.60% |
| 41.1% | Prairie Star | 83.65% |
| 34.1% | Southwest | 86.79% |
| 34.5% | St. Lawrence | 80.73% |
| 36.1% | Thomas Jefferson | 92.84% |

Appendix 2: Now is the Time! Comprehensive Campaign State of the Fund Flash Report as of 12/16/08



Now is the Time! Comprehensive Fundraising Campaign

State of the Campaign Flash Report
Tuesday, December 16, 2008

Campaign Income Vitals

| | Income | Goal | % goal |
|-----------------------|----------------------|----------------------|------------|
| Cash Gifts | \$ 18,097,998 | \$ 20,000,000 | 90% |
| Legacy Gifts | \$ 29,055,302 | \$ 30,000,000 | 97% |
| Campaign Total | \$ 47,153,300 | \$ 50,000,000 | 94% |
| <i>In Negotiation</i> | \$ 15,861,750 | - | - |

Cash Detail (including pledges)

| | |
|-------------------------|----------------------|
| UUA Restricted | \$ 12,915,918 |
| UUA Unrestricted | \$ 424,411 |
| Umbrella | \$ 4,757,670 |
| Total Cash Gifts | \$ 18,097,998 |
| Outstanding Pledges | \$ (4,357,602) |

Umbrella Giving Detail

| | |
|-----------------------------|----------------------|
| UU Organizations | \$ 8,314,441 |
| Congregations | \$ 7,068,373 |
| Total Umbrella Gifts | \$ 15,382,814 |

Includes both cash and legacy umbrella gifts

Legacy Gifts Detail

| | |
|---------------------------|----------------------|
| UUA Restricted | \$ 13,242,735 |
| UUA Unrestricted | \$ 5,227,423 |
| Umbrella | \$ 10,585,144 |
| Total Legacy Gifts | \$ 29,055,302 |

Legacy Gift Vehicles

| | | |
|--------------------|----------------------|------------|
| Bequest | \$ 20,321,498 | 102 |
| Gift Annuity | \$ 5,337,756 | 267 |
| Remainder Unitrust | \$ 1,876,411 | 35 |
| Pooled Income Fund | \$ 269,636 | 30 |
| Life Insurance | \$ 250,001 | 3 |
| Totals | \$ 28,055,302 | 437 |

Legacy gifts are included at face value

Now is the accepted time, not tomorrow, not some more convenient time...

- W.E.B. DuBois

Totals as of 12/16/2008
These figures have not been reconciled with finance.



Appendix 3: Stewardship & Development Travel

| Staff Member | Purpose of Visit | Location | Date Start | Date End |
|--------------|---|---------------------------------|-------------------|-------------------|
| Beth Graham | Donor Visits | Washington, DC | Fri, Oct 10, 2008 | Mon, Oct 13, 2008 |
| Beth Graham | Preach - Unitarian Universalist Church of Arlington | Arlington, VA | Sun, Oct 12, 2008 | Sun, Oct 12, 2008 |
| Beth Graham | Donor Visits | Atlanta, GA | Wed, Oct 15, 2008 | Thu, Oct 16, 2008 |
| Beth Graham | Donor Visits | Raleigh / Chapel Hill, NC | Sun, Oct 19, 2008 | Wed, Oct 22, 2008 |
| Beth Graham | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
| Beth Graham | Donor Visits | Denver / Durango, CO | Fri, Oct 31, 2008 | Tue, Nov 04, 2008 |
| Beth Graham | Donor Visits | Philadelphia / Lancaster PA | Fri, Nov 07, 2008 | Sun, Nov 09, 2008 |
| Beth Graham | Preach - UUA Church Restoration, PA | Philadelphia, PA | Sun, Nov 09, 2008 | Mon, Nov 10, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Tue, Nov 11, 2008 | Wed, Nov 12, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Thu, Nov 13, 2008 | Fri, Nov 14, 2008 |
| Beth Graham | Donor Visits | Chicago, IL | Fri, Nov 14, 2008 | Sat, Nov 15, 2008 |
| Beth Graham | Preach - First Unitarian Chicago | Chicago, IL | Sun, Nov 16, 2008 | Mon, Nov 17, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Thu, Nov 20, 2008 | Thu, Nov 20, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Mon, Nov 24, 2008 | Mon, Nov 24, 2008 |
| Beth Graham | Donor Visits | Westport, CT and Huntington, NY | Wed, Dec 10, 2008 | Thu, Dec 11, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Wed, Dec 17, 2008 | Thu, Dec 18, 2008 |
| Beth Graham | Staff Meetings | Boston, MA | Thu, Jan 08, 2009 | Thu, Jan 08, 2009 |
| Beth Graham | Donor Visits | Georgia | Sun, Jan 25, 2009 | Mon, Jan 26, 2009 |
| Beth Graham | Building Dedication - UUA Church of Coastal GA | Brunswick, GA | Sun, Jan 25, 2009 | Sun, Jan 25, 2009 |
| Beth Graham | Staff Meetings | Boston, MA | Thu, Feb 05, 2009 | Thu, Feb 05, 2009 |

| | | | | |
|-----------------|---|-----------------|-------------------|-------------------|
| Catherine Lynch | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
| Catherine Lynch | Donor Visits & Visiting UUA DC Office | Washington, DC | Fri, Nov 07, 2008 | Tue, Nov 11, 2008 |
| Catherine Lynch | Donor Visits & Houston Roundtable Holiday Party | Houston, TX | Sat, Dec 13, 2008 | Mon, Dec 15, 2008 |
| Catherine Lynch | Speaking at Towson UUA Congregation | Lutherville, MD | Sun, Jan 11, 2009 | Mon, Jan 12, 2009 |
| Catherine Lynch | Speaking at UUA Loudoun | Leesburg, VA | Sun, Jan 25, 2009 | Mon, Jan 26, 2009 |

| | | | | |
|------------------------|-----------------------------|-----------------|-------------------|-------------------|
| Moira Pulitzer-Kennedy | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
|------------------------|-----------------------------|-----------------|-------------------|-------------------|

Appendix 3: Stewardship & Development Travel (continued)

| Staff Member | Purpose of Visit | Location | Date Start | Date End |
|------------------|---|--|-------------------|-------------------|
| Devin Letzer | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
| Katrina Bergmann | Donor Project - Visiting Unitarian Schools | Khasi Hills, India | Tue, Sep 30, 2008 | Thu, Oct 09, 2008 |
| Katrina Bergmann | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
| Katrina Bergmann | Donor Visits | Houston, Austin TX | Sat, Dec 13, 2008 | Mon, Dec 15, 2008 |
| Laurel Amabile | Ecumenical Stewardship Center Mission Funding Forum | Chicago, IL | Mon, Sep 29, 2008 | Wed, Oct 01, 2008 |
| Laurel Amabile | Generosity & Stewardship Workshop | Fairhaven, MA (Ballou Channing District) | Fri, Oct 24, 2008 | Sat, Oct 25, 2008 |
| Laurel Amabile | Congregation Visits | Denver, CO Area | Tue, Oct 28, 2008 | Fri, Oct 31, 2008 |
| Laurel Amabile | Congregation Visits | Spartanburg, SC | Fri, Nov 28, 2008 | Sun, Nov 30, 2008 |
| Laurel Amabile | Congregation Visits | Washington, DC | Mon, Dec 08, 2008 | Tue, Dec 09, 2008 |
| Laurel Amabile | Congregation Visits | Richmond, VA | Tue, Dec 09, 2008 | Wed, Dec 10, 2008 |
| Laurel Amabile | Congregation Visits | Durham, NC | Thu, Dec 11, 2008 | Thu, Dec 11, 2008 |
| Laurel Amabile | Congregation Visits | Worcester, MA (Clara Barton District) | Sun, Jan 11, 2009 | Tue, Jan 13, 2009 |
| Laurel Amabile | Congregation Visit, Workshop, Preach | Exeter, NH | Sat, Jan 24, 2009 | Sun, Jan 25, 2009 |
| Laurel Amabile | Midsize Congregation Conference | Houston, TX | Thu, Feb 05, 2009 | Mon, Feb 09, 2009 |
| Laurel Amabile | Congregation Visits or Annual Assembly | Pacific Northwest District | Thu, Feb 19, 2009 | Mon, Feb 23, 2009 |
| Stephan Papa | Association Sunday Visit | Boston, MA | Wed, Oct 01, 2008 | Wed, Oct 01, 2008 |
| Stephan Papa | Association Sunday Visit | Minneapolis, MN | Fri, Oct 03, 2008 | Sat, Oct 04, 2008 |
| Stephan Papa | Preach - First Universalist | Minneapolis, MN | Sun, Oct 05, 2008 | Mon, Oct 06, 2008 |
| Stephan Papa | Association Sunday Visit | Bellevue, WA | Sat, Oct 11, 2008 | Mon, Oct 13, 2008 |
| Stephan Papa | Preach - East Shore | Bellevue, WA | Sun, Oct 12, 2008 | Sun, Oct 12, 2008 |
| Stephan Papa | Preach - Princeton | Princeton, NJ | Sun, Oct 19, 2008 | Wed, Oct 29, 2008 |
| Stephan Papa | President's Council Meeting | Minneapolis, MN | Wed, Oct 22, 2008 | Sat, Oct 25, 2008 |
| Stephan Papa | Preach - Main Line Unitarian | Devon, PA | Sun, Oct 26, 2008 | Sun, Oct 26, 2008 |
| Stephan Papa | Staff Meetings | Boston, MA | Wed, Nov 12, 2008 | Thu, Nov 13, 2008 |
| Stephan Papa | Preach - West Chester UUA Fellowship | West Chester, PA | Sun, Nov 16, 2008 | Sun, Nov 16, 2008 |

Appendix 3: Stewardship & Development Travel (continued)

| Staff Member | Purpose of Visit | Location | Date Start | Date End |
|--------------|----------------------------------|----------------------------|-------------------|-------------------|
| Stephan Papa | Preach - First Unitarian Society | Brooklyn, NY | Sun, Nov 23, 2008 | Sun, Nov 23, 2008 |
| Stephan Papa | Association Sunday Visits | Concord & Cambridge, MA | Wed, Dec 03, 2008 | Wed, Dec 03, 2008 |
| Stephan Papa | Association Sunday Visit | Boston, MA | Fri, Dec 05, 2008 | Fri, Dec 05, 2008 |
| Stephan Papa | Association Sunday Visits | Exton, PA | Mon, Dec 08, 2008 | Mon, Dec 08, 2008 |
| Stephan Papa | Association Sunday Visit | Devon, PA | Mon, Dec 08, 2008 | Mon, Dec 08, 2008 |
| Stephan Papa | Association Sunday Visits | Alexandria & Manassas, VA | Tue, Dec 09, 2008 | Tue, Dec 09, 2008 |
| Stephan Papa | Association Sunday Visits | Columbia & Lutherville, MD | Wed, Dec 10, 2008 | Wed, Dec 10, 2008 |
| Stephan Papa | Association Sunday Visits | Philadelphia, PA | Thu, Dec 11, 2008 | Thu, Dec 11, 2008 |
| Stephan Papa | Association Sunday Visits | Huntington, NY | Wed, Dec 17, 2008 | Wed, Dec 17, 2008 |
| Stephan Papa | Association Sunday Visit | Manhasset, NY | Wed, Dec 17, 2008 | Wed, Dec 17, 2008 |
| Stephan Papa | Association Sunday Visits | New York, NY | Thu, Dec 18, 2008 | Thu, Dec 18, 2008 |
| Stephan Papa | Association Sunday Visits | Portsmouth, NH | Tue, Jan 06, 2009 | Tue, Jan 06, 2009 |
| Stephan Papa | Association Sunday Visit | Boston, MA | Wed, Jan 07, 2009 | Wed, Jan 07, 2009 |
| Stephan Papa | Staff Meetings | Boston, MA | Thu, Jan 08, 2009 | Thu, Jan 08, 2009 |
| Stephan Papa | Association Sunday Visits | Boston, MA | Fri, Jan 09, 2009 | Fri, Jan 09, 2009 |
| Stephan Papa | Association Sunday Visit | Media, PA | Tue, Jan 13, 2009 | Tue, Jan 13, 2009 |
| Stephan Papa | Staff Meetings | Boston, MA | Thu, Feb 05, 2009 | Thu, Feb 05, 2009 |
| Stephan Papa | Preach - First Unitarian | Houston, TX | Sun, Feb 22, 2009 | Mon, Feb 23, 2009 |

| | | | | |
|----------------|------------------------------------|--|-------------------|-------------------|
| Terry Sweetser | Leadership Council Meetings | Boston, MA | Wed, Oct 01, 2008 | Thu, Oct 02, 2008 |
| Terry Sweetser | Staff Meetings | Boston, MA | Thu, Oct 02, 2008 | Fri, Oct 03, 2008 |
| Terry Sweetser | Preach - Association Sunday | Harrisburg, PA | Sun, Oct 12, 2008 | Mon, Oct 13, 2008 |
| Terry Sweetser | Board of Trustees Meeting | Boston, MA | Thu, Oct 16, 2008 | Fri, Oct 17, 2008 |
| Terry Sweetser | President's Council Meeting | Minneapolis, MN | Thu, Oct 23, 2008 | Mon, Oct 27, 2008 |
| Terry Sweetser | Staff Meetings | Boston, MA | Thu, Nov 06, 2008 | Fri, Nov 07, 2008 |
| Terry Sweetser | Donor Visits | Nashville, TN | Sun, Nov 09, 2008 | Wed, Nov 12, 2008 |
| Terry Sweetser | Donor Visits | Charlottesville, VA | Fri, Nov 14, 2008 | Sat, Nov 15, 2008 |
| Terry Sweetser | Preach - Thomas Jefferson Memorial | Charlottesville, VA | Sun, Nov 16, 2008 | Mon, Nov 17, 2008 |
| Terry Sweetser | Staff Meetings | Boston, MA | Thu, Nov 20, 2008 | Fri, Nov 21, 2008 |
| Terry Sweetser | Donor Visits | Northern California / San Francisco Area | Mon, Dec 08, 2008 | Tue, Dec 09, 2008 |
| Terry Sweetser | Houston Roundtable Holiday Party | Houston, TX | Sat, Dec 13, 2008 | Sat, Dec 13, 2008 |

Appendix 3: Stewardship & Development Travel (continued)

| Staff Member | Purpose of Visit | Location | Date Start | Date End |
|---------------------|---|--------------------------------|-------------------|-------------------|
| Terry Sweetser | Attending services - Emerson UUA Church | Houston, TX | Sun, Dec 14, 2008 | Sun, Dec 14, 2008 |
| Terry Sweetser | Donor Visits | San Diego / Thousand Oaks Area | Sun, Dec 28, 2008 | Thu, Jan 01, 2009 |
| Terry Sweetser | Staff Meetings | Boston, MA | Mon, Jan 05, 2009 | Thu, Jan 08, 2009 |
| Terry Sweetser | UUA Board of Trustees Meeting | Boston, MA | Wed, Jan 14, 2009 | Sat, Jan 17, 2009 |
| Terry Sweetser | Donor Visits | Florida | Sat, Jan 17, 2009 | Sun, Jan 18, 2009 |
| Terry Sweetser | Leadership Council and Staff Meetings | Boston, MA | Tue, Feb 03, 2009 | Thu, Feb 05, 2009 |
| Terry Sweetser | Staff Meetings | Boston, MA | Tue, Feb 03, 2009 | Fri, Feb 06, 2009 |
| Terry Sweetser | Evening Celebration - UUA Society of Mill Creek, DE | Pike Creek Valley, Newark, DE | Sat, Feb 21, 2009 | Sat, Feb 21, 2009 |
| Terry Sweetser | Donor Visits | Delaware | Sat, Feb 21, 2009 | Sun, Feb 22, 2009 |
| Terry Sweetser | Preaching at UUA Society of Mill Creek, DE | Pike Creek Valley, Newark, DE | Sun, Feb 22, 2009 | Sun, Feb 22, 2009 |
| Terry Sweetser | Houston Roundtable Luncheon | Houston, TX | Wed, Feb 25, 2009 | Wed, Feb 25, 2009 |

Appendix 4: Association Sunday 2008 Participating Congregations as of December 16, 2008

| District # 10 Massachusetts Bay | | |
|---|--|--|
| MA | First Parish in Bedford, Bedford | |
| MA | The First Church in Belmont, Belmont | |
| MA | King's Chapel, Boston | |
| MA | First Church in Boston, Boston | |
| MA | Arlington Street Church, Boston | |
| MA | First Parish in Brookline, Brookline | |
| MA | First Parish in Cambridge (UU), | |
| MA | First Parish in Concord, Concord | |
| MA | Northshore UU Church, Danvers | |
| MA | First Parish in Framingham, | |
| MA | Independent Christian Church | |
| MA | First Church in Jamaica Plain UU, | |
| MA | First Parish in Lexington, Lexington | |
| MA | First Parish in Malden Universalist, | |
| MA | First Parish UU, Medfield | |
| MA | First Parish in Milton UU, Milton | |
| MA | First Parish in Needham UU, Needham | |
| MA | The North Parish of North Andover, | |
| MA | United First Parish Church (Unitarian) | |
| MA | UU Area Church at First Parish in | |
| MA | First Parish Church in Waltham UU | |
| District # 20 Northern New England | | |
| ME | The UU Society of Bangor, Bangor | |
| ME | UU Church of Belfast, Belfast | |
| ME | UU Congregation of Castine, Castine | |
| NH | Durham UU Fellowship, Durham | |
| NH | Keene UU Church, Keene | |
| NH | UU Congregation in Milford, Milford | |
| VT | UU Fellowship of Bennington, | |
| VT | First UU Society of Burlington VT Inc., | |
| VT | UU Congregation of the Upper Valley, | |
| VT | UU Church of Rutland Vermont, Rutland | |
| VT | Universalist Unitarian Congregation, St | |
| District # 33 Ballou Channing | | |
| MA | Murray UU Church, Attleboro | |
| MA | First Parish in Cohasset, Cohasset | |
| MA | First Parish Church UU, Duxbury | |
| MA | UU Fellowship of Falmouth, East | |
| MA | UU Society of Fairhaven, Fairhaven | |
| MA | First Parish in Hingham Old Ship | |
| MA | Second Parish UU in Hingham, Hingham | |
| MA | First Congregational Parish in Kingston, | |
| MA | First UU Society, Middleboro | |
| MA | Second Congregational Meeting House | |
| MA | Unity Church of North Easton, North | |
| MA | First Parish Church, Norwell | |
| MA | Universalist Meeting House, | |

Appendix 4 Association Sunday Participating Congregations

| | | |
|-------------------------------------|----|---|
| | MA | First Parish Universalist Church, |
| | RI | Religious Society of Bell Street Chapel, |
| | RI | First Unitarian Church of Providence, |
| | RI | UU Congregation of South County, |
| District # 40 St. Lawrence | | |
| | NY | First UU Society of Albany, Albany |
| | NY | Unitarian Church of Barneveld, |
| | NY | UU Fellowship of Big Flats, Big Flats |
| | NY | UU Congregation, Binghamton |
| | NY | UU Church of Canandaigua, Canandaigua |
| | NY | First Universalist Society of Central |
| | NY | First UU Church of Niagara, Niagara Falls |
| | NY | UU Fellowship of Plattsburgh NY, |
| | NY | The First Universalist Church of |
| | NY | First Unitarian Church, Rochester |
| | NY | First Unitarian Society of Schenectady, |
| | NY | Hornell Alfred UU Society, Scio |
| | NY | First UU Society of Syracuse, Syracuse |
| | NY | All Souls UU Church, Watertown |
| | NY | UU Church of Amherst, Williamsville |
| | PA | UU Church of Athens and Sheshequin, |
| District # 45 Metro New York | | |
| | CT | UU Congregation of Danbury, Danbury |
| | CT | UU Society in Stamford, Stamford |
| | NJ | The Unitarian Society A UU |
| | NJ | UU Congregation of the Palisades, |
| | NJ | The UU Congregation at Montclair, |
| | NJ | UU Fellowship of Sussex County, Newton |
| | NJ | First UU Church of Essex County, |
| | NJ | Central Unitarian Church, Paramus |
| | NJ | UU Congregation of Princeton, |
| | NJ | The Unitarian Society of Ridgewood NJ, |
| | NJ | UU Congregation of Somerset Hills, |
| | NJ | UU Church at Washington Crossing, |
| | NJ | Lakeland UU Fellowship, Wayne |
| | NY | UU Fellowship of Bellport, Bellport |
| | NY | UU Congregation of The South Fork |
| | NY | UU Fellowship Briarcliff Croton |
| | NY | South Nassau UU Congregation, |
| | NY | UU Congregation of Central Nassau, |
| | NY | First Unitarian Society of Westchester, |
| | NY | UU Fellowship of Huntington, |
| | NY | UU Congregation at Shelter Rock, |
| | NY | Fourth Unitarian Society of Westchester |
| | NY | Upper Delaware UU Fellowship, |
| | NY | The Community Church of New York |
| | NY | First Unitarian Society of Rockland |
| | NY | The First Universalist Church of |
| | NY | Unitarian Church of Staten Island, |
| | NY | UU Fellowship at Stony Brook, Stony |
| | NY | UU Congregation at Rock Tavern, |

Appendix 4 Association Sunday Participating Congregations

| | | |
|---------------------------------------|----|---|
| | NY | Community Unitarian Church, White |
| District # 50 Heartland | | |
| | IN | UU Church of Bloomington Inc., |
| | IN | UU Congregation of Columbus Indiana, |
| | IN | Unit Univ Community Church of |
| | IN | UU Church, Evansville |
| | IN | UU Church of Indianapolis, Indianapolis |
| | IN | Oaklandon UU Church, Indianapolis |
| | IN | UU Church of Muncie, Muncie |
| | KY | Thomas Jefferson Unitarian Church, |
| | KY | UU Fellowship of Madison County, |
| | MI | First UU Congregation of Ann Arbor, |
| | MI | UU Church of Farmington, Farmington |
| | MI | UU Church of Flint, Flint |
| | MI | People's Church, Kalamazoo |
| | MI | People's Church, Ludington |
| | MI | UU Fellowship of Central Michigan, Mt |
| | MI | Northwest UU Church, Southfield |
| | MI | UU Congregation of Grand Traverse, |
| | OH | St John's UU Church, Cincinnati |
| | OH | First Unitarian Church, Cincinnati |
| | OH | Northern Hills Fellowship, Cincinnati |
| | OH | Miami Valley UU Fellowship, Dayton |
| | OH | UU Fellowship of Lima Ohio Inc., Lima |
| | OH | First Universalist Church (UUA), New |
| | OH | Hopedale UU Community, Oxford |
| District # 51 Clara Barton | | |
| | CT | Unitarian Society of New Haven, Hamden |
| | CT | Unitarian Society of Hartford, Hartford |
| | CT | All Souls UU Congregation, New |
| | CT | Mattatuck UU Society, Woodbury |
| | MA | UU Society of Amherst, Amherst |
| | MA | First Parish Church of Ashby UU, Ashby |
| | MA | First Parish Church UU, Fitchburg |
| | MA | UU Society of Grafton & Upton, Grafton |
| | MA | All Souls UU Church, Greenfield |
| | MA | Unitarian Church of Marlborough & |
| | MA | The First UU Church of Milford, |
| | MA | First Parish Church UU, Northborough |
| | MA | First Congregational Parish Unitarian, |
| | MA | UU Society of Greater Springfield, |
| | MA | First Parish Church UU of Stow & |
| | MA | First Unitarian Church (Second Parish), |
| | MA | UU Church of Worcester, Worcester |
| District # 53 Joseph Priestley | | |
| | DC | All Souls Church Unitarian, Washington |
| | DC | Washington Ethical Society, |
| | DE | UUs of Southern Delaware, Lewes |
| | DE | First Unitarian Society of Wilmington |
| | MD | The First Unitarian Church of |
| | MD | Cedar Lane UU Church, Bethesda |

Appendix 4 Association Sunday Participating Congregations

| | | |
|---------------------------------------|----|--|
| | MD | River Road UU Congregation, Bethesda |
| | MD | UU Congregation of the Chesapeake, |
| | MD | Davies Memorial UU Church, Camp |
| | MD | UUs of the Chester River, Chestertown |
| | MD | UU Congregation of Columbia, |
| | MD | UU Fellowship of Greater Cumberland, |
| | MD | UU Fellowship at Easton, Easton |
| | MD | UUs of Fallston, Fallston |
| | MD | UU Fellowship of Southern Maryland, |
| | MD | Towson UU Church, Lutherville |
| | MD | UU Church of Rockville, Rockville |
| | NJ | UU Church in Cherry Hill, Cherry Hill |
| | NJ | UU Congregation of the South Jersey |
| | PA | UUs of the Cumberland Valley, Boiling |
| | PA | Thomas Paine UU Fellowship, |
| | PA | UUs of Gettysburg, Gettysburg |
| | PA | Unitarian Church of Harrisburg, |
| | PA | UU Church of Lancaster PA, Lancaster |
| | PA | UU Fellowship of Lower Bucks, |
| | PA | UU Congregation of Susquehanna |
| | PA | UU Church of the Restoration, |
| | PA | First Unitarian Church, Philadelphia |
| | PA | First UU Church Berks County, Reading |
| | PA | UU Fellowship of Centre County, State |
| | PA | Unitarian Fellowship of West Chester, |
| | PA | The UU Congregation of York, York |
| | VA | Mt Vernon Unitarian Church, |
| | VA | UU Church of Arlington, Arlington |
| | VA | Accotink UU Church, Burke |
| | VA | UU Church of Loudoun, Leesburg |
| | VA | UU Congregation of Fairfax, Oakton |
| | VA | UU Church in Reston, Reston |
| | VA | UUs of Sterling, Sterling |
| District # 60 Thomas Jefferson | | |
| | GA | UU Church of Augusta, Augusta |
| | GA | UUs of Coastal Georgia, Brunswick |
| | GA | UU Church of Savannah, Troup Square, |
| | GA | UU Fellowship of Statesboro, Statesboro |
| | NC | UU Church of Asheville, Asheville |
| | NC | UUs of Transylvania County, Brevard |
| | NC | UU Church of Charlotte, Charlotte |
| | NC | UU Fellowship of Franklin North |
| | NC | UU Congregation of Greenville, |
| | NC | UU Congregation of the Outer Banks, |
| | NC | UU Fellowship of New Bern NC, New |
| | NC | UU Fellowship of Raleigh, Raleigh |
| | NC | UU Fellowship, Wilmington |
| | SC | Aiken UU Church, Aiken |
| | SC | UU Fellowship of Beaufort, Inc, Beaufort |
| | SC | The UU Fellowship of Clemson, Clemson |
| | SC | UU Fellowship of Columbia, Columbia |

Appendix 4 Association Sunday Participating Congregations

| | | |
|-------------------------------------|----|--|
| | SC | The Greenville UU Fellowship, Greenville |
| | TN | Holston Valley UU Church, Gray |
| | TN | Unitarian Fellowship of Murfreesboro, |
| | TN | UU Church of Tullahoma TN, Tullahoma |
| | VA | Thomas Jefferson Memorial Church |
| | VA | Harrisonburg UUs, Harrisonburg |
| | VA | First Unitarian Church of Lynchburg |
| | VA | Unitarian Church of Norfolk (UU), |
| | VA | UU Fellowship of Waynesboro VA, |
| | VA | Williamsburg UUs, Williamsburg |
| District # 62 Florida | | |
| | FL | UU Fellowship of Boca Raton, Boca |
| | FL | UU Church in the Pines, Brooksville |
| | FL | Nature Coast UUs Inc., Citrus Springs |
| | FL | First UU Church of West Volusia, |
| | FL | UU Church of Fort Lauderdale, Fort |
| | FL | UU Church of Fort Myers Inc., Fort |
| | FL | UU Fellowship of Gainesville, |
| | FL | UU Church of Jacksonville, Jacksonville |
| | FL | The UU Congregation of Lakeland, |
| | FL | UU Congregation of Miami, Miami |
| | FL | UU Congregation of Greater Naples, |
| | FL | First UU Congregation of the Palm |
| | FL | Spirit of Life UUs, Odessa |
| | FL | Mosaic UU, Orange City |
| | FL | Buckman Bridge UU Society, Orange |
| | FL | University UU Society Inc., Orlando |
| | FL | River of Grass UU Congregation, |
| | FL | Treasure Coast UU Society, Stuart |
| | FL | Unit. Univ. Fellowship of Marion |
| | FL | UU Church of Tallahassee, Tallahassee |
| | FL | UU Church of Tarpon Springs Inc., |
| District # 63 Mid-South | | |
| | AL | Auburn UU Fellowship, Auburn |
| | AL | UU Church Huntsville, Huntsville |
| | FL | UU Fellowship of the Emerald Coast, |
| | GA | UU Congregation of Atlanta, Atlanta |
| | GA | UU Fellowship of Columbus, Fortson |
| | GA | Emerson UU Congregation, Marietta |
| | MS | Gulf Coast UU Fellowship, Gulfport |
| | MS | Hattiesburg U U Fellowship, Hattiesburg |
| | MS | UU Church of Jackson, Jackson |
| | MS | UU Congregation of Oxford, Oxford |
| | TN | The First UU Church of Nashville, |
| District # 70 Ohio-Meadville | | |
| | NY | UU Congregation of Jamestown NY, |
| | OH | UU Fellowship of Athens (Ohio), |
| | OH | Maumee Valley UU Congregation, |
| | OH | UU Congregation of Greater Canton, |
| | OH | West Shore UU Church, Cleveland |
| | OH | UU Society of Cleveland, Cleveland |

Appendix 4 Association Sunday Participating Congregations

| | | |
|--------------------------------------|----|--|
| | OH | UU Church of Akron, Fairlawn |
| | OH | UU Church of Blanchard Valley, Findlay |
| | OH | UU Church of Kent Ohio, Kent |
| | OH | East Shore UU Church, Kirtland |
| | OH | UU Congregation East, Reynoldsburg |
| | OH | First Unitarian Church of Cleveland, |
| | OH | First Unitarian Church, Toledo |
| | PA | UU Congregation of Erie, Erie |
| | PA | UU Church of Meadville, Meadville |
| | PA | UU Church of the South Hills, |
| | PA | UU Church of the North Hills, |
| | PA | Ginger Hill UU Congregation, Slippery |
| | WV | UU Fellowship of Morgantown, |
| District # 76 Central Midwest | | |
| | IL | First Unitarian Church, Alton |
| | IL | Carbondale Unitarian Fellowship, |
| | IL | First Unitarian Society of Chicago, |
| | IL | Unitarian Church of Evanston, |
| | IL | Unitarian Church of Hinsdale, Hinsdale |
| | IL | Dupage UU Church, Naperville |
| | IL | Countryside Church UU, Palatine |
| | IL | UU Church, Peoria |
| | IL | The UU Church, Rockford |
| | IL | Lake Shore Unitarian Society, Winnetka |
| | MI | Keweenaw UU Fellowship, Houghton |
| | MI | The Marquette Unitarian Universalist |
| | MO | UU Church, Columbia |
| | MO | Emerson UU Chapel, Ellisville |
| | MO | UU Fellowship of Jefferson City, |
| | MO | Eliot Unitarian Chapel, Kirkwood |
| | WI | Fox Valley UU Fellowship Inc., Appleton |
| | WI | UU Church of the Lakes, Elkhorn |
| | WI | Green Bay Area UU Fellowship, Green |
| | WI | Lake Country UU Church, Hartland |
| | WI | First Unitarian Society, Madison |
| | WI | Prairie UU Society, Madison |
| | WI | James Reeb UU Congregation, Madison |
| | WI | Unitarian Church North, Mequon |
| | WI | First Unitarian Society of Milwaukee, |
| | WI | United Unitarian & Universalist Society, |
| | WI | UU Fellowship of Door County, Sister |
| | WI | First Universalist Unitarian Church, |
| District # 83 Prairie Star | | |
| | IA | UU Society of Black Hawk County, |
| | IA | UU Fellowship of Clinton, Clinton |
| | IA | First Unitarian Church of Des Moines |
| | IA | UU Fellowship of Dubuque IA, Dubuque |
| | IA | UU Fellowship of N Central Iowa, |
| | IA | First Unitarian Church, Sioux City |
| | KS | Unitarian Fellowship of Lawrence, |
| | KS | UU Fellowship of Manhattan, Manhattan |

Appendix 4 Association Sunday Participating Congregations

| | | |
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| | KS | Shawnee Mission UU Church, Overland |
| | MN | Minnesota Valley UU Fellowship, |
| | MN | Michael Servetus Unitarian Society, |
| | MN | Nora Church UU, Hanska |
| | MN | White Bear UU Church, Mahtomedi |
| | MN | First Unitarian Society of Minneapolis, |
| | MN | First Universalist Church, Minneapolis |
| | MN | First UU Church, Rochester |
| | MN | Unity Church Unitarian, Saint Paul |
| | MN | UU Church of Minnetonka, Wayzata |
| | NE | First Unitarian Church, Omaha |
| | SD | All Souls Church UU, Sioux Falls |
| | WI | UU Congregation, Eau Claire |
| | WI | Unitarian Society of Menomonie, |
| District # 88 Southwestern | | |
| | AR | UU Fellowship of Fayetteville, |
| | LA | All Souls UU Church, Shreveport |
| | OK | Channing UU Church of Edmond OK |
| | OK | UU Church of Lawton, Lawton |
| | OK | Norman UU Fellowship, Norman |
| | TN | Neshoba UU Church, Cordova |
| | TN | First Unitarian Church, Memphis |
| | TX | Amarillo UU Fellowship, Amarillo |
| | TX | First UU Church of Austin, Austin |
| | TX | Wildflower Church: A UU Congregation, |
| | TX | The First Unitarian Church of Dallas, |
| | TX | Red River UU Church, Denison |
| | TX | First Jefferson UU Church, Fort Worth |
| | TX | Bay Area UU Church, Houston |
| | TX | Unitarian Fellowship of Houston, |
| | TX | Emerson UU Church, Houston |
| | TX | Northwest Community UU Church, |
| | TX | Comal County UU Society, New |
| | TX | Community UU Church, Plano |
| | TX | Community UU Church, San Antonio |
| | TX | First UU Church of San Antonio, San |
| | TX | UU Fellowship of Hidalgo County TX, |
| | TX | San Marcos UU Fellowship, San Marcos |
| | TX | Pathways Church, Southlake |
| | TX | Henry David Thoreau UU Congregation, |
| | TX | Northwoods UU Church, The |
| | TX | UU Fellowship of Waco, Waco |
| District # 90 Pacific Northwest | | |
| | AK | Anchorage UU Fellowship Inc, |
| | AK | UU Fellowship of Fairbanks, Fairbanks |
| | ID | Magic Valley UU Fellowship, Twin Falls |
| | OR | Pacific UU Fellowship, Astoria |
| | OR | UU Fellowship of Corvallis, Corvallis |
| | OR | UU Community Church of Washington |
| | OR | Mid Columbia UU Fellowship, Hood |
| | OR | Atkinson Memorial Church, Oregon |

Appendix 4 Association Sunday Participating Congregations

| | | |
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| | OR | First Unitarian Church, Portland |
| | OR | Wy'east UU Congregation, Portland |
| | WA | East Shore Unitarian Church, Bellevue |
| | WA | Kitsap UU Fellowship, Bremerton |
| | WA | Kittitas Valley UU Congregation, |
| | WA | All Souls UU Community, Lacey |
| | WA | Evergreen UU Fellowship, Marysville |
| | WA | Skagit UU Fellowship, Mount Vernon |
| | WA | Community UU Church, Pasco |
| | WA | Olympic UU Fellowship, Port Angeles |
| | WA | Quimper UU Fellowship, Port Townsend |
| | WA | Rainier Valley UU Congregation, Seattle |
| | WA | UU Church of Spokane, Spokane |
| | WA | Michael Servetus UU Fellowship, |
| | WA | Cascade UU Fellowship, Wenatchee |
| District # 93 Pacific Central | | |
| | CA | UU Fellowship of Santa Cruz County, |
| | CA | Berkeley Fellowship of UUs, Berkeley |
| | CA | UU Church of the Monterey Peninsula, |
| | CA | UU Church of Davis, Davis |
| | CA | Mission Peak UU Congregation, Fremont |
| | CA | UU Community of the Mountains, Grass |
| | CA | Starr King UU Church, Hayward |
| | CA | UU Community of Lake County, |
| | CA | UU Church of Berkeley, Kensington |
| | CA | UU Fellowship of Los Gatos, Los Gatos |
| | CA | UU Fellowship of North Bay, Napa |
| | CA | UU Church of Palo Alto, Palo Alto |
| | CA | UUs of Petaluma, Petaluma |
| | CA | UU Fellowship, Redwood City |
| | CA | UU Community Church, Sacramento |
| | CA | UU Society of Sacramento, Sacramento |
| | CA | UU Fellowship Stanislaus County, Salida |
| | CA | First UU Society of San Francisco, San |
| | CA | First Unitarian Church of San Jose, San |
| | CA | UUs of San Mateo, San Mateo |
| | CA | UU Congregation Santa Rosa, Santa |
| | CA | UU Fellowship of Tuolumne County, |
| | CA | UU Fellowship of Visalia, Visalia |
| | CA | Mt Diablo UU Church, Walnut Creek |
| | NV | UU Fellowship of Northern Nevada, Reno |
| District # 94 Pacific Southwest | | |
| | AZ | UU Congregation of Green Valley, |
| | AZ | UU Congregation of Phoenix, Paradise |
| | AZ | Prescott UU Fellowship, Prescott |
| | AZ | Granite Peak UU Congregation, |
| | AZ | UU Church of Southeast Arizona, Sierra |
| | AZ | UU Church, Surprise |
| | AZ | UU Congregation of NW Tucson, Tucson |
| | AZ | UU Church of Tucson, Tucson |
| | AZ | UU Fellowship of Yuma, Yuma |

Appendix 4 Association Sunday Participating Congregations

| | | |
|--------------------------------------|----|--|
| | CA | UU Church in Anaheim, Anaheim |
| | CA | Orange Coast UU Church, Costa Mesa |
| | CA | Chalice UU Congregation, Escondido |
| | CA | The UU Church in Fullerton, Fullerton |
| | CA | Live Oak UU Congregation, Goleta |
| | CA | UU Church of the Verdugo Hills, La |
| | CA | UU Fellowship of Laguna Beach, Laguna |
| | CA | Tapestry A UU Congregation, Mission |
| | CA | Monte Vista UU Congregation, |
| | CA | Sepulveda UU Society, North Hills |
| | CA | Neighborhood UU Church of Pasadena, |
| | CA | UU Church of the Desert, Rancho Mirage |
| | CA | South Bay Unitarian Fellowship, |
| | CA | UU Church, Riverside |
| | CA | UU Fellowship Hemet & San Jacinto |
| | CA | UU Fellowship San Luis Obispo County, |
| | CA | Unitarian Society of Santa Barbara, |
| | CA | UU Community Church of Santa |
| | CA | Summit UU Fellowship, Santee |
| | CA | UU Church of Studio City, Studio City |
| | CA | Conejo Valley UU Fellowship, Thousand |
| | CA | UU Church of Ventura, Ventura |
| | CA | Palomar UU Fellowship, Vista |
| | NV | UU Congregation of Las Vegas, Las |
| District # 97 Mountain Desert | | |
| | CO | First Universalist Church of Denver, |
| | CO | Jefferson Unitarian Church, Golden |
| | CO | The Boulder Valley UU Fellowship, |
| | CO | Prairie UU Church, Parker |
| | ID | UU Church in Idaho Falls, Idaho Falls |
| | ID | Pocatello UU Fellowship, Pocatello |
| | NM | Unitarian Church of Los Alamos, Los |
| | NM | The UU Congregation of Santa Fe NM, |
| | UT | UU Church of Ogden, Ogden |
| | WY | UU Church of Cheyenne, Cheyenne |
| | WY | UU Fellowship of Laramie, Laramie |
| | WY | UU Fellowship of Sheridan, Sheridan |

Appendix 4 Association Sunday Participating Congregations**Association Sunday District Totals**

| District | # of Cong.s | # of Gifts | Sum of Gifts |
|---|--------------------|-------------------|----------------------|
| District # 10 Massachusetts Bay | 22 | 188 | \$ 17,944.89 |
| District # 20 Northern New England | 12 | 69 | \$ 4,470.75 |
| District # 33 Ballou Channing | 17 | 150 | \$ 13,831.99 |
| District # 40 St. Lawrence | 16 | 118 | \$ 9,322.80 |
| District # 45 Metro New York | 30 | 330 | \$ 20,815.41 |
| District # 50 Heartland | 24 | 301 | \$ 16,076.97 |
| District # 51 Clara Barton | 17 | 127 | \$ 8,506.57 |
| District # 53 Joseph Priestley | 40 | 591 | \$ 45,126.71 |
| District # 60 Thomas Jefferson | 28 | 238 | \$ 18,594.74 |
| District # 62 Florida | 21 | 192 | \$ 11,586.11 |
| District # 63 Mid-South | 11 | 100 | \$ 5,708.00 |
| District # 70 Ohio-Meadville | 19 | 132 | \$ 8,809.75 |
| District # 76 Central Midwest | 28 | 148 | \$ 18,904.88 |
| District # 83 Prairie Star | 22 | 271 | \$ 20,585.86 |
| District # 88 Southwestern | 27 | 221 | \$ 21,441.74 |
| District # 90 Pacific Northwest | 23 | 195 | \$ 12,523.19 |
| District # 93 Pacific Central | 26 | 374 | \$ 23,912.37 |
| District # 94 Pacific Southwest | 33 | 318 | \$ 24,924.09 |
| District # 97 Mountain Desert | 12 | 125 | \$ 9,553.19 |
| Grand Totals | 428 | 4,188 | \$ 312,640.01 |

Appendix 5 Association Sunday Survey

PART I: Association Sunday 2008 Follow-Up

1. Did your congregation participate in Association Sunday 2008?

- Yes
- No

2. If Yes, what factors contributed to your congregation's decision to participate?

- Affirming the value of our connection with the UUA and other congregations
- Wanting to support growth
- Liked funding options (lay theological education and excellence in ministry)
- Loyalty to the Association
- Other (please specify)

2. If No, why not?

- Economy
- Didn't want to make ask 2 years in a row
- Didn't like funding options (lay theological education and excellence in ministry)
- Didn't like date/bad timing
- Other (please specify)

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Appendix 4 Association Sunday Participating Congregations

PART II: Association Sunday 2009 *Growing Our Diversity* Funding Buckets

Here is your chance to share your thoughts on what programs the money raised by Association Sunday 2009 should fund.

Please vote for 3:

- To support the 50 candidates for our ministry and present ministers who identify as people of color, Latina/o, Hispanic, multiracial, and sustainable multicultural ministries. [Learn More!](#)
- To support the [Building the World We Dream About](#) curriculum and associated resources (this curriculum enables UU congregations to become more welcoming of racial, ethnic, and cultural diversity).
- To enable Unitarian Universalist congregations (and districts) to minister effectively to youth and young adults of color and their families, multiracial youth, young adults, and their families in the areas of spiritual development, racial/cultural identity development, and leadership development.
- To create grants for continuing education, leadership development, and outreach to support congregations who are working to create a Unitarian Universalism that is racially and culturally diverse and intergenerational.
- To create scholarships for ministerial students who identify as people of color, Latina/o, Hispanic, and multiracial at Starr King School for the Ministry and Meadville Lombard Theological School.
- To develop a strategic plan for the recruitment of ministers, religious educators, and musicians who identify as people of color, Latina/o Hispanic, multiracial.
- To provide support to congregations that are actively working to build a multicultural future for Unitarian Universalism.
- To provide young adults and ministers with the opportunity to engage in service and learning projects in the developing world.
- NOTA/Other (Please specify)

Comments:

(OPTIONAL) Please let us know what district you are in.

(OPTIONAL) Please describe your role in your congregation.



Unitarian Universalist Association Stories and Blessings

For New Year 2009, we asked Unitarian Universalists to share blessings in their lives with us. Here are the stories that we collected:

Truly a blessing, one of our foster children returned to our home on 10/20 and he recently had an evaluation finding him “the happiest boy we’ve ever seen,” what a joy. We expect his two brothers to join him here in their forever home in the coming months and fingers crossed, we plan adoptions in 2009. We are truly blessed.

- *Patricia Link, Ripley, West Virginia*

In August, 1995, a few weeks into a new ministry in Virginia, away from all of the support systems of friends and family, our 20 year old daughter came to visit us in our new home. Out one night with friends from university, on her way home to us the car she was riding in was hit head-on by a truck driven by a drunk driver going the wrong way on the Interstate. In an instant, three of the four young people in the car were killed, including our Ericka.

And so began a journey of relying on the "kindness of strangers" who were not really strangers because they were fellow UUs.

We needed information: I had been in the new community such a short time I didn't even know where a funeral home was.

We needed comfort: into our lives poured ministerial colleagues who came unbidden and unfamiliar, with ready shoulders for tears and appropriate words of solace.

We needed community: not only the congregation I was serving but members from all of the surrounding UU congregations were there at the memorial service, standing with us in our time of need, knowing only that we shared a common spiritual path.

We needed faith: a younger colleague who had known our daughter brought the reminders of our liberal religious tradition that can encourage us even in the face of what seems like ultimate loss.

So, we never stood alone, but were embraced by a community of faith. For that, we will always feel blessed.

- *Rev. Dr. Randolph W. B. Becker, Key West, Florida*

I am so grateful for my friends at UU Waco, Texas, for my supportive friends, and my beautiful grandgrlz.

- *Anonymous*

Unitarian Universalist Association Stories and Blessings

My mother, who lives with me, has dementia and is declining rapidly. I work full time and run my own business part time, leaving little time to care for her. A dear friend of mine moved into my home in September and has not only watched over my mother, but continually helps me to work through the various emotions I'm experiencing while watching my mom deteriorate. I'm extremely grateful for her support and the support of my brother. My friend had been out of the country and out of touch for quite some time prior to the onset of my mother's illness. She resurfaced and needed a place to stay right around the time my mother was diagnosed. I believe that God brought her back into my life so that we could help each other.

- *Anonymous*

My work as a Religious Educator is a blessing in my life. To be challenged to be ever better in service to a congregation and our faith, and to learn and grow in the company of seekers has been a true gift.

- *Anne Bancroft, Newton, Massachusetts*

I am blessed to be part of a faith community that opened my eyes up to the realities of racism. I have been personally transformed by this work and am grateful for the leadership of Unitarian Universalism to continue to challenge me to grow and deepen.

- *Anonymous*

My daughter was diagnosed with stage 4 breast cancer two years ago. She has been in remission for more than a year. That is my greatest blessing.

- *Anonymous*

My most recent and deeply felt blessing is my recent marriage with my partner. We've been friends for over 20 years, and fell in love 6 years ago. He's been a true blessing in my life.

- *Kathy Partridge, Longmont, Colorado*

Our greatest blessing is our marriage; it is our sanctuary, our sacred space, our refuge, our crowning glory, within which we are both free to grow and learn and become the best selves we have yet been. All of this, in the context of an open and free search for meaning, in the UU tradition. We are so grateful!

- *Anonymous*

Unitarian Universalist Association Stories and Blessings

From a very young age in my life I have learned to look at every event in my life to be with purpose and therefore give thanks no matter if it brought joy or sadness at that particular time to me.

With such an out look in life I have had many memorable events in my life for which I have been very grateful. I guess it all depends what one considers to be a blessing for one's self. To me everything counts a blessing. I like to believe that every little thing teaches me something that should learn and know, and I believe learning from life's experiences are so rich in essence to one's life.

I had learned to hold on to positive thoughts and be optimistic about matters concerning life and living. I am a believer in the source of goodness that enriches life and provides for spiritual value to life and living. These systems of beliefs I acquired from my father who was a Buddhist, my mother who was a Roman Catholic and I who turned out to be an Anglican since my teens.

As an Anglican Priest serving the church in Sri Lanka I had great joy in ministering to different congregations in the urban and rural areas. Life was full of eventful experiences and with my involvement with people, and working for and with people, my life became a blessing to me as well to many with whom I came in contact. It was my thirst for truth and meaning in life that I asked many questions about beliefs traditions and practices that took me places and eventually to know about Unitarian Universalism.

It is eight years since I have come to know Unitarian and Universalism. I have had a lot of hurdles to conquer and [in] every event, it has been people who have been there for me. Who would ever dream that Nihal from Srilanka a priest of the Anglican church leave his vocation and country to live [among] strangers in another country for twenty years, looking a liberating faith – then come to know the Unitarian Universalist in Dumaguete City in the Philippines and after eight years be elected as the President of the UU church of the Philippines? Because of the friendship with UUs in the United States get all his legal problems resolved with immigration and tour the states all in one year –2008? Isn't this a blessing?

Yes, it depends how one looks, at what a blessing must look like. What is important to me is that I had a life story behind the blessing. I had worked hard my way with a positive outlook in life, sincere to myself, responsible, accountable, looking for ways to be of help to others rather than immersing too much with my own wants and needs. What good one does to others [returns] a blessing. I guess this must have been the reason why I consider [myself] to be blessed. Let us be a blessing to others! Thank you.

- *Nihal Attanayake, Dumaguete City, Philippines*

Unitarian Universalist Association Stories and Blessings

I've been blessed with the gift of age. Who knew? It's the only way I can think of to put it. I have less self-doubt; which frees me to move forward with plans and ideas that hold value for me. At 58, though aches and pains have begun to creep into my body, I have more energy, maybe it's more energy of the psyche, than I have had in quite some time. I'm not as afraid to step beyond my comfort zone. Though retired after 25 years at a job of physical labor, I have taken a part-time job as a newspaper clerk, hoping to stretch my mind and skills. I am secure in my friendships and am learning to better cultivate and nurture them. This blessing of age is a fairly new revelation for me, so thank you for letting me try to articulate my newest sense of self.

- *Kay H. Wilson, Waco, Texas*

While visiting my daughter and her family in Eugene, OR over Thanksgiving, we worked at the Food for Lane County, OR facility, where they were serving breakfast and dinner, and also offered gently-used clothing and toys. My eight-year-old grandson helped out, as well. This truly enhanced our own Thanksgiving celebration. It also gave me a chance to compare their services with those of Respond Now, an emergency help agency in Chicago Heights, IL, where I work on Wednesdays. We are getting about 35% more people needing help over last year's numbers.

- *Suzanne Brown, Park Forest, Illinois*

The Unitarian Church of Hot Springs has helped me embrace my spirituality. The loving family at UUCHS adopted me and helped me to nurture my self-image, gain confidence and find a safe rest with an inner peace I had never known.

Growing up, I endured a childhood of painful abuse based on the religious beliefs of my parents. I was threatened if I talked to people, learned to distrust people, and was punished if I showed that I felt anything.

My response to my childhood was to reject the Father God of my parents completely. For many years I denied my own spirituality, a reminder of my pain. Help was unaffordable, so the long road of recovery has been slow and intensely personal for me.

When doing research into Transcendentalism, I liked what I found out about Unitarian-Universalists. Shortly after, I literally drove by The Unitarian Church of Hot Springs and decided to try it out.

It didn't take me long to figure out that finding this loving community of wonderful people was the best thing that had ever happened to me. They have been such a blessing, bringing my soul back to life, encouraging me to strive to do and be things

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I'd long ago given up, supporting me with a depth of caring I'd never experienced before. Simply put, living their covenant: "Love is the doctrine of this church." What a blessing to belong to a community that supports and loves each other!

- *Dori Braithwaite, Benton, Arkansas*

I was blessed earlier this year by being able to witness my mother's passage from this life to the great beyond. She blessed me with a new perspective on death and illness. I came to realize that we come into this world with no possessions and that we exit that way as well. Therefore, all that we think we possess is an illusion. My mother's true essence came through brighter as her body became more frail. Her faith in the creator, whatever that is, helped her go in peace.

- *Doug McCusker, Burke, Virginia*

When I had to call 911 to send an ambulance because my husband couldn't get up, we were flooded with love and concern from our congregation plus other friends.

- *Sarah Tate, West Palm Beach, Florida*

First I would like to say that some of our greatest blessings are those of which we cannot speak. That being said, I offer the following story as a special blessing received this holiday season:

I hate the computer...but it can be a wonderful thing.

Throughout my life, Thanksgiving at Grandma's house was a great family affair. "Over the river and through the woods" described our annual trek to the country home that my grandmother shared with her sister. She and my great-aunt were tiny little dynamos in complete command of the kitchen, hefting 25-pound turkeys and restaurant-sized soup pots.

Dinner was in the basement and everyone had a role. Children set the tables, men brought down the food and, after dinner, the women and teens washed the dishes. Then, the men and teens went outside to play football, the women caught up on family life, and the children were allowed to open the Treasure Box under the basement stairs. The Treasure Box had all manner of small toys and games just right for little hands.

Grandma's Treasure Box also contained some well-worn Little Golden Books. I would race to the box and rummage around for my favorite book about an old lady with a feather in her hat and a puffin. We all grew older, each assuming our roles in turn. The Treasure Box and the book became one of my favorite childhood memories.

Grandma and Aunt Ann died several years ago and I've been trying ever since to find that Little Golden Book. With only those few key words (feather, hat, puffin), I searched dozens of websites and hundreds of titles, unsuccessfully. Recently, I

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posted a note on a new site and received an email the very next morning with the title and author of the book from an anonymous "friend." Unfortunately, Lucky Mrs. Ticklefeather is one of the more collectible Little Golden Books out of print and, having lost my job recently, I couldn't afford any of the used copies I found online.

(continued on next page)

Besides, I remembered that I loved the book, but I didn't remember the actual story. I certainly couldn't afford to buy a sentiment that I might see differently through adult eyes.

Two days before Christmas, I wistfully relayed the story to my daughter and her husband over a birthday dinner. I told them how excited I was that, at last, I finally knew the title of the book! Some day, maybe....end of story.

On Christmas Eve, my daughter couldn't wait for me to open my gifts; she was as restless and excited as a child on Christmas morning. She hurried me through a pile of riches and then, eyes aglow, bursting with anticipation, handed me her final package. There was Mrs. Ticklefeather's smiling face on a vintage copy of the story! It really didn't matter anymore what the theme of the story was; my daughter's gift of love was the priceless treasure. I only wished I could show my grandmother, "Look, Grandma, Mrs. Ticklefeather!"

As soon as my guests left for the evening, I snuggled in to read my beloved childhood story. Mrs. Ticklefeather longs for a sunflower to put in a beautiful vase in her home. Her dear companion Paul, the puffin, sneaks out that night to get her one, and encounters danger along the way. A resourceful police officer saves the day, and Mrs. Ticklefeather and Paul (sunflower in his beak) are reunited. The story is about love and devotion, giving and peacemaking.

Computers can isolate us, or they can bring us together in ways we never imagine. No wonder Lucky Mrs. Ticklefeather was a favorite story, and how lucky I am to have been blessed by the generations both before me and after me.

- *Dianne Farrelly, Lilburn, Georgia*

We are deeply grateful to those who share their stories, and inspire us daily to strengthen Unitarian Universalism in our hearts and in the world.

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Gift of the Week – September 17th, 2008



Who Gave It: Tomas Firle and Joan Cudhea

How It Happened: Both Tomas Firle and Joan Cudhea have made significant gifts to the Unitarian Universalist Association over the years. Their dedication to Unitarian Universalism is not only demonstrated by their generosity, but by their involvement in their congregation and

membership with the UUA's President's Council, of which they were members for over ten years. Their contributions have included multiple campaigns (*Handing on the Future*, *Campaign for UUism, Now is the Time*), Friends of the UUA, Association Sunday, the Living Tradition Fund... the list goes on.

When asked why they give to Unitarian Universalism, Tomas says that "What I like most is the joy I feel from expressing gratitude to my faith. These gifts have allowed me to participate in collective empowerment and help the voice of Unitarian Universalism to ring louder and wider." Tomas Firle, like many UUs, wants to do whatever he can to make the world a better place. He believes in giving to make change and with the help of the UUA and Joan, who is also his financial planner, Tomas has been able to make gifts very generous gifts off of what he considers a moderate means.

Joan's inspiration to give comes from her wishes for the future of Unitarian Universalism. She wishes that all children, youth and college-aged young adults who find our community will have meaningful experiences in searching, serving, and affirming as she has; for our ministers quiet times for rest and reflection; and for a truly multicultural UU community. Joan believes that "The elements of compassion, courage, fairness, freedom, and responsibility that I learned in UU settings as a young person still inspire me in the Unitarian Universalist communities in which I serve. That's what I hope will endure into our future—a religious community which cherishes those qualities of being, rather than "right" belief."

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Gift of the Week – September 24, 2008

Who Gave It: Susan Ford

Who Got It: Knoxville Relief Fund

How it Happened:

The following publicity was sent to us by Susan Ford:

Unitarian Universalist Susan Ford is a UU with a passion for doing Ironman triathlons. The unique challenge of swimming 2.4 miles, bicycling 112 miles and running 26.2 miles holds a special mental and physical appeal to her. She is also former member of the Tennessee Valley Unitarian Universalist Church, prior to her moving from the area. When a gunman opened fire in the sanctuary at TVUUC on July 27, 2008, she was desperate to find a way to help, but she found little she could do to offer assistance from Cookeville, TN, where she currently lives and is a member of the Unitarian Universalist Congregation of Cookeville.

So, she went for a run. She ran for 22 miles, but found little relief for the pain inside, and she realized that it did little good for those affected. As she finished her prep and participated in Ironman Louisville on August 31, she realized that there is a way to bring her passion and her desire to help together.

Scheduled to participate in Ironman Florida on November 1, 2008, she made arrangements with the UUA through the Janus Charity Challenge to dedicate her participation in Ironman Florida to fundraising for the Knoxville Relief Fund.

Susan Ford is demonstrating her passion and dedication to her UU community by taking on this challenge. We wish her the best of luck and hope that UUs across the country will take this opportunity to come together and earn the matching support of the Janus Charity Challenge in support of the Knoxville Relief Fund

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Gift of the Week – October 1, 2008

Who Gave It: The UU Church of Washington Crossing

Who Got It: Annual Program Fund and the Metro New York District

How it Happened:

At the beginning of last spring, the UU Church at Washington Crossing, faced a challenging budget year. Already it had become clear that the church's finances could not cover all the necessary expenses, particularly contributions to the UUA's Annual Program Fund and the Metropolitan New York District. The UU Church at Washington Crossing had been an APF Honor Congregation for a solid eighteen years. But this year, the financial picture was complicated by a roof leak that resulted in a ceiling collapse in the minister's office—never a good thing!

Andrew Kidd, the new Canvass Committee Chair, brought lots of contagious energy and an inspired vision for how funds could be raised at the UU Church at Washington Crossing. Andrew and his team established a positive and compelling case for increased giving and engaged in a highly successful and energizing face-to-face canvass process.

“People had not been asked in quite this way before and they stepped up to the plate,” reports Pam Shadzik, President. “We became a new congregation, in a different place and with a new attitude. We are proud about being in this new place of abundance.”

The congregation realized the importance of taking the time to do a face-to-face canvass—to model commitment, build relationships within the congregation, and offer the opportunity to educate folks about the church, Unitarian Universalism, and the wider organization.

Due to visionary and strategic leadership, an effectively-organized annual canvass, and an energized congregation, the UU Church at Washington Crossing rose to the challenges and established new heights of generosity. As a result of their success, they were able to make their Fair Share contributions to the Annual Program Fund and the Metro New York District. Congratulations and Thank you, UU Church at Washington Crossing

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Gift of the Week – October 8, 2008

Who Gave It: Sarah Armstrong

How Much: \$1,000

Who Got It: Friends

How it Happened:

A long-time Friend of the UUA, Sarah Armstrong of Berkeley, California describes joining her first UU church as “coming home.” At that time, Sarah was overjoyed to have finally discovered a group of people with ethical and humanitarian values so similar to her own, a deep appreciation for diversity, and no dogma or prescribed belief system.

Sarah Armstrong gives generously to the Friends because of the Association’s strong leadership on civil rights and social justice issues, in particular that of gay marriage. Sarah feels strongly that gay rights are a civil rights issue and that the denial of civil rights to any group threatens us all.

Most importantly, Sarah believes that her contributions will be well used – to further civil rights, to strengthen and build congregations, and to spread the word about the UUA and Unitarian Universalism – but she also takes pleasure in reading her periodic Friends of the UU updates. “Bill Sinkford (and his staff) write(s) great fund-raising appeal letters. And host great meetings in cities across the US. And he stands personally for what he believes.”

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Gift of the Week – October 14th, 2008

Who Gave It: 10 Generous Donors

How Much: \$250,000+

How It Happened: On Oct. 3, 2008, Congress passed and the president signed the Emergency Economic Stabilization Act of 2008 (H.R. 1424), legislation which includes a two-year extension of the IRA charitable rollover. The provision, originally enacted as part of the Pension Protection Act of 2006 (PPA), which allows donors, age 70.5 or older, to give directly from their IRA without including the IRA withdrawal in their taxable income.

This is great news because last year ten donors used the IRA charitable rollover to make a combined total of over \$250,000 in tax-free cash gifts to the Unitarian Universalist Association. The extension of this giving opportunity will allow countless donors to not only make donations to the UUA but to their congregations as well.

For more information on this limited giving opportunity and details on how you can make a gift from your IRA to the UUA, your congregation, and other UU entities, visit www.uua.org/giftplanning.



Act now to take advantage
of the **Charitable IRA Rollover!**

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Gift of the Week – October 29th, 2008

Who Gave It: Huntsville UU Fellowship, Huntsville, Texas

Who Got It: Association Sunday 2008

How It Happened: As a small congregation of only twenty-eight members who gather in a hospital chapel in rural Texas, the Huntsville UU Fellowship hasn't always found it easy to feel connected to the larger denomination. The celebration of Association Sunday provided the fellowship with an opportunity to recognize and affirm the common bonds that unite us as Unitarian Universalists and they joyfully scheduled their special service for October 12, 2008. However, a tragic event unfortunately derailed these plans.

The congregation has been without a minister since theirs moved to Iowa. They had arranged for one of their members, a former Biology professor, to speak at their Association Sunday. Just days before the scheduled service, he was hospitalized and told that he had only two to three weeks to live. And we are deeply saddened to have heard that since then, he has passed on. Needless to say, the entire congregation is in profound mourning.

As astonishing as it may be to think about moving forward in the face of such immediate tragedy, that *is* what the Huntsville UU Fellowship is doing. They have already lined up a replacement speaker, a young local Methodist minister, and rescheduled their Association Sunday service. This young minister was first an ordained Baptist before he became a Methodist, and the folks at HUUF tell him that he is really UU.

They will be announcing Association Sunday and speaking to its importance, especially being, as they are, in the middle of the "Bible Belt." They will also be using this opportunity to begin energizing the congregation for the campaign to build a new church building where they can be more inviting to the surrounding community and better suited to serve families.

The fellowship hopes that by demonstrating this commitment to their faith and its growth, they will be able to celebrate future Association Sundays in their own building.

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Gift of the Week – November 5th, 2008

Who Gave It: Members of the UUA's President's Council

Who Got It: The President William G. Sinkford Fund

How Much: \$140,000

How it Happened: Having begun his service in June 2001, Rev. Bill Sinkford will leave the Association with many profound and lasting gifts including initiating national and regional marketing, the innovative Diversity of Ministry Initiative, and support for lay theological education and ministerial development programs. To honor his legacy in the years to come, the Unitarian Universalist Association has established the President William G. Sinkford Fund to further Rev. Sinkford's visions by providing scholarships for promising and passionate students preparing for Unitarian Universalist ministry.

With input from many dedicated members of the current UUA President's Council, the UUA has established the following guidelines for the Fund.

- Scholarships are designated for students of color.
- Students in candidate status for Unitarian Universalist ministry are eligible to apply.
- Scholarships will be in the amount of \$20,000 each (as many as funds make available).
- The first Sinkford Scholarships will be awarded for the 2010 – 2011 academic year.
- Funds will be distributed through the Ministerial and Professional Leadership Committee on Scholarships.

Deeply dedicated to diversifying our Unitarian Universalist ministry, a few members of the Council collaborated to take the lead in supporting the Sinkford Scholarship Fund – both financially and by spreading the word about its purpose to other Council members. The Fund was finally presented to President Sinkford at the end of the annual President's Council meeting in October 2008. In a moving ceremony, members of the Council announced that they had already generously contributed a total of \$140,000 for the Fund!

Ultimately, the UUA seeks to raise \$250,000 in spend-down cash and an additional \$250,000 to support the endowment of the Sinkford Fund, which will be publicly unveiled at General Assembly 2009, Rev. Sinkford's last GA as Association President.

We are profoundly grateful to the members of the President's Council for their generosity and vision. With their lead gifts, they have brought to the Sinkford Fund the momentum and energy it needs to ultimately succeed and make a profound not only on the lives of Unitarian Universalist seminarians of color, but on Unitarian Universalism.

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Gift of the Week – November 12th, 2008

Who Gave It: The UU Congregation of Central Nassau

Who Got It: Annual Program Fund

How it Happened: The Unitarian Universalist Congregation of Central Nassau (UUCCN) in Garden City, NY had a tough year and almost didn't make the Fair Share payments to the UUA and to the District. They struggled to pay both the UUA and Metro New York District. As they neared the end of the congregational year, their thoughts turned to all that needs attention – the boiler that needs to be replaced; the alarm system requires updating; the loss of rental income...

The Board of Trustees, Minister, and Finance Committee were of one accord: “We’ll simply have to find a way to do what we know is right. We have a lot to cover. Not just the bills, the emergencies, but also our Fair Share and Full Share payments. Taking a year off is not an option. Though we don't have much time, we have imagination, creativity, and a challenge that we can meet!”

Over the past five years UUCCN has benefited greatly from a strong relationship with the UUA and Metro New York District. They made a commitment to becoming Fair Share and Full Share because it was the right thing to do. Mindful of the many services that they have received from both the UUA and Metro New York District, they *hoped against hope* that they would find *a way out of no way* ... They were determined that UUCCN would make the right decision and honor all of the commitments. *All of them*. UUCCN’s leadership worked hard to ensure that they did “the right thing.”

UUCCN's check was received just in time for each of attendees of General Assembly to get and proudly wear our purple ribbons indicating that UUCCN is an Annual Program Fund Honor Congregation – a Fair Share congregation. This was not only for the world to see but, more importantly, for each member of UUCCN to know that they had fulfilled their responsibilities. Being an Honor Congregation for five years in a row is a cause for celebration of years of ministry *together*. Through that effort there were extra appeals, generosity of some anonymous members of the congregation, a multi-generational “Stimulus Party,” a “Mile of Quarters” to which all ages contributed – each effort made a big difference. Each effort showed the spirit of generosity. Each effort *mattered* ... There is much to be thankful for.

Yet, that led the congregation to other questions, each one difficult to answer: How on earth will we be able to take care of the rest of the bills? They had already received a Chalice Lighters grant. Will they still be able to support the sibling congregations as is not only expected, *but required*, in congregational polity? We have already received both the Metro New York District and the UUA Eugene Pickett Awards for Growth of Unitarian Universalism. How will they sustain this?

Rev. Hope Johnson, the minister of the congregation affirmed the congregation’s commitment to the spirit of generosity: “There is no doubt in my mind that we will cover the rest of our responsibilities – known and unknown – because we will remember that good stewards can do more than they think they can do, even, *or perhaps especially*, when ‘the going gets rough.’ Creativity. Dreams. Growth. Imagination. Love. Reaching in. Reaching out. Risk-Taking ... All of these, and more, will help us to realize our dreams – big, small, and in-between. We will continue to do all possible to keep our little engine humming happily as we face the many peaks and valleys that lie before us. We can do it. More importantly, *we will do it* ...”

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Gift of the Week – November 19th, 2008

Who Gave It: The UU Church of Silver Spring, MD

Who Got It: Annual Program Fund

How it Happened: “We have big dreams of where we want to be, where we need to be,” declares Jim Paoletti, President of the Unitarian Universalist (UU) Church of Silver Spring. “In the end it was the congregation that came through to make this happen.”

What happened is this: due to a combination of events, the church found itself with a budget gap of over \$72,000. After making selected budget cuts of over \$20,000, within a week’s time, the church leaders envisioned a plan to raise the \$52,000 they needed to retain critical 2008 budget goals, and brought it to the congregation on May 11th. The message was inspiring, the vision compelling, and the congregation responded enthusiastically. By the time the Sunday services were over that day, the church had raised over \$25,000 in contributions. And they kept coming. A “Target Fund” was established for the nearly \$36,000 pledged, and the remainder of the congregation pledged to a “Match Fund” which quickly brought the tally to \$54,000. By June 5th, the gap was completely closed.

During this period of time, church leaders also fulfilled their goal of contributing their congregation’s full Fair Share contribution to the UUA’s Annual Program Fund. “The leadership of our congregation has made it a priority to return UUCSS to Fair Share status for several years now,” reports Geoff Gavett, the church’s Vice President of Finance. “We entered May thinking that we might have to make serious cuts in our expected funding of the Fair Share contribution. Our minister, Liz Lerner, challenged the Board to take the issue back to the congregation in our Mother’s Day services. At the end of it all, we learned that giving is not a function of logic and numbers. It comes from inspiration, faith, and passion for the work of our church and the denomination to which it belongs.”

On May 24th, a check was cut for the entire balance of their full Fair Share contribution. This was sent along with a letter ceremoniously signed by the minister and nine elected leaders of the Board. The message was clearly stated:

Please find enclosed our check in the amount of \$20,250.00 in payment of our congregation’s fair share to the UUA [Unitarian Universalist Association] Annual Fund for the 2007-2008 fiscal year. Our payment represents our congregation’s return to fair share status after many years of financial scarcity.

Our congregation takes great pride in resuming full financial partnership as a member of the Unitarian Universalist Association. We hope you will share the good news with the rest of the Association. Our delegates look forward to wearing their “Fair Share” ribbons to the General Assembly in Fort Lauderdale.

“I feel very honored to be this church’s minister,” says the Reverend Liz Lerner. “A lot of people dug really deep to give this much in support of their church. They responded with alacrity and graciousness.” In addition, Liz expresses her appreciation for the Unitarian Universalist Association and the many ways the church has benefited from the training, programs and services the UUA provides. President Jim Paoletti was ready to attend his third UU University at the June 2008 General Assembly. By sharing their perspectives, leaders have raised awareness throughout the congregation about the value of their Association, and thus stimulated interest in increasing their financial support to the UUA.

Clearly the UU Church of Silver Spring had a lot to celebrate during their June 8th Flower Communion Sunday services. Together they have risen to this challenge out of their love and commitment to their church and its vision for the future, one of growth and diversity and all the best that they can be as Unitarian Universalists in community. Thank you, UU Church of Silver Spring!

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Gift of the Week – December 3, 2008

Who Gave It: Susan Ford and Others

Who Got It: Knoxville Relief Fund

How Much: \$3,410.66

“I made friends, I was surprised by generosity, and I got the peace I so desperately needed in the wake of the violence.”

– Susan Ford, Ironman Triathlete

How it Happened: In September of this year, we announced that Susan Ford of Cookeville, Tennessee would be participating in the Ironman Florida Triathlon. And on November 1st, she did! While Susan has a passion for triathlon racing for its own sake – for the special physical and mental challenges it poses – this year she raced for something bigger than herself. Susan registered her participation with the Janus Charity Challenge and pledged to raise funds in support of the UUA-Thomas Jefferson District Knoxville Relief Fund.

Susan Ford is a former member of the Tennessee Valley Unitarian Universalist Church (TVUUC), where a gunman opened fire on July 27, 2008 killing two and wounding others. When she heard the terrible news, Susan yearned to help. And by taking on the Janus Challenge, she found a way to channel her sadness and despair into hope and to actively demonstrate her passion and commitment to the values of Unitarian Universalism.

On the day of the race, Susan’s goal was to break 12 hours, which would have been a personal best for her, and she finished in 11:54:39. With her greater purpose in mind, she completed the swim, bike and run with personal best times in each sport!

Through her fundraising efforts, Susan raised \$2660.66, to which the Janus Charity Challenge added \$750.00, bringing the total raised to \$3410.66 to help those affected by the tragedy in Knoxville. And in the end, Susan says, she got so much more personally out of the experience than she put into it.

But this race certainly wasn’t Susan’s first major act of living her faith in the world. When she and her husband moved to Cookeville, Tennessee years ago, there was no Unitarian Universalist church. Determined to create Unitarian Universalist community where there might otherwise have been none, they started the UU Congregation of Cookeville with one other woman.

The Cookeville congregation is still emerging, but Susan declares that nonetheless the congregation is “stepping out, being visible, and trying to create a beacon to liberals lost in a small, conservative community.” Susan is stepping out too.

What happened at TVUUC made me even bolder, because I want to stand up for my liberal faith, even if there is risk. When the local paper called about the shooting, I didn't hesitate to talk about gay rights, atheists, pagans, or anything else that might make people uncomfortable. It ended up on the front page, and new people came through our doors the next week.

We are deeply grateful to Susan Ford for the leadership she has shown and all that she has done, not only to support the Knoxville Unitarian Universalists, but to open the doors of Unitarian Universalism to those who seek it. During this season, let her story inspire us all to give back.

Unitarian Universalist Association
Stories and Blessings

Gift of the Week – December 10, 2008

Who Gave It: The First Universalist Church in Providence, Rhode Island

Who Got It: Annual Program Fund

Choosing to be Fair Share Congregations

The impact of the recent economic downturn is being felt by all of our member congregations. It is important to remember and appreciate all those who make the choice to financially support their congregation, and those congregations that choose to fully contribute their Fair Share to the Annual Program Fund. Particularly at times like these, this is not an easy choice to make alongside the congregation's other goals, programs, and priorities.

The First Universalist Church in Providence has 39 members dedicated to the perpetuation of our traditional Christian Universalist faith and the preservation of their historical downtown church building. Situated in the heart of downtown Providence, the First Universalist Church functioned as a prominent "neighborhood church" that proclaimed the liberal religious message of universal salvation. The congregation and minister, Rev. Scott Axford, are actively involved in the Universalist Church of Rhode Island, the RI State Council of Churches, Council of Christian Churches (UU), as well as the UUA. Built in 1872, the ornate Gothic Revival style church building is an historic structure and meeting place for a variety of community organizations. The church is fortunate to have the support of an endowment to supplement the contributions of the members. The First Universalist Church has chosen to contribute at the full fair share level for an unbroken 18 years.

The First Unitarian Church of Providence, is also an impressive historic white stone building situated in the midst of Brown University. The First Unitarian Church community of over 400 members draws from surrounding counties, giving it a metropolitan feel. For the first time in its history, the church has pledged its full fair share support to the Annual Program Fund. In part, this is due to the congregation's appreciation for the support and services it has experienced in recent years of ministerial transition. This fall, several members of the stewardship team attended stewardship workshops co-sponsored by the Ballou Channing District, one led by Wayne Clark and the other co-led by APF Staff and BCD representative, Rev. Bob Thayer.

Unitarian Universalist Association
Stories and Blessings

Gift of the Week – December 17, 2008

Who Gave It: Lyndoll Pauline “Polly” Day

Who Got It: Friends of the UUA

How Much: \$35.00

How It Happened: In October, the Friends of the UUA received a gift of \$35 from a non UU prospect who had received a recent mailing on theme of Moral Values. Attached to the check was a letter that read in part “...I was overcome with the articulate clarity of how the problems facing not only Americans but the entire world were explained so succinctly.” Ms. Day’s grandparents were married in 1889 at the Unitarian Church in Hutchinson, Kansas and while her parents were both active UU’s until the late 1920’s, Ms. Day and her family decided not to attend the UU church after the family moved to Kansas City, MO. Though her parents weren’t church goers they always proudly considered themselves to be Universalist.

As Ms. Day grew up, she recognized the importance that her Unitarian Universalist roots played in her religious development and philosophy. As an adult she attended Presbyterian, Congregationalist, Baptist, Methodist and Lutheran churches while living in Belgium, Germany, England, Brazil and Iran – always feeling at home at any church and with any ethnic group – and she deeply appreciated this opportunity to connect with the faith that she felt made it possible for her to enjoy such a rich and varied spiritual life. Ms. Day closed her note with these words:

What have I taken from those experiences is this: all people are pretty much the same, and, indeed the great Moral Value is to value our differences as we value our sameness. To impose our values on others is the greatest immorality of all.

Even though she isn’t a member of a UU congregation, Ms. Day promises that in addition to her modest donation that she will continue to give and is proud to be a Friend of the UUA.

Unitarian Universalist Association
Stories and Blessings

Gift of the Week – December 23, 2008

Who Gave It: Nearly 130,000 Unitarian Universalists – via their generous contributions to Association Sunday 2007

Who Got It: Pacific Central District of the UUA

The outstanding success of the first annual Association Sunday on October 14, 2007 has been felt throughout the country. One-third of the over 1.4 million dollars raised by this exciting event went back to our districts in the form of grants for projects which will help to grow Unitarian Universalism. The Pacific Central District is especially excited about what they were able to do in 2008 with their share of this money.

Cilla Raughley, PCD Executive, announced that her district has launched a Google AdWords campaign for every congregation in the district who wishes to participate. This new effort builds upon the successes of the San Francisco Bay Area Regional Marketing Campaign staged in the Fall of 2007. “Almost half of the district’s web traffic during that marketing effort came from Google AdWords, suggesting that this is a powerful tool to bring guests to our websites,” Cilla says.

The district is also utilizing their regional marketing gUuerillas, a cross-congregational group that collaborates on low-cost marketing initiatives, and has successfully acquired grant funding to add software that tracks where online traffic goes after visiting the regional website (i.e., they will be able to count how many people go from the regional site to a congregation’s homepage, including which congregation they visit online). Cilla adds, “This metric will allow the district to fine-tune our analysis and become increasingly sophisticated about which kind of web advertisements produce the most results and on which third-party sites our ads get the most traction.”

Thanks to the grant money provided by Association Sunday 2007, the Pacific Central District of the UUA is positioning itself to utilize technology to *Grow Our Faith* in 2008 and beyond.

Unitarian Universalist Association
Stories and Blessings

Gift of the Week – January 7, 2009

This holiday season, we asked Unitarian Universalists to share blessings in their lives with us. Here are just a few of the stories that we collected:

I am blessed to be part of a faith community that opened my eyes up to the realities of racism. I have been personally transformed by this work and am grateful for the leadership of Unitarian Universalism to continue to challenge me to grow and deepen.

- Anonymous, Bay Village, Ohio

Our greatest blessing is our marriage; it is our sanctuary, our sacred space, our refuge, our crowning glory, within which we are both free to grow and learn and become the best selves we have yet been. All of this, in the context of an open and free search for meaning, in the UU tradition. We are so grateful!

- Anonymous, Santa Paula, California

The Unitarian [Universalist] Church of Hot Springs has helped me embrace my spirituality. The loving family at UUCHS adopted me and helped me to nurture my self-image, gain confidence and find a safe rest with an inner peace I had never known.

Growing up, I endured a childhood of painful abuse based on the religious beliefs of my parents. I was threatened if I talked to people, learned to distrust people, and was punished if I showed that I felt anything.

My response to my childhood was to reject the Father God of my parents completely. For many years I denied my own spirituality, a reminder of my pain. Help was unaffordable, so the long road of recovery has been slow and intensely personal for me.

When doing research into Transcendentalism, I liked what I found out about Unitarian Universalists. Shortly after, I literally drove by The Unitarian [Universalist] Church of Hot Springs and decided to try it out.

It didn't take me long to figure out that finding this loving community of wonderful people was the best thing that had ever happened to me. They have been such a blessing, bringing my soul back to life, encouraging me to strive to do and be things I'd long ago given up, supporting me with a depth of caring I'd never experienced before. Simply put, living their covenant: "Love is the doctrine of this church." What a blessing to belong to a community that supports and loves each other!

- Dori Braithwaite, Benton, Arkansas

We are deeply grateful to those who share their stories, and inspire us daily to strengthen Unitarian Universalism in our hearts and in the world.



Stewardship & Development YTD Income and Projection

Fiscal Year 09

as of: **January 12, 2009**

| Annual Program Fund | | | | | | |
|---------------------|-------------|----------------------|--------|----------------------|---------------|--|
| Year | Goal | Attainment thru 1-12 | | Full Year Attainment | | |
| FY 2005 | \$6,092,214 | \$2,840,298 | 46.62% | \$6,068,616 | 99.61% | |
| FY 2006 | \$6,493,307 | \$2,868,779 | 44.18% | \$6,463,856 | 99.55% | |
| FY 2007 | \$6,717,684 | \$3,043,250 | 45.30% | \$6,785,083 | 101.00% | |
| FY 2008 | \$7,019,739 | \$3,202,975 | 45.63% | \$7,039,166 | 100.28% | |
| FY 2009 | \$7,166,004 | \$3,130,966 | 43.69% | \$ 7,054,432 | 98.44% | |

Projected FY 09 Year End

| | Paid | Outstanding | Total | |
|--|--------------------|---------------------|------------------------|---------------|
| FY 2009 Pledges | \$3,130,966 | \$2,800,545 | \$5,931,511 | |
| Additional pledges and non-pledge payments anticipated | | \$ 1,122,921 | \$ 1,122,921 | |
| Total | \$3,130,966 | \$3,923,466 | \$7,054,432 | 44.38% |
| | | | Cost per dollar raised | \$0.025 |

| Friends of the UUA | | | | | | |
|--------------------|--------------|----------------------|--------|----------------------|---------------|--|
| Year | Goal | Attainment thru 1-12 | | Full Year Attainment | | |
| FY 2005 | \$ 1,092,000 | \$ 442,686 | 40.54% | \$ 1,238,642 | 113.43% | |
| FY 2006 | \$ 1,600,000 | \$ 594,194 | 37.14% | \$ 1,482,279 | 92.64% | |
| FY 2007 | \$ 1,600,000 | \$ 824,509 | 51.53% | \$ 1,564,176 | 97.76% | |
| FY 2008 | \$ 1,625,000 | \$ 762,787 | 46.94% | \$ 1,426,210 | 87.77% | |
| FY 2009 | \$ 1,650,000 | \$ 693,586 | 42.04% | \$ 1,425,000 | 86.36% | |

| Appeal | Audience | Households | Projected | | |
|-----------------------------|-------------|----------------|---------------------|---|--------------------------------------|
| Aug - Knoxville | Congregants | 24,000 | | Received to date | |
| Sept: GA Update/Van Jones | Donors | 24,000 | | | |
| Oct: Moral Values | Donors | 35,338 | \$ 693,586 | | |
| Oct: Moral Values | Congregants | 45,000 | | | |
| November Appeal | Donors | 30,000 | | | |
| December Appeal | Donors | 22,000 | | | |
| Staff and Board of Trustees | | 27 | \$ 10,000 | | |
| January Appeal | Donors | 14,000 | \$ 62,000 | | Highlighted cells are projections |
| February Appeal | Donors | 24,000 | \$ 85,800 | | |
| February Appeal | Congregants | 45,000 | \$ 30,375 | | |
| April Appeal | Donors | 20,000 | \$ 91,800 | | |
| May Appeal | Donors | 35,338 | \$ 126,360 | | |
| May Appeal | Congregants | 45,000 | \$ 30,375 | | |
| June Appeal | Donors | 24,000 | \$ 85,800 | | |
| Spring Phonathon | Donors | 12,000 | \$ 90,000 | | |
| Sustainers | Donors | 600 | \$ 118,800 | | |
| Total | | 400,303 | \$ 1,424,896 | Full Year 86.36% of goal \$0.309 per dollar raised | |

| Legacy Gifts | | | | |
|--------------|------------|------------|-------------------|---------------------------|
| | Budget | 12-Jan | Full Year | |
| Legacy Gifts | \$ 425,000 | \$ 425,000 | \$ 425,000 | \$0.270 per dollar raised |

| | Budget | 12-Jan | Full Year | |
|----------------------------------|--------|--------|--------------------|---|
| Total non-campaign Income | | | \$8,904,328 | Full Year \$0.096 per dollar raised |

Friends of the UUA – Summary status December 2008

Context

From FY 2002 to FY 2005 The Friends program showed steady but modest growth, with revenue growing from slightly below \$1 million to slightly over \$1 million. During this period the number of donors was relatively constant – 11,845 in FY02 and 12,571 in FY05. The growth was attributable to increasing donor loyalty. Donors who gave a gift were successfully encouraged to give a second gift, regular donors were successfully encouraged to continue giving, and the average number of gifts per donor increased slightly.

Beginning in FY2006 we began an effort to significantly grow the Friends program. We engaged an outside consultant – Craver, Mathews, & Smith (CMS) – to assist in designing and executing that strategy. The cornerstone of the growth strategy was acquisition of new donors; both increasing the number of UU congregants who donated to Friends, and by acquiring donors who are not in our member database by mailing to rented lists. We were successful in achieving the primary objectives: donors increased by 30% to over 16,000, and income rose almost 20%, to slightly less than \$1.5 million in FY 06, and slightly over \$1.5 million in FY07.

The long term goals of sustainable and cost-effective growth require different metrics and tactics than the short-term goal of getting the first gift. The key is converting the newly acquired first-time donors to repeat donors. In direct mail and telephone fundraising (more about email later) it simply costs too much (time, paper, and money) to acquire a donor who only gives once.

Although our initial plans with CMS included cultivation and retention as well as acquisition, there were some assumptions in the Craver Mathews Smith plan that did not work out as anticipated. After a very successful first half of our three year relationship, working closely with Roger Craver and a very well qualified account manager, Craver Mathews Smith went through a very difficult transition period. The company now has a completely new management team and professional staff. As one of the consequences of this, during the critical period of converting new donors to repeat donors, we did not have the level of professional support that we needed.

Changes

This was one of several reasons that led us to change direct mail partners effective July 1 of this year. Our new partner, Vital Data Management (VDM), began working immediately with Liz Baker McClain (Manager, Friends of the UUA) to both (1) implement some changes Liz had been anxious to implement, and that were corroborated and supported by VDM, and (2) conduct a thorough analysis of our donor file, including key indicators of health and trends in donor behavior (a “file audit” in direct mail parlance.)

The changes that have already been implemented include:

1. Increased personalization of letters and envelopes
2. Improved cost efficiency by target segmenting
3. Shorter, “greener” letters
4. Significant increase in message segmentation:
 - a. New Donors
 - b. Winbacks¹
 - c. Monthly Giving²
 - d. Selective strategies by RFM (Recency, Frequency, Monetary value)
5. Package variations (address labels, monarch size, tax statements)
6. Variable gift arrays³ for all donor records

¹ Winbacks are those donors whose most recent gift falls within the last 12 months, but whose preceding gift was in excess of 12 months before the former.

² The Monthly Giving segment indicates a frequency of giving that is higher than average, currently defined as three or more gifts within the preceding 24 months.

³ Variable gift arrays are suggested gift amounts on the reply device of an appeal wherein the amounts listed are dependant upon the donor’s unique giving history

The Audit

The summary of the analysis of our donor file from VDM is this:

“Friends program revenue has been rising, mostly due to increased participation and increased retention of patterned donors⁴. Counters to program growth have been sustained decline in new donor retention, increases in gift downgrading, overall increased lapsing rates, and a comparatively small base of \$100+ donors.”

Program Strengths. The strengths that were evident in the period prior to the focus on growth and acquisition remain.

- We continue to have very strong retention of current pattern donors
 - Current Renewal rate – Second Year Multiples = 84.2%
 - Current Renewal rate – Third Year Multiples = 82.9%
- Our acquisition strategy has produced revenue that was at an all-time high during the past two years.

Issues. We have been able to identify specific patterns and trends within our donor files that allow us to understand the issues that we need to address. We have 61 pages of detailed analysis to provide depth and detailed segmentation of the issues, which are summarized below. In addition, we have three pages of specific recommendations, some of which have already been implemented and some of which are still in the planning phase. Mapping of tactics to issues follows the list of issues.

A. Conversion

While the infusion of an increased number of new donors since 2006 has contributed to short term revenue gains, retention of New Donors within the first year of acquisition has been and continues to be a major problem.

| Fiscal Year | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 |
|--|-------|-------|-------|-------|-------|-------|
| Retention of new donors from previous year | 40.2% | 36.8% | 44.0% | 34.3% | 35.2% | 31.1% |

Comparative baselines for conversions are in the 40-60% range.

B. Lapsing Rates have increased

Lapsing rates reflect issues ranging from the retention of New Donors, retention of Winbacks and renewals of Patterned Donors. In that the highest returns come from donors with most recent and frequent giving patterns, any increases in lapsing rates are counterproductive.

| Fiscal Year | 2002 to 2003 | 2003 to 2004 | 2004 to 2005 | 2005 to 2006 | 2006 to 2007 | 2007 to 2008 | UUA Avg. |
|-----------------------|--------------|--------------|--------------|--------------|--------------|--------------|----------|
| Overall Lapsing Rates | 32.0% | 25.9% | 24.1% | 34.3% | 35.2% | 31.1% | 35.2% |

Comparative baselines for lapsing rate is 20%

⁴ Patterned donors are those with 2+ gifts within a year to date and/or those with consecutive period transactions.

C. The Upgrade/Downgrade ratio has recently become inverted

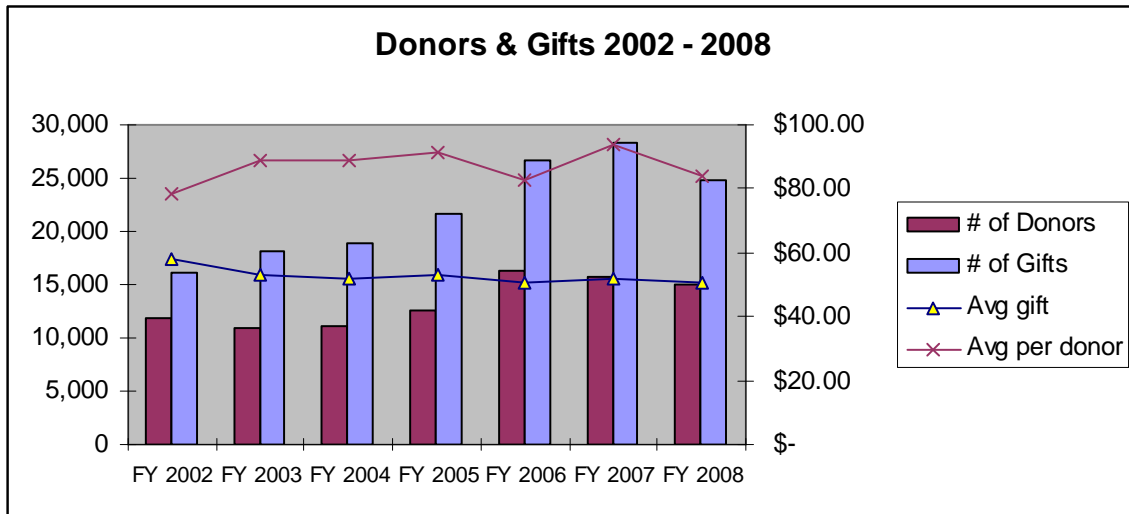
UUA upgrading hit its highest levels in FY2005. In FY2008, the ratio between those upgrading and downgrading became inverted for the first time.

| | 2002/2003 | 2003/2004 | 2004/2005 | 2005/2006 | 2006/2007 | 2007/2008 | UUA Average | Benchmark |
|-----------|-----------|-----------|-----------|-----------|-----------|-----------|----------------|-----------|
| Upgrade | 34.61% | 33.17% | 43.45% | 42.60% | 42.31% | 32.82% | 38.16% | 20.00% |
| Same | 38.03% | 38.76% | 32.91% | 28.22% | 29.48% | 27.67% | 32.51% | 50.00% |
| Downgrade | 27.36% | 28.07% | 23.64% | 29.18% | 28.20% | 39.51% | 29.33% | 15.00% |

D. The number of available Current + Patterned Donors has been shrinking.

The surge of new donors acquired since 2006 has provided an income stream and participation levels that appear, at first glance, to be causing an upswing. However, the conversion rates of the new donors is well below average, and combined with increases in lapsing rates in all but the patterned donor cells, the Friends program donor base has been in decline since at least 2006. Increases in income have been created by the influx of new donors and the rising retention of patterned donors. However, these gains have been neutralized by the other patterns outlined above. These have steadily reduced the number of available donors to renew in successive periods, and have by nature reduced the flow of donors into the patterned donor cells.

While the program has had a consistent number of total donors to renew in recent years; the allocation of these donors by segment has steadily changed, increasingly overwhelmed by the presence of peripheral (one-time) donors – who have a lesser likelihood to respond / renew / upgrade.



Next steps. In addition to the changes that we have already implemented, the following changes are planned and/or under discussion:

- A. Welcome packages for new donors to enhance conversions
- B. Elevated use of monthly giving (sustainers) to impact frequency and retention
- C. Customizing letter text for new donors
- D. Potential use of handwritten direct mail packages to key segments
- E. Challenge Gift program
- F. Giving level program
- G. Relationship based letters – strategy based upon identifiable donor need
- H. Accelerate retention and recapture rates to offset reduction in new donors

- I. Discover long term retention patterns of Congregant Non-Donors vs. External Acquisition before implementing an enhanced acquisition program
- J. Develop Mid and High End donor strategies to grow the \$100+ clusters (possible donor base screening)
- K. Develop elevated awareness of new donor conversion/retention patterns of UU vs. non UU/ Congregant vs. rental list acquisition new donors. Execute analytics in December, 2008.

Other Channels. The steps outlined above specifically address direct mail fundraising. In addition, we are planning and implementing changes in other channels.

Telephone. We had success with increasing income in past years with telephone appeals. However, we are adjusting plans this year for the following reasons:

- Telephone calling is the most expensive form of fundraising
- People who are called often become less responsive to letters
- There has been an general decline in telephone response rates experienced by all non-profits this year

Consequently, we are planning to focus this year on calling only those people who have demonstrated in the past that they are responsive to telephone solicitation only, and who do not respond to letters. We may do some limited testing of calling other segments, but will be very sensitive to the response rates that we are experiencing.

E-mail and multi-channel. There have been substantial changes in donor behavior and the state of the art (and therefore donor expectations) in e-fundraising over the last 3 years. Non-profits with an effectively integrated email appeal strategy and online donation processing capability have seen orders of magnitude increases in the percentages of their fundraising that is moving from mail to web. Interestingly, the highest response rates are in multi-channel appeals, i.e. mail or phone calls that direct someone to the web, emails directing donors to look out for an envelope in the mail, or simply coordinated appeals occurring via mail and email simultaneously.

We currently have online donation processing capability and email blast capability, but neither is nearly state of the art (or even what donors minimally expect at this point). Also, the tools that we are using are not well integrated for effective campaign management.

We have evaluated several providers of software and services to allow us to do:

- Email campaigns with dynamic personalized content (i.e. basic mail merge functionality PLUS conditional text or images based on donor attributes)
- Customized donation pages with a look and feel more consistent with the UUA look and feel
- Ability to send e-cards for tribute gifts (honor, memorial, rite of passage gift)
- Virtual gift catalog (a la Heifer International)

In late December 2008 we signed an agreement with Blackbaud to use the Kintera Sphere product line which we plan to be implementing in calendar 2009. This product will be used for all aspects of Stewardship & Development – campaign/major gifts, Legacy, Friends, and potentially new programs such as virtual gift catalogs. We are still working out the phasing of this project.

Annual Program Fund Formula Task Group Update

January 12, 2008

Task: A representational task group will assess and analyze the current APF calculation formula, consider alternatives, and make recommendations for consideration and action by Finance Committee, Board and Administration.

Context and Rationale: Similar analyses have been conducted periodically over the past 20 years. This is a good time to do so again, due to the anticipated financial impact of the economic downturn on congregations and the UUA.

Purpose: To assess current formula to determine the benefits or necessity of fine-tuning or changes with three primary criteria in mind:

- The APF formula meets or exceeds annual income goals;
- Offers incentives for growth of congregational membership and budgetary funding; and
- Fair to all size congregations, to the extent possible.

Current APF Formula Task Group Participants:

- Laurel Amabile, APF Director and Convener
- Barb Brown, General Chair, APF Committee
- Stefan Jonasson, Director of Large Congregation Services
- Dick Jacke, DPA Liaison to the APF Committee,
- Dan Brody, UUA Financial Advisor
- Mary Ellen Morgan, Pacific Central District President
- Stan Kidder, APF Committee, Mountain Desert District representative

Progress Report:

- 1) As reported in October 2008, an exploratory teleconference was held on October 14, 2009 with nine representative participants to discuss the Annual Program Fund and this initiative.
- 2) Actions taken to date:
 - A smaller representative task group was formed to do more in-depth work on APF formula.
 - Current and historical information about the APF and previous analyses was shared among the participants.
 - This group met by web-teleconference in December 2008 and early January 2009.
 - New ideas were generated and discussed, including the relevance of the district grants program and the issue of tracking special congregation collections and outreach funding currently not included in annual reporting to the UUA.
 - More research is planned, with the gathering of more comparison data (APF), other denominational funding structures, and on the feasibility of web-based Fair share calculation and reporting mechanisms for congregations.
- 3) No firm conclusions have been reached about recommended changes to the current APF calculation formula. More information is needed to inform the work of the task group.
- 4) Next steps and time line: Information gathering, further analysis and discussion, regular task group meetings, with a goal of making recommendations or a final report to the UUA leadership in April 2009.