

WHAT CONGREGATIONS CAN EXPECT FROM THE UNITARIAN UNIVERSALIST ASSOCIATION



Equipping
congregations

Amplifying
Connections

Supporting
Leaders

Advancing
Justice



**We are an
Association of
Congregations**

**We covenant
to support one
another**

**APF is the
vehicle for our
mutual support**

The UUA's three core missional areas are equipping congregations, supporting and training leaders, and advancing our values in the public sphere.

Equipping Congregations

The UUA equips and supports congregations for vital and thriving ministry in all areas of congregational life. From publishing and online resources, to training and coaching, to ministerial search and settlement, the UUA provides essential foundational resources for sustaining transformative and liberating ministry.

- The UUA is present with congregations to
 - **Coach**
Offering regional trainings, support during transitions, non-profit management and development, program and innovation support, health and vitality coaching
 - **Challenge**
Providing assistance to congregations in justice-making, resources for dismantling systems and structures of oppression, large scale justice-making opportunities
 - **Companion**
Offering conflict transformation resources and support, build and strengthen trust and health, offer presence and support, trauma resources
 - **Connect**
Providing online and in-person gatherings for learning, collaboration, networking, worship; sharing of best practices

Resources:

- Worship Web – searchable library of worship readings and collections www.uua.org/worship
- Curricula for religious education and faith development for all ages www.uua.org/re
- Finance and fundraising tools, including grants, common endowment, building loans www.uua.org/finance
- Dismantling White Supremacy www.uua.org/justice/dismantle-white-supremacy

Supporting Leaders

For staff and volunteer leaders, the UUA offers values-based training, professional credentialing and support services, and intensive leadership development experiences to prepare for faithful leadership of UU congregations and communities.

- Professional credentialing for ministers, religious educators, and musicians www.uua.org/careers
- Benefits and Compensation www.uua.org/finance/compensaion
- Minister Search and Settlement system to link ministers and congregations in search www.uua.org/transitions
- Youth Leadership www.uua.org/youth/leading
- LeaderLab – online resources and learning opportunities for congregational leadership www.uua.org/leadership
- Support of Leaders – Finding Our Way Home (retreat for UU leaders of color), TRUUST (retreat for transgender religious professionals), First Year Ministers Seminar, Interim Ministers Training, Summer Seminary (ministry exploration retreat for UU youth), Thrive (annual gathering for UU youth of color)

“Our Whole Lives (OWL) helps participants learn to make sexual decisions that demonstrate respect for themselves and for others.”

—Melanie J. Davis,
OWL program associate,
UUA

“Being able to bond with other people of color within the UU faith was honestly something that brought joy and hope to my heart, and makes me feel much more connected in my faith.”

—Rhea,
Thrive alum 2015



Advancing Justice and Values

Our faith calls us to take action for justice and liberation in our communities. As the national voice of Unitarian Universalism, the UUA shows up with campaigns and partnerships to bring UU values into the wider world.

- Side with Love www.sidewithlove.org
- Love Resists www.loveresists.org
- College of Social Justice www.uucsj.org
- Books www.uua.org/books

Amplifying Connection

Online, on paper, in person and around the world, we help one another stay connected to our shared faith. Engage the stories of other Unitarian Universalists and find your place in the wider UU movement.

Gatherings

- General Assembly www.uua.org/ga
- District and Regional Gatherings www.uua.org/regions

International

- U/U global partnership www.uua.org/international
- UU United Nations office www.org/uu-uno

Online

- UU World magazine www.uuworld.org
- inspirit Books and Gifts www.uuabookstore.org
- UUA on Facebook www.facebook.com/theuua
- UUA on Twitter www.twitter.com

“It is like an awakening. You get a chance to understand more than just the faith, or just the possible occupations, you get to learn about the communities built and the relationships made, and the infinite beauty that is our faith. For some, it’s a way to look into the faith from a new perspective, and for others, it’s a renewal.”

—Melissa Priese, Summer Seminary class of 2015

Your congregation’s support of the Annual Program Fund makes all of this possible. Thank you for your generosity!

Find more at www.uua.org



APF

ANNUAL
PROGRAM
FUND

FROM UUA PRESIDENT

Dear Friends,

This is no time for a casual faith, or for a casual commitment to our faith. And this is no time to go it alone; we need one another like never before. In order to meet the challenges before us, we are called to do three things.

- **We are called to be responsive and robust.** Our values are amplified powerfully by a well-funded UUA that is organized for impact.
- **We are called to recognize the reality of our interdependence.** We are an Association of Congregations, and we covenant to support one another. The Annual Program Fund is the vehicle for our mutual support.
- **We are called to renew the covenant that connects us.** I ask you now to renew the covenant, both personally and as a congregation, which connects you to this tradition and to the Unitarian Universalist Association.

I ask you to recommit and re-prioritize your support for one another and this collective faith through your contributions to the Annual Program Fund, which makes the work of the UUA possible.

Your congregation's full contribution is needed so that all of our congregations can receive the support they are depending on, and so that our Association can meet the challenges of this time.

There is so much good work happening in our movement, yet so much more remains. Thank you for taking up the call to strengthen your congregation's commitment to our larger faith and the amplification of our values.

Yours in gratitude and spirit,



Rev. Susan Frederick-Gray
President, Unitarian Universalist Association

The Unitarian Universalist Association is an Association of Congregations. The UUA is also a body of people, programs, and resources, which serves congregations and advance our values in the public sphere. (See "What Congregations Can Expect From the UUA" in this packet for more detail.)

“

A congregation becomes a member upon acceptance by the Board of Trustees of the Association of its written application for membership in which it subscribes to the principles of and pledges to support the Association.

– UUA Bylaws

“

As free congregations we enter into this covenant, promising to one another our mutual trust and support.

– Principles and Purposes



APF

ANNUAL
PROGRAM
FUND

FROM CONGREGATIONAL GIVING DIRECTOR

Dear Friends,

When asked what their dreams are for the UU movement, a strong majority of Unitarian Universalists named the hope that we will “become an even more visible and influential force for good in the world”^[1]. We can gain visibility and influence only if we are strong as congregations, and strong as an Association.

APF contributions are our UUA’s primary source of funding to support our congregations, amplify our moral voice in the world, and protect our history and our future as a religious movement. As congregations, we are independently governed, yet we are connected to one another through the Association of Congregations. As President Susan Frederick-Gray has said, we are already held within the covenant between and among us, in which we offer to one another our trust and mutual support.

Financial support for the Annual Program Fund (and previously for our Districts and or Regions) is a **tangible expression of our covenant as member congregations**. Thank you for supporting Unitarian Universalists in every corner of our Association through your contributions to the Annual Program Fund.

We are glad to report that after years of study and fine-tuning, we are introducing a new formula for congregational giving. This packet is meant to explain the New APF in depth, and give you a sense of what to expect. We want to also link you with further resources and opportunities for conversation. So without further ado...**WELCOME TO THE NEW APF!**

In the Spirit of Stewardship,



Rev. Vail Weller
Congregational Giving Director
Unitarian Universalist Association



APF
ANNUAL
PROGRAM
FUND

We are in the process of finalizing the customized APF Ask forms for each of the congregations in our UUA. Be on the lookout! Your congregation’s “Anticipated Ask Amount” letter will be arriving late-October.

¹ Fulfilling the Promise survey

HOW WE GOT HERE

In partnership with the UUA Board of Trustees' APF Task Force (and with the help of the congregations in the Southern Region who piloted the GIFT program), we have been working for a number of years to shape congregational giving in a way that is fair and responsive to the realities of congregational life, while at the same time providing sustainable financial support so that our congregations can be well served. We wanted to create a formula that would be based upon a congregation's ability to pay, and to inspire greater numbers of our congregations to provide the full requested amount.

WHY A NEW APF?

- Congregational leaders are asking for a new model
- We have been looking carefully at how congregations support the work of the Association as well as the changing landscape of religious affiliation in our country
- We want to continue serving congregations with programs and resources that allow them to bring Unitarian Universalist values to life in their communities
- The covenant that holds us is mutual: congregations are asked to support the UUA financially, and we also want our funding program to be responsive to the realities that face congregations.
- Congregations have different definitions of membership
- In times of crisis, a congregation's membership may not reflect the reality of financial challenge
- Linking APF to certified expenditures (rather than membership) is more responsive to what's happening within the life of the congregation, and therefore links more directly with the congregation's ability to pay
- Separating APF contributions from membership numbers encourages congregations to welcome greater number of members
- We are all one UUA, and we want a funding program that demonstrates this by inviting contributions to UUA nationally and locally (District or Region) in a single, unified ask
- Contributions to APF have dropped from an attainment rate of 84% in 2006 to 71% in 2015, even as congregational expenditures are rising.
- Unitarian Universalists are statistically the second highest paid income group^[1] but dead last in terms of giving to support our own faith, as compared to other faith groups^[2]
- **We hope that talking about the New APF can serve to open a deeper UUA-wide conversation about stewardship as a spiritual principle**

¹ Barry A. Kosmin and Seymour P. Lachman, *One Nation under God: Religion in Contemporary American Society* (New York: Crown Publishers, 1993) 260.

² Dean Hoge, ed., *Money Matters: Personal Giving in American Churches* (Louisville: Westminster John Knox Press, 1996) 12.



56.5%

of UUA fundraising dollars provided by congregations supporting the APF (largest source)



60%

of UU congregations who are fully contributing Honor Congregations



76%

of the UUA budget which goes to programming and resources for our congregations

We are in the process of finalizing the customized APF Ask forms for each of the congregations in our UUA. Be on the lookout! Your congregation's "Anticipated Ask Amount" letter will be arriving late-October.

HOW WE GOT HERE

WHY NOW?

- The quest to find the most equitable funding program has been ongoing for over four decades
- Regionalization changes how our staff, regions, and districts operate and are funded
- The times in which we live demonstrate how necessary our Unitarian Universalist values are
- Our UUA can be robust and responsive only with the full support of our congregations
- We ask congregations to recommit to the covenant of support for one another so that we may powerfully meet the challenges of our time

There have been at least six studies of the Annual Program Fund by various bodies such as the Commission on Appraisal, the Finance Committee, and the Board of Trustees, dating back forty years to 1977. The studies have overwhelmingly recommended linking APF requests to the congregation's expenditures rather than membership numbers. The Board of Trustees last year commissioned an APF Task Force which came to the same conclusion. All of this is to say: we've been on this path for quite some time! Asking congregations for a percentage of their certified expenditures, rather than basing the ask on membership number, is more equitable, since the request would be proportionally the same across the entire UUA. Congregations have been requesting this sort of formula for some time.

Currently, **60%** of our congregations are fully-contributing Honor Congregations. We receive **70%** of the income that we request overall. Congregations pledge to support the Association when they become member congregations in the UUA, and this support is what allows us to serve congregations across the entire UUA. We are an Association of Congregations, and we are in covenant with one another. Support for the Annual Program Fund (including support for the District or Region) is a concrete expression of this promise.



Handy Tip: When you are doing a comparison of what you've been asked to give

in the past and what you will be asked to give in the New APF, please remember to count BOTH APF and District or Regional request amounts, as the New APF formula includes both.

APF TASK FORCE MEMBERS

Denise Rimes, former Vice Moderator, UUA Board of Trustees, member of First UU Church of Richmond, VA

Rev. Sarah Stewart, Minister, First Unitarian Church (Second Parish) Worcester, MA

Rev. Leslie Takahashi, Chair of Commission on Institutional Change, UUA, and Lead Minister, Mt. Diablo UU Church, Walnut Creek, CA

Rev. Mary Katherine Morn, Former Director of Stewardship and Development and Special Advisor to the President, UUA member Theodore Parker UU Church, West Roxbury, MA, President and CEO of the UUSC

Lucia Santini Field, UUA Financial Advisor, member of Murray UU Church, Attleboro, MA

Rev. Vail Weller, Congregational Giving Director, UUA, member of the Church of the Larger Fellowship

Tim Brennan, Treasurer, UUA, member of First Parish in Needham, MA

Norrie Gall, Congregational Giving Manager, UUA, member of the First Parish Church UU in Beverly, MA

Larry Ladd, former UUA Financial Advisor, member of First Church in Boston, MA

Hank Rauch, member of UU Area Church at First Parish, Sherborn, MA

Dan Brody, former UUA Financial Advisor, member of First UU Society in Newton, MA



APF Task Force and UUA Staff

(Front row, left to right) Denise Rimes, Sarah Stewart, Leslie Takahashi, Mary Katherine Morn, Lucia Santini Field, Vail Weller (back row) Tim Brennan, Harlan Limpert, Norrie Gall, Dan Brody, Larry Ladd, Hank Rausch

THE NEW APF FORMULA

The move to the New APF is a move away from a per-member calculation, and is a move to a percentage of certified expenditures.

This request includes your congregation's contribution to the Annual Program Fund AND your district or region.

We wanted the formula to be simple. But there are a number of factors that will affect the amount that is requested of you. **Please note that we have taken great care to create a formula that takes into account the particular circumstances of your congregation.**

We recognize that you may be looking immediately for the bottom line. That's natural. To begin, we ask that you revisit the words of Rev. Susan Frederick Gray, and take them to heart. The first thing that is asked of each of our congregations is to **renew the covenant between and among us**. This is spiritual work, as befits a people of faith.

Next, you can take a deep breath and be reassured. We are putting in place a "collar", which will support both our congregations of whom more is asked, and of whom less will be asked.

What this means is that if your "new" requested amount is a decrease from what you are accustomed to contributing, we are asking you to hold steady, or to reduce your giving by no more than 10%. This is so that you can help to hold in care the congregations whose ask is increasing. If your "new" requested is an increase, we will be asking you to increase by only 10%. It is this collar, both for increases and decreases, which helps us to support one another.

APF = Annual Program Fund

THE NEW APF FORMULA

The New APF Formula begins with 6.75% of the congregation's reported operating expenditures. *Please note that the New APF contribution covers the congregation's support for both the UUA and the Region.*

Several data points about your congregation, in relation to all others, are then factored in. These are:

- Your Geo Index Number (a rating based on wage rates in your area, used as the basis of the UUA's Fair Compensation guidelines)
- Your expense per member ratio (determined using your reported operating expenditures and number of certified members)
- The amount requested from your congregation for APF and District or Region from the last fiscal year

These data points are used to create the following adjustments:

- The Formula reduces the full amount asked for those congregations who are in a Geo-Index rating of 4 or higher.*
- The Formula reduces the full amount asked for those congregations whose expense per member ratio is in the top 20% of all certified congregations.*
- The New APF Formula takes the full requested amount of support from the APF and your Region or District, and applies a transition collar, capping the increase in the amount requested at no more than 10% over the prior year, and capping the decrease so that it is no less than 10% under the prior year**. This means:
 - **NO CONGREGATION will have an ask that is more than 10% higher** (than what was previously asked for both APF and District or Region)
 - **NO CONGREGATION will have an ask that is 10% Lower**** (than what was previously asked for both APF and District or Region)

*Please note, only one of these adjustments will be applied. If a congregation is in a Geo-Index of 4 or higher, AND is in the top 20% of per member spending, the requested amount will be reduced by whichever number benefits the congregation the most.

** Congregations in the Southern Region have been participating in the GIFT Program, which asks for an unadjusted 7% of operating expenditures. As they have already been asked to contribute at a higher rate than the new formula, they are excluded from the minimum collar.

FOR YOUR MINISTER

Dear Colleague,

I hope that the information in this packet will be helpful in explaining the New APF to you and your congregation's leadership.

Your role is a unique one in the congregational system; you are the spiritual leader, the preacher, the teacher, and in some cases, the author of the budget. You help educate our congregations about the importance of stewardship as a religious concept, and you inspire them to support the congregation, and the Association, with their gifts.

President Susan Frederick-Gray has said: "“This is no time for a casual faith, or for a casual commitment to our faith. We are called to renew the covenant that connects us.”"

We are asking that you help inspire the congregation you serve to prioritize giving to the Annual Program Fund. For those who have long been champions of this giving, thank you! For others, we want to partner with you and offer you whatever support we can.

The New APF program seeks to:

- Ensure the financial health and growth of our congregations in a time of change. The New APF will base contributions on a percentage of certified expenditures, rather than purely on number of reported members.
- Ensure the resources to meet the changing needs of Unitarian Universalists. We have created a program that is responsive to the realities of congregational life, and based on congregational ability to pay.
- The New APF will incorporate national as well as district / regional contributions into the formula, emphasizing the fact that “we are all one UUA.”

Please see the back of this sheet for a detailed description of the New APF formula.

Thank you for the precious gift of your ministry.

In Stewardship,

Rev. Vail S. Weller

Rev. Vail Weller
Congregational Giving Director

110

number of participants in Finding Our Way Home in 2018, a gathering for religious professionals of color

164

youth and young adults of color who have graduated from Thrive, UUA's Multicultural Leadership School

115

attendees at most recent Mosaic Makers Conference (for those who are intentionally building multiracial, multiethnic, multicultural UU congregations), representing 17 congregations and all UUA regions

We invite all of you to join us for one of the webinars for ministers we are offering to discuss APF and how we can best articulate the importance of full congregational support.

I welcome conversation with you anytime. Please contact me at vweller@uua.org if you'd like to schedule a time for a phone call or a zoom chat.

Webinar for Ministers (dates):

- 10/25/2018 at 1PM EST
- MidAmerica Ministers “New APF Chat” 11/13/18 at 1 PM EST
- Pacific West Ministers “New APF Chat” 11/15/18 at 1 PM EST
- Zoom Room for each of these calls is: <https://zoom.us/j/6506789566>
- Vail will also be taking appointments to discuss New APF at UUMA Ministry Days and General Assembly between June 18-23, 2019 in Spokane, WA
- If none of the listed times work for you, please email apf@uua.org to schedule a time to go over specific questions you may have! We want to connect with you.

FOR YOUR MINISTER

THE NEW APF FORMULA

The New APF Formula begins with 6.75% of the congregation's reported operating expenditures. The contribution will cover the congregation's support for the UUA and the District or Region.

Several data points about your congregation, in relation to all others, are then factored in. These are:

- Your Geo Index Number (a rating based on wage rates in your area, used as the basis of the UUA's Fair Compensation guidelines)
- Your expense per member ratio (determined using your reported operating expenditures and number of certified members)
- The amount requested from your congregation for APF and District or Region from the last fiscal year

These Data points are used to create the following adjustments:

- The Formula reduces the full amount asked for those congregations who are in a Geo-Index rating of 4 or higher.*
- The Formula reduces the full amount asked for those congregations whose expense per member ratio is in the top 20% of all certified congregations.*
- The New APF Formula takes the full requested amount of support from the APF and your Region or District, and applies a transition collar, capping the increase in the amount requested at no more than 10% over the prior year, and no less than 10% over the prior year**.
- **NO CONGREGATION will have an ask that is more than 10% higher** (than what was previously asked for both APF and District or Region)
- **NO CONGREGATION will have an ask that is 10% Lower**** (than what was previously asked for both APF and District or Region)

*Please note, only one of these adjustments will be applied. If a congregation is in a Geo-Index of 4 or higher, AND is in the top 20% of per member spending, the requested amount will be reduced by whichever number benefits the congregation the most.

** Congregations in the Southern Region previously participated in the GIFT Program, which asked for an unadjusted 7% of operating expenditures. As they were already contributing at a higher rate than the new formula, they have been excluded from the minimum collar.

Honor Path = .5%
of certified expenditures increase over
what congregation gave last year



67

Ministers who received preliminary fellowship at most recent General Assembly

33

ministers settled this year

30

interim ministers hired this year

10

developmental ministry positions filled this year

14

Contract ministry positions filled this year

74

percent of UU congregations who have gone through an intentional process of education and outreach around LGBTQ issues and are officially recognized as Welcoming Congregations

HOW DOES THE FORMULA WORK?

The New APF Formula begins with 6.75% of the congregation's reported operating expenditures. The contribution will cover the congregation's support for the UUA and the District or Region.

The Formula factors in several data points about your congregation, in relation to all others. These are:

- The prior year's APF and Regional request for support
- Your Geo Index Number (a rating based on wage rates in your area, used as the basis of the UUA's Fair Compensation guidelines)
- Your expense per member ratio (determined using your reported operating expenditures and number of certified members)
- The amount requested from our congregation for APF and District or Region from the last fiscal year

We are in the process of finalizing the customized APF Ask forms for each of the congregations in our UUA. Be on the lookout! Your congregation's "Anticipated Ask Amount" letter will be arriving late-October.

These Data points are used to create the following adjustments:

- The New APF Formula takes the full requested amount of support from the APF and your Region or District, and applies a transition collar, capping the increase in the amount requested at no more than 10% over the prior year, and no less than 10% over the prior year**.
- **NO CONGREGATION will have an ask that is more than 10% Higher in the first year of the New APF.**
- **NO CONGREGATION will have an ask that is 10% Lower** in the first year of the New APF.**
- The Formula reduces the full amount asked for those congregations who are in a Geo-Index rating of 4 or higher.*
- The Formula reduces the full amount asked for those congregations whose expense per member ratio is in the top 20% of all certified congregations.*

*If a congregation is in a Geo-Index of 4 or higher, AND is in the top 20% of per member spending, their ask will only be reduced by ONE of those factors (whichever adjustment provides the lowest ask).

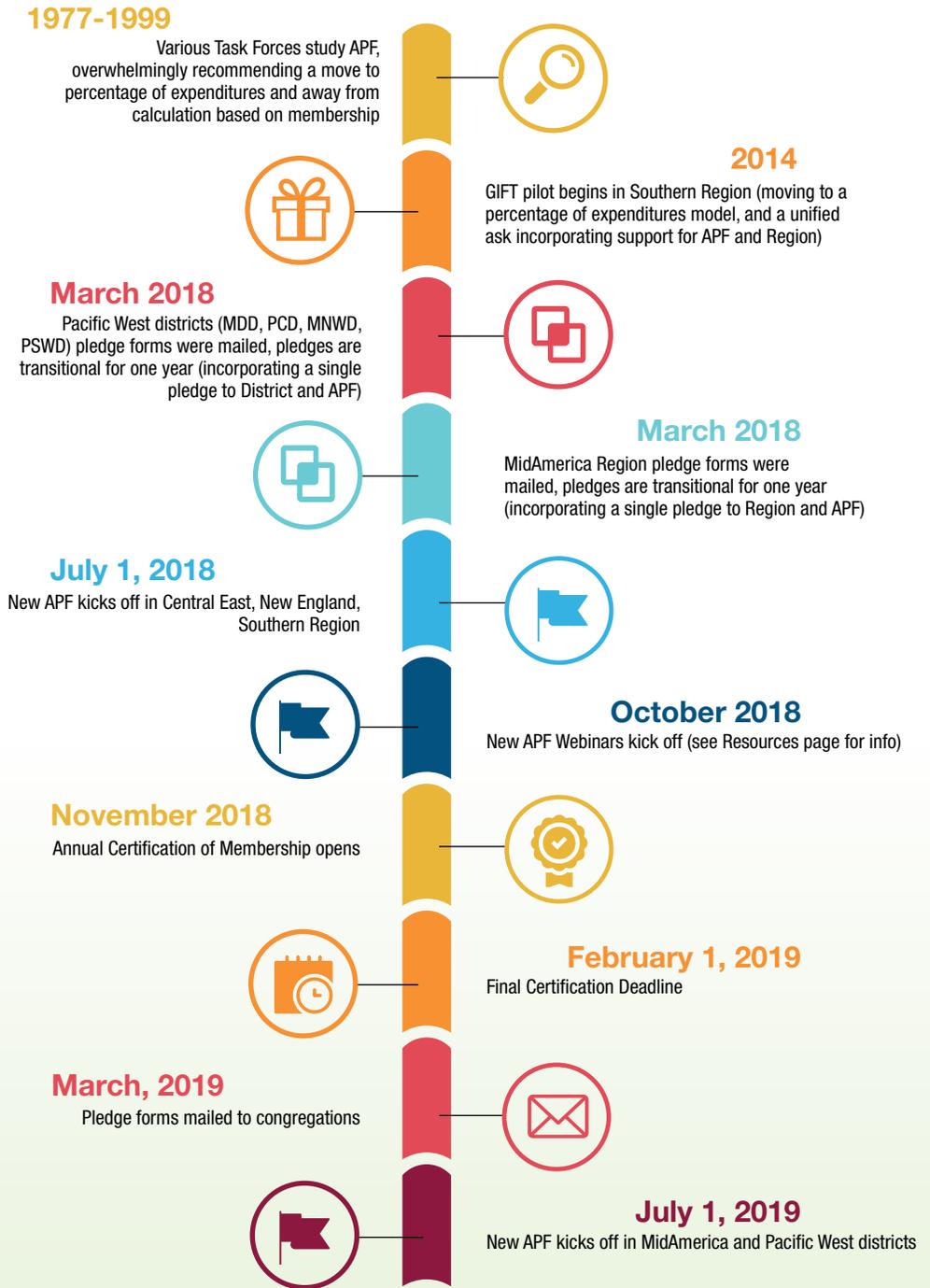
**Congregations in the Southern Region previously participated in the GIFT Program, which asked for an unadjusted 7% of operating expenditures. As they were already contributing at a higher rate than the new formula, they have been excluded from the minimum collar.



Handy Tip: When you are doing a comparison of what you've been asked to give in the past and what you will be asked to give in the New APF, please remember to count BOTH APF and district or regional request amounts, as the New APF formula includes both.

Honor Congregation = congregation that contributes the full requested amount to the Annual Program Fund

NEW APF TIMELINE



FOR CONGREGATIONAL ADMINISTRATORS / NEWSLETTER EDITORS / WEBSITE

What is the Annual Program Fund?

Every UU congregation in our Association is asked to contribute a specific sum of money annually to the Annual Program Fund to support all of the congregations in our Association. The Annual Program Fund makes up the single largest source of funding for the work of the Unitarian Universalist Association. In turn, the UUA utilizes these funds to provide resources, programming and support to all of the congregations across the Association. Your giving makes this possible. Thank you!

In July of 2019, congregations in MidAmerica and the Districts of the Pacific Western Region will move to the New APF.

The New APF formula is different in two significant ways.

First, the New APF request supports both APF and what your congregation formerly contributed to your district and/or region. The New APF is a unified program, demonstrating that we are all one UUA. ***The New APF is also based upon a congregation's ability to pay, and it therefore is based on a congregation's certified expenditures rather than number of members.*** The New APF is a fair and equitable way for all of our congregations to both support, and be supported.

The New APF formula asks for a contribution of 6.75% of your congregation's certified expenditures. There are built in adjustments to the formula for congregations in high wage rate areas (utilizing the national UUA Geo Index), or for congregations who have extremely high expenses per member (whether this is due to the high cost of your building or other circumstance). Additionally, there is a transition collar applied so that ***no congregation's requested contribution amount will go up by more than 10% in a year.*** At the same time, ***no congregation's requested contribution amount will go down by more than 10% in a year.***

How Did The New APF Come About?

The APF Task Force of the UUA Board (with the help of the UUA Staff and the congregations in the Southern Region who piloted the GIFT program) worked for a number of years to study congregational giving in order to create a program that would be fair and responsive to the realities of congregational life, while at the same time providing sustainable financial support so that our congregations can be well served. The New APF Formula is the result of this work.

Please visit www.uua.org/amplify for further information and resources about APF.



8,634,454

pageviews of
www.uua.org in the
past year

1,411,231

page views of the
Curricula and Faith
Development section
of www.uua.org

1,152,877

pageviews of Tapestry
of Faith section of
www.uua.org

59,717

pageviews of the OWL
(Our Whole Lives
sexuality education
program) section of
www.uua.org

951,840

pageviews to
WorshipWeb section
of www.uua.org



47

number of countries
where the UU World
magazine is mailed

- The resources found in this packet can be found at www.uua.org/amplify
- We have set up a series of webinars and online gatherings to further discuss the New APF, to assist you with Certified Operating Expenditure reporting, and address your additional questions (see below)
- Your regional staff, and particularly your primary contact, will also be able to help talk you through this process

Do You Need To Talk With A Person?

Please do contact your Congregational Giving Team with any questions or concerns!

We can be reached collectively at the APF Helpline at apf@uua.org, or via phone at (617) 948-6512. Your primary contact will also be able to help you.

Important Dates:

- Fiscal Year 2020 will run 7/1/2019-6/30/2020
- The annual Certification of Membership will be open Thursday November 15, 2018, and will close Friday February 1, 2019. The figures reported at this time will be used to calculate your request for support for our Fiscal Year 2021 (which starts 7/1/2020).
- Pledge forms will be sent to congregations in March 2019.
- The last date that payments can be received to apply to the current Fiscal Year (2019) is June 30, 2019.

Learning Opportunities:

Please visit our “virtual” office hours on Mondays (beginning October 15) from 5PM EST-6PM EST via Zoom by visiting the following link: <https://zoom.us/j/6179486514>

Webinar for Treasurers / Finance Folks (dates):

- 10/30/2018 at 3PM EST
- 11/14/18 at 3 PM EST
- 11/20/18 at 1 PM EST
- Via Zoom by visiting the following link: <https://zoom.us/j/6179486514>

Webinar for Ministers (dates):

- 10/25/2018 at 1PM EST
- MidAmerica Ministers “New APF Chat” 11/13/18 at 1 PM EST
- Pacific West Ministers “New APF Chat” 11/15/18 at 1 PM EST
- Via zoom by visiting the following link: <https://zoom.us/j/6506789566>

If none of the listed times work for you, please email apf@uua.org to schedule a time to go over specific questions you may have! We want to connect with you.



106

youth who have graduated UUA's Summer Seminary program in the last 5 years



470

participants in College of Social Justice immersion learning journeys over the last five years



30%

of UU congregations which are fully accredited Green Sanctuaries



825,000

number of books Beacon Press shipped to bookstores, libraries, schools and colleges around the world last year



\$60,000

given out by the UUA in grants and scholarships to Youth and Young Adults last year

FREQUENTLY ASKED QUESTIONS

How was the decision made to move to a New APF?

- Various studies of APF have been done for decades. Most recently, our UUA Board of Trustees created the APF Task Force (which includes a representation of ministers, financial leaders in our faith, congregational treasurers and UUA Staff). They worked for 2 years to shape the New APF. As part of the process, a workshop was presented at GA 2016, a survey was sent out to all identified treasurers and presidents, and specific follow up was made with those congregations that were flagged for concern.
- Please see more information on the “How We Got Here” sheet in this packet or online at www.uua.org/amplify

Will we have to pay the New APF and our district or regional contribution?

- NO! The New APF is designed to fund the UUA nationally and regionally in **one request**.

Is the New APF request amount based upon our congregation's membership number?

- NO! The New APF is designed to be based on your ability to pay, so it is linked to the congregation's Certified Operating Expenditures. (This means as your income goes up, so does your requested amount. As your income decreases and your expenditures decrease, so does your requested amount.)

How do we calculate our Certified Operating Expenditures?

- A guide is currently available at www.uua.org/operating-expenses, and our team is available to help talk your congregation through the process. Reach out to us at apf@uua.org.

What happens if we DON'T update our certification?

- Per UUA Bylaws all member congregations MUST participate in the annual certification, however, if we do not have a current figure from your congregation, we will use the most recent data available to us.

When will we receive our Anticipated Ask listing our New APF request amount?

- Your congregation will receive your customized Anticipated Ask form in late-October, 2018.

How can we budget for the next fiscal year when we don't yet have our New APF requested contribution amount?

- You can be reassured that no congregation's ask will go up by more than 10%. Additionally, no congregation's ask will go down by more than 10%.

When will we receive our Pledge Form?

- Pledge forms will be sent out in March.

Are all regions moving to the New APF this year?

- In the first year of the New APF, the Southern Region, Central East Region, and New England Region all moved to the new formula.
- The Districts of the Pacific Western Region and the MidAmerica Region are currently in a transitional year, with a single pledge being made to cover current APF and Regional/District request.
- The Districts of the Pacific Western Region and MidAmerica will move to the New APF Formula in FY20 (which begins in July 2019).

We have always been an Honor Congregation. How can we retain that status?

- Honor Congregation designation will be given to congregations who contribute the full amount requested by the New APF formula.

We have always wanted to be an Honor Congregation. How can we get there?

- Congregations who increase their contributions by .5% (or more) of their Certified Operating Expenditures will be on the **Honor Path** - a new designation which will garner you a ribbon at General Assembly and additional special recognition of your progress.
- Please connect with your Regional staff, or with us in the Congregational Giving Office, to strategize about a plan to increase the congregation's support.

I feel strongly about congregations supporting one another through their contributions to the New APF. How can I help spread enthusiasm so that more congregations are Honor level givers?

- We love this question! Please reach out to Elizabeth Terry (eterry@uua.org) to find out more about joining our Generosity Network.

How do you stay in touch with our congregation's leaders?

- Please be sure to visit myuua.org and update the contacts for your congregation. We rely on you to identify your leaders!

300

youth and adults visit the UUA on UU Heritage Pilgrimages as part of the Coming of Age curriculum

We are in the process of finalizing the customized APF Ask forms for each of the congregations in our UUA. Be on the lookout! Your congregation's "Anticipated Ask Amount" letter will be arriving late-October.

FOR YOUR MINISTER

THE NEW APF FORMULA

HOW WE GOT HERE

FROM UUA PRESIDENT

WHAT CONGREGATIONS
CAN EXPECT FROM THE
UNITARIAN UNIVERSALIST
ASSOCIATION

Equipping
congregations

Amplifying
Connections

Supporting
Leaders

Advancing
Justice

HOW DOES THE FORMULA WORK?

The New APF Formula begins with 6.75% of the congregation's reported operating expenditures. The contribution will cover the congregation's support for the UUA and the District or Region.

The Formula factors in several data points about your congregation, in relation to all others. These are:

- The prior year's APF and Regional request for support
- Your Geo Index Number (a rating based on wage rates in your area, used as the basis of the UUA's Fair Compensation guidelines)
- Your expense per member ratio (determined using your reported operating expenditures and number of certified members)
- The amount requested from our congregation for APF and District or Region from the last fiscal year

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These Data points are used to create the following adjustments:

- The New APF Formula takes the full requested amount of support from the APF and your Region or District, and applies a transition collar, capping the increase in the amount requested at no more than 10% over the prior year, and no less than 10% over the prior year**.
 - **NO CONGREGATION will have an ask that is more than 10% Higher in the first year of the New APF.**
 - **NO CONGREGATION will have an ask that is 10% Lower** in the first year of the New APF.**
- The Formula reduces the full amount asked for those congregations who are in a Geo-Index rating of 4 or higher.*
- The Formula reduces the full amount asked for those congregations whose expense per member ratio is in the top 20% of all certified congregations.*

*If a congregation is in a Geo-Index of 4 or higher, AND is in the top 20% of per member spending, their ask will only be reduced by ONE of those factors (whichever adjustment provides the lowest ask).

**Congregations in the Southern Region previously participated in the GIFT Program, which asked for an unadjusted 7% of operating expenditures. As they were already contributing at a higher rate than the new formula, they have been excluded from the minimum collar.



Handy Tip: When you are doing a comparison of what you've been asked to give in the past and what you will be asked to give in the New APF, please remember to count BOTH APF and district or regional request amounts, as the New APF formula includes both.

Honor Congregation = congregation that contributes the full requested amount to the Annual Program Fund