

Stewardship & Development Quarterly Staff Group Report

To: The Board of Trustees of the Unitarian Universalist Association

From: Terry Sweetser, Vice President of Stewardship and Development

Date: March 20, 2007

The *Now is the Time* comprehensive campaign has picked up significant momentum since our last report in October 2006. In fact, all program areas are raising more funds compared to this time last year.

We have used Rev. Dan King's decision to return to parish ministry as an opportunity to reallocate the significant talent in our staff group. Effective February 1, Catherine Lynch has been promoted to manage the *Now is the Time!* campaign, Pat Grimm has moved from Legacy Gifts to focus on budget and day to day operations, including analyzing and improving effectiveness of all aspects of gift processing, and Marcy Bailey-Adams has returned to Legacy Gifts, a program area where she has made significant contributions over the years.

THE ANNUAL PROGRAM FUND

Year to Date as of March 20:

FY	Actual	Goal	% to Goal	Previous FY
FY07	\$4,446,259	\$6,717,684	66.2%	+ 3.7%
FY06	\$4,285,863	\$6,493,307	66.0%	+ 3.8%

The Annual Program Fund (APF) Committee meets in Boston from March 23-25 for their annual spring meeting under the capable leadership of General Chairperson, Barb Brown. The APF Committee plans to meet with President Bill Sinkford and the Rev. Terry Sweetser on Friday, followed by a Keynote address by the Rev. Jeanne Pupke, minister of the First UU Church of Richmond, VA. The Committee and APF staff will reflect upon and discuss the roles of stewardship and personal philanthropy in their own lives and in their volunteer work on behalf of the UUA and their districts. The staff will thank the seven committee members and/or liaisons whose terms of service are ending in June, and will begin preparations for new committee members. The next weekend-long APF Committee meeting will be August 2007.

FRIENDS OF THE UUA

Year to Date as of March 20:

FY	Actual	Goal	% to Goal	Previous FY
FY07	\$1,084,252	\$1,600,000	67.8%	+ 46.1%
FY06	\$742,223	\$1,600,000	46.4%	+ 4.5%

The Friends of the UUA Program continues its strategy of fundraising and educating donors using themed appeal letters. December's special appeal has raised over \$101,000 to date to fund a DVD entitled "What is Unitarian Universalism?" One hundred and sixty donors have

given \$250 or more to the DVD appeal and will be listed as co-producers of the film. Other themes for this fiscal year included Moral Values, Social Justice, Public Witness, District Services, Washington D.C. Office, and Tapestry of Faith Update.

The April 2007 mailing is a joint effort between the UUA and the UUSC to raise funds in support of UU volunteer efforts on the Gulf Coast. We anticipate a strong response from this 60,000 piece mailing.

The Friends monthly sustainer program brings in approximately \$9,000 monthly from our 600 active sustainer donors. We anticipate income totaling \$105,000 for this fiscal year.

The Friends of the UUA Program projects that we will meet our goal of gaining 4,400 new donors this year. As of March 2007, we have reached 59% of our goal, and anticipate a 1.14% return rate from prospect mailings for the next two mailing cycles. The Friends active donor base (those who have given a gift to Friends within the past 36 months) now totals 26,446, which is a 35% increase from last year at this time.

LEGACY GIFTS

Legacy Gifts Summary as of 3/14	UUA		UU Entity	Total
	Unrestricted	Restricted		
<i>Matured Gifts – QTD</i>	\$ 302,930	\$ 522,496	\$ 114,189	\$ 939,616
<i>Matured Gifts – YTD</i>	\$ 899,036	\$ 592,752	\$ 168,355	\$ 1,660,144
<i>New Gifts* - QTD</i>	\$ 101,868		\$ 69,995	\$ 171,863
<i>New Gifts* - YTD</i>	\$ 309,636	\$ 5,317	\$ 429,183	\$ 744,137
<i>Commitments</i>	\$ 1,002	\$ 485,000	\$ 377,362	\$ 863,364

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

Matured Legacy Gifts:

After a phenomenally busy December and January, Legacy Gifts reports unrestricted gift and bequest income totaling \$899,036 and \$592,752 in restricted gifts for the year to date. Through our Umbrella Giving program, we passed along \$168,350 to UU entities. These forty-five gifts are the result of generous Unitarian Universalists who made provisions many years ago to contribute to the Association through their estate.

New Legacy Gifts:

Six new gifts were booked for Charitable Gift Annuities, the UUA Pooled Income Fund and other gifts held in trust, totaling \$744,137 fiscal year to date (including two gifts made in November 2006 by Mrs. Tid Kowalski who died in January). The distribution of these gifts was \$309,636 for the UUA's unrestricted use, \$5,317 for UUA restricted purposes and \$429,183 for congregations and other UU entities.

New Commitments:

For this fiscal year we have received thirteen new Legacy commitments, one of these is an umbrella bequest for more than \$850,000, to be shared by the UUA, our Westport, CT church's endowment, and Meadville Lombard Theological School.

For all these gifts, and for those yet to be given, we are deeply grateful.

“NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS

This winter included more extensive planning for our *Now is the Time!* comprehensive campaign. With help from the UUA's Marketing Director, Valerie Holton, and our newly hired marketing firm, Swardlick Marketing Group, we will officially launch the campaign at the 2007 General Assembly. The Stewardship and Development staff will be in contact with the Board of Trustees and the President's Council before General Assembly to discuss how you can help us celebrate this launch.

We are pleased to report that as of March 20, 2007, we have secured approximately \$10 million in cash gifts, approximately \$5 million in bequest gifts and approximately \$3 million in pledges for the \$50 million *Now is the Time!* campaign. Not included in those figures is an additional \$9.7 million in negotiation. A Campaign Flash Report as of March 20 is attached to this report; an updated Flash Report is available weekly and will be distributed at the Board of Trustees meeting.

The San Francisco Bay Area Marketing Campaign, which will begin in September 2007, has raised \$191,000 to date towards the goal of \$260,000. Emily Mullins, previously Major Gifts Administrator, has been promoted to full-time Gift Officer and is making progress towards securing the remaining funding.

Association Sunday (October 14, 2007) is another important part of the *Now is the Time!* campaign and we hope to raise \$1 million for growth and outreach initiatives. The Rev. Dr. Stephan Papa has been visiting ministers across the country gathering ideas and enlisting their support for this effort. In addition, we have sent a mailing to all congregations with a letter from President Sinkford asking them to participate. The general feedback is that ministers are pleased to be consulted and like the idea of supporting growth initiatives.

As of March 14, 2007, eighty-two congregations have agreed to join us by conducting a special service and collection on Association Sunday; this includes thirty-four of our fifty largest congregations. Eight congregations will pilot our materials by conducting their Association Sunday this April and May.

In addition to new gift activity, we continue to receive payments on pledges made to previous campaigns. So far this year we have received \$99,686 from matured planned gift commitments to *Handing on the Future*, and \$532,305 in receipts for the Campaign for Unitarian Universalism (cash pledge receipts of \$51,282 and matured legacies \$481,023.)

The continuing positive response to all our programs and campaigns reinforces our overall impression that Unitarian Universalists are showing tremendous generosity to the Association, our congregations, and other UU entities. It 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 collaborating to make this a better world.

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

Annual Program Fund Statistics as of March 5, 2007

\$6,717,684 Goal
 \$8,166,544 Total Fair Share
 1,043 Total Number of congregations

 \$4,017,718 Total gifts received to date
 49% Current Fair Share dollars received to date
 60% Current Goal dollars received to date

 \$5,802,080 Pledged dollars
 71% Current Fair Share dollars pledged
 86% Current Goal dollars pledged

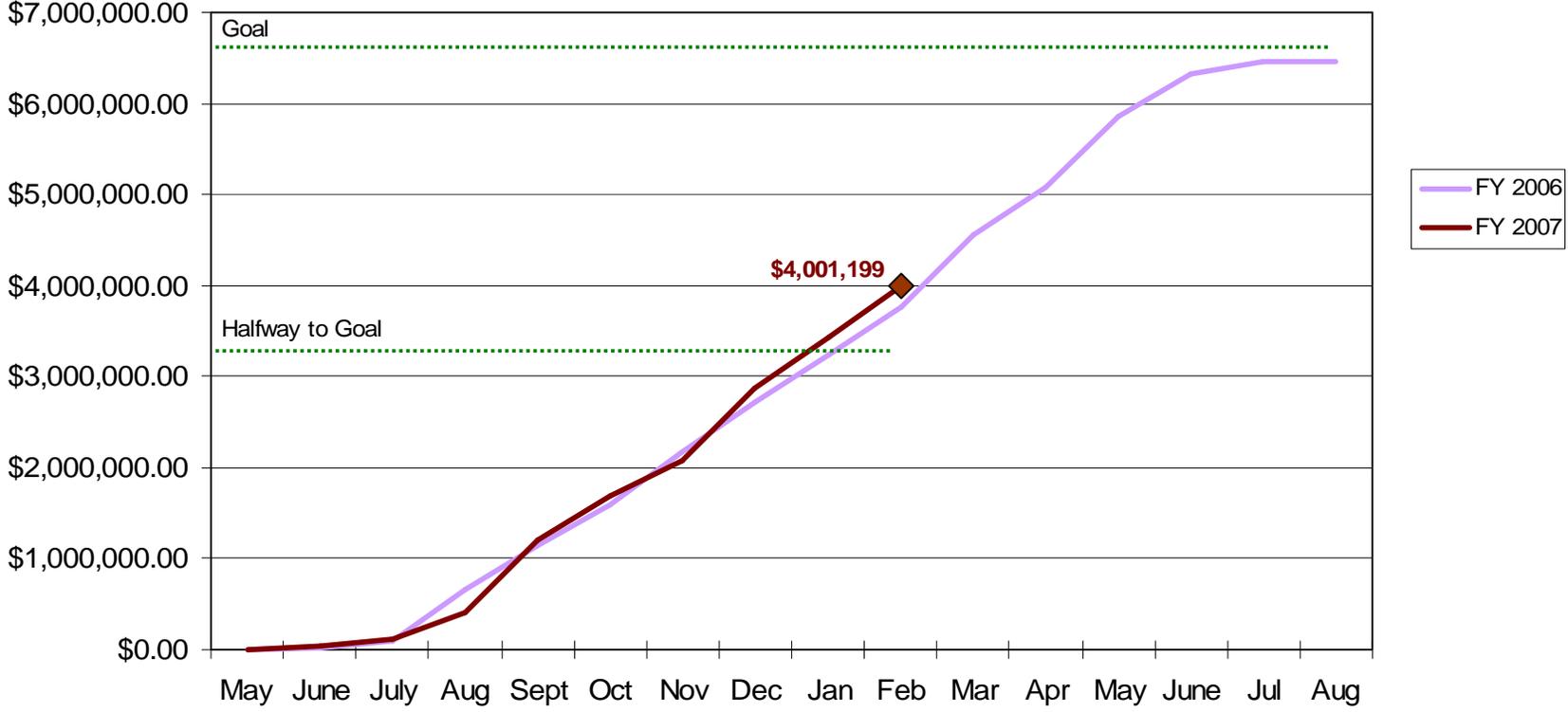
 \$6,302,257 Projected Contribution dollars*
 77% Current Fair Share dollars Projected
 94% Current Goal dollars Projected

 813 congregations have pledged
 660 congregations that pledged have pledged Fair Share
 233 congregations have given their full pledge

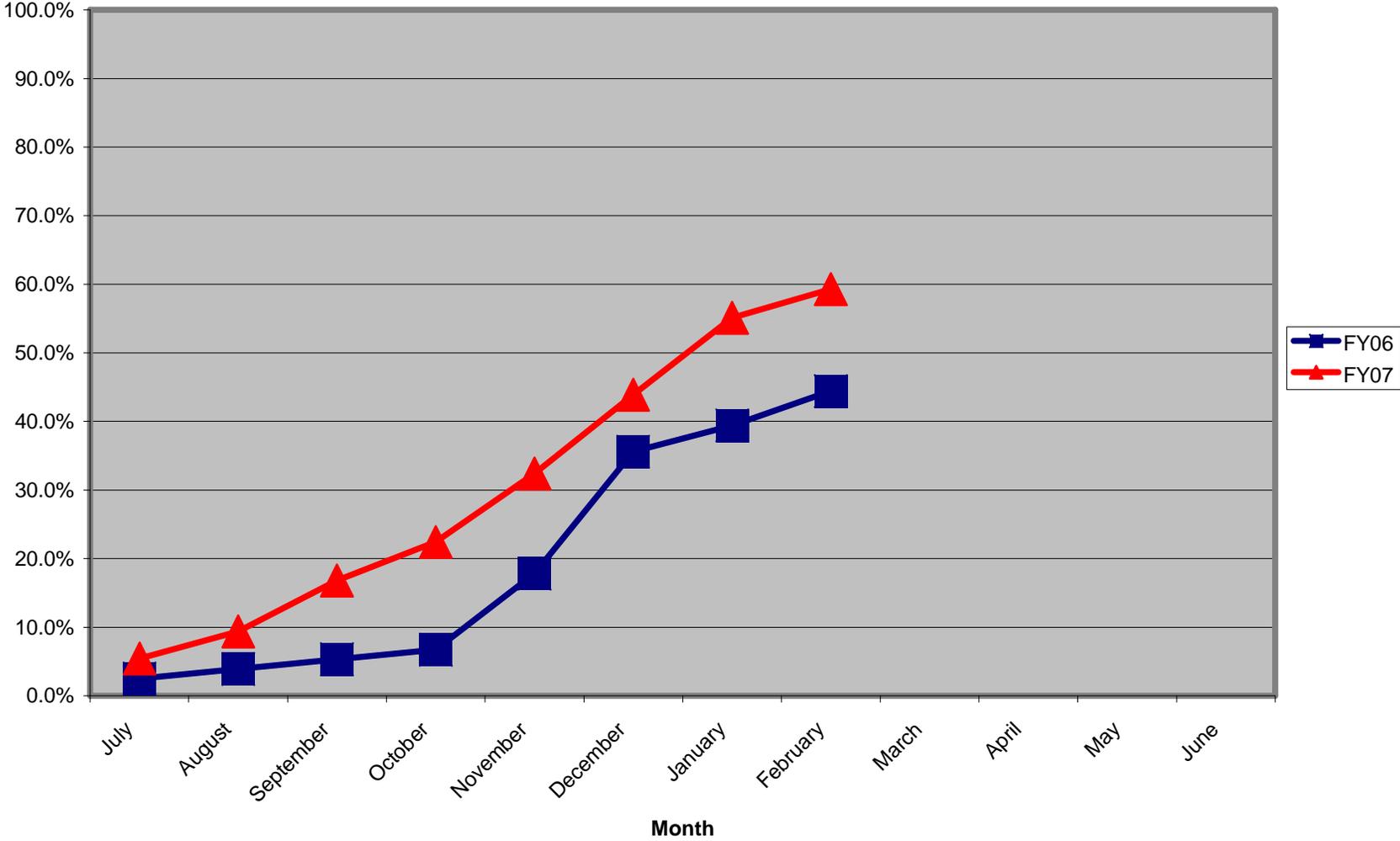
% Fair Share Dollars received	DISTRICTS	% Projected* Dollars Received
34%	Ballou Channing	59%
43%	Central Midwest	54%
40%	Clara Barton	55%
55%	Florida	74%
45%	Heartland	61%
51%	Joseph Priestley	76%
43%	Mass Bay	60%
55%	Metro New York	56%
56%	Mid-South	68%
60%	Mountain Desert	66%
49%	New Hampshire/Vermont	71%
43%	Northeast	78%
39%	Ohio-Meadville	78%
57%	Pacific Central	61%
62%	Pacific Northwest	56%
55%	Pacific Southwest	68%
48%	Prairie Star	61%
57%	Southwest	65%
48%	St. Lawrence	87%
58%	Thomas Jefferson	67%

* not all Districts have submitted projections

Annual Program Fund Income by end of each Month Fiscal Years 2006 and 2007



**Friends % of Goal
As of 2/28/2007**



Campaign Flash Report 3/16/07

Campaign Income

	Income	Goal	% goal
Cash	\$ 10,783,012	-	-
Outstanding Pledges	\$ 3,159,072	-	-
Total (Cash + Pledges)	\$ 13,942,084	\$ 20,000,000	70%
Legacy Gifts	\$ 5,034,073	\$ 30,000,000	17%
Friends of the UUA	\$1,084,252	\$ 1,600,000	68%
Association Sunday '07	\$ -	\$ 1,000,000	0%
Campaign Total	\$ 20,060,409	\$ 52,600,000	38%
<i>In Negotiation</i>	<i>\$ 9,780,000</i>	-	-

The date of transfer amount is used for gifts of securities. These figures have not been reconciled with finance.

Special Projects

Bay Area Regional UU Marketing Project	
Fall '07 Launch	\$191,952
UUA-UUSC Gulf Coast Relief Fund	
	\$3,643,940
Rev. Marjorie Bowens-Wheatley Fund	
	\$10,440
Friends DVD Appeal - What is UUism?	
145 co-producers!	\$98,055

data updated on 3/20/07 by Istritof

The Rev. William Sinkford, President of the Unitarian Universalist Association of Congregations, and the Rev. Terry Sweetser, Vice President for Stewardship and Development, are pleased to announce the winners of

**The 2007 Richard Borden and Paul Holton Awards
for Sermonic Excellence Competition**

- *First Place:* **Learning the Principles by Heart**
Leslie Becknell, Andover Newton Theological School
- *Second Place:* **Can't We Get Along? Loving Your (Political) Opponent**
Jessica Purple Rodela, Meadville Lombard Theological School
- *Runners Up:* *(listed alphabetically by author)*
Putting "Labor" Back in Labor Day
David Breedon, Meadville Lombard Theological School
What We Can Do for Religion Today
Holly Anne Lux-Sullivan, Meadville Lombard Theological School
Embracing Our Aging
Catherine Senghas, Andover Newton Theological School

All five award recipients will each receive an award certificate and cash prize of \$8,000. They will also be named in the 2007 General Assembly program book and invited to a joint luncheon of the UUA President's Council and Annual Program Fund Committee at this year's General Assembly in Portland, Oregon.

Copies of the award-winning sermons will be available on the new UUA.org website, which is set to launch on April 2, 2007. To access the sermons and competition guidelines, please visit <http://www.uua.org/giving> and click on "Awards and Scholarships."

This year's contest was restricted to Unitarian Universalist theology students who had aspirant or candidate status prior to January 1, 2007. Entries were anonymously read and evaluated based on how well they met several criteria, including describing ways in which Unitarian Universalists can apply the seven principles of Unitarian Universalism to better our world, country, communities, and the lives of family, friends, and others.

Special consideration was given to sermons which demonstrate how UUs, individually or collectively, can take leadership roles in these efforts. In particular, the judges sought sermons that focused on turning hope and good intentions into practical action, with the goal of making UU principles come alive to solve problems and move our world to a better place.

A wide variety of topics were addressed in the entries submitted, including racism, poverty, the prison industrial complex, and global warming, just to name a few. The unwavering commitment to truth and social justice displayed in the sermons speaks volumes about the quality of our future ministers and the vitality of our liberal religious movement. Continuing in the tradition of our UU forebears, our theological students are speaking out and taking action – and daring others to do the same – on some of the most pressing issues of our time.

The following letter has been sent to the settled minister or president of each congregation

March 9, 2007

Dear Reverend/President,

At General Assembly this year I will announce the launch of *Now is the Time!* – a comprehensive campaign to support Unitarian Universalism nationally, regionally, and in our congregations. The theme speaks to me at this moment in history as it did to W.E.B. DuBois when he wrote the words which inspired it: “*Now is the accepted time, not tomorrow, not some more convenient time... It is today that we fit ourselves for the greater usefulness of tomorrow.*”

Now is the time for us to live up to the promise of our liberal religion, to let the world know we are here, and to welcome those who seek our community of peace, justice and love. Now is the time for our congregations to grow stronger and more effective because our religious values are sorely needed to help heal a wounded world.

As part of our efforts to grow our faith community, I have asked The Rev. Dr. Stephan Papa to organize a series of **Association Sundays**, the first of which is scheduled for October 14, 2007. I ask you to participate by scheduling that day to speak to your congregation about the importance of strengthening our Association-wide spiritual community and to make arrangements to take a special collection for the UUA’s Comprehensive Campaign. Enclosed you will find more information about this opportunity to inspire each other.

We know we are better together; we inspire one another, and combining our spirits and resources we can more effectively pursue our vision of a world of peace and justice. Please join us on **Association Sunday** to celebrate our shared commitment to Unitarian Universalism.

In faith,

A handwritten signature in black ink that reads "William G. Sinkford". The signature is written in a cursive, flowing style.

Rev. William G. Sinkford
President
Unitarian Universalist Association of Congregations

Association Sunday FAQs

Why do we need Association Sundays?

Unitarian Universalist congregations are self-governing entities whose connections to one another sometimes seem tenuous. We need Association Sundays to strengthen the bonds of common purpose among congregations. Even more importantly, we need to combine our resources in order to make Unitarian Universalism the voice of liberal religious values in the world.

We need to bring our congregations together to pursue our mission of affirming the "inherent worth and dignity of every person". These Association Sundays will strengthen our connection, and combine our resources, enabling us to have more of an influence on our country. Now Is the Time for our congregations to grow stronger and more effective because our religious values are needed to help heal the wounded world.

What are Association Sundays?

Association Sundays are a request by the UUA for all congregations to recognize and support, both in spirit and financially, the national work of the Association. We envision a day— an "Association Sunday" - during which thousands of UUs across the nation are simultaneously celebrating our shared commitment to Unitarian Universalism.

Like *Ministry Sunday* in 1995, (which was a request to support the financial needs of ministers and seminary students) and *Mind the Gap Sunday* in 2002 (which was focused on supporting Youth and Young Adult Ministries), each Association Sunday will include a worship service based on a particular theme and congregations will be asked to host a special collection to support the Association of Congregations.*

* Association Sunday is different from The Annual Program Fund (APF) and Friends of the UUA; those programs help to pay for the operating budget of the UUA. Special projects require additional funding and that's the purpose of Association Sunday.

When is Association Sunday, and what will its funds support?

The first Association Sunday is scheduled for October 14, 2007. Funds raised this year will support national marketing and growth outreach projects. A portion of the funds will be set aside for grants to congregations who wish to enable their own growth projects.

Four subsequent Association Sundays (one per year) will be devoted to the following themes: growth in diversity, growth in witness, growth in spirit and growth in leadership.

UUA President Bill Sinkford believes strongly that "now is the time" to share our faith message with a national marketing campaign. An awareness campaign will help seekers looking for a liberal religious home to find us. This is an opportunity for us to support the work that individuals, congregations, and the UUA are currently doing to share the "good news" of Unitarian Universalism in the larger communities we serve.

As planning for national marketing and growth outreach projects gets underway, the UUA will be providing congregations with many resources to help welcome newcomers. For example, the UUA is currently producing a new DVD explaining Unitarian Universalism to newcomers. The UUA will have this DVD ready for congregations to use this fall.

Note:

Stewardship and Development

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Association Sunday FAQs

Resources are currently available on the UUA website in the “uncommon denomination” section to help congregations focus on hospitality and membership. Go to: <http://www.uua.org/cde/> and <http://www.uua.org/programs/congservices/uncommon/hospitalityhome.html>. And, of course, District staff are available to assist with more resources and regional workshops.

How will the money be raised?

We ask that each member and minister contribute individually as part of a special collection during services on Association Sunday.

The Association Sunday staff will provide each congregation with pledge cards, talking points, worship materials and other tools to make it easy for congregations to participate.

Congregations that raise an average of \$50 per member will be listed as *Empowering Congregations* in our Annual Report on Giving and at a special display at General Assembly.

If you or a member of your congregation wish to make a leadership contribution, matching gift, stock gift or bequest to benefit Association Sundays, please contact us:

AssociationSunday@uua.org

The Reverend Stephan Papa, 610-902-3090

Cherisse Haakonsen, 617-948-6544.

How can my congregation register for Association Sunday?

Each congregation has a different way of managing special services and collections, so it is important that you check with your minister and Board before taking any steps to register. Once you have followed the guidelines set out by your congregation, please:

1. Have your minister or board President register with the Stewardship and Development Office by emailing AssociationSunday@uua.org ✉ by May 1, 2007;
2. Schedule Sunday, October 14, 2007, for your "Association Sunday" service;
3. Send us a picture of your congregation. We'd like to use it in our display at General Assembly and online.
4. Spread the word about Association Sunday among members of your congregation. Newsletter articles, pulpit announcements, and emails are all good ways to share your enthusiasm for this project. Contact the Association Sunday staff to request brochures, sample newsletter articles, and other publicity materials. And lots of resources will be available on line this summer (see below).

If that Sunday is not available, can we choose another?

Yes! To discuss choosing another date for your Association Sunday, please contact Cherisse Haakonsen, Assistant for Congregational Giving, at AssociationSunday@uua.org or 617-948-6544.

Association Sunday FAQs

Once my congregation agrees to participate, what resources will you provide?

In August 2007, we will send registrants a resource packet containing the following tools:

Publicity materials: Association Sunday poster, promotional pieces for newsletters

Worship materials: Words for the offering, opening words, chalice lightings, readings, mediations, music, sermons, prayers, testimonials and other suggestions for the Association Sunday service.

In addition, we will make the following items available: pledge cards, order of service covers, tracking sheets. These materials will also be available online in June 2007.

Who can I contact for further information?

Send an email to AssociationSunday@uua.org , or call the Reverend Stephan Papa, Special Assistant to the President for Congregational Giving and Growth Funding at 610-902-3090, or Cherrisse Haakonsen, Assistant for Congregational Giving at 617-948-6544.

Who has agreed to participate so far?

Congregations:

Auckland Unitarian Church
UU Fellowship of Longview
First Parish Church In Dorchester
Namaqua UU Congregation
UU Fellowship of Franklin
Universalist Natl., Memorial Church
Pathways Church
Westside UU Church in Fort Worth
First Parish UU, Canton
Prairie UU Church
First UU Society
Third Unitarian Church of Chicago
UU Church of St. Petersburg
First Church in Jamaica Plain UU
Starr King UU Fellowship
Unitarian Fell. Of Westchester
UU Church in Meadville
Henry David Thoreau UU Cong.
Davies Memorial UU Church
UU Fellowship of Stanislaus City
Community UU Church
First UU Church of Stockton, CA
UU Fellowship of Fayetteville, AR
UU Society of Mill Creek
First Unitarian Church
UUs of San Mateo
First UU Church
Michael Servetus UU Fellowship

Unitarian Church of Norfolk UU
First Church in Boston
UU Church of Delaware County
Arlington Street Church
UU Fellowship of Huntington
King's Chapel
First Parish in Needham UU
Horizon UU Church
Unitarian Society of Germantown
Pacific Unitarian Church
First Unitarian Society of Denver
Olympia Brown UU Church
Community Church of Chapel Hill UU
First Parish in Bedford
The UU Cong. of Santa Fe NM
Mt. Diablo UU Church
UU Church West
UU Comm. Church Of Santa Monica
First Unitarian Church Of Cleveland
First Unitarian Church 2nd Parish
Emerson UU Church
First Unitarian Soc. Of Minneapolis
First UU Church of Houston
Fox Valley UU Fellowship Inc.
First Unitarian Society of Wilmington
Eliot Unitarian Chapel
UU Church of Asheville
West Shore UU Church

Foothills Unitarian Church
First UU Society of Burlington
First Parish Church in Weston
UU Church of Annapolis
Birmingham Unitarian Church
The Unitarian Church In Westport
First UU Church of Austin
First Universalist Church of Denver
UU Congregation of Fairfax
The Universalist Ch. Of West Hartford
River Road Unitarian Church
Main Line Unitarian Church(May 13)
First Unitarian Church of Albuquerque
First UU Church Of Columbus
East Shore Unitarian Church
All Souls Church Unitarian
First Unitarian Society of Milwaukee
First UU Church of San Diego
Neighborhood UU Ch. Of Pasadena
First Unitarian Church
First Parish in Concord
Cedar Lane UU Church
UU Church of Arlington
The First Unitarian Church of Dallas
Unitarian Church of All Souls
First Unitarian Society