

## 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: May 17, 2007

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In the fourth quarter of FY 2007, the Stewardship and Development staff group is focused on:

- Finishing out the year with income projected to be slightly better than budgeted;
- Preparing to transition from the lead giving phase of the *Now is the Time* comprehensive campaign to the public phase, with our announcement at General Assembly;
- Preparing to thank donors for their generosity at General Assembly in Portland.

We are also preparing to handle staff transition as Cindy Salloway, Director of the Friends of the UUA program, will be starting a position with the Church of the Larger Fellowship on July 1. A search is underway for her replacement as Friends Director.

### THE ANNUAL PROGRAM FUND

Year to Date as of May 15:

FY	Actual	Goal	% to Goal	Previous FY
FY07	\$5,641,722	\$6,717,684	84.0%	+ 4.0%
FY06	\$5,426,333	\$6,493,307	83.6%	+ 3.9%

The APF Committee met again in Boston in March. The meeting was an excellent opportunity for community building, training, and the exchange of ideas in support of each other and of the committee's mission (to promote generous congregational stewardship toward the fulfillment of their covenant of support to one another as an association of member congregations.)

Congregational giving kept a steady pace through the year, reaching the half-way mark by the beginning of February, nearly a month earlier than expected. Through the collective efforts and diligence on the part of all concerned, income projections indicate that we are on track for reaching our goal for this fiscal year. As of May 15, 2007, contributions totaled \$5,641,722, or 84.0% of the \$6,717,684 goal for fiscal year 2006-2007. This compares to contributions of \$5,426,333 at this time last year.

## FRIENDS OF THE UUA

### Year to Date as of May 15:

FY	Actual	Goal	% to Goal	Previous FY	Average Gift:	\$56
FY07	\$1,280,888	\$1,600,000	80.1%	+ 12.1%	Median Gift:	\$25
FY06	\$1,142,791	\$1,600,000	71.4%	+ 18.2%	Largest Gift:	\$10,000

As of May 15, 2007, Friends income received to date totals \$1,280,888, which is 80.1% of the annual goal of \$1,600,000. Last year at this time, Friends had achieved 71.4% of its \$1,600,000 annual goal.

The Friends of the UUA program continues fundraising and educating donors using themed appeal letters. Themes for this fiscal year have been: Moral Values (prospect mailings), Social Justice, Public Witness, District Services, Unitarian Universalist DVD appeal, Washington Office, Tapestry of Faith Update, Religious Professionals of Color, and Marriage Equality (mailing in June).

December's special "What is Unitarian Universalism?" DVD appeal has raised \$103,397 to date. Donors who gave \$250 or more to the DVD appeal are eligible to be listed as co-producers. There are 164 co-producers as of this writing.

Response from donors to the April mailing in support of UU volunteer efforts on the Gulf Coast is underway. This is a joint appeal of the UUA and UUSC. We anticipate raising \$150,000 from this 60,000 piece mailing which was sent to the combined active donor bases of the UUA and UUSC. To date, this appeal has raised \$61,681 – \$52,043 for the Volunteer Fund and \$9,638 for Gulf Coast congregations in need.

In addition to the \$103,397 brought in for the DVD and the \$150,000 expected for the Gulf Coast Volunteer Fund, we anticipate that we will end the year with approximately \$1,356,350 in unrestricted gifts, for a total of \$1,609,748 in income generated by the Friends program.

The Friends monthly sustainer program continues to bring in approximately \$9,100 monthly. There are 600 active sustainers as of this writing. We anticipate income totaling \$105,000 from this group of donors.

The Friends active donor base (giving within the past 36 months) is approximately 26,000.

## LEGACY GIFTS

### Year to Date as of May 17:

Legacy Gifts Summary as of 5/17	UUA		UU Entity	Total
	Unrestricted	Restricted		
<i>Matured Gifts – QTD</i>	\$ 5,738	\$ 51,639	\$	\$ 57,377
<i>Matured Gifts – YTD</i>	\$ 917,783	\$ 647,778	\$ 193,898	\$ 1,759,459
<i>New Gifts* - QTD</i>	\$ 2,800	\$ 5,000	\$ 157,783	\$ 165,583
<i>New Gifts* - YTD</i>	\$ 275,724	\$ 50,053	\$ 628,962	\$ 954,739
<i>Commitments</i>	\$ 1,011	\$ 2,260,000	\$ 2,402,363	\$ 4,664,000

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

### Matured Legacy Gifts:

The Office of Legacy Gifts counts \$917,781 in unrestricted income realized from the estates of sixteen generous Unitarian Universalists since July 1, 2006. This brings us to 216% of the \$425,000 FY07 goal for unrestricted gift and bequest income. (As a matter of policy, \$425,000 will be credited to operating income, \$277,952 will be credited to unrestricted income, and the remaining Legacy income above budget will go to the endowment.) UU congregations and entities received gifts from nine matured planned gifts, totaling \$180,031.90. All in all, it has been a spectacular year of estate giving to the Association.

In addition to unrestricted generosity, we also have received \$647,777.78 in restricted gifts from twelve estates, distributed according to donor intents as follows:

UUA General Investment Fund	\$ 22,278.06
NOW is the Time Campaign	\$ 4,119.67
Campaign for UUism (CFUU)	\$480,023.09
Handing on the Future (HOTF)	\$141,356.96*

\*This figure is net after ten percent (10%) is returned to the General Investment Fund (GIF) in repayment of costs incurred for HOTF. Gross receipts for HOTF this year, all from realized planned gifts, total \$157,063.29; \$15,706.33 has been credited to the GIF and included in the unrestricted gifts and bequest income tally.

### New Commitments:

Fifteen new Legacy commitments have been added to the rolls this year. Eleven are for amounts undisclosed by donors. The remaining four are umbrella bequest intentions totaling \$4,663,360. Notable among the four is a recent \$3.3 million addition from a very generous donor. This gift is a splendid result of the fundraising collaboration between the UU Service Committee and the Association – with special thanks to Charlie Clements. UUSC and the UUA each will receive half of this \$3.3 M bequest.

### New Legacy Gifts:

Thirty-six new life income gifts have been completed this year as follows:

	#	Total \$	UU Entities \$
Charitable Gift Annuities	28	\$769,916.67	\$501,709.92
Deferred Gift Annuities	3	\$105,000.00	\$ 99,000.00
Charitable Remainder Trusts	1	\$ 21,270.00	\$ 15,952.50
<u>Pooled Income Fund</u>	<u>4</u>	<u>\$ 58,552.83</u>	<u>\$ 12,000.00</u>
Totals	36	\$954,739.50	\$628,662.42

## “NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS



At the 2007 General Assembly, the Stewardship & Development staff, in conjunction with Swardlick Marketing Group, will officially launch our \$50 million *Now is the Time* campaign. At President Sinkford's plenary speech on Saturday, June 23, the campaign will be announced, and the campaign case statement will be handed out to all attendees. Negotiations are ongoing with the entire Board of Trustees and, as of this writing, 80% of the Board has committed to making a cash and/or legacy gift for the campaign. Thank you for your extraordinary generosity and for supporting the staff through this process!

In addition, we are pleased to report that as of May 15, 2007, we have secured approximately \$14,016,334 in cash and pledge gifts and approximately \$9,956,373 in bequest gifts for the \$50 million *Now is the Time!* campaign. Not included in those figures is an additional \$16,274,309 in negotiation. A Campaign Flash Report as of May 15 is attached to this report; an updated Flash Report is available weekly and will be distributed at the Board of Trustees meeting.

Thanks to our wonderful team of gift officers, the San Francisco Bay Area Marketing Campaign exceeded its goal of raising \$260,000. We have since raised the goal and hope to bring in \$300,000 by General Assembly. President Bill Sinkford will attend the launch party for the campaign in September 2007.

The Association Sunday program (October 14, 2007) is steadily gaining momentum as the year goes on. As of May 15, 2007, two hundred congregations representing more than 50,000 UUs have agreed to join us by conducting a special service and collection on Association Sunday; this includes forty-one of our fifty largest congregations. Eight congregations piloted the program in April and May; as of this writing, data is still being collected on their success.

In addition to new gift activity, we continue to receive payments on pledges made to previous campaigns. So far this year we have received \$141,357 from matured planned gift commitments to *Handing on the Future*, and \$674,424 in receipts for the Campaign for Unitarian Universalism (cash pledge receipts of \$194,401 and matured legacies \$480,023).

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 collaboration 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:**

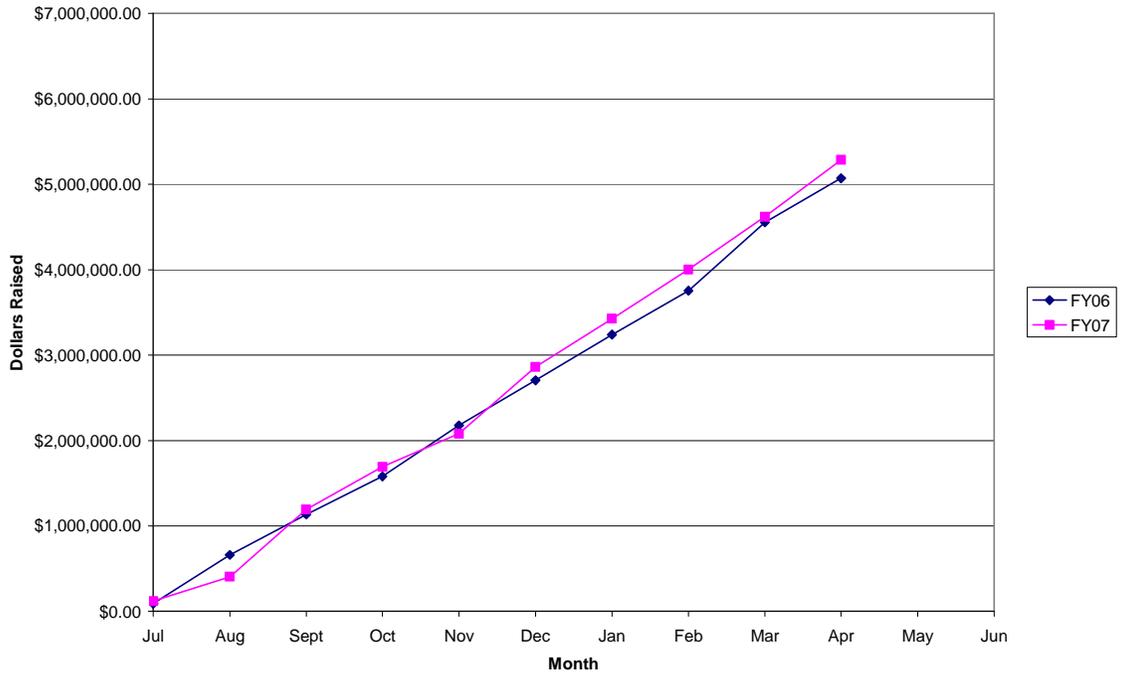
As of **May 3, 2007**

\$6,717,684	Goal
\$8,167,021	Total Fair Share
1,044	Total number of congregations
\$5,296,234	Total gifts received to date
64.85%	Current Fair Share dollars received to date
78.84%	Current goal dollars received to date
\$5,952,469	Pledged dollars
72.88%	Current Fair Share dollars pledged
88.61%	Current goal dollars pledged
\$6,727,129	Projected contribution dollars*
82.37%	Current Fair Share dollars projected
100.14%	Current goal dollars projected
838	Congregations that have pledged
680	Congregations that have pledged Fair Share
325	Congregations that are Fair Share
407	Congregations that have given their full pledge

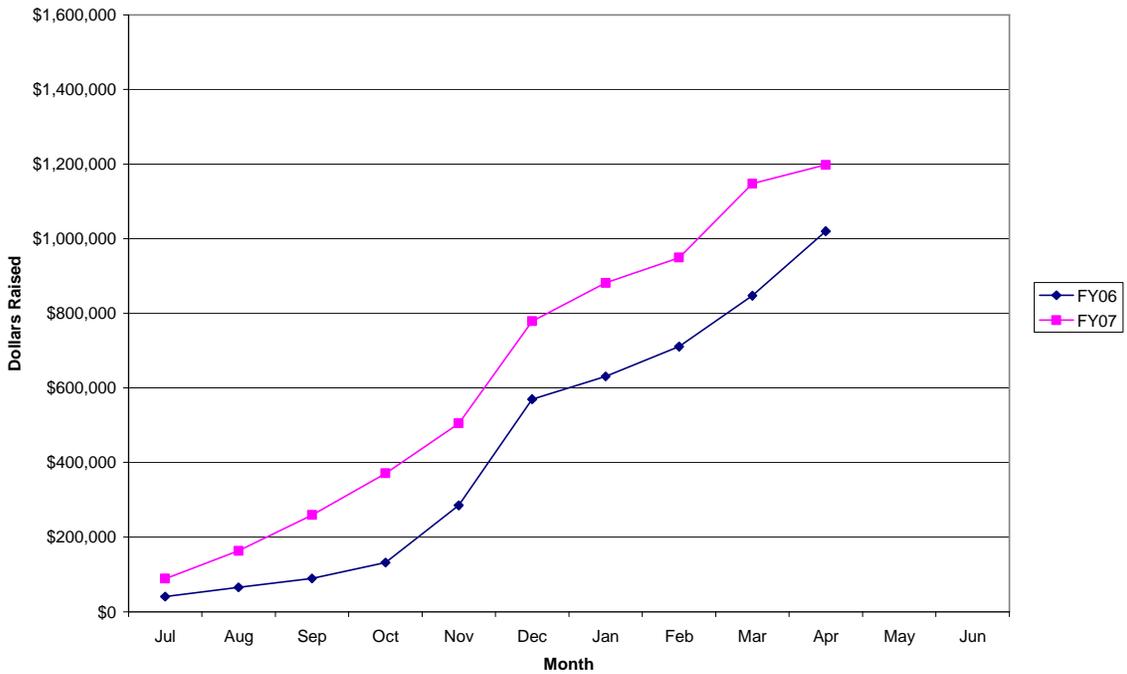
<b>% Fair Share Dollars Received</b>	<b>DISTRICTS</b>	<b>% Projected* Dollars Received</b>
47%	Ballou Channing	80%
60%	Central Midwest	74%
51%	Clara Barton	70%
76%	CLF	77%
69%	Florida	77%
64%	Heartland	79%
70%	Joseph Priestley	81%
58%	Mass Bay	76%
70%	Metro New York	71%
87%	Mid-South	91%
75%	Mountain Desert	83%
60%	New Hampshire/Vermont	82%
57%	Northeast	93%
52%	Ohio-Meadville	78%
73%	Pacific Central	78%
74%	Pacific Northwest	75%
76%	Pacific Southwest	80%
63%	Prairie Star	79%
75%	Southwest	87%
65%	St. Lawrence	86%
70%	Thomas Jefferson	78%

\* not all Districts have submitted complete projections

Annual Program Fund Income by Month



Friends Income by Month



## Campaign Flash Report

### Campaign Income Vitals

	Income	Goal	% goal
<b>Cash Gifts</b>	<b>\$ 14,016,334</b>	<b>\$ 20,000,000</b>	70%
<b>Legacy Gifts</b>	<b>\$ 9,956,373</b>	<b>\$ 30,000,000</b>	33%
<b>Campaign Total</b>	<b>\$ 23,972,707</b>	<b>\$ 50,000,000</b>	<b>48%</b>
<i>In Negotiation</i>	<i>\$ 16,274,309</i>	-	-

### Special Projects

<b>Bay Area Regional UU Marketing Project</b>	
Fall '07 Launch	\$219,777
<b>UUA-UUSC Gulf Coast Relief Fund</b>	
Final as of 3/31/07:	\$3,659,513
<b>Rev. Marjorie Bowens-Wheatley Fund</b>	
	\$10,940
<b>Friends DVD Appeal - What is UUism?</b>	
164 co-producers!	\$103,397
<b>UUA/UUSC Gulf Coast Volunteer Fund</b>	
Volunteer funds	\$52,043
Congregation funds	\$9,638

*data updated on 5/18/07 by Istritof*