

ANNUAL PROGRAM FUND OVERVIEW

The Annual Program Fund (APF) is the fund to which congregations pledge and contribute each year in support of the UUA's annual operating budget. This financial support is nearly half of the UUA's undesignated funding, providing for many essential programs, services and operations which directly benefit the member congregations.

Ours is a covenantal Association in which congregations pledge their mutual trust and support. The ongoing financial support of our Unitarian Universalist Association is a matter of congregational responsibility and commitment to the whole. This is accomplished through year-round stewardship practices and careful budgetary planning that includes the congregation's full contributions of support to the Annual Program Fund and District in their operating budget.

Each year, congregations are asked to give a requested contribution, called Fair Share, based on an amount designated by the UUA Finance Committee. This is based on recommendations by the UUA Administrative staff, as well as the Stewardship and Development committee, the UUA Financial Advisor, and the APF Committee. General Assembly Delegates vote on the proposed budget annually.

COMMUNICATION

- **Monthly by the End of the First Full Week:**
 - Monthly Statements mailed (Quarterly statements mailed Sept, Dec, Mar, & June)
 - Monthly District Report shows the giving status of all congregations and is used to track the progress of each congregation to meet our APF goals. It is available online at: <http://www.uua.org/aboutus/professionalstaff/staff-appointedcommittees/annualprogram/22346.shtml>
- **APF Quarterly Newsletter:**
 - Published four times a year - Fall, Winter, Spring, & Summer
 - Distributed electronically via APF reps and District Staff.
 - Found online at <http://www.uua.org/giving/annualprogram/51886.shtml>

DISTRICT GRANT FROM THE UUA

Once the congregations' contributions are received, the UUA provides a District Grant based two levels:

- Basic Grant: Based on the total contributions
- Fair Share Bonus: Based on the number of Fair Share congregations, and the percentage of Fair Share dollars received. Additional bonus is provided if the 100% Fair Share congregations and 100% Fair Share dollars.

APF PATHWAY TO STEWARDSHIP

Each District has an appointed APF Representative to the APF Committee whose primary purpose is to increase financial support of our Association, be liaison between Association and congregations, and

encourage that all congregations include APF contribution in their annual budget. The APF Committee meets twice a year in Boston. This is an outline of the yearly activities of the APR Representatives:

- **PRAISE SEASON** (August): Certificates mailed to all Honor and Merit Congregations in late August, along with letters of appreciation.
- **PLEDGING SEASON** (August-September): Pledge forms for the FY2010 sent the middle of May with a June 30 due date. APR Representative follows up with district congregations to get all their pledges in by the end of August - necessary for preparation of UUA income projections.
- **PROJECTION SEASON** (January-February): Work with congregations to ensure membership certification is completed on the UUA Data Services web site. This number is used to calculate the congregations APF contribution in the coming year. In addition, the APF representative provides projected income figures based on pledges, updates made by congregational leadership, due by March 1st.
- **PUSH SEASON** (March-June): Lots of personal contact with congregations to encourage year-end contributions to be made in advance of General Assembly. Emphasis is to have checks in the mail to the lock box by June 9th, particularly among congregations that missed the deadline in the past.

RECOGNITION OF CONGREGATIONS

- **Fair Share Congregation:** To be considered Fair Share, the full Fair Share contribution must be received by the APF office between July 1 and June 30.
- **Honor Congregation:** Those contributing the full Fair Share amount by the end of the current fiscal year.
- **10 year+ Honor Congregation:** Those contributing the full requested contribution for ten or more consecutive years.
- **Leadership Congregations:** The 50 highest contributing congregations each year.
- **Merit Congregation:** Those contributing at least 20% more than the prior fiscal year.

Linda D. Nelson
APF Representative
Thomas Jefferson District