

Report from Annual Program Representative to the  
Thomas Jefferson District Finance Committee  
and  
Thomas Jefferson District Board  
April 2011

First, let me say “thank you” to your congregations for their support of the UUA through their contributions to the Annual Program Fund. These contributions are used to develop, support, and implement a wide variety of activities in support of our UUA mission. Your support is essential, and the leadership of the UUA is grateful for it.

Fair Share, Pledges, and Contributions to Date (April 01, 2011)

	FY2011	FY2010
Fair Share	580,212.00	\$569,038.
Pledged	\$441,436.50*	Not Available
Paid-to-date (April 01, 2011)	\$344,707.43	\$342,459.37
Percentage of Pledged Amount Paid-to-date (April 01, 2011)	78.1%	Not Available

\*Some congregations have not made a pledge for FY11 yet. Most of these congregations will make a contribution to the APF, and some will actually pay their full Fair Share. Each year, approximately 85% of the congregations in the District will eventually make a pledge.

As can be seen, the percentage of the pledged amount that has been paid as of April 01 (78.1%) is just about what would be expected at this point in the fiscal year (75.0%). In addition, total contributions for FY11 are just slightly ahead of total contributions for FY10.

Pledging to the Annual Program Fund for FY12:  
May and June, 2011

May and June are the months to submit each congregation’s pledge to the Annual Program Fund for FY12 based on the report of certified members that was submitted in February 2011. The form that needs to be completed is called the “Estimate of Giving.” Congregations are asked to make their pledges and return the form by June 30, 2011.

It is important to note that after several years without an increase, the fair share contribution for FY12 beginning in July, 2011 will be \$58.00 per member. As in the past, congregations with 550 or more members have the option of basing their contribution on 4.2% of their budget.

End of the Fiscal Year

We are approaching the end of the fiscal year (June 30, 2011). The majority of congregations are on schedule to meet their pledges by the end of the year. However, there are a number of congregations who have not made a pledge or payment to date,

and a few congregations who are behind in their pledged giving. I will be working with the leaders in the congregations over the next months to bring the year to successful end. It would be a big help if each person on the TJD Board would check with leaders in his or her local congregation to determine the status of both the APF pledge and the TJD pledge and to work with me and the District staff to foster generous giving so that our UU mission can be fulfilled. Feel free to contact me if you have any questions or concerns.

#### Anticipated District Grant

It is always difficult to project the contributions that will be received from the congregations by the end of a fiscal year. However, based on several different estimates, and assuming that past behavior is the best predictor of future behavior, I suspect that next year's district grant will be pretty close to what was distributed this year (\$45,216.58). If there is a change, it is likely to be a slight reduction from this year's amount. It is important that we all work together to be sure that pledged contributions are submitted by the end of the fiscal year (June 30, 2011).

#### Contributions of Large Congregations

I recently came back from the Annual Program Fund meeting at UUA headquarters at 25 Beacon Street. One issue that was discussed, and is of growing importance to the UUA, is the difference in giving between our large congregations and our small and medium sized congregations. It was noted that a higher percentage of small and medium sized congregations are giving their full fair share than for our largest congregations.

I looked at what is happening in our District. I decided to include congregations with 200 or more members in the large congregation category and those with 199 or fewer members in the small and medium sized category. Here is what I discovered (based on FY10)

Size of congregation	Full fair share	Less than full fair share
Large (200+)	11 congregations (61.1%)	7 congregations (38.9%)
Small and medium (<200)	36 congregations (81.8%)	8 congregations (22.2)

Thus the data suggest that this pattern is found in our District as well as in the UUA as a whole. Clearly, there are a number of situations that can arise that make it difficult to be a full fair share congregation. While I, as the Annual Program Fund representative from the TJD have not heard any complaints from leaders in congregations here, it is not hard to understand why some congregational leaders in small and medium congregations are frustrated by this situation and feel they are "carrying" some of the responsibilities that should rightfully fall to the largest congregations.

President Morales is addressing this concern with the largest congregations in the UUA (those with 550 or more members). I will be working with District staff and the TJ Board members to think about what is happening in our District and work to bring all congregations into right relationship by giving a full fair share.

I should also note that the issue of what is “fair” in the fair share contribution guidelines has been raised. We did have a very preliminary discussion about this at last month’s annual APF meeting in Boston. I will keep everyone informed about this discussion.

#### Treasurer’s Handbook

At the APF Committee meeting in Boston, it was announced that a Treasurer’s Handbook has been created as a resource for the Treasurers in our congregations. I am working with District staff to insert information relevant to the TJ District. Once this is done, the Treasurer’s Handbook will be available for distribution.

#### Generous Giving Curriculum

It was also announced at the recent APF Committee meeting, that Laurel Amabile has created a curriculum for the book, *Giving – The Sacred Art: Creating a Lifestyle of Generosity*, by Lauren Tyler Wright (Skylight Paths Publishing, 2008). This book has been held up as an excellent resource concerning generous giving. However, since the book was written within a Christian framework, Laurel felt that supplemental material putting the concepts discussed in the book into a UU context was needed. The curriculum that Laurel created does that. Again, I am working with District staff to determine the best way to distribute this great resource and to encourage congregations to use the curriculum.

#### Thank You

I will end as I started by assuring everyone in the District that the UUA is very grateful for the support that our congregations make through their contributions to the Annual Program Fund.

Jeffrey Clark  
Representative to the Annual Program Fund Committee  
Thomas Jefferson District

*Generosity Matters*