

**Unitarian
Universalists
for
Social Justice**
of the Baltimore-Washington-
Northern Virginia Region
Annual Report
July 1, 2008 – June 30, 2009

Rev. Terry Ellen, Executive Director
Rev. Cynthia Snavelly, Administrator
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Silver Spring, MD 20910
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www.uusj.org

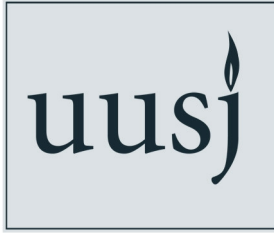
Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region

ANNUAL REPORT

2008- 2009

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Unitarian Universalists for Social Justice, Inc.

of the Baltimore-Washington-Northern Virginia Region

Co-Chairs' Report

We celebrate the vitality of UUSJ on its Tenth Anniversary year.

The words “challenge” and “social justice” are inexorably linked. This statement is not negative, but rather refers to ‘challenges’ overcome and ‘challenges’ to be solved. It is not surprising that this is descriptive of UUSJ.

UUSJ’s name and work became more visible this year, in no small part due to our public recognition of the successes of those who take those challenges head-on. The seven awards bestowed at the UUSJ/OpenDoor Benefit Gala showcased the work we do and introduced the many dedicated people who accomplished this work. The proceeds from the Benefit Gala created the UUSJ Collaborative Fund, a new way for UUSJ to foster the goal of increasing the frequency, visibility and impact of UU collaborative efforts across the region. The UUSJ Collaborative Fund is a grant program designed to promote cooperation to enhance the impact of social justice endeavors among congregations, organizations and individuals. The first two grants supported the Ethical Investing Conference held at All Souls and the Interfaith Youth Core event at the UU Church of Rockville on religious pluralism.

UUSJ also benefited by inviting the congregational social justice chairs to our Board teleconferences. Their participation not only assisted with planning for UUSJ cluster meetings but also strengthened their social justice network. And vital in the communication-networking process is UUSJ's semi-monthly E-News, a comprehensive, annotated, collection of social justice events and news that continues to receive praise.

On the advice of our Development Committee we changed the method of computing the monetary contributions expected from each church. The base amount expected from each member congregation is \$4.00 per member of that church. Ten member churches met or exceeded their fair share, three were very close, six contributed half or less, and three were unable to make any financial contribution. Considering the economic situation where for non-profit organizations "flat is the new up," we were able to hold our own this year, but hope to do better next year to better serve our member congregations.

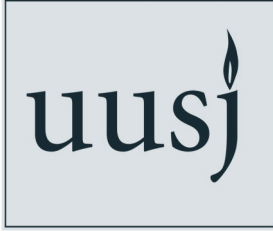
And with respect to member congregations, we are delighted that this year the Washington Ethical Society joined UUSJ, and the UU Church of Reston re-joined.

In addition to the development plan, another key tool, the marketing plan, was designed to work in tandem. Specifically, the marketing plan is based on the clear need to improve UUSJ's visibility and viability among its key stakeholders. Marketing is not just promotion or publicity -- it involves the understanding of and responsiveness to the key wants and needs of its membership, and -- as necessary -- modifying its "offerings" to meet those needs. To that end, social action chairs of the member congregations are being interviewed this summer to better identify ways that UUSJ can serve their needs to strengthen our collective social justice efforts in the region.

We are grateful for the success of this past year, and as we celebrate UUSJ's Tenth Anniversary, we anticipate continued good works and expanding collaboration in the coming year.

Peace and Justice,

Pat Karlsen
Bob Denniston



Unitarian Universalists for Social Justice, Inc. of the Baltimore-Washington-Northern Virginia Region

Executive Director's Report

UUSJ's year involved, in brief:

- ◆ 9/20 Cedar Lane held a benefit concert to help finance our Green Festival booth.
- ◆ 9/27 I led a GLBT workshop at the Virginia Revival at Arlington.
- ◆ 10/4 UUSJ provided a display, closing worship, and resource help for the Green Sanctuary gathering at Arlington.
- ◆ 10/22 Our first Gala Awards Dinner in Bethesda honored outstanding area UU social justice people and raised funds for grants to congregations for doing justice work.
- ◆ 10/25 At the Journey Toward Wholeness event in Philadelphia, UUSJ initiated and led the awarding of a certificate of distinguished service to Paula Cole Jones for her dedicated and superb leading of anti-racism efforts. We involved a member of All Souls, the District Executive, and the UUA Moderator.
- ◆ 11/1 At a Board meeting with keynote and workshops, Pam Sparr of All Souls was our keynote speaker on ethical investing.
- ◆ 11/8-9 UUSJ again provided a UU booth at the Green Festival in the D.C. Convention Center. This is the largest area environmental gathering.
- ◆ 11/8 UUSJ met with the JPD Growth Committee and Valerie Holton (UUA growth campaign head) about, for the first time, including an area justice project as part of a regional campaign. The campaign has been presently down-sized due to the economy.
- ◆ 11/15 UUSJ staff attended the UULM-MD (Legislative Ministry) annual meeting to show support and coordinate efforts.
- ◆ 1/11 We held a cluster conference call with the social actions chairs of Maryland to enhance networking and possible cooperation.
- ◆ 2/1 We did the same with the social actions chairs of northern Virginia.
- ◆ 3/14 We held a Virginia cluster meeting at Mt. Vernon with workshops proposed by the congregations. (All programming details are in the document on page 10).
- ◆ 4/4 We did the same for the Maryland congregations in Annapolis.
- ◆ 4/25-6 At the JPD annual meeting I did a workshop on environmental justice, participated in a panel on social justice work, and attended the day-long social-justice training by Rev. John Gilmore.
- ◆ 4/14 Cindy Snavey, Hal Fuller, and I attended workshops on grant-writing and fund raising.
- ◆ 5/9 With the JPD, All Souls, and Arlington, UUSJ sponsored a major conference on Ethical Investing at All Souls. A video of conference highlights is now on the UUA website, program specifics are on pp. 13-16. I was on the planning team.
- ◆ 5/18 At the invitation of Greater Washington Interfaith Power and Light, Cindy and I testified at the EPA public hearings on the ethics of addressing greenhouse gas emissions.
- ◆ 5/31 At our Board meeting at the Washington Ethical Society with keynote and workshops, the main presentation was by Gary Mummert and Lisa Lincoln on environmental justice.

Meanwhile, we continued our traditional ongoing activities and began some new initiatives:

- ◆ Two times a month Cindy put out our E-News about area justice events.
- ◆ Cindy and Bill Alsmeyer-Johnson have maintained our website, www.uusj.org, with its many resources on area social justice events and organizations.
- ◆ We continued to compile our resource libraries on good justice issue speakers for services or other presentations and on congregational policies regarding social justice and environmental issues.
- ◆ We took Rev. John Crestwell's community radio show, "The Barbershop," under our non-profit wing and provided logistical support to the Virginia Revival, Green Sanctuary, D.C. UU Interweave and NoVA LUUP.
- ◆ We continued to offer our congregations a discounted Green Buying program with GreenLine in York, PA.
- ◆ We have cooperated extensively with John Gilmore as he sets up a District-wide social justice organization. I am on his planning committee, and we are trying to weave our structures together rather than duplicating each other.
- ◆ We continue to actively work cooperatively with UULM-MD (Legislative Ministry), UUSC, Journey Toward Wholeness, District Growth Committee, GWIPL (Greater Washington Interfaith Power and Light), CCAN (Chesapeake Climate Action Network), VICPP (VA Interfaith Council on Public Policy), WRRCAT (Wash. Regional Religious Coalition Against Torture), the Maryland Interfaith Legislative Committee (MILC) and others in order to avoid duplicating services and confounding schedules.
- ◆ I continue to speak at congregations to raise money and/or to inform them about UUSJ. This year I went to Cedar Lane, Gettysburg, Mt. Vernon (2X), Arlington, Sugarloaf, Southern Chesapeake, Sterling, Accotink, and First Baltimore (2X).
- ◆ Hal Fuller, with Terrie Barr's assistance, developed and revised a Development Plan to put UUSJ on a stable financial footing. This was a huge and important effort.
- ◆ Bob Denniston supplemented this with a much-needed Marketing Plan to address our great need to make ourselves fully and clearly known to area UUs.
- ◆ We adjusted to a new governing structure resulting from our previous work on bylaws revision and administrative efficiency. The revisions have in general worked very well.

When the major growth/UUA advertising campaign for this area fizzled along with the economy, and the new idea to have a common social justice project as part of it was indefinitely shelved, we of course lost a great opportunity. But everything is on hold, and so this waits as a possible future opportunity.

Surely there will be some follow up to the ethical investing conference, which was a first step in bringing financial people together with social and environmental activists to find points of common ground. Our region is now a UU national leader in this area.

Surely, too, we need to further the vast interest in environmental justice begun by Van Jones' Ware lecture. Our programming at the JPD annual meeting and our May keynote were steps. More are needed.

Also, the success of our Gala last fall has established honoring and celebrating the superb social justice volunteers working in our congregations as a prime function of UUSJ. We can do even more in this area, but Terrie Barr and Par Karlsen put together a fun and inspiring first step.

And lastly, the financial situation of all non-profits makes this a year when we will have to be even more frugal than normal and pay extra attention to fund-raising.

At the same time, with so much happening in Washington in areas of concern to UUs, this is a time ripe with possibility for our mission. We need the ideas and hands-on help of all of us to be worthy of the time. Please help as fully as you can. Our staff time is very limited.

That's why I am so appreciative of the wonderful volunteers who keep us vibrant. Al Robbert has carried the unsung hero job of Secretary of both the Exec and the Board and is stepping down from the Exec. Besides this service, he has brought us his organizational skills and thoughtful mind. Lois Hybl, she of the many hats, is also stepping down from the Exec after bringing us her wise counsel and hard work. We will miss them both on Exec, but are happy they will remain on our Board.

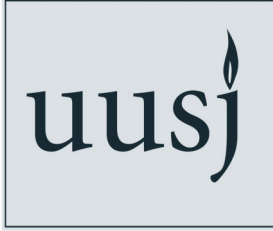
Pat Karlsen, Helen Rose, and Ed Butterworth are ending their Board terms. We'll miss Helen's outreach to young adults and environmental passion, but wish her every joy with her thriving new son Henry. And Ed single-handedly began our Green Festival booth and has been a constant source of creative outside-the-box ideas and resources. Thank you.

Pat Karlsen's indomitable spirits, passion for racial justice, laughter, and good counsel have graced us as Co-Chair these past four years. Terrie Barr is an exceptional replacement, with her many talents and graceful good humor, but Pat is peerless. She has kept us all on the journey toward wholeness, no matter what our focus, and she has kept this Executive Director on task many times, let alone constantly heaping tasks on her own shoulders. We will miss her sorely. The good news, hopefully so with all others stepping down, is that we suspect she and they will pick up new tasks close to their hearts and continue to bring honor and joy to Unitarian Universalism. This is an inspiring consolation.

Co-Chair Bob Dennison's keen calmness and organizational savvy have been a great complement to Pat. Plus he has become our unofficial photographer, a badly-needed resource for us. Treasurer John Harris and Bookkeeper Linda Collyer continue in their dedicated competence to keep us fiscally aware and afloat. The Exec has stepped in and taken on new tasks as needed. Our Board has been rising to the challenges of the new Development Plan. And my colleague in all this, Rev. Cindy Snavely, has handled innumerable simultaneous tasks, great and small, with competence, calmness, and creativity. She's a joy to work with and an invaluable organizational memory and wide-ranging resource person.

We can always work on being more efficient and effective in our work, but as long as there are people such as these and you in our company, we will not fail to build within us, even as we work to build it around us, the beloved community. What a journey, and what a people.

With affection and respect,
Terry



Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region
UUSJ Accomplishments

In the 2008-2009 Fiscal Year UUSJ:

- ◆ Visited congregations to present our cooperative work in forums, services, etc.
- ◆ Maintained a website with information on social justice opportunities and a calendar of events for many social justice endeavors in the area www.uusj.org.
- ◆ Published a bimonthly E-news highlighting upcoming area social justice events.
- ◆ Cosponsored the Ethical Investing Conference. National UU leaders and socially responsible investment professionals explored aligning congregations' financial management practices with UU social and environmental justice principles enhancing congregation's financial standing and justice ministries.
- ◆ Served as the fiscal agent for the Northern Virginia in the LUUP Legislative Preview and the Northern Virginia UU Revival.
- ◆ Used our share of money from a Baltimore Washington UU Growth event to fund scholarships for youth to participate in social justice events and for Beacon House.
- ◆ Recognized UU social activists with the first annual regional social justice awards at the UUSJ Awards Benefit Gala, which benefited the UUSJ Collaboration Fund.
- ◆ Exhibited at the DC Green Festival.
- ◆ Held a Virginia and a Maryland Cluster Program.
- ◆ Held fall and spring social justice programs.
- ◆ Organized workshops that were held at the annual Joseph Priestley District Conference.



**2008 SOCIAL JUSTICE
AWARDS BENEFIT GALA**

CO-SPONSORED BY UNITARIAN UNIVERSALISTS FOR SOCIAL JUSTICE
AND OPENDOOR HOUSING FUND

AS WE HONOR

MARY FENELON

OF RESTON

WITH THE INTERFAITH AFFORDABLE HOUSING AWARD

DR. JACKSON HARPER

OF BULL RUN

WITH THE ENVIRONMENTAL JUSTICE AWARD

BETH AND TODD HARRISON

OF RIVER ROAD

WITH THE YOUNG ADULT AWARD

**BARBARA JOHNSON, ANN ULSCHNEIDER,
PHYLLIS DOGAN, & THE JOURNEY TOWARD
WHOLENESS TEAM**

OF ARLINGTON

WITH THE RACIAL JUSTICE MULTICULTURAL AWARD

KUUMBA PLAYERS

OF ALL SOULS

WITH THE GROUP COLLABORATIVE SJ PROGRAM AWARD

MARILYN THORN

OF TOWSON

WITH THE INDIVIDUAL COLLABORATIVE SJ PROGRAM AWARD

REV. PHYLLIS HUBBELL

OF PAINT BRANCH, FORMERLY OF FIRST UU OF BALTIMORE

WITH THE MINISTER'S AWARD



SUNDAY, OCTOBER 12, 2008

5:30 P.M.

POSITANO RISTORANTE ITALIANO

4948 FAIRMONT AVENUE

BETHESDA, MD 20814



TICKET: \$80/PERSON

RSVP TO CYN SNAVELY

CSNAVELY@UUSJ.ORG • 301-588-1951

THIS GALA BENEFITS THE UUSJ COLLABORATIVE FUND.

Feeding the Flame of Justice

A gathering for UU social justice leaders

*Sponsored by Unitarian Universalists for Social Justice of the
Baltimore Washington Northern Virginia Region*

Saturday, November 1

at River Road UU Congregation 6301 River Road Bethesda, MD

8:30-9:00 Gathering and Coffee

9:00-9:20 Opening Worship with Rev. Terry Ellen, UUSJ Executive Director

9:20-10:15 Keynote and Discussion with Pam Sparr

How do we capture the inspiration of Van Jones at GA and place racial and economic justice at the core of our efforts to address environmental concerns? Let's talk about how to strategically leverage the opportunities already present within our congregations, communities, denomination and the nation.

Pam Sparr, a member of All Souls, has twenty years of professional experience working with many religious bodies on how they can effect environmental justice.

10:15-10:25 Break

10:25-11:40 First workshops

1. Workshop with Our keynote speaker, Pam Sparr

Based on your feedback, this will focus this on how to do an environmental justice audit with your congregation, experiential environmental justice education with teens and adults in your congregation, creating green jobs and low-income housing in the DC area, or building the beloved community in national climate change work.

2. The Fairfax Unitarian Universalist Summer Experience (FUUSE)

FUUSE is a program for Unitarian Universalist youth to live out their values in the larger community. FUUSE interns are placed in summer internships with social service and justice organizations in Fairfax County..

11:45-1:00 Second Workshops

1. Rainbow Spoken Here - Youth Outreach

Two and one half years ago the UU Church of Rockville began an outreach program to support LGBTQI teens 14 - 18, their friends and allies in Montgomery County. The Rainbow Youth Alliance (RYA) meets twice a month and provides a safe place to ask questions, find mutual support and learn pertinent information. Check out this and other LGBTQI teen programs featured in the UU World www.uuworld.org/news/articles/101000.shtml

3. Network of Spiritual Progressives

Not long ago All Souls hosted a major conference of this network spanning evangelicals to atheists. Come learn about NSP and its advocacy for a Global Marshall Plan, moving our present foreign policy toward this past successful model of building others up for the sake of the common good.

1:00-1:05 Closing

1:05-1:30 Lunch

1:30 to 3:30 Board Meeting

A free will offering will be taken.

Register by contacting UUSJ at info@uusj.org or 301-588-1951.

UUSJ Virginia Cluster Meeting
Saturday, March 14
8:30 a.m. to 1 p.m.
Mt. Vernon Unitarian Church
1909 Windmill Lane, Alexandria, VA, 22307
703-765-1237, www.mvuc.org

Schedule:

8:30-9 Registering, networking, coffee and bagels

9-9:20 Welcome and opening worship with Rev. Kate Walker

9:25-10:25 **WORKSHOP: VICPP, VOICE, NoVA LUUP, etc** – what are the current UU and interfaith collective efforts in Virginia, and what are they currently up to? Representatives will fill us in and there will be time for discussion and additions from the floor.

10:30-11:30 **WORKSHOP: Homelessness and Affordable Housing** – what are we doing?

Dick Foster- Accotink UU Church, a member of the UU Church of Arlington

An update on some of the programs congregations are involved with in these two areas and a chance to share others from the floor.

11:35-12:35 **WORKSHOP: Environmental Possibilities in Northern Virginia**

Hear what Chesapeake Climate Action Network and Greater Washington Interfaith Power and Light are up to and what they are aware of and share other opportunities you know of.

12:40-1:00 CLOSING: Feedback and ideas for future workshops, brief closing service, networking time.

1:00 OPTIONAL BROWNBAG LUNCH

UUSJ Maryland Cluster Meeting
Saturday, April 4 8:30 a.m. to 1 p.m.
Unitarian Universalist Church of Annapolis
333 Dubois Rd
Annapolis, MD 21401
www.uuca-md.org

Schedule:

8:30-9 Registering, networking, coffee and bagels

9-9:20 Welcome and opening worship with

9:25-10:25 **WORKSHOP: Funding Your Social Justice Program** Hear some innovative ways congregations raise money for their social justice work Don Chery and Virginia Richardson River Road UUC,
Charlie Culbertson Towson UU Church and others.

10:30-11:30 **WORKSHOP: Health Care in Maryland** how you can become involved and make a difference
Virginia Richardson, River Road UU Congregation and others

11:35-12:35 **WORKSHOP: Celebrating Solutions: Using an Appreciative Inquiry Outlook**
Meredith Higgins, All Souls Church, Unitarian

12:40-1:00 CLOSING: Feedback and ideas for future workshops, brief closing service, networking time.

1:00 OPTIONAL BROWNBAG LUNCH

Feeding the Flame of Justice

Sponsored by Unitarian Universalists for Social
Justice Baltimore Washington Northern Virginia Region



Saturday, May 30, 2009

8:30am - 1:00pm

Washington Ethical Society

7750 16th St NW

Washington, DC 20012

Directions at

<http://www.ethicalsociety.org/article.php?id=11>

SCHEDULE

8:30-9 Registering, networking, coffee

9-9:10 Welcome and opening worship

9:10-9:50 **Green Justice Presentation**

Gary Mummert, All Souls, and Lisa
Lincoln, Paint Branch

10:00-11:15 WORKSHOPS

**1. Intergenerational Social Justice
Programming** Gabrielle Farrell,

Director of Religious Education All
Souls Church, Lois Hybl and Joyce
Duncan, Towson, and Dick Schaffer,
Mount Vernon or

2. Follow Up Green Justice Workshop

11:25-12:40 WORKSHOPS

1. Worktrips: Lavona Grow, Arlington,
Jim Caldiero, UUSC and Columbia, or

2. Nonviolent Communication

Bob Wentworth, Washington Ethical
Society

12:40-1:00 **CLOSING**

Feedback and ideas for future
workshops, brief closing service,
networking time.

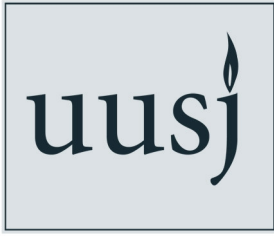
1:00 **OPTIONAL BROWNBAG
LUNCH**

1:30 UUSJ Board Meeting

Need more information?

info@uusj.org

301-588-1951



Unitarian Universalists for Social Justice, Inc. of the Baltimore-Washington-Northern Virginia Region

UUSJ Collaboration Fund

The UUSJ Collaborative Fund supports programs promoting cooperation to enhance the impact of social justice endeavors among congregations, organizations and individuals. Priority will be giving to collaborative projects involving two or more member congregations/organizations of UUSJ, to promote best practices in areas such as environmental justice and reducing oppression. The UUSJ co-chairs have authority to approve expenditures for a variety of collaborative program expenses, for example, grants to congregations and individuals, keynote speakers for UUSJ educational programs, and Green Fest exhibit fees, none to exceed \$300. Two events received Collaboration Fund grants in 2008-2009:

- ◆ Money, Values and Impact: A Conference on Ethical Investing for UUs
- ◆ Interfaith Youth Core Training

(Event Fliers Follow)

Money, Values and Impact: *A Conference on Ethical Investing*

Saturday, May 9, 2009

PROGRAM

- 9:20 **Welcome, Creating Community, Worship** – Sanctuary
Moderator: Pamela Sparr, Chair of the Planning Team, ASC
Worship leader: Rev. Louise Green, Minister of Social Justice, ASC
Music: Lenard Starks, Associate Music Director, ASC
- 10:00 **Plenary 1 – For Such A Time As This – SRI in context** – Pierce Hall
From its modern beginnings in the 1960s through today, the panel examines the evolution, accomplishments, and challenges of the socially responsible investing movement in the U.S. – and the role of Unitarian Universalists within it.
Speakers: Leslie Lowe, Interfaith Center on Corporate Responsibility
Tim Brennan, Unitarian Universalist Association
Moderator: Mark Flood, All Souls Church Investment Committee Chair
- 11:00 **Break**
- 11:15 – 12:30 **Workshop Sessions** (*see page 2 for details*)
- 12:30 **Low Carbon Footprint LUNCH BUFFET** begins – Pierce Hall
- 12:50 **Luncheon & Plenary 2** -- Pierce Hall
SRI Lessons from the Field -- Financial Results and Social Impact
Two practitioners tell their stories and share insights.
Speakers: Donna Katzin, Shared Interest – Reinvesting in South Africa
Colin Woodhouse, UUCSR -- UUC at Shelter Rock as an SRI case study
Moderator: Vanessa Lowe, Co-chair UUA Cmte. on Socially Responsible Investing
- 1:50 **Break**
- 2:00 – 3:15 **Workshop Sessions** (*see page 3 for details*)
- 3:15 **Break**
- 3:30 – 4:30 **PLENARY 3 –Seizing the Moment** – Pierce Hall
We conclude the conference by examining how we can take advantage of opportunities at this unique point in history to create a greener and more just economic future.
Intro: Vanessa Lowe, Co-chair, UUA Cmte. on Socially Responsible Investing
Speaker: Reginald Stanley, Calvert Investments
Moderator: Rev. Terence Ellen, Executive Director, Unitarian Universalists for Social Justice
- CLOSING** – reflection, evaluation and blessing
Facilitated by: Rev. Louise Green, Minister of Social Justice, ASC

WORKSHOP INFORMATION

MORNING SESSION (11:15 – 12:30)

Overview of SRI

Eaton Room (2nd floor)

A basic introduction to the three techniques of socially responsible investing: security screens (negative and positive), shareholder advocacy, and community investing. Also covered: what you can do without an endowment: using checking and money market accounts and credit cards in SRI ways. And something for all congregations: the UUA's new corporate campaign initiative.

Resource person: Tim Brennan, Treasurer of the UUA

Introduction to Money Managers

Reception Room (1st floor)

This session will cover: what kinds of services money managers and advisors offer; when should congregations go the professional route; how to choose advisors wisely; what kinds of questions should congregations ask of their advisors; how to talk with money managers about socially responsible investing; and where to find independent sources of information and analysis.

Resource person: Stephanie Leighton, Director of Equity Research and Sr. Portfolio Manager, Trillium Assets

Prudent Practices for Investment Stewards

Tupper Room (2nd floor)

This session will focus on fiduciary practices for persons who have the legal responsibility for managing investment decisions (trustees and investment committee members). It will discuss the framework to organize, formalize, implement, and monitor prudent practices.

Resource persons: Tom Bird, Sr. V.P. and Ken Barkman, Financial Advisor, Smith Barney

Community Investing – Affordable, Green Housing

Library (1st floor)

What has the impact been of congregational support for affordable housing? What's the most strategic use of investment funds in this sector now? How can we green the economy, create jobs, and build affordable housing at the same time? Case studies from the Open Door Housing Fund (formerly known as the UU Affordable Housing Corp.) and Enterprise Community Partners.

**Resource persons: David Bowers, V.P., Enterprise Community Partners
Charlotte Crow, Treasurer, Capital Management, Enterprise Community Partners
Jerry Konohia, President and CEO, OpenDoor Housing Fund
(formerly known as the Unitarian Universalist Affordable Housing Corporation)**

CONFERENCE GROUND RULES

For financial market professionals:

Feel free to discuss any aspect of what you do and how you do it. The person you're talking to may or may not be in the market for your services, but they will be interested in learning how your investment practices have been shaped by experience. We ask that you do not initiate a request for contact information (for example, proposing an exchange of business cards) either at the conference or in a follow-up conversation (first step).

For staff and members of congregations:

feel free to discuss any investment questions and concerns with all your fellow attendees. *The primary goal of the conference to share information and learn from one another.* If you happen to be ready to pursue a conversation that might ultimately lead to a business engagement, that's wonderful. While their services may or may not be suited to your needs, we have great respect the professionalism of all the vendors who are participating in the conference. If you're not ready, that's fine too. This is not the purpose of the conference, and you should not feel pressured in any way. The onus is on **you** to initiate any exchange of contact information (your interlocutor will be forbidden by our etiquette here from taking that first step).

AFTERNOON SESSION (2:00 – 3:15)

The UUA's Common Endowment Fund

Tupper Room (2nd floor)

Many congregations choose to hitch their investment wagon to the UUA's star – the Common Endowment Fund – which is highly diversified and incorporates the three legs of socially responsible investing in the portfolio. How does this work? How does the CEF approach SRI? What are the pros and cons of this approach?

Resource person: Tim Brennan, Treasurer of the UUA

How to “SRI” Your Investment Policy

Reception room (1st floor)

Perhaps your congregation has an investment policy but hasn't considered socially responsible investing approaches before. Perhaps your congregation has no investment policy at all. Regardless of your beginning point, this workshop will explore “model” policies, processes and strategies for getting them approved and implemented.

**Resource persons: Mark Flood, ASC Investment Committee Chair
Vanessa Lowe, Co-chair, UUA Committee on Socially Responsible Investing**

**Bringing Racial and Environmental Justice
to the Investment Table**

Library (1st floor)

We want our denomination known for our commitment to racial justice and the environment. Too often congregations separate this work and do not infuse either emphasis in their financial policies and practices. What are some first steps social justice activists and those responsible for church finances can take? Tips and practical examples of what congregations are and can be doing.

Resource person: Leslie Lowe, Director of Energy and Environment Program, Interfaith Center on Corporate Responsibility

Investment Management in “Interesting” Times

Eaton Room (2nd floor)

Unemployment is high, the stock market is low. How can congregations handle the financial rapids with integrity and vision? Two investment managers – one with a traditional focus and one who specializes in SRI -- will dialogue over some of the thorny issues in a “talk show” format. Lively audience participation is expected!

**Resource persons: Peter Kenny, V.P., Global Wealth Management, Merrill Lynch
Stephanie Leighton, Director of Equity Research and Sr. Portfolio Manager, Trillium Assets
Len Cohen, Principal, CF Services Group, Inc.**

Find all conference materials and videos on-line:

www.uua.org/leaders/leaderslibrary/responsibleinvesting/index/shtml

To save paper and enable more people to benefit from this conference, we're posting:
Speakers' bios and contact information
Congregational and UU organizational case studies of the impact of SRI work
Sample investment policies
Workshop handouts, resource guides, etc.
Videos of the plenary presentations

We are extremely grateful to our Guest Speakers....

Ken Barkman, Financial Advisor, Smith Barney – ken.barkman@smithbarney.com
Tom Bird, Sr. V.P., Smith Barney –thomas.bird@smithbarney.com
David Bowers, V.P., Enterprise Community Partners –dbowers@enterprisecommunity.org
Tim Brennan, Treasurer, Unitarian Universalist Association -- tbrennan@uua.org
Lenard Cohen, Principal, CF Services Group, Inc. – len@cfservicesgroup.com
Charlotte Crow, Treasurer, Enterprise Community Partners – ccrow@enterprisecommunity.org
Mark Flood, Chair, All Souls' Church (DC) Investment Committee -- mdfflood@starpower.net
Donna Katzin, Executive Director, Shared Interest -- donna@sharedinterest.org
Peter Kenny, V.P., Global Wealth Management, Merrill Lynch -- peter_kenny@ml.com
Jerry Konohia, President and CEO, OpenDoor Housing Fund -- jkonohia@opendoorhousingfund.org
Stephanie Leighton, Dir. of Equity Research & Sr. Portfolio Mgr., Trillium Assets sleighton@trilliuminvest.com
Leslie Lowe, Director of Energy and Env. Program, Interfaith Center on Corporate Responsibility – llowe@iccr.org
Vanessa Lowe, Co-chair, UUA Committee on Socially Responsible Investing – vaness32@earthlink.net
Reginald Stanley, Sr. V.P., Chief Marketing Officer, Calvert -- reggie.stanley@Calvert.com
Colin Woodhouse, Chair, Socially Responsible Investment Subcommittee, UU Congregation at Shelter Rock – woodhouse.colin@pmlmail.com

...All Souls Church Staff

Alicia Dixon Rev. Louise Green Katie Loughary Lenard Starks

... our Volunteers

Ariana Childs Graham Steve Goodwin Jodi Hammer Michele Keegan Judy Leaver
Kathy Ogle David James Reynolds Mary Rojas Helen Rose Scott Stark
Mandy Swimmer Laura Trejo Barbara Wheeler Stuart Whitaker

... UUSJ and JPD Staff

Jillian Conway Rev. Cynthia Snavelly Cristina Sanchis

...our Low-Carbon-Footprint Caterer

Buddy Adams

...our Funders

All Souls Church Unitarian, Beckner Advancement Fund UUSJ's Social Justice Fund

...Endorsing Organizations

All Souls Church, Unitarian (Washington, D.C.) UUA Cmte. on Socially Responsible Investing
UUA Joseph Priestley District UUA Office of the Treasurer
Unitarian Universalist Church of Arlington (Virginia) Unitarian Universalists for Social Justice (UUSJ)

...in appreciation, the Planning Team

Rev. Terence Ellen Mark Flood Vanessa Lowe Pamela Sparr

INTERFAITH YOUTH CORE (IFYC)

builds mutual respect and pluralism among young people from different religious traditions by empowering them to work together to serve others.

WHY CORE, NOT CORPS?

We are the core of the larger movement of people in the world who are promoting religious pluralism. As the core, our role is to provide resources, network, and catalyze the corps of people who are actively engaged in this work in communities, and provide a platform to showcase their work to the rest of the world.

WHAT WE DO

There are millions of religious young people in the world interacting with greater frequency. That interaction tends either toward conflict or cooperation. Where so many of these interactions tend towards conflict, the Interfaith Youth Core aims to introduce a new relationship, one that is about mutual respect and religious pluralism. Instead of focusing a dialogue on political or theological differences, we build relationships on the values that we share, such as hospitality and caring for the Earth, and how we can live out those values together to contribute to the betterment of our community.

The Interfaith Youth Core is creating these relationships across the world by inspiring, networking, and resourcing young people, who are the leaders of this movement. We provide young people and the institutions that support them with leadership training, project resources and a connection to a broader movement.

***An Invitation* To you and your youth group and youth groups of other faiths whom we hope you will invite and bring with you**

A day of training by the Interfaith Youth Core, founded by Eboo Patel

Saturday, April 18, 2009

Unitarian Universalist Church of Rockville

**9:00-10:00 a.m.- Training for Youth Leaders, Religious Educators,
Religious Education and Youth Committees**

**10:30 a.m.-12:30 p.m. & 1:30-3:30 p.m. – Youth Training, “How to Organize an
Interfaith Service-Learning Event”**

12:30-1:30 p.m. – lunch provided

4:00-5:00 p.m. Information and Keynote Address for parents and all interested folk

R.S.V.P. by Wednesday, April 1, Suggested donation \$5/person

Questions: Contact Seanan Holland, Intern Minister, sholland@uucr.org, or Deborah Kahn, Director of Religious Education, dkahn@uucr.org

UUSJ Mission

Vision

A vibrant and united regional community of Unitarian Universalists working for social justice

Core Values

- ◆ We are committed to pursuing sustainable change for advancing human rights and creating economic and environmental justice
- ◆ We believe in the inherent worth and dignity of every person
- ◆ We promote justice, equity and compassion in human relations
- ◆ We believe that working for justice leads to spiritual growth

Goals

- ◆ To advance the social justice work of UU congregations, organizations, and individuals
- ◆ To increase the frequency, impact, and visibility of UU collaborative social justice efforts in the region

Strategies

UUSJ employs two distinct but interrelated strategies:

Congregational/Organizational Support

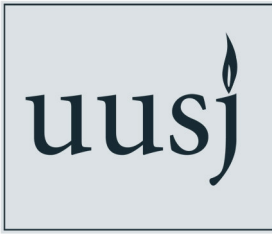
Actions:

- ◆ Identify and communicate successful local programs and projects
- ◆ Provide technical support through direct assistance and skill building workshops
- ◆ Facilitate regional communication
- ◆ Offer opportunities for networking
- ◆ Assist in securing financial resources for social justice work
- ◆ Encourage and support volunteerism

Regional Leadership

Actions:

- ◆ Identify issues for regional leadership and action
- ◆ Provide project development and management for regional efforts
- ◆ Track social justice activities across the region
- ◆ Offer educational materials and events
- ◆ Initiate regional communication



**Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region**

Board of Trustees

Executive Committee 2008 - 2009

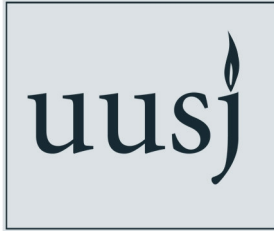
Bob Denniston	Arlington
John Harris	Columbia
Lois Hybl	Towson
Pat Karlsen	Cedar Lane
Al Robbert	Mount Vernon
Helen Rose	All Souls

Other Board Members 2008 - 2009

Betty Lou Anderson	Towson	Candy Kessel	River Road
Terrie Barr	Rockville	Rob Keithan	UUAWO
Eli Briggs	Silver Spring	Michelle Knight	Loudoun
Ed Butterworth	Fairfax	Mike McCord	Accotink
Ed Day	Bull Run	Rev. Don Robinson	Beacon House
Marc DeFrancis	Arlington	Lisa Schumaker	JPD
Hal Fuller	Fairfax	Nancy Sorden	Washington Ethical
Emma Sue Gaines-Gerson	Paint Branch	Ron Verdonk	Davies
		Lorraine Webb	Goodloe

UUSJ Staff 2008- 2009

Rev. Terry Ellen	Executive Director
Rev. Cynthia Snavelly	Administrator



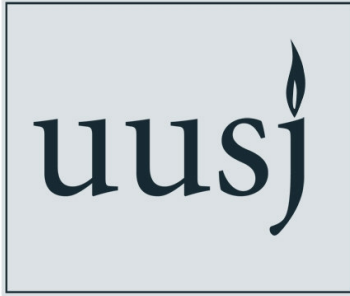
Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region

Financial Statements
Balance Sheet

	<u>Jun 30, 09</u>
ASSETS	
Current Assets	
Checking/Savings	
1000 · Checking-Suntrust	4,732.01
1010 · Money Market-Suntrust	<u>10,723.68</u>
Total Checking/Savings	15,455.69
Other Current Assets	
1420 · Advance to Employee	<u>300.00</u>
Total Other Current Assets	<u>300.00</u>
Total Current Assets	15,755.69
Fixed Assets	
1645 · Equipment	2,171.46
1650 · Accum. Deprec. Equipment	<u>-1,370.00</u>
Total Fixed Assets	<u>801.46</u>
TOTAL ASSETS	<u>16,557.15</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Other Current Liabilities	
2100 · Payroll Liabilities	638.07
2220 · Beacon House Fundraiser	567.25
2270 · Ethical Investing Conference	1,051.85
2280 · Collaboration Fund	<u>1,750.00</u>
Total Other Current Liabilities	<u>4,007.17</u>
Total Current Liabilities	<u>4,007.17</u>
Total Liabilities	4,007.17
Equity	
3900 · Fund Balance	13,367.25
Net Income	<u>-817.27</u>
Total Equity	<u>12,549.98</u>
TOTAL LIABILITIES & EQUITY	<u>16,557.15</u>

Statement of Income and Expense

	<u>Jul '08 - Jun 09</u>	<u>Budget</u>	<u>\$ Over Budget</u>	<u>% of Budget</u>
Income				
4001 · Contributions-Congregations	20,173.75	12,866.00	7,307.75	156.8%
4002 · Contributions-Individuals	13,789.76	15,367.00	-1,577.24	89.74%
4010 · Dues-Agencies	0.00	600.00	-600.00	0.0%
4011 · Dues-CBOs	0.00	300.00	-300.00	0.0%
4012 · Dues-Congregations	650.00	7,133.00	-6,483.00	9.11%
4013 · Memberships-Individuals	1,410.00	2,668.00	-1,258.00	52.85%
4030 · Programs	103.89	1,000.00	-896.11	10.39%
4040 · UUSJ Collaboration Fund				
4041 · Collaboration Fund Expenses	-2,423.02	0.00	-2,423.02	100.0%
4042 · Collaboration Fund Grants	-300.00	0.00	-300.00	100.0%
4040 · UUSJ Collaboration Fund - Other	<u>3,410.00</u>	<u>0.00</u>	<u>3,410.00</u>	<u>100.0%</u>
Total 4040 · UUSJ Collaboration Fund	686.98	0.00	686.98	100.0%
4050 · Investment Income	<u>18.91</u>	<u>40.00</u>	<u>-21.09</u>	<u>47.28%</u>
Total Income	36,833.29	39,974.00	-3,140.71	92.14%
Expense				
5010 · Salary-Executive Director	16,423.17	16,303.00	120.17	100.74%
5011 · Salary-Admin. Asst.	10,410.00	11,960.00	-1,550.00	87.04%
5015 · Payroll Taxes	2,155.41	2,261.00	-105.59	95.33%
5018 · Workers Comp Insurance	574.00	400.00	174.00	143.5%
5030 · Travel	1,677.34	1,000.00	677.34	167.73%
5050 · Fundraising Expenses	135.00	0.00	135.00	100.0%
5060 · Bank Service Charges	19.95	50.00	-30.05	39.9%
5080 · Board Expenses	228.91	50.00	178.91	457.82%
5090 · Depreciation Expense	224.00	0.00	224.00	100.0%
5100 · Copying	43.13	100.00	-56.87	43.13%
5110 · Facilities Expense	2,070.00	2,760.00	-690.00	75.0%
5120 · Filing Fees	145.00	245.00	-100.00	59.18%
5130 · Postage	86.31	175.00	-88.69	49.32%
5140 · Supplies	335.96	200.00	135.96	167.98%
5150 · Telephone	748.60	900.00	-151.40	83.18%
5191 · Program Expenses-Workshops	34.28	900.00	-865.72	3.81%
5192 · Program Expenses-Outreach	1,771.00	1,000.00	771.00	177.1%
5193 · Dues-MILC & VA Interfaith	200.00	400.00	-200.00	50.0%
5200 · Meals	0.00	20.00	-20.00	0.0%
5210 · Fundraising Events	0.00	250.00	-250.00	0.0%
5211 · Fundraising Materials	0.00	100.00	-100.00	0.0%
5235 · Brochure	0.00	100.00	-100.00	0.0%
5240 · Technology Consulting	71.10	600.00	-528.90	11.85%
5241 · Web Hosting/Internet	107.40	100.00	7.40	107.4%
5270 · Miscellaneous Expenses	<u>190.00</u>	<u>100.00</u>	<u>90.00</u>	<u>190.0%</u>
Total Expense	37,650.56	39,974.00	-2,323.44	94.19%
Net Income	<u>-817.27</u>	<u>0.00</u>	<u>-817.27</u>	<u>100.0%</u>



Unitarian Universalists for Social Justice, Inc. of the Baltimore-Washington-Northern Virginia Region

Development Plan

Introduction

In July 2008 the UUSJ Board of Directors approved a three year Development Plan (2008-2011) and authorized the UUSJ Executive Committee to take actions as necessary to implement it.

In essence, the approved UUSJ development strategy looks primarily to its member congregations for funding its basic operational activities. Congregational funding consisted of the recommended “fair share” donations needed to meet basic UUSJ operational expenses.

Additional secondary funding sources included fees from affiliated organizations, membership fees and gifts from individual members. fund raising activities, and occasional grants from foundations and similar charitable sources.

The actions approved by the Board included (a) modifying the relevant UUSJ bylaws; (b) developing “fair share” funding levels for each congregation based upon the size of its membership and the UUSJ annual operating budget as approved by the UUSJ Board; and (c) communicating the resulting information to the members of the UUSJ Board.

The Board members agreed to (a) communicate the specifics of the Plan to the professional and lay leadership of their congregation; (b) work with the Congregational leaders to devise ways and means of achieving the Congregation’s donation goals; and (c) follow up with congregational leadership to ensure that the funds are delivered to UUSJ in a timely fashion.

The results of the first year of operation under the Plan have been mixed. Most member congregations have not yet met the “fair share” donation targets approved by the UUSJ Board, although nine congregations out of 22 have met or exceeded their targets as of May 8. One congregation is close to making its fair share and 4 are half way there.

Some have not even reached the level of dues payments required in previous years.

Some complaints have been heard that congregations were not consulted before the “fair share” donation targets were established.

Some Board members do not want to be involved as fund raisers; others feel uncomfortable being asked to make a sizable personal donation to UUSJ.

For these and other reasons, the Development Plan has been reviewed and revised..

The new Plan has the following changes:

It reaffirms the “fair share” funding concept based on \$4 per capita for each congregation member.

It clarifies roles and responsibilities for congregations and for UUSJ Board members.

It charges the Development Committee to provide Board members with training and skills development needed to carry out their fund raising responsibilities.

Summary

UUSJ development strategy looks primarily to its member congregations for funding basic operational activities. Additional, secondary funding sources include fees from affiliated organizations, dues from individual members, gifts, ad hoc fund raising activities, and occasional grants from foundations, and other charitable sources such as the Combined Federal Campaign. When feasible, individual donations including CFC contributions are attributed to appropriate member Congregational “fair share” goals.

To implement its development strategy UUSJ

- (1) Encourages stable, predictable funding from member organizations, while providing those members with total flexibility in determining how to raise the money.
- (2) Grows the number of UUSJ individual members, as a means of developing support for UUSJ within member congregations.
- (3) Increases the size of individual donations, where feasible.
- (4) Seeks foundation grants and sizable individual gifts for specific activities when justifiable in terms of programmatic content, but rarely to cover the costs of basic operations.

Responsibilities for Fund Raising

Everyone associated with UUSJ is responsible for raising the funds necessary for its operations.

The Board of Directors

- ◆ Approves development and fund raising policy and priorities.

Members of the Board of Directors

- ◆ Serve as the primary channels of communication between UUSJ and the leadership of their congregations on fund raising issues.
- ◆ With the support and assistance of the Development Committee and the UUSJ staff, encourage members and friends of the organizations they represent to generously support UUSJ.
- ◆ Contribute financially to UUSJ as generously as their personal circumstances permit.

The Executive Committee

- ◆ Recommends fund raising strategies and priorities to the Board.
- ◆ Implements ongoing fund raising operations and programs.
- ◆ Oversees Staff activities relating to fund raising.
- ◆ Encourages Board members to take an active role in fund raising.

The Development Committee

- ◆ Evaluates fund raising possibilities and proposes fund raising activities.
- ◆ Makes recommendations to the Executive Committee.
- ◆ Assists Board members in carrying out their fund raising responsibilities.
- ◆ Arranges for Board members to receive the training and skills development needed to carry out their fund raising responsibilities.

The Staff

- ◆ Manages the paper-flow relating to fund raising.
- ◆ Communicates funding needs and requirements to Board members and to UUSJ membership.
- ◆ Keeps the Executive Committee and the Development Committee informed about fund raising issues as they arise.
- ◆ The Executive Director makes direct appeals to potential donors for funds as directed by the Executive Committee.

Basic Approach to Fund Raising

If UUSJ is to prosper, it requires a stable, predictable income source to meet its basic operational expenses. The best and most reliable source is the member organizations that it serves.

- ◆ The basic operations of UUSJ (base salaries, office expenses, etc) are met primarily by annual “fair share” donations from each member Congregation based upon size of Congregational membership.
- ◆ Member Congregations have total flexibility to determine how to finance their fair share donation (budget line item, plate collection, fund raiser, individual donations, pledges, etc.).
- ◆ The UUSJ board member from each represented Congregation has primary responsibility for ensuring that his/her congregation’s fair share donation is forthcoming, assisted as needed by the UUSJ Development Committee and UUSJ staff.
- ◆ A strong Marketing Plan is an essential component of a successful Development Strategy. If a member Congregation is unaware of services UUSJ provides, UUSJ has little hope of generating adequate financial support.
- ◆ Associate memberships are available to organizations other than Congregations. Affiliated organizations pay an annual membership fee set by the Board.
- ◆ Individual memberships in UUSJ are encouraged, partially as a fund-raising mechanism, but also as a means of generating support for UUSJ within each congregation.
- ◆ The annual dues for individual membership will be set by the Executive Committee at a level sufficiently low as to encourage broad participation.
- ◆ UUSJ programs (as opposed to basic operational expenses) will be financed by the following means:
 - User fees (e.g. registration to attend a conference or workshop), and free will offerings collected at events sponsored by UUSJ.
 - Special event fund-raisers including those co-sponsored with other organizations).
 - Grants from foundations or charitable organizations to carry out specific program objectives with measurable outcomes.

Board Member Responsibilities for Fund Raising

As with almost all not for profit organizations, members of the UUSJ Board of Directors are responsible for the financial health of the organization. This is a moral obligation as well as a legal, fiduciary responsibility.

A willingness to ensure that the organizations that they represent on the Board meet their financial commitments to UUSJ, and a willingness to raise funds on behalf of UUSJ are essential elements of Board members' job descriptions.

Member Responsibilities for Meeting Financial Commitments

Member Congregations and affiliated organizations are expected to make good faith efforts to meet their financial obligations to UUSJ in a timely manner. Quarterly payment of donations will greatly facilitate UUSJ meeting its financial obligations. To assist in this effort, payment reminders will be rendered on a quarterly basis.

Fund Raising Goals for Fiscal Year 2009-2010

1. Fair Share Contributions from Congregations	32,000
2. Individual Memberships	2,700
3. Gifts from Individuals	4,850
4. Fees from Affiliated Organizations	1,000
 Total Funds Needed for Operational Expenses	 \$40,550

APPENDIX

UUSJ Proposed Fair Share Funding For FY 2009-2010

<u>Congregation</u>	<u>Number of Members</u>	11/07	Actual 2009	Fair Share 2009-2010
1. Arlington	936		924	3,695
2. Cedar Lane	866		866	3,464
3. River Road	633		635	2,540
4. All Souls	688		794	3,176
5. Fairfax	609		661	2,644
6. Annapolis	583		536	2,144
7. Columbia	379		415	1,660
8. Mount Vernon	377		349	1,396
9. Silver Spring	375		309	1,236
10. Rockville	322		351	1,404
11. Towson	289		293	1,172
12. Bull Run	234		229	916
13. Paint Branch	229		215	860
14. Baltimore	221		204	816
15. Accotink	220		202	808
16. Reston	219		198	792
17. Frederick	209		211	844
18. Davies	150		115	460
19. Loudoun	85		71	284
20. Goodloe	70		69	276
21. Sterling	65		74	296
22. Washington Ethical			150	600
	8,452		7,943	

ACTION PLAN FOR FY 2009-10

The material that follows does not require approval of the Board of Directors. It is provided for informational purposes, so that the Board members understand the implementation steps that will be taken, subject to approval of the Development Plan by the Board.

Actions Needed During Remainder of 2009

Recommendation (1): Obtain Board approval of the revised Development Plan for FY2010-2012

- Target Date for Completion: May 30, 2009
- Lead Action: UUSJ Co-chairs (Bob and Pat)
- Other Participants: Executive Committee, Development Committee Members

Recommendation (2): Continue following-up on collecting FY 2008-2009 “fair share” donations from member congregations.

- Target date for completion: June 30, 2009
- Lead: Development Committee Co-chairs.
- Other Participants: UUSJ Board Members.

Recommendation (3): Follow-up on soliciting and collecting FY 2008-2009 donations from individual members and supporters.

- Target Date for Completion: June 30, 2009
- UUSJ Board members

Recommendation (4): Follow-up regarding membership renewals from individual members and affiliated organizations. This was done in May 2009.

- Target date for completion: October 30, 2009
- Lead: UUSJ staff
- Other Participants: UUSJ Board Members.

Recommendation (5): Arrange professional fund-raising orientation and training for UUSJ Board members to equip them with the skills and confidence necessary for carrying out their fund raising responsibilities – to include familiarity with the UUSJ Marketing Plan.

- Target Date for Completion: September 2009
- Lead: Development Committee Co-Chairs
- Other Participants: Board Members; Staff

Recommendation (6): Conduct a fund raising event during the autumn of 2009.

- Target Date for Completion: 2009
- Lead Action: Development Committee Co-Chairs
- Other Participants: Development Committee Members Staff (Terry and Cyn). Board Members

Recommendation (7): Apply for foundation grants or sizable private donation in support of specific project or projects.

- Target Date for Completion: October 2009
- Lead Action: Development Committee Co-Chairs
- Other Participants: Staff (Terry and Cyn), Development Committee Members, Executive Committee Members

Actions Required: (to be determined by Lead) Status: *Action not yet started.*

Recommendation (8): Increase the number of individual members and/or donors. Target is to achieve a 10 percent growth per annum for the next four years (2009-2012).

How #1: The UUSJ Executive Committee should take the following steps:

Review and if necessary adjust the current basic individual membership of \$30 per year.
Establish a graduated level of rewards and benefits to accompany individual membership.

For example:

\$50 entitles the member to the newsletter and other announcements of UUSJ events.

\$100 donation entitles the donor to attend UUSJ Board meetings and to speak from the floor on issues of interest.

\$250 donation entitles the donor to attend UUSJ workshops and events at half cost.

\$500 donation entitles the donor to attend all UUSJ workshops and events at no cost.

\$1,000 donation includes a second “free admission” to all UUSJ workshops and events.

\$2,500 donation entitles the donor to a “member at large” voting seat on the UUSJ Board of Directors.

How: #2 Board members take on responsibility for increasing the number of individual UUSJ memberships in their congregation. Targets are set by congregation based on size.

Board members will use their own judgment in determining what will work best in their congregation to encourage individual memberships at the various levels in their congregation.

One approach would be to approach previous donors to UUSJ and other leading social activists on an individual basis.

Another approach would be for board members to form a small nucleus of “Friends of UUSJ” within each congregation to assist in fund raising activities and recruiting new donors.

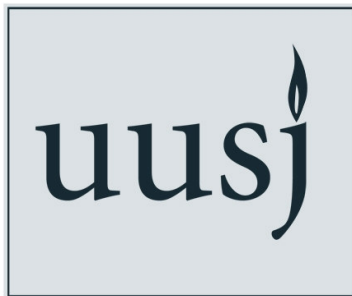
UUSJ Development Committee will provide support and assistance as needed, including talking points and instructions.

Following are illustrative goals for increasing individual members and/or donors:

Donor Organizations	Members	Individual members as of 11/07	Goal 2010	Goal 2011	Goal 2012
1. Arlington	936	3	20	30	60
2. Cedar Lane	866	15	20	30	60
3. River Road	633	4	20	30	45
4. All Souls	688	15	25	30	50
5. Fairfax	609	10	20	35	50
6. Annapolis	583	5	10	20	35
7. Columbia	379	7	10	20	30
8. Mt Vernon	377	5	10	20	30
9. Silver Spring	375	15	20	25	30
10. Rockville	322	12	20	25	30
11. Towson	289	11	15	20	25
12. Bull Run	234	1	5	10	17
13. Paint Branch	229	0	5	10	16
14. Baltimore	221	8	10	15	20
15. Accotink	222	21	22	23	24
16. Reston	219	0	5	10	15
17. Frederick	209	0	5	10	15
18. Davies	150	1	3	5	10
19. Loudoun	85	0	1	3	6
20. Channing	83	6	6	7	8
21. Goodloe	70	6	6	7	8
22. Sterling	65	1	2	4	6

Recommendation (9): Establish specific “fair share” donation goals for member congregations based on Board approved budget for FY 2009-2010 and communicate goals to member congregations.

- Target Date for Completion: June 15, 2009
- Lead Action: UUSJ Co-Chairs
- Other Participants: Development Committee Co-Chairs Board Members Staff



Unitarian Universalists for Social Justice, Inc.

of the Baltimore-Washington-Northern Virginia Region

Marketing Plan

Preamble:

This marketing plan for UUSJ is based on the clear need to increase the organization's visibility and viability among its key stakeholders. It is intended to be complementary to the recently-approved UUSJ development plan. Together, these plans when implemented can help:

- ◆ Assure the long term survival of UUSJ
- ◆ Contribute to the realization of its vision – *A vibrant and united regional community of Unitarian Universalists working for social justice*
- ◆ Accomplish its mission – *to provide leadership and coordination for effective social action that reflects Unitarian Universalist principles in the region*
- ◆ Realize its goals to --
 - advance the social justice work of UU congregations, organizations, and individuals*
 - increase the frequency, impact, and visibility of UU collaborative social justice efforts in the region*

Marketing is not just promotion or publicity – it involves understanding target audiences' wants and needs, and as necessary, modifying the organization's "offerings" to meet those needs. Thus, seeking out and listening to stakeholders (stockholders) is an essential element of a marketing plan, followed by communicating accurately and appropriately back to them so they know we are listening and recognizing their needs. Over time this will allow UUSJ to evolve and refresh our unique value proposition – that is – *what is UUSJ offering that no one else has?*

The plan is based on a key overarching concept – a belief that social justice work is essentially relational. It is concerned with developing and strengthening partnerships in the broader communities in which we live to advance the common good and to maintain focus on anti-racism, anti-oppression, multiculturalism and environmental justice. And while newer technologies provide improved opportunities for social networking among interested individuals and groups, a key challenge remains how to tell the story about UUSJ accomplishments and capabilities in human terms. The fact that UUSJ does good work – sadly enough – doesn't equate to people caring or taking action. Wherever possible, this story should convey the value of social action on the well-being of individuals and the contribution of UUSJ in advancing the common cause of social justice.

Goal:

To advance understanding of, support for, and participation in UUSJ so that it might pursue its vision and mission with renewed and sustained capacities. (This should be understood to include encouragement for contributions of time, talent, and treasure, including opportunities for leadership recruitment and development.)

Target audiences:

Three key target audiences are the focus of this plan:

- UUSJ trustees and members
- social justice champions (AKA *social actionistas*) among the member congregations
- congregational leadership among the member congregations
- leadership of other social-justice oriented groups in the region, including foundations and other potential sources of support

While other audiences may be prioritized in the future, these four audiences should be considered “low-hanging fruit” for the near term (the next year).

Strategies:

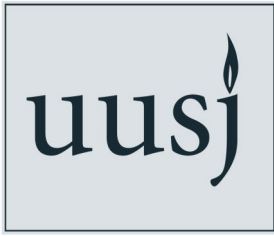
- Engage UUSJ leadership and trustees in vigorous outreach to member congregations and social justice champions to promote UUSJ and to probe the shared congregational needs that UUSJ could address.
- Provide new and improved tools to make the case for UUSJ.
- Seek outreach opportunities with key regional social justice groups to develop relationships and seek mutually-beneficial collaborations.
- Appoint a PR/marketing committee to organize and facilitate the work, monitor progress, and report quarterly to the board on priorities and new opportunities.

Tactics:

An array of tactics should be employed to ensure that we reach our target audiences with messages that promote the UUSJ mission and priorities. In no particular order:

1. Meet face-to-face with the social action leadership of each member congregation within the next two years to increase understanding of UUSJ, to probe the priorities and needs of congregational social actionistas, and to identify promising candidates for UUSJ leadership roles.
2. Develop an “elevator speech” and create key talking points to ensure we can comfortably convey UUSJ vision and mission, along with key accomplishments and capabilities.
3. Periodically refresh and upgrade the current list of UUSJ accomplishments and provide a downloadable version on the website and for display in various settings, such as display tables, bulletin board postings, SAC tables, relevant regional conferences, etc.
4. To help tell the story, add visuals such as photographs of UUSJ-supported efforts to the website, biweekly e-news, and for use in displays, postings, and the like.
5. Upgrade the UUSJ brochure and make it available in quantities and/or in downloadable form for use in various settings.
6. Promote the availability of Rev. Terry and Rev. Cyn to visit member congregations and deliver themed sermons, with direct relevance to the topical SJ issues of the congregations, and to promote share-the-plate collections for social justice causes (i.e. UUSJ).

7. Ensure that the websites of all congregations include links to the UUSJ website and vice versa.
8. Develop stories that convey the contribution of UUSJ to regional social justice, for dissemination through the website, e-news, congregational newsletters, and outlets in regional publications, including organizational media and public media. (Good example – results of annual Social Justice recognition awards for various media outlets.)
9. Enlist expertise of financial leadership from select congregations to provide consultation and/or a peer-led briefing on successful yet painless approaches to support UUSJ financially and other social justice causes without harm to their financial well-being (e.g. the Fairfax experience where 1/3 of each collection is earmarked for social justice).
10. Seek to conduct or co-sponsor a regional workshop on environmental justice or socially-responsible investing.
11. Pursue opportunities such as Green Fest to promote UUSJ and its value in supporting green action and environmental justice through member congregations and UUA.
12. Conduct outreach to social-justice related groups such as LGBT groups, CCAN, WRRCAT, Ministry for Earth and Green Sanctuary, Open Door, VOICE, and others who share our core values.
13. Follow up with individuals who participated in events such as the “Inspired Faith, Effective Action” to promote individual memberships and leadership development.
14. Offer to list social-justice related events on website and in newsletter to congregations and other groups, consistent with policy guidelines. Consider adding a feature to the website to list needs for volunteers or “wish lists” for UUSJ-related functions.
15. Develop and promote social justice speaker’s bureau.
16. Seek high-profile role in JPD Spring conference.
17. Develop and disseminate a brief announcement on UUSJ’s participation in the Combined Federal Campaign for trustees to place in congregational newsletters and the like.
18. Conduct annual UUSJ Awards Gala and use proceeds to support new UUSJ Collaborative SJ Fund.
19. As part of regular UUSJ board meetings, twice per year conduct ½ day program on a social justice theme and showcase area SJ “best practices” that are developing innovative approaches. (Could link to the new UUSJ Collaborative SJ fund.)



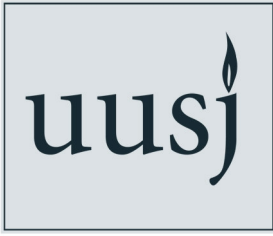
**Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region**

Congregational Giving Report

On the advice of our Development Committee UUSJ changed the method of computing the monies expected from each church. The base, a charge of \$4.50 per member of any church, times the number of members in the specific church determined the money expected from that church. Ten churches met or exceeded their fair share. Three were very close to their fare share. Six contributed $\frac{1}{2}$ or less of their fare share. Three churches did not make any contribution. Our final bank balance was \$15, 500. Considering the economic storms in our nation this year, we were able we held our own.

(See next page for report)

Congregation	2008-2009 Re-quest	Received 6/30/09	Manner paid
Accotink		882 *1450	1 cong. check, 4 ind. Donors 1 cfccna donors of unknown amounts
All Souls		3375	11956 individuals and 1 cong. Check
Annapolis		2556	1001 individual cong check, 17 individuals and special collection 2 cfccna donors of unknown amount
Arlington		4171.5	3654
Baltimore, First		1048.5	543.75 1 cong. Check, 7 individuals
Bull Run		1057.5	325 1 cong. Check, 1 individual 1 cfccna donor of unknown amount
Cedar Lane		3861 *6300	2 cong. Checks and 8 individuals
Channing		369 *369	1 cong. Check
Columbia		1840.5	435 1 cong. Check and 2 individual
Davies	(affiliate) 603		0
Fairfax		2713.5	2325 12 individual and 1 cong. Check
Frederick	(affiliate) 873		100 1 cong. Check
Goodloe		301.5 *325	1 cong. Check
Loudoun	(affiliate)	333	0
Mount Vernon		1593 *2706	2 cong checks, 7 individuals 5 individuals and special collection 1 cong. check 1 cfccna donor of unknown amount
Paint Branch		1030.5	991
River Road		2799 *3480	1 cong check, 5 individuals
Rockville		1516.5 *2185	2 cong. Checks, 19 individuals
Silver Spring		1687.5	0
Sterling	(affiliate) 292.50	*611	1 cong check. Special collection
Towson		1350 *2150	1 cong check, 6 individuals
Washington Ethical Society		666 *666	2 cong. Check
		total-- 29910.75	



**Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region**

Organizational Donors to UUSJ

Chesapeake UU Ministers' Association \$500

Major Donors

July 1, 2008– June 30, 2009

On behalf of the UUSJ Board and the organizations and individuals we serve we thank our major donors for their generosity and commitment to justice

Clara Barton Circle \$5,000 to \$9,999

Ralph Waldo Emerson Circle \$2,500 to \$4,999

Susan B. Anthony Circle \$1000 to \$2499

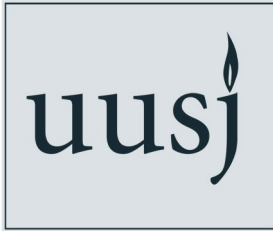
Susan Clark
Pat Karlsen

Whitney Young Circle \$500 to \$999

Linda Collyer
Rev. Terry Ellen and Amy Boscov
Pete Fontneau
Hal Fuller
Lavona Grow and Bob Denniston

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William Ades	Dee Idnani
Terrie Barr	Sean Libberton
Craig Bennett	Mike McCord
Nancy Boardman	Betty McGarvie
Ron Brandt	Scott and Natasha Peterson
Dot and Jim Caldiero	Bruno Walker
Steve Eckstrand	Salli and Bill Ward
Carol Falk and Alan Johnson	Marsha White
Rev. Phyllis Hubbell	Pat Wilson and Roald Schrack



Unitarian Universalists for Social Justice, Inc.
of the Baltimore-Washington-Northern Virginia Region

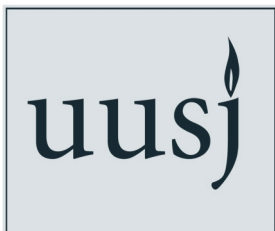
UUSJ Green Policy

Unitarian Universalists for Social Justice (UUSJ) is a 501(c)3 non-profit social justice education and enabling agency. UUSJ recognizes and places the highest of priorities on its obligation to responsible stewardship of earth and its beings. To this end, UUSJ seeks to assure environmental justice to beneficiaries of UUSJ social action and all others who are impacted by the quality of the living environment. UUSJ is a leader in relating UU environmental justice vision to the secular and greater faith communities. To this end, UUSJ commits to making the execution of social justice a greener process.

UUSJ works across multiple Unitarian Universalists (UU) congregations in partnership with other faith and secular organizations. UUSJ establishes environmental justice awareness and presence that supports the greater range of environmental justice activity of member congregations, UU Ministry for Earth (UUMFE), Joseph Priestly District (JPD), UU Association (UUA), and our formal non-UU partners approved by the UUSJ Executive Board.

In setting an example of appropriate environmental behavior, UUSJ will conduct its business affairs and meetings with due consideration to mitigating adverse impact on the environment. In the acquisition of goods, services, and facilities access, UUSJ will optimize the use of recycled material, assure recycling of waste, minimize the transport of people and materials, and advocate the use of green computers and network infrastructures. UUSJ commits to being a learning organization ways to improve its environmental performance as humankind gains greater knowledge and insights to the world's environmental problems and solutions.

UUSJ seeks to find opportunities to help educate UUs about life styles that lessen environmental impacts associated with domiciles, transportation, diet, social and cultural practices, business and work place choices, congregation affairs, community education, and practice means to effect environmental improvement and justice at the individual, congregation, multi-congregational, and interfaith levels.



Unitarian Universalists for Social Justice, Inc. of the Baltimore-Washington-Northern Virginia Region

Maryland Interfaith Legislative Committee (MILC) Report

UUSJ is a member of the Maryland Interfaith Legislative Committee (MILC). This organization seeks to influence decisions of the Maryland General Assembly in the field of social justice, especially support for families, low income and disadvantaged people, and environmental concerns. In the recently completed 2009 session, MILC helped pass the following legislation:

Domestic Violence, Protective Orders: Surrender of Firearms (HB296/SB267)

Requires that those subject to a final protective order must surrender any firearms and refrain from possessing any firearm for the duration of the protective order.

Termination of Electric and Gas Service during Temperature Extremes (HB 453/SB1057)

Prohibits public service companies from terminating service to residential customers for non-payment when the high temperature is lower than 32 degrees or higher than 95 degrees.

Eligibility, for Unemployment Insurance for Part Time Work. (HB 310/SB 270) Provides

(under specified circumstances) for unemployment insurance for those able to work only part time.

Modification of Electric Universal Service Program (HB 736/SB 703) Expands the program for providing assistance with electric bills, clarifies the scope of weatherization assistance.

Training Welfare-to-Work Participants for Employment in Green Jobs. (HB 268/SB 992) Requires that a program be developed and implemented to hire Family Investment Program recipients and others, with special emphasis in training for jobs in energy efficiency and renewable energy industries and construction.

Identification Cards for Released Inmates (HB 215/SB 186) Requires that an identification card meeting certain requirements be issued to inmates as they are released from prison

Greenhouse Gas Emissions Reduction (HB315/SB 278). Sets a statewide goal of reducing greenhouse gas emissions by 25% below 2006 levels by 2020; Develop and implement specified programs to achieve this goal.

Preschool Education for All (184/SB234) requires development of a business plan to extend preschool education to all children, and identify a funding source.

Member Organizations

DC Congregations

All Souls Church, Unitarian
Washington Ethical Society

Maryland Congregations

Unitarian Universalist Church of Annapolis
First Unitarian Church of Baltimore
Cedar Lane Unitarian Universalist Church
Channing Memorial Church, Unitarian Universalist

Unitarian Universalist Congregation
of Columbia

*Davies Memorial Unitarian
Universalist Church

Goodloe Memorial Unitarian
Universalist Congregation

*Unitarian Universalist Congregation
of Frederick

Paint Branch Unitarian Universalist Church
River Road Unitarian Universalist

Congregation

Unitarian Universalist Church of Rockville
Unitarian Universalist Church of Silver Spring

Towson Unitarian Universalist Church

Virginia Congregations

Accobink Unitarian Universalist Church

Unitarian Universalist Church of Arlington

Bull Run Unitarian Universalists

Unitarian Universalist Congregation of Fairfax

*Unitarian Universalist Church of Loudoun

Mount Vernon Unitarian Church

*Unitarian Universalists of Sterling

*Affiliate member

Affiliate Organizations

Beacon House Community Ministry
Chesapeake UU Ministers Association
Open Door Housing Fund

Become an individual member

Get our bimonthly E-News
and use our webforums

Donate \$30 or more annually

Mail check along with your name, address,
phone, email address, and congregation to

8605 Cameron St. Suite 200

Silver Spring, MD 20910

Questions: www.uusj.org

Phone: 301-588-1951 Fax: 301-588-5272

E-mail: info@uusj.org CFCNCA #17271

About UUSJ

UUs for Social Justice is a tax-exempt, non-profit composed of 26 member UU congregations, affiliated groups and individual members. We believe that working for justice is an expression of our religious faith. Guided by the principles of Unitarian Universalism, our purpose is to add value to the social justice work of UU congregations, affiliates and individuals.

UUSJ is governed by a Board of Directors composed of one representative from each member organization and co-chairs. The representatives are selected by the member organizations and serve for a term of three years. The Board sets policy, establishes priorities, raises money, and performs much of the work associated with UUSJ activities.

UUSJ is staffed by an Executive Director and Administrator. Both are ordained UU ministers, and each is paid for 10-15 hours of work. Office space is shared with OpenDoor Housing Fund (formerly UU Affordable Housing Corporation)

Please choose UUSJ
CFCNCA ID #17271

Inspiring Ideas,
Sharing Resources,



Working Together

Unitarian Universalists
for Social Justice
Baltimore-Washington-
Northern Virginia Region

UUSJ Vision and Mission

Vision: To be a vibrant and united regional community of Unitarian Universalists working for social justice

UUSJ at Work

1. UUSJ acts as a REGIONAL SOCIAL JUSTICE COORDINATOR enabling collaboration and cooperation.

Maintains a website with information and a calendar of events for UU and Interfaith social justice activities in the region.

Publishes a bi-weekly e-newsletter that highlights social justice programs of member congregations and interfaith social justice activities, and provides links to other social justice websites.

Procured a grant to hire a part-time person to facilitate Virginia UU congregations' efforts to defeat a proposed constitutional amendment defining marriage as between a man and a woman.

Recognized UU social activists with the first annual regional social justice awards at the UUSJ Awards Benefit Gala, October 2008, benefiting the UUSJ Collaboration Fund.

2. UUSJ advances the SOCIAL JUSTICE WORK OF UU CONGREGATIONS AND ORGANIZATIONS.

Holds workshops twice a year to develop social justice leaders and to showcase model programs and share best practices.

Offers workshops annually at the Joseph Priestley District annual meeting.

Sponsored with the Washington office of the UUA an all day workshop on successful social justice programs at the congregational level. UUA President Bill Sinkford was the keynote speaker. December 2007

Held a joint fund raising program with Beacon House Community Ministry celebrating its 15th Anniversary. March 2007

UUSJ served as the fiscal agent for the Northern Virginia in the LUUP Legislative Preview. 2008

Used our share of money from a Baltimore Washington UU Growth event to fund scholarships for youth to participate in social justice events and for Beacon House. 2008

3. UUSJ increases the FREQUENCY, IMPACT AND VISIBILITY of UU collaborative efforts in the region.

Funds social justice programs with grants of up to \$300 through the UUSJ Collaboration Fund.

UU Legislative Ministry of MD grew out of a UUSJ meeting.

Co-sponsored a Faith and Freedom anti-torture program along with the Washington Regional Religious Coalition Against Torture. UUSJ served as a fiscal agent and used our website to register attendees. 2007

Co-sponsored with the Joseph Priestly District an anti-racism conference and recruited Washington area UUs to attend. 2006, 2007, 2008

The Freedom to Marry Task Force supported various legislative issues affecting same-sex couples in Maryland; and worked against the proposed constitutional amendment in Virginia limiting marriages to a man and a woman. The Task Force is currently working on an adult religious education marriage curriculum. The Environmental Task Force has exhibited annually since 2005 at the DC Green Festival.

Brought a bulk Green buying program to our congregations.

Increased UU participation in Equality Maryland Lobby Days. 2005, 2006, 2007, 2008

Increased UU participation in Maryland Global Warming Rallies. 2007, 2008

Cosponsored the Ethical Investing Conference. National UU leaders and socially responsible investment

pros explored aligning congregations' financial management practices with UU social and environmental justice principles enhancing congregation's financial standing **and** justice ministries. May 2009