
CLF

A Unitarian Universalist Congregation Without Walls



www.CLFUU.org
www.DailyCompass.org
www.QuestForMeaning.org

Phone: 617-948-6150 Email: CLF@CLFUU.org
25 Beacon Street, Boston MA 02108

October 17, 2013

Rev. Edward D. Wight
Executive Director
Unitarian Universalist Veatch Program at Shelter Rock
48 Shelter Rock Road
Manhasset, NY 11030

Dear Ned,

The UU Veatch Program at Shelter Rock's generous support of the Church of the Larger Fellowship (CLF) has made a big impact on online liberal religious faith development and spirituality. As the CLF has developed its online presence over the past few years, our financial supporters, like the UU Veatch Program at Shelter Rock, have made it possible for the CLF to create innovative, far-reaching online programming. With that in mind, the CLF is most pleased to present the attached renewal grant report.

We are thankful for your support.

Should the CLF be fortunate to receive additional funding, we will indeed refer to you on all materials as Unitarian Universalist Veatch Program at Shelter Rock, not "Veatch Foundation" or another funder.

We remain grateful for your consideration,

A handwritten signature in cursive script that reads "Meg".

Rev. Meg A. Riley
Senior Minister

mriley@clfuu.org
(612) 741-8152

Attachments

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

Date Prepared: October 17, 2013

Name of Organization: Church of the Larger Fellowship	Executive Director: Lorraine J. Dennis
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Address of Organization: 25 Beacon Street, Boston MA 02108

Primary Contact Person: Rev. Meg A. Riley	
Telephone number: (612) 741-8152	Email address: megriley@clfuu.org

Fax number: (617) 523-4123	Website: www.QuestForMeaning.org & www.clfuu.org
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Fiscal Sponsor (if any): self-sponsored

Have there been any changes to your organization's IRS 501(c)(3) not-for-profit status since your grant was approved? **YES / NO** If yes, please explain: Not Applicable

Grant Period covered by this Report:	1/1/2013	10/18/2013	
	Month/Day/Year	to	Month/Day/Year

Prepared by:	Lisa Kielt	Director of Development	(617) 948-6170
	Name	Title	Phone

INSTRUCTIONS: Address the report and renewal proposal questions in a narrative format in **one Microsoft Word document**, beginning the renewal proposal on a new page. Submit your organization's application materials by email to both your Program Officer and jan@veatch.org.

CHECK LIST: Please check that you have met the following requirements before submitting:

- XX Accurately completed cover page (this page)
- XX **I. Report on funded activities** (in one Microsoft Word document) **(A-H)**
- XX **II. Renewal proposal** (begin on a new page) **(A-F)**
- XX **III. Financial Requirements** **(A-E)**
 - X **(A-B) Audited financial statements OR Approved Audit Alternatives** (see list)
 - X **(C) Current and Prospective Funders List**
 - X **(D) Narrative Questions**
 - (E) Fiscally Sponsored Projects** (if relevant)
- X **IV. Attachments:** up to three supporting materials and up to three recent photos **(A-B)**
- X **V. Optional Questions** **(A-B)**
- X **501(c)(3) documentation** for your organization, or for your fiscal sponsor if applicable
- X Proofread and check for grammar and spelling
- X Make sure to refer to the correct Veatch Program Officer on all materials
- X Confirm that you refer to us on all materials as **Unitarian Universalist Veatch Program at Shelter Rock**, not "Veatch Foundation" or another funder

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I. REPORT ON FUNDED ACTIVITIES (A-H)

A. Organizational background including history, purpose, structure and accomplishments.

Since our last report in late 2012, after much institutional reflection, the Church of the Larger Fellowship is pleased to have finalized our mission statement to guide and reflect our work in the world:

The Church of the Larger Fellowship's (CLF's) mission is to build a global spiritual community, rooted in profound love, that cultivates wonder, imagination, and the courage to act for justice.

As Unitarian Universalists, we carry the flame of love, burning bright for all who yearn for its warmth and light.

The CLF hopes that these words convey our aspiration to honor and celebrate what is most precious, what is most central to our loving community—a gathered and growing progressive religious family that is incredibly diverse and engaged, intelligent and caring.

Chartered in 1970, the Church of the Larger Fellowship (CLF) has its roots reaching back to the Pony Express during the 1800s. The CLF has traditionally served as both a congregation (currently serving 3,363) and a Unitarian Universalist outreach organization. With the advent of the electronic age, beginning with a website in 1999, and podcasts of our signature worship publication, *Quest*, the work of the CLF began to extend beyond the mail and telephone. Since the current Senior Minister, Rev. Meg A. Riley, was called in 2010, the CLF has even more aggressively pursued the adoption of internet innovations to maximize the reach and the depth of Unitarian Universalism.

Maintained in a small administrative office adjacent to the current Unitarian Universalist Association headquarters, the CLF will relocate in the spring of 2014, sharing space on the ground floor of the UUA's new headquarters on Farnsworth Street in Boston. Regardless of location, the virtual nature of the CLF's work actually allows staff, interns and volunteers to live and work from locations all over the United States. The CLF is governed by a nine person board that meets by telephone several times a year, and has face-to-face meetings twice annually. Expert advice from fundraising, finance, communication and nominating committees composed of board members and additional volunteers with expertise in these areas informs the CLF's work.

In recent history, the CLF has revisited and renewed its mission, vision and strategy, and developed the intellectual and structural capacity to serve the broad and emerging needs in the U.S. and around the world for open and welcoming faith communities. Based on these efforts, we unveiled a seekers' website in December 2011, www.QuestForMeaning.org, where we hold online weekly worship services for several hundred people, and connect people in numerous small groups. The CLF provides an online daily meditation via subscription and RSS feed called "The Daily Compass", and has re-launched our

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congregational website, www.CLFuu.org, to provide a more streamlined and organized vantage for an audience already accustomed to the CLF or Unitarian Universalism.

Our six interns, a small staff and a cadre of volunteer ministers and laypeople provide pastoral counseling and support to many: religious professionals and their families, individuals in need of spiritual sustenance, including women, LGBTQ people, those in the military, the incarcerated, young adults, and many others. The CLF communicates with members and faith seekers through various media: mail, telephone, and a vibrant online community featuring written, video and audio content, and maintains a program roster of online worship services, religious education classes and special-interest discussion groups including a Young Adult Group, Youth/ Young Adults of Color Group, Parents' Group, Grief Group, Families/Military group and an Ex-Pat Group. CLF's much-lauded flagship publication, *Quest*, is a regular worship publication mailed to thousands eleven times per year. *Quest* showcases content from liberal religious ministers, thinkers and members from around the world.

Religious affiliation in the U.S. is diverse and fluid, and Unitarian Universalism uniquely addresses this paradigm. Nonetheless, this has not always been a visible or compelling option for many. With deliberate outreach, the CLF is capturing the attention of thousands of 'unenrolled' Unitarian Universalists and bringing countless spiritually unaffiliated people into conversation and commitment. The CLF's work centers on engaging and serving this audience.

B. Please restate the objectives described in your previous proposal, the outcomes since then, and how they were achieved. For any objectives you did not achieve or that were altered, explain why. Please be specific.

In 2013, the CLF continued to build out programs and resources. The generous expertise, advice and time of those who have provided their skills to make the CLF a vibrant online sanctuary continued. New collaborations further enhanced CLF programs and resources. Among the many individuals volunteering their expertise to the CLF include: Rev. Jeremy Taylor, dream symbolism, mythology, and archetypal energy; David Helfer, MBA turned seminarian, helping with strategic and business planning; Dr. Ibrahim Farajaje, Provost at Starr King School for the Ministry, helping to design an outreach program to progressive Muslim communities; a team of weekly guests and hosts at our online 'magazine' show, The VUU; Rev. Marcia Marino, a chaplain offering in-service training in pastoral counseling to our interns; and countless musicians, ministers, and religious educators who contribute pieces for our online worship services.

The CLF's stated objectives from our previous proposal, and the status of those objectives, are outlined below:

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- **Building the CLF as a permanent, sustainable community connected through liberal religion and justice.**

In a nutshell, this objective is the CLF's modus operandi. Indeed it will always be a challenge—and an opportunity—to maintain the CLF's fiscal health while maximizing the impact of CLF programs on liberal religion and social justice.

As in most things, achieving an increased and sustainable revenue stream is the primary indicator of how well the CLF can reach out into the world. Through the expansion of spiritual programming and resources, and increased outreach and visibility, the CLF has cultivated a growing audience committed to the principles of Unitarian Universalism in practice, if not in name. While CLF programs may vary in type and popularity, the stable of CLF offerings has long supported a loving and growing community committed to liberal religion and justice. The CLF's ongoing challenge is and will always be to find more ways to financially support and grow our programs. Fundraising for annual support is becoming increasingly tailored to our donor interests, and with growing audiences, we have a larger pool of constituents outside of our membership from which to enlist support. But building the engagement of the 'seeker' audiences learning about Unitarian Universalism and/or the CLF for the first time is different than garnering annual support from our congregational membership: members are obliged to financially support us, while seekers need to place a 'value' on their association with our community. There is much room to improve our annual fundraising program, especially with our 'seeker' audiences.

The CLF has also recognized that now, more than ever before, we need to place a high priority on developing an effective major gifts program. With a \$5,000 gift from the Fundraising Mini-grant initiative from The Veatch Program at Shelter Rock, the CLF has taken a preliminary step in that direction by developing our case for support: ***Anyone. Anywhere. Anytime. The Campaign for the Online Face of Unitarian Universalism*** (see attached). With the help of staff and the CLF Board, a strategic major gifts fundraising plan is being drafted by CLF volunteer and ministerial candidate David Helfer, who has extensive experience in this arena. David has already begun working with our Board, the Fundraising Committee, and staff to build and execute a successful major gifts initiative. Also, an association of several UU organizations (the **UUA, UUSC, UUMA, Starr King School for the Ministry and Meadville Lombard Theological School**) has begun to consider ways in which we can collaborate on fundraising from individual donor universe that we share to be most effective.

- **Providing a fertile training ground for our Unitarian Universalist leaders of the future, who will require technological savvy to best embrace their work.**

The CLF provides a substantive training laboratory for ministerial candidates interested in learning and applying creative, online applications in UU ministry. In

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the three years of producing online worship and spiritual resources, we have engaged eleven seminarians in our learning and in our ministry. As technology continues to evolve, ministers and ministerial interns are increasingly aware of how society is adapting to a world of on-demand information procured online. To be well equipped to serve churches and cater to spiritual seekers in the future, religious professionals and seminarians are looking for opportunities to shape and learn from and contribute to the CLF's technologically-innovative initiatives. Not only does the CLF enjoy collaborative efforts with many religious professionals, the CLF currently has six interns learning and contributing to different aspects of the CLF ministries. We are honored to collaborate with ordained religious professionals, and feel privileged to serve seminarians hungry to learn. Ministerial interns and other religious professionals with a diversity of life experiences have helped the CLF enrich our online resources with Taize services, Dream Groups, programming centered around young adults, those in the military, families with young children, families of incarcerated individuals, and a multitude of other areas.

Now in progress, the CLF has also created an eight month program entitled **21st Century Ministry: Using Social Media to Reach, Teach and Minister**. Ten congregations, ranging from large to small, comprised of teams of ministers, religious educators, administrators, and volunteers are currently enrolled in this innovative program. We are training them in online skills and the use of technology through large group learning experiences coupled with small group practicum. The **UUA Religious Education Credentialing Office** has approved this continuing education class for credentialing. The CLF is thrilled to provide this kind of training to enhance the cross-pollination of ideas and practices within the Unitarian Universalist movement. While initially we felt it was beyond the scope of our mission, so many congregations asked for it that we decided to reach out in this way and share what we have learned so that others can also develop online ministry. Beyond the ten enrolled congregations, we are allowing key partners, including the UUA staff members who might eventually decide to offer such classes, to view our taped shows and begin to imagine their own ministries in this area. We believe that we will learn as much as we teach in this process, and that more congregations will take risks in online ministry as a result.

- **Streamlining and refining current programs and communication practices, more fully optimizing our websites and electronic resources for social media and search engine optimization (SEO).**

It is challenging for even the most technologically savvy among us to stay ahead of the ever-changing world of technology. The CLF is continually adopting new practices and services, primarily online, in an effort to reach our audiences most effectively. In 2013 the CLF has made significant progress in the way we use social media, the way we reach out to spiritual seekers, and the ways that we communicate with our CLF friends:

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Social Media and Search Engine Optimization:

As a result of a generous \$14,000 grant from the **Unitarian Universalist Funding Panel's Fund for Unitarian Universalism**, in early 2013 the CLF was able to hire Tim Atkins as the CLF's part-time social media coordinator. The former coordinator of **UU Atlanta's Social Media Program**, co-founder of the **UU Media Collaborative**, and a young adult involved in a wide range of online UU social media efforts, Tim has been instrumental in the CLF's growing proficiency with social media. At around the same time Tim came to the CLF, the CLF was awarded an ongoing **Google Grant for NonProfits** grant valued at \$120,000/year in free Google AdWords advertising, and a free, CLF-branded **Nonprofit YouTube channel**. As the prize winner in a contest sponsored by the software company **Blackbaud** for a mobile website, the CLF was able to launch a mobile version of our www.CLFuu.org website in April 2013, making CLF offerings much more user-friendly to those who access CLF services via smartphones and tablets. The combination of these factors has significantly grown the social media reach of the CLF, and we are thrilled.

Skillful developments in social media outreach has led to increased online visibility and enhanced the CLF's ability to reach even more people in our target audience. The CLF is continually optimizing our websites by creating inviting, keyword-rich-text to promote our webpages higher in search results. Using social media, especially **Facebook**, in recent times of crisis and national outrage has enabled the CLF to rapidly respond to events and convene meaningful gatherings. From current happenings in Congress and in Syria, the Sandy Hook Elementary School shootings, the Boston Marathon bombing, reactions to the Trayvon Martin case among others, the CLF has been able to quickly mobilize and respond pastorally to unfolding events with worship services, poetry, video clips, meditations, and other activities, offering online solace and community for hundreds, and sometimes even thousands of individuals.

The CLF's disappointment in this area is that while we have occasionally reached tens of thousands of people (please refer to attached social media report) we strive to regularly reach hundreds of thousands. The CLF will continue to create videos, images and ideas, and disseminate them more aggressively so that they may go viral at levels we have not yet attained.

Relational Database:

The CLF completed conversion to a new fundraising and communications database, **eTapestry**, in November 2012. The adoption of a new database has altered nearly every administrative operation at the CLF—from data clean-up we are still completing, to communicating with numerous constituencies in countless capacities, to financial reporting. Capturing and recording transactional-level details helps

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effectively target and communicate with specific audiences. While the conversion and adjustment process was fairly smooth, managing and executing this organizational change has been a time-consuming and significant diversion for a stretched staff with primary responsibilities in other areas. To communicate with specific CLF audiences most appropriately, we will need to further refine the information we capture on a strategic but also very granular level, with the structural integrity, watchful oversight and staff capacity to record this information in a timely and effective way and develop protocols to accurately extract that information to put it to use. And of course this includes coming to consensus about how the messaging and methods for our communication and programming will change going forward.

Amazon.com:

For many years the CLF has sold inexpensive jewelry and stationery items online and at General Assembly to help fund CLF operations. In 2013, while moving the server housing www.QuestForMeaning.org, the CLF created a CLF shop on Amazon.com, currently featuring our chalice jewelry. Adhering to Amazon.com's strict rules about selling jewelry is challenging, and the creation of the shop was a very detailed and intricate process requiring copious amounts of staff time and energy. The CLF believed that putting our chalice jewelry onto Amazon would increase our orders while untethering us from the daily logistics of the shipping process. Curiously, since the transition in May 2013, sales have been slower than expected. We plan to devote some time to more effectively market and reach consumers interested in these items in the future.

- **Launching an adjunct website, www.clfuu.org, to better serve our congregational members who already embrace the tenets of Unitarian Universalism, to complement our seeker-centered website www.QuestForMeaning.org.**

To complement what we now see as our spiritual seekers website, www.QuestForMeaning.org, the CLF re-launched a more organized and streamlined congregational website, www.CLFuu.org in December 2012. This congregational website focuses on services and resources for our current and future membership. It differs from the outreach-focus of our seekers website, www.QuestForMeaning.org, but is interconnected through cross-links to access resources on either website based upon user needs and interests. In January 2014, we look forward to launching a significantly upgraded version of [QuestForMeaning.org](http://www.QuestForMeaning.org) which is even more user friendly and dynamic.

The CLF still struggles to crystallize how we speak to our audiences—are they seekers? Are they UUs? Are they CLF members? Are they CLF friends? Will language that is UU specific engage them or drive them away? From what vantage

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do we speak to them and which website do we send them to? The CLF is fortunate that two ministerial interns with significant professional experience evaluating process and communications are helping us determine messaging and develop best practices in this area.

- **Go ‘live’ with the CLF’s planned digital radio station to offer around the clock spoken resources to Unitarian Universalists and progressive spiritual seekers.**

In a small way, the CLF did develop our planned digital radio station, beta-launched in April 2013. Unfortunately, we quickly realized that although we had literally thousands of podcast segments available created out of our worship publication, **Quest**, the process was too onerous and labor intensive to extend beyond the initial beta-tests. At the outset we believed it would be fairly simple to arrange a lineup of segments to be broadcast each day, for the most part on auto-. As we delved into the project, it became clear that each segment would need editing, and that each author would need to be tracked down and identified by the current positions they now held, which would frequently involve re-recording and re-editing segments. With other promising programs, and limited staff and volunteer capacity, the CLF determined not to continue this project.

Meanwhile, **Google Plus** developed a new platform called “**On the Air.**” This allows live broadcast on **YouTube** stations, which are then also available on demand. We launched, tongue in cheek, a show entitled “**The VUU,**” where every week a regular panel – CLF ministers Meg Riley and Patrice Curtis, joined by Rev. Joanna Crawford (Houston, TX), Rev. Tom Schade (Ann Arbor, MI) and Rev. Hank Peirce (Westford, MA) lift up current events in Unitarian Universalism. Shows thus far have been wide-ranging. Several hour shows have featured guests talking about spiritual identities—Judaism, Humanism, Buddhism, Christianity, and Islam, with more to come this fall. And in recent weeks we talked about the settlement process, and interviewed an activist who committed an act of civil disobedience. One viewer, a UU from a small congregation in rural Missouri, likened the show to sitting next to a group of influential people in a café during GA and eavesdropping. **Google On the Air** is a much easier way to approach the ‘talk radio’ format than creating our originally envisioned digital radio station, and we look forward to expanding its use.

- **Establish opportunities, networks and platforms to enlist, train, support and monitor volunteer activity to aid in the support and outreach work of the CLF.**

The CLF would not be possible without the extraordinary good will and efforts of hundreds of religious professionals and lay people who volunteer their skills and expertise in the creation or assistance in the creation of blog posts, worship segments, technical and administrative work; volunteers touch nearly every CLF aspect and program. In January 2013 fifteen CLF members and friends convened in New Orleans for five days in a service opportunity, and that effort will continue again in 2014. In 2014, we will also partner with the **Center for Ethical Living** to

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engage youth advisors, religious educators, and ministers in a training program for people who want to lead pilgrimages to places such as New Orleans.

Partnerships with community ministers and other religious professionals have been successful, particularly in times of crises. **Standing on the Side of Love** and **Trans-Spirit** have joined us in our efforts to create 2013's Transgender Remembrance service. This partnership enables us to focus especially on the murders of young transgender people of color, disproportionately represented among the murders. This is one of the CLF's largest online worship services —there were over 1000 participants in 2012's service—and this year the service will be following by online social media projects that extend throughout the week, including an episode of The VUU focusing on violence against transgender people.

The largest group of CLF volunteers are our pen pals, currently numbering 144, who exchange letters with the CLF's incarcerated members on a regular basis. These caring, prolific volunteers participate in a very personal way to increase understanding between UUs on both sides of the prison wall. The Pen Pal Program is a way to put a human face on the entire criminal justice issue, and can be transformative for both pen pal volunteers and our prisoner members.

Enlisting a day-to-day volunteer corps of CLF members and friends, providing and guiding them into fulfilling meaningful volunteer acts of service is a bigger challenge—one that the CLF has become ambivalent about. Yes, the CLF envisions future projects where such volunteers can be essential for success. At this time, however, the CLF is just not sure it has the capacity or the opportunities to develop, recruit, engage and maintain volunteers en masse in a meaningful way.

- **Develop new platforms for hosting online classes and conducting small group ministries, simplifying and enhancing our offerings and making them more accessible to those they serve.**

The CLF is continually testing new platforms to simplify the way that we communicate with our audiences and to facilitate better ways for our audiences to interact with one another. We learn about new services that might help in our work every day, and we look for platforms that are easy to use requiring minimal technological skills and hardware requirements. The CLF's modes of communication are numerous, from **Quest's** printed words on paper and spoken words via podcast, to live video conferencing with our members, real-time electronic conversations during worship services, our Facebook groups and activities, blog posting, etc. We have found that the nature of the project we are working on typically dictates the best mode for presenting that project and we do not rely upon any platform exclusively. Zoom.us, for example, has been a user-friendly way for CLF staff and interns to communicate with each other as well a reasonably simple, relatively low-tech way for discussions with the larger CLF audience.

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C. Please provide concrete examples of outcomes of your campaigns and programs. We are looking for both quantitative *and* qualitative results of your work. (Examples: The project increased voter turnout in 5 targeted precincts by 25%; or by over 2,400 people; or we trained 10 new leaders. The campaign shifted or widened public dialogue; or allowed us to build lasting relationships with unlikely allies.)

Data analytics provide us with a powerful snapshot of the reach and effectiveness of our programs. The CLF has launched many new programs and viewership and participant data is an effective way for us to understand who we are serving, how they interact with us, and what is (or isn't) working. Some statistics:

- We know that www.QuestForMeaning.org has had 66,615 visits from 27,119 unique visitors this year.
- The Daily Compass, the CLF's daily meditation, has 575 subscribers, and reaches many more through Facebook, our CLF websites and our Google AdWords activity, garnering 6,962 unique click-throughs in September 2013 alone.
- Our website visitors come from 88 countries and speak at least 10 native languages other than English.
- The CLF's active Facebook pages have 4,266 likes, growing from 2,600 at this time last year. Our most widely shared post occurred after the Trayvon Martin verdict was issued, with 36,688 page views and 580 shares.
- When weekly online worship began in beta test in September 2011, 43 of our most enthusiastic supporters participated via invitation. Now online worship is open to all, and as of September 2013 at least 675 participate in online worship every week, more than 1,400 participated during the Boston Marathon bombing services, and we expect to see participation at that level during the Transgender Day of Remembrance online worship service on November 17, 2013.
- The CLF has a visually inviting electronic newsletter emailed to 909 CLF members and friends each week to provide timely reflections as well as to inform and engage our audience about CLF happenings.

The most current CLF Social Media Data Analytics report is attached, and it details some of the significant events and trends in further detail.

It is also important to note some statistics regarding the most substantial CLF population—and a group that is one of our most active despite being offline: The 500+ incarcerated members of our Prison Ministry.

- Prison Ministry members complete multi-lesson, essay-driven courses through the mail. An astonishing 800 non-credit courses have been taken by prisoner

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members since 2007. These classes are often the first opportunity for many prisoners to seek their own truth and meaning by exploring Spiritual Life, World Religions and other spiritual topics in-depth.

- The CLF's incarcerated members love to read, but mailed books are usually forbidden. The CLF's Reading Project makes more than two dozen spiritually progressive books available in prison-mail-friendly reading formats. The hunger for liberal religious perspectives in our prisons is great—150 reading packets are printed and mailed each month, every month.
- CLF prisoner members write letters through the CLF's Letter Writing Ministry—in 2013 the CLF will facilitate more than 2,000 friendly letter exchanges between volunteer pen pals and incarcerated CLF members on topics of mutual interest.

D. Did your work produce any unanticipated results? Please describe any lessons learned through the process of carrying out your work or evaluating it. Be specific if there were any changes to your organization that were made as a result of what you have learned.

Earlier we discussed the CLF's planned digital radio station and the reasons we abandoned that project. Another lackluster project that the CLF experimented with this year was an attempt to create an interactive expression of UU religious education through electronic games, supported by a grant from the **Unitarian Sunday School Society**. In retrospect, we should have undertaken this project with a less electronically technical, more practical approach. So much effort was put toward researching, understanding and developing the technology required to execute a video-game type experience, that when early beta tests received a lukewarm reception, we understood that we had not approached the concept in the right way. The CLF recognizes now that we should have brainstormed more to create a technically simple electronic game that was compelling, relevant and engaging to our audience. Most of all, we should have begun our game project with simple exercises utilizing social media and other electronic venues we already had developed a facility for, only growing them into more technical games as we gained more technical capabilities and envisioned a more compelling premise.

One positive surprise has been the growth of the internship program. We had not anticipated the level of interest, or the level of skill that interns could bring into our ministry. Originally we had envisioned working with two interns; that number has now expanded to six. Our learning experience with them, in turn, has spawned our interest in reaching out and sharing what we've learned with congregations. The teaching/learning dimension of what we are doing, ahead of the curve of most of our congregations, is an element of our work that holds promise beyond what we have currently actualized. We expect future developments in this aspect of our ministry, particularly as the **UUA's** "Congregations and Beyond" vision continues to gain traction. In addition, the United Church of Christ, who are launching an online congregation, have

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asked Meg Riley to present a keynote speech to the initial crowd which gathers to envision that effort.

Organizationally, the CLF is very fluid. The CLF board, staff and ministerial interns are adept at multitasking and thrive on experimentation. The CLF expects a certain number of surprises (and failures) in its work, as taking risks and forging new paths are part of that landscape. As a result of our failures, and many bumps in the road, we have tried to learn from our experiences and improve the quality of the rest of the work.

E. For membership organizations: What is your current membership? How has your membership grown or deepened during the last year? Please provide numbers. What circumstances helped or hindered your membership and leadership development? If you were to organize a rally or participate in a mobilization, how many people do you estimate your organization could turn out?

As a congregation, our members come from all over the world, and represent all sorts of audiences. CLF membership numbers, at 3,363, have been relatively constant in recent years, but that does not reflect the whole story. “Membership” is a fluid concept when you are both a congregation and an outreach organization. Membership is one pathway to monitor engagement, but is not a requirement for participation or access to most CLF resources. Although there will never be completely accurate ways to gauge every CLF encounter, as discussed earlier, analytics help the CLF more accurately tally online participation.

The CLF operates as a virtual congregation but in many ways is also a non-profit spiritual service provider. With our online presence and special focus on attracting spiritual seekers, the majority of CLF resources are deliberately available to everyone regardless of membership status. This duality has prompted the CLF to think through just what it means to be a CLF member and whether or not membership is something to encourage, as we redefine potential pathways to engagement and/or membership. Meanwhile, our fundraising committee has recommended aggressively building our membership base to secure additional membership revenue, something we have heretofore not attempted. The fundraising committee envisions reaching out to people who are already committed to Unitarian Universalism and asking them to join the CLF in support of our outreach ministry. These considerations are complex, time consuming and in preliminary stages—meanwhile the CLF has focused on increasing our reach and exposure rather than directly increasing membership. We look forward to clarifying our strategic goals in this direction in the coming year.

The CLF’s prison ministry, at 500+, represents nearly 15% of the CLF’s total population. Another metric to consider, however, is that we have had 54,566 unique visitors to the CLF’s various websites. We are still undergoing an examination of the rules of engagement for our audiences. When we are both an organization seeking to engage spiritual seekers in addition to serving as a congregation, membership numbers don’t really tell the whole story, and we struggle with this dichotomy.

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The CLF, being a largely electronic community dispersed throughout the world, could not convene a significant group of people for a rally or mobilization. That being said, the CLF encourages and inspires members and friends toward social justice, and has been a supportive sounding board in the aftermath of such events.

**F. What is the demographic make-up of your constituency, staff, and board?
(Examples: Our current constituency is approximately 25% Latino and 50% African American, and 25% white; our current staff of five includes three white people and two People of Color; our current board is 50% low wage workers, 25% undocumented immigrants, and 25% women.)**

It continues to be difficult to ascertain the demographics of the CLF constituency, because for the most part, we have never met them in person! And again, the CLF membership is only a fraction of those who are touched by CLF programs. What we do know is that among CLF members, there are 1,621 members under the age of 30 in 67 different countries. 2,627 are women, and members have self-reported 545 children. Other ways we view the constituency: 2,167 ministers are minister members, and 1,213 additional UU ministers receive the CLF's worship publication, *Quest*, published 11 times a year, as a gift from the CLF membership. We have 3,107 members in the United States. There are 528 CLF members who are incarcerated. The CLF also has a worship and religious education resources program for small congregations called "Church Online" which services 54 small groups.

Although demographics are difficult to gather from the anonymity of the internet, our burgeoning efforts to attract spiritual seekers have resulted in an even greater influx of visitors coming from all over the world, who have, as expected, varying degrees of interest and participation.

The CLF's current twelve person staff is comprised of three Caucasian women with full-time status, and seven women with part-time status--one identifying as biracial, the rest Caucasian. Two are lesbians and, one part-time young adult male. Four staff members are UU ministers. As noted last year, for many years there has been little employee attrition: CLF employees enjoy their work and each other, and appreciate the flexibility afforded part-time staffers. This collegial working environment does, however, contribute to the uniformity of our staff. As staff openings become available, the CLF will actively seek qualified minority group candidates of varied backgrounds to fill unmet needs. Our interns include five women and one man; one African American and five Caucasians.

Our current nine-member board consists of three women, six men, three ministers and one person of color. We are, as always, dedicating our efforts to increase CLF board diversity by seeking qualified people of color and mindful of recruiting board members capable of leading the CLF into a promising future. In the past several years, we have gained a great deal more age diversity on the board, and are committed to racial

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

diversity as well. As the reach and effectiveness of our online sanctuary continues to grow, the CLF audience will likely change, but a fully representative board is unlikely: the current CLF membership consists of a disproportionate number of people who would be unable to serve in a leadership capacity due to mental illness, physical or extreme geographic isolation, very low incomes, or incarceration.

G. What impact has the Veatch Program grant had on the work of your organization? Has our grant enabled you to undertake new work that you hadn't been able to consider in the past? Has it amplified your impact or increased your organizational capacity? Explain.

The CLF is grateful for the money gifted by the **Veatch Program at Shelter Rock** in 2013. The CLF was beginning to feel the strain of swift programmatic growth when we received your initial \$25,000 grant: donors as well as staff were beginning to show signs of fatigue. The **Veatch Program at Shelter Rock** money, in providing overall support, has helped the CLF maintain our infrastructure by alleviating some of the stress associated with financially sustaining it. This generosity has enabled the CLF to proceed with project-based initiatives supported from outside funders, as there are fewer worries about supporting basic CLF operations. An example of this is the social media coordinator, who was funded in part by the **Unitarian Universalist Funding Program's Fund for UU**. Progress with social media would have suffered had this initiative not have the proper guidance and infrastructure to support it. **The Veatch Program at Shelter Rock** made it possible for the CLF to maintain consistency and momentum, better utilizing the talents of existing staff, interns and other volunteers.

An additional \$5,000 from the **Fundraising Mini-Grant Fund** at the **Veatch Program at Shelter Rock** helped the CLF to develop a Case for Support as we build our capacity to raise major gifts from individual supporters.

Veatch funding has resulted in a more secure, capable CLF better able to maintain our core and elevated operations while we continue to work on building financial capacity with our new and existing audiences.

H. Please provide personal stories of two individuals or families whose lives were affected by the results achieved by your organization.

Due to painful congregational dysfunction that alienated many long-time congregants, Mark quite reluctantly left his local bricks and mortar church in Virginia about a year and a half ago. Nonetheless, Mark wanted to maintain the UU connection that had been an important part of his life for the previous eighteen years. Remembering that he had heard about the CLF when he went through the new member orientation at his former bricks and mortar church years before, he found the CLF online and thought he would "drop in" from time to time as he sought a new spiritual home. What he discovered, though, was that he liked the people he was meeting in the online services, as well as the folks who were conducting/facilitating worship. Before long, the CLF services became an essential part of his week. Even better, Mark lives in Sweden for six months

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

of the year, and discovered that wherever he is, he needs only to find an internet link to permit him to connect with his "church" community. Mark is grateful that the CLF is here/there/everywhere for him and everyone else.

Eileen has this to say: "What does CLF mean to me? Well, for 14 years, CLF served my family when we lived too far from a local UU church for regular participation. When a Fulbright year took me to South Africa in 2009, I turned to CLF again for services while abroad. Now I maintain my membership in CLF as my constant congregation wherever I travel internationally or when I am home in the states; I attend my local congregation when I can, but CLF provides the year-round continuity I need. Through the Facebook groups and chats, I have seen how important CLF is to individuals isolated by geography or by circumstances such as health or military service. Recently I became a pen pal to a prisoner member, and I look forward to this new experience as well. Through CLF's ever-developing international ministry, we meet each other where we are and grow together."

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

II. RENEWAL PROPOSAL (begin on a new page) (A-F)

A. Describe the specific goals, objectives, and activities for the coming year. If the proposed work represents a departure from previous years, please explain why. If not, please describe how your work in the coming year will further advance the goals you have been working on.

- 1. Achieve clarity in the platforms and the voices the CLF uses to speak to its differing audiences. Make our ministry accessible and visible to those who seek it.**
- 2. Scrutinize operations and streamline and simplify the administrative activities that keep the CLF running.**
- 3. Establish a successful major gifts program.**
- 4. Create new fundraising opportunities, increase donor segmentation and experiment more with online fundraising to complement the existing activities for raising annual support.**
- 5. Evaluate the financial structure of the CLF to maximize financial resiliency.**

The CLF has entered a particularly exciting era. With more than 50 worship services a year aired more than 150 times; *Quest* published 11 times a year; online classes; workshops; daily blog posts through outlets such as www.QuestForMeaning.org, www.patheos.com, www.dailycompass.org, www.clfuu.org and other venues; a weekly newsletter; online conferences with CLF members and friends; The VUU—a weekly live chat broadcast discussing issues of the day; a vibrant prison ministry; social media activities; pastoral care; potential work lifting up CLF’s family ministry and religious education programs as well as reinvigorating our young adult offerings, particularly those overseas and/or in the military; guiding the experiences of six interns and embarking on a major gifts campaign, our work is cut out for us. As the CLF becomes increasingly complex, internal communications and protocols are being reviewed. Overseeing and managing the collective efforts of staff, volunteers and interns to ensure our work gets done presents many logistical and operational challenges. Staff and interns, ever mindful of the need to streamline and simplify, are scrutinizing all of our activity to help the CLF function more effectively and smoothly—from where to archive worship service sessions to best practices when convening online video conferences and everything in between.

B. Outline the criteria you will use to determine the success of your work. Rather than explaining the internal process you use to evaluate your work, we are looking for the

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

specific measures or benchmarks that will indicate that your work has succeeded or progressed. As much as possible, please let us know the number of people who will be affected by your successes.

Like last year, increased visibility, increased participation, and increased commitment are the determining factors to measure the success of the CLF's work. The online nature of our work allows access to evaluatory metrics that bricks and mortar churches just don't have, and we can adjust our programs and focus in response.

That said, as we are still considering what it means to be a CLF member, it is difficult to put precise benchmarks into writing. In general, however, we are looking to have a significant reach and impact with the estimated 35% of the world not aligned with traditional religions, but who are spiritual seekers. The quantifiable metrics we imagine for the next three years look something like this:

1. Reach 100,000 people with Unitarian Universalism's saving message of love, hope and inclusion. Use social media to strategically speak to our progressive, spiritual target audience; building credibility through public witness and earned media relevant to our target audience.
2. Engage, support and deepen the faith of at least 5,000 people participating in the CLF's vibrant, multifaceted community. Creating meaningful programs to add value to participants' lives (e.g. prayer groups, purpose groups, thematic groups, classes in spiritual living, etc.); engaging experts in small group organizing to collaborate and engage people on and offline.

C. What are the challenges and opportunities for building progressive power in your context over a three or five year period? How does the work of your organization contribute to the long-term goal of building permanent progressive power in your region, state and nationally?

The CLF sees its role in building progressive power as one that is less tangible, perhaps, than most. As it has throughout its history, the CLF endeavors to build a sustainable global spiritual community cultivating wonder and imagination, as well as commitments and connections to justice. The CLF strives to enhance understanding and increase awareness about the existence of our liberal religious principles. Discovering and practicing our progressive faith within a global community supporting like-minded individuals can lend strength to the voices of local progressive power.

The CLF will continue to enhance its collaborative structure to widen the reach and influence of progressive liberal faith in action. The CLF will collaborate with bricks and mortar congregations with the desire to offer their ministries to others beyond their own walls (to satellites and to the world); with UU theologically or culturally based groups, offering services, talks or classes lifting up their faith-center (ex. **UUJA, CUUPS,**

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DRUUM, Interweave, among others); and with justice-centered organizations to offer opportunities for online, justice-creation (ex. **Standing on the Side of Love, UUSC, CA Legislative Ministries, UUA Washington Office**).

D. How does nonpartisan civic engagement work fit into your organization's strategy?

The CLF is committed to the widespread dissemination of our progressive faith, and is mindful of becoming a thought leader in many social issues of our day. In that sense, the work of the CLF ministry dovetails with the advancement of nonpartisan civic engagement.

In recent times, the CLF seeks the engagement of others by offering compelling resources and dialogue through social media and by the provision of content to external mediums, most notably **The Huffington Post** and **Patheos.com**. The CLF and a great many of its members and friends are committed to **Standing on the Side of Love**, an initiative formed and initially directed under the leadership of the CLF's current Senior Minister, Meg Riley.

E. Is your organization engaged in multigenerational organizing? Is there youth organizing or a youth program?

With the myriad changes the CLF has undergone in the past three years and the tasks before us, the CLF is not yet at the point where it can realistically explore the possibility of deliberate efforts toward multigenerational organizing.

Although for a long time the CLF has offered educational materials for younger children through our worship publication and through other religious education resources, the CLF does not have organized collaborative youth activities online, in part because of internet security concerns. The CLF is actively pursuing funding to develop a more comprehensive and dynamic family religious education program to create a website that lifts up educational resources, online experiences, family worship, exercises and activities to engage and inform the spiritual lives of Unitarian Universalist and seeker families, and we look forward to fulfilling this aspect of the CLF ministries.

F. Please list the organizations that you collaborate with in a significant way and describe the nature of your collaboration. If you participate in any national, state or regional coalitions, campaigns or other collaborations, please describe how partnerships have affected your work. Please identify other Veatch Program grantees involved. For a current list of Veatch grantees, please visit our most recent Annual Report www.uucsr.org/veatch. Please make certain that you indicate whether or not a UU Congregation at Shelter Rock member is on your board.

In recent weeks, the CLF has joined into a partnership with the **Unitarian Universal Association, Unitarian Universal Service Committee, Starr King School for the Ministry**

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

and **Meadville-Lombard Theological School** to explore how we can effectively advance Unitarian Universalism by coordinating our major gift fundraising efforts. The assembled group recognizes that there is a rather small universe of individuals who have the capacity and the interest in making large-scale contributions to any of our causes, and that it makes sense to see how we might work together to best meet the needs of individual donors and maximize the impact their contributions might make to the UU movement and to our respective organizations. Our organizations are still deliberating rules of engagement for this fundraising coalition, but the CLF feels strongly that our participation in this will help elevate the CLF's prominence in the Unitarian Universalist fundraising arena.

Our collaboration with the **Center for Ethical Living in New Orleans** will continue, and we are delighted that they are also a **Veatch Program** grantee. We will collaborate with **Trans-Spirit** this year, as well as **Standing on the Side of Love**, for our Transgender Day of Remembrance Service. We have also collaborated with the **Women's' Alliance for Theology, Ethics and Ritual** to lift up feminist theology. Our collaboration with **the UU Trauma Response Ministry** will continue to enhance our ability to react swiftly to tragedies like the Newtown shootings and the Boston Marathon bombing. Our collaborations will continue to grow and evolve, as we test potential partners for viability and capacity.

The CLF does not have a member of the **UU Congregation at Shelter Rock** on our Board of Directors.

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
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III. FINANCIAL REQUIREMENTS (A-E)

***PLEASE NOTE:** As of JULY 1, 2013 the Unitarian Universalist Veatch Program at Shelter Rock **no longer requires applicants to submit ANY form of budget** with your Report on Funded Activities or Request for Funding. Please do **NOT** submit budgets adapted from other foundation proposals, the budget prepared for your Board or any other type of budget/planning document.*

**ALL APPLICANTS (RENEWAL AND NEW)
MUST PROVIDE THE FOLLOWING MATERIALS FROM:**

**EITHER
COLUMN A OR B**

A. AUDITED FINANCIAL

STATEMENTS: All applicants, incorporated 501(c)3 and fiscally sponsored projects, are required to provide us with Audited Financial Statements (draft or final) from your most recent fiscal year end.

- If your fiscal year is **July 1 – June 30**, you must submit statements as of June 30, 2013.
- If your fiscal year is **January 1 – December 31**, you must submit statements as of December 31, 2012.
- If you have a fiscal year that is not consistent with the guidelines above and you need assistance determining what timeline applies to your organization, please email denise@veatch.org.
- If you have a fiscal sponsor, see below for additional details.

B. AUDIT ALTERNATIVES: If you do not have an audit or it has not yet been prepared you **MUST** submit financial statements from the list of documents below.

Please note that you must submit one from each column. We recognize that our grantees use many different software programs to track your financial information; we have included the three most common names for the reports we are requesting.

If you are not clear what to submit, please contact denise@veatch.org.

1.	2.
Quick Books Balance Sheet Standard Report	QuickBooks Profit Loss Report
Balance Sheet	Income and Expense Statement
Statement of Financial Position	Statement of Activities

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

11:44 AM
09/26/13
Accrual Basis

CHURCH OF THE LARGER FELLOWSHIP
Balance Sheet
As of December 31, 2012

	Dec 31, 12
ASSETS	
Current Assets	
Checking/Savings	
1001 - Citizens Bank - Checking - UR	52,778.13
Total Checking/Savings	52,778.13
Other Current Assets	
1103 - A/R - Other \UR	
1103a - A/R Meg Riley (A/R Meg Riley for AT...	216.95
1103e - Elavon A/R (Elavon - Credit card proc...	88.00
Total 1103 - A/R - Other \UR	304.95
1201 - Prepaid Expenses \UR	3,343.15
1202 - Ppd Postage - Bulk Permit \UR (Permit N...	1,362.07
1300 - Inventory - Ord Service Covers (Order of...	2,465.61
1302 - Inventory - Jewelry \UR	2,391.70
1303 - Inventory/Notecards (UU-Themed Notec...	2,417.73
1400 - Endowment Funds	
1401MM - Citizens Bank MMkt/Endowment (ts...	48,762.58
1401VG - Vanguard FTSE Social Index	161,303.22
1401VGM - Vanguard Money Market Account	3,063.69
1402 - UUA - Common Endowment Fund	1,682,278.57
Total 1400 - Endowment Funds	1,895,408.06
Total Other Current Assets	1,907,693.27
Total Current Assets	1,960,471.40
Fixed Assets	
1501 - Furniture & Equipment \UR	
1501a - Original Cost	32,131.01
1501b - Accum Depreciation	-25,897.01
Total 1501 - Furniture & Equipment \UR	6,234.00
1502 - Lending Library	2,003.61
	2,003.61

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09/26/13
Accrual Basis

CHURCH OF THE LARGER FELLOWSHIP
Balance Sheet
As of December 31, 2012

	Dec 31, 12
Total Fixed Assets	8,237.61
TOTAL ASSETS	1,968,709.01
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Credit Cards	
2000c - Capital One Visa (Media One Visa Cr...	4,939.36
Total Credit Cards	4,939.36
Other Current Liabilities	
2000b - Loan from CLF Investments (Loan fro...	62,000.00
2002P - Accrued Prof Xpenses/PrisonMini (Sa...	1,236.95
2004 - UUA PYRL/Misc Chgs (Reimbursemen...	-936.92
2006 - Deferred Revenue	25.00
Total Other Current Liabilities	62,325.03
Total Current Liabilities	67,264.39
Total Liabilities	67,264.39
Equity	
3000 - Net Assets	
3000res - Permanently Restricted Funds (Perm...	169,533.50
3000tmp - Temporarily Restricted Funds (Funds...	44,882.40
3000ur - Unrestricted	1,359,435.09
Total 3000 - Net Assets	1,573,850.99
3900 - Retained Earnings	220,346.06
Net Income	107,247.57
Total Equity	1,901,444.62
TOTAL LIABILITIES & EQUITY	1,968,709.01

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RENEWAL APPLICATION**

11:58 AM
09/26/13
Accrual Basis

**CHURCH OF THE LARGER FELLOWSHIP
Profit & Loss
January through December 2012**

	Jan - Dec 12
Ordinary Income/Expense	
Income	
4000 - Contributions (Parent acct for all types of cont...	385,806.24
4005 - Church On Loan Income (Main A/C for Subs/...	28,146.00
4008 - Retail (Non-Jewelry) (books, posters, etc)	2,774.21
4009 - Jewelry Retail Activity (income & expenses)	15,150.49
4010 - Trust Income (Pooled UUA CEF funds and Te...	26,343.39
4011 - Grants	32,967.66
4101 - Misc Income (Uncategorized contributions)	1,198.81
4200 - Draw from Endowment Funds (Transfers for ...	108,652.00
4300 - Rel Educ Program Income (Income/Expense)	1,674.00
Total Income	602,712.80
Gross Profit	602,712.80
Expense	
5000 - Salaries (Accrual All Base Salaries)	414,174.81
5050 - Indep Contract/Outsourced Activ (Accrual Edit...	68,038.66
5103 - Annual Program Fund - UUA (Accrual)	21,933.00
5104 - Bank & Credit Card Fees Activit	7,623.52
5105 - Board & Committee Expenses (Accrual)	7,890.12
5106 - Bulk & 1st Class Mail Prep. (Accrual)	7,661.13
5112 - Equip. Rental & Maint. (Accrual)	2,436.58
5113 - General Assembly (Accrual)	6,540.04
5119 - Postage (Accrual)	24,752.49
5120 - Printing & Production (Accrual)	26,051.46
5125 - Expenses for Staff	577.11
5127 - Supplies (Accrual)	2,579.54
5129 - Telephone	2,790.50
5130 - Professional Development	1,647.18
Total Expense	594,696.14
Net Ordinary Income	8,016.66
Other Income/Expense	

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

11:58 AM
09/26/13
Accrual Basis

CHURCH OF THE LARGER FELLOWSHIP
Profit & Loss
January through December 2012

	<u>Jan - Dec 12</u>
Other Income	
7000 - Non-operating Revenues (parent account for En...	227,882.91
Total Other Income	<u>227,882.91</u>
Other Expense	
6002 - Endowment Fund Transfers	128,652.00
Total Other Expense	<u>128,652.00</u>
Net Other Income	<u>99,230.91</u>
Net Income	<u><u>107,247.57</u></u>

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
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C. CURRENT AND PROSPECTIVE FUNDER LIST

All applications must include a list of your current and prospective foundation funders. This can be in either Microsoft Excel or Word and must include the name of the foundation; the amount they currently give or are projected to give; and if they are a current or prospective funder.

Status	Funder	2013	Anticipated future project support (2014 or 2015)
Current/Prospect	New York State Convention of Universalists: Gave \$4,000 toward Young Adult Outreach in April 2013.	\$ 4,000	\$4000?
Current/Prospect	The Society for Propagating the Gospel Among Indians and Others in North America —received \$1,200 in May 2013 for general operating support.	\$ 1,200	\$1200?
Prospect	Unitarian Sunday School Society -- May 2013 online family religious education program proposal, declined \$5,000 request.	\$ -	\$3500?
Current/Prospect	Unitarian Universalist Funding Program-Fund for Unitarian Universalism: Family Ministry Website proposal currently under consideration for the fall 2013 grant cycle, \$20,000 request.	\$13000?	\$10,000?
Prospect	Unitarian Universalist Women's Federation—Equity and Justice Program. March 2013 proposal requesting \$5,000 for online worship services targeted at women, declined.	\$ -	\$5000?

D. NARRATIVE QUESTIONS

Please answer the following questions in a separate Microsoft Word document along with your financial statements.

- 1. Describe the current status of your foundation fundraising efforts. We are interested in learning about any new funders you have secured in the last year, any**

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

fundere you will have/will be cycling off from, and any other unexpected changes (good or bad) in your overall foundation fundraising.

Over the years, the CLF has received numerous grants, typically under \$5,000, from UU foundations and grant making entities. As a progressive, faith-based congregation, the pool of potential funding sources is rather small. We continue to align ourselves with leaders in other nonprofit arenas with different vantages on foundations that could possibly open doors for us through word-of-mouth referrals, program partnerships or other possibilities.

As our programmatic sphere expands, the CLF will also likely find foundations whose goals are in alignment with our work. One example of this is the hopeful development, pending the outcome of a **UUF Fund for UU** proposal approval now being considered, of a family-centered website to spiritually engage and enrich the lives of families. This and programs like this might open up new foundation avenues that the CLF can approach.

The potential funders the CLF has interacted with in the past year:

- **Google for Nonprofits:** Ongoing in-kind Google AdWords grant valued at \$120,000/year, plus a CLF branded **YouTube** channel.
- **New York State Convention of Universalists:** Gave \$4,000 toward Young Adult Outreach in April 2013.
- **The Society for Propagating the Gospel Among Indians and Others in North America—** received \$1,200 in May 2013 for general operating support.
- **Unitarian Sunday School Society--** May 2013 online family religious education program proposal, declined \$5,000 request.
- **Unitarian Universalist Funding Program-Fund for Unitarian Universalism:** Family Ministry Website proposal currently under consideration for the fall 2013 grant cycle, \$19,910 request.
- **Unitarian Universalist Women's Federation—Equity and Justice Program—**CLF-Produced Online Worship Series for Liberal Religious Women, March 2013 \$5,000 request declined.

2. Are you diversifying or trying any new approaches to fundraising (e.g., matching grants, grassroots fundraising, events, new appeals, major donor development, or government grants)? If so, what were the results?

The CLF is always mindful of the need to sustain our operations with fundraising revenue, and is attempting to increase our annual support by enhancing our ability to target specific audiences and tailoring our appeals to their interests using improved data collection, tracking and reporting. We are also crafting a more comprehensive "multi-channel" fundraising strategy coordinating our appeals via electronic mail, paper mail, social media and worship service messages to optimize results. We have had limited success using social media by itself to drive contributions, but coordinated media appeals will bolster fundraising success.

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

The CLF has had limited success with challenge grants offering CLF friends the opportunity to increase the impact of their gift. Our experience is that without a truly timely and compelling occasion to draw funding, our donor base has grown weary of this tactic and donations remain level. A challenge fund presented to CLF Friends commemorating Meg Riley's installation as senior minister for the CLF, which coincided with an initiative to develop the www.QuestForMeaning.org website, was resoundingly successful. This challenge took place in June and July of 2011, and 920 donor households responded with \$100,771, compared to the same time period in 2010, when 550 donor households made CLF contributions totaling \$46,039. When a challenge fund was initiated in November and December of 2012, an effort funded by a group of leading CLF donors, the CLF did not experience an increase in revenue or number of contributing households. In fact, a few significant donors opted to participate in the challenge opportunity by earmarking contributions for 2012 that they traditionally would have made in 2013, thereby creating a revenue gap in the current year.

The CLF has had some success from its efforts to secure special collections from congregations, particularly in support of the CLF's Prison Ministry, a program uniquely serving the social justice priorities of many congregations. Although the CLF's Prison Ministry is compelling, the challenge is the varied approaches, connections, and efforts required to be considered as a special collection candidate in any given congregation, and the unpredictable timing and revenue outcomes. This initiative defies systematizing, and a consistent revenue stream from congregational support is elusive. Nonetheless, our efforts in this area are ongoing, and since 2009 the CLF is grateful to have received gifts from the following 26 churches:

East Shore UU Church
Eliot Unitarian Chapel
First Parish Church UU
First Unitarian Church of Oakland
First Unitarian Church, Omaha, NE
First Unitarian Church, Portland, OR
First Unitarian Church, Rochester, NY
First Unitarian Society of Minneapolis
First Universalist Church of Denver
First Universalist Church, Minneapolis, MN
First UU Society of Exeter
Fox Valley UU Fellowship, Inc.
Main Line Unitarian Church

Maumee Valley UU Congregation
Rogue Valley UU Fellowship
The Unitarian Society: A UU Congregation
Unity Church Unitarian of St. Paul
UU Church of Canton
UU Church of Reading
UU Congregation of Atlanta
UU Congregation of Marin
UU Fellowship of Ames
UU Fellowship of Central Oregon
UU Fellowship of Los Gatos
UUs of Clearwater FL Inc.
West Shore UU Church

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK RENEWAL APPLICATION

As already noted, the CLF recognizes that now, more than ever before, we need to place a high priority on developing an effective major gifts program. The \$5,000 gift from the Fundraising Mini-grant initiative from **The Veatch Program at Shelter Rock**, the CLF took a preliminary step in that direction by developing our case for support: ***Anyone. Anywhere. Anytime. The Campaign for the Online Face of Unitarian Universalism*** (attached). With the help of staff and the CLF Board, a strategic major gifts fundraising plan is being drafted by CLF volunteer and ministerial candidate David Helfer, who has extensive experience in this arena. David has already begun working with our Board, the Fundraising Committee, and staff to build and execute a successful major gifts initiative. Also, an association of several UU organizations (the **UUA, UUSC, Starr King School for the Ministry and Meadville Lombard Theological School**) has begun to consider ways in which we can collaborate on fundraising from individual donor universe that we share to be most effective.

3. **Based on your most recent fiscal year end, what do you expect to be changing in your current fiscal year? For example: major new expenses, major savings, staff expansions or contractions, new programs or campaign expenses, or major capital costs (moving or expanding your office space, major computer upgrades, new databases, buying a building or building maintenance etc.)**

The CLF will be leaving its current office space and joining the UUA at its new headquarters at 24 Farnsworth Street in Boston in the first half of 2014. Although there certainly will be costs associated with this move, we are not yet certain what they will be.

Once the CLF moves, housing expenses for our two 'in-person' board meetings per year will rise. The CLF Board is accustomed to staying at Pickett and Eliot Houses, and the CLF enjoys a very reasonable rate to accommodate our board in an extremely convenient locale. Indeed, the current CLF offices are housed in the basement of that building. We anticipate finding future accommodations at the going market-rates in Boston—an unavoidable expense, but significantly higher than we are accustomed to paying.

It is also a likely possibility that the CLF will invest in a fundraising professional to staff our upcoming major gifts initiative. The travel budget will need to expand to accommodate any prospect and donor visits made by CLF staff and board in these efforts.

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

IV. ATTACHMENTS (A-B)

- A.** Please send up to three brief and concise supporting materials (recent media coverage, executive summaries, or reports).
- Attached please find the CLF's Analytics Report summarizing salient social media outreach statistics.
 - Also attached, the Case Statement entitled ***Anyone. Anywhere. Anytime. The Campaign for the Online Face of Unitarian Universalism***
- B.** Please send up to three recent photos of your work. We use grantee photographs for our outreach materials and within our sponsoring congregation. Please indicate the date and what event or campaign is depicted as well as a description of the people (and their names if available) in the photo. We can only accept digital photographs submitted by email to denise@veatch.org.

Photos follow, and will also be submitted to Denise@veatch.org

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**



January 2013—CLF Volunteers Unite in Service in New Orleans.

UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION

CLF



www.DailyCompass.org



**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
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V. OPTIONAL QUESTIONS (A-B)

- A. We are always interested in hearing stories about Unitarian Universalist involvement in social justice work around the country. If there is any noteworthy engagement by UU's in the work of your organization, please take a minute to share it with us.**

At this time, the CLF maintains no record of our member involvement in external social justice activities.

- B. How many staff hours did your organization spend to complete this application? Is it more or less cumbersome for your organization to submit applications through an online grants application management system?**

Because this application was very much a collaborative effort it is difficult to quantify the amount of time spent completing it—although it certainly involved more than 20 hours. Much of the CLF's work is conducted, like our ministry, virtually—our staff and interns are scattered all over the country in multiple time zones, each with their own area of expertise, and each essential to representing the CLF most fully in a grant application.

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Because this application has had multiple editors and document versions, we anticipate it might be challenging, but not impossible, to submit applications through an online grants application system. Revisions and adding details might be tricky. That said, if there was the ability to cut and paste text from a traditional word processing program into such a system, and it could be saved for multiple editors to review over several days, there would be minimal difficulty with electronic submissions.

**UNITARIAN UNIVERSALIST VEATCH PROGRAM AT SHELTER ROCK
RENEWAL APPLICATION**

Unitarian Universalist Association of Congregations



25 Beacon Street, Boston, Massachusetts 02108, USA

(617) 742-2100

FAX (617) 367-3237

<http://www.uua.org>

Kathleen Montgomery
Executive Vice President

January 14, 2005

Ms. Lorraine Dennis, Administrator
Church of the Larger Fellowship
25 Beacon Street
Boston, MA 02108

Dear Lorraine:

Under the current Internal Revenue Code provisions and the regulations issued thereunder, churches are automatically tax exempt, I.R.C. Sections 501(a), 501(c)(3) and Sections 508(c)(1)(A). A church is not required to file an application for recognition of its exemption, Treas. Reg. Section 1.508-1(a)(i)(a). Enclosed are copies of these sections. You may also obtain a copy of I.R.S. Publication 557, entitled "Tax Exempt Status for your Organization," from your local I.R.S. office, which you will find helpful.

Enclosed is a letter regarding the standing of your church with the Unitarian Universalist Association.

Should you need any further assistance please be in touch with us.

Sincerely,

Kathleen Montgomery
Executive Vice President

KCM:nl

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Kathleen Montgomery
Executive Vice President

January 14, 2005

To Whom It May Concern:

I hereby certify that the Church of the Larger Fellowship, Boston, MA, is a member congregation in good standing of the Unitarian Universalist Association of Congregations.


Kathleen Montgomery
Executive Vice President
Recording Secretary

KCM:nl