

Church of the Larger Fellowship
Board of Directors meeting
March 28, 2008

Staff Reports

Report from the Senior Minister

February 23, 2008

We hear it all the time: “The Church of the Larger Fellowship is unique.” Most of us understand what people mean by that—the comment invariably derives from the fact that our membership doesn’t gather in person.

And yet, the longer I serve the CLF, the more I experience us as an ordinary large congregation:

1. We are clear about our mission.
2. We care about one another. If you want to be in touch with other CLF members, you can be. If you’re inclined to reach out with kindness and concern or if you ask for support, we welcome that. At the same time, anonymity is an option too.
3. We offer a wide variety of programs and resources—we’re more than “Sunday morning.” We offer choice.
4. We reach beyond ourselves with substantial social justice work.
5. We count on member pledges and contributions, and fund-raisers, to keep us thriving.
6. The congregation is in charge, and the board, and the staff runs things day-to-day, just like in other large congregations.
7. We are diverse. And we reach out.
8. Our way of worship, *Quest*, matters most to our membership, whether it’s accessed in podcast form, print, or online.

Maybe it’s because I’m a minister, but I like ordinary congregations! And like any minister, I am grateful for all those CLF members, generous of spirit, who are our living, breathing congregation.

Jane Rzepka

Report from the Executive Director, Lorraine Dennis

As I read the staff reports which follow, I've been reflecting on my grand good fortune in working here at the CLF. These staff members, though all part-time, are completely committed to the CLF and to their constituencies. They all work very hard and care deeply about the work they do. We provide a lifeline to many isolated UUs around the world and are always working to create new programs for our members and for the growth of Unitarian Universalism. We also try to do our work in the most efficient way we can and to manage our finances in a responsible way so that the CLF will be here for many years to come.

You will read that we have increased the numbers of new full and trial members, the number of trial members converting to full membership and, thus, the number of email responses and questions asked and answered. We continue to explore and use every free or inexpensive advertising venue we can discover. From the UUA's monthly congregational mailings to the newsletter of the European UUs, we promote the CLF and our programs everywhere. We have streamlined our jewelry fundraising sales so that our margin has increased from 40-41% in the past to 62% in 2007.

We continue to increase the number of individuals and congregations who use our religious education materials. Our online courses offer excellent materials for study by members and non-members and we have expanded the scope of the curriculum resource work we do to include not just our families and the smallest congregations, but also religious educators working in our mid-size and larger churches. We offer community online for those who want it and a fine worship publication for all.

Member and non-member solicitations are articulated clearly and managed efficiently via regular mail and electronically. We continue to generate contributions ahead of budget, and with the help of the board, hope to find new major gifts donors among members and non-members this year.

Our congregation continues to train seminarians and offer opportunities for learning in our unique congregation. And, our prison ministry continues to grow in size and in depth of programming. The CLF leads the movement in ministry to incarcerated people. Our correspondence courses offer prisoners, and a few free-world people, the opportunity to expand their knowledge of Unitarian Universalism and world religions as well as their knowledge of themselves and others on their spiritual journeys.

Our visibility at GA grows each year, and even though we expect registrations to be lower this year, we will be in Fort Lauderdale spreading the word and selling our jewelry and UU-themed products.

And finally, i am proud to work with such a motivated group as this Board of Directors. You are also our faces out in the UU world and we appreciate your support and good work here at the CLF. Thank you for all you do for the CLF and for Unitarian Universalism.

Report from Cindy Salloway, CLF Fiscal Administrator (26 hrs per week)

I joined the CLF staff in July 2007. Prior to my taking on the responsibilities of fiscal administrator, I attended a 2-day QuickBooks training workshop. Although I had completed accounting and finance college courses and had a number of years work experience in the accounting field, the QuickBooks software training was extremely helpful in getting me up to speed technologically. Upon my arrival at CLF, I was fortunate to have a few weeks to work with the accounting temp who had been filling in since Donna's departure in April. I had a lot to learn and accomplish in a short period of time.

My main responsibilities include:

- Accounts payable.
- Daily deposits to operating account.
- Anticipating, tracking, and implementing all income and expense entries into QuickBooks Accounting System and reconciliation of CLF general ledger operating accounts on a monthly basis.
- Reconciling UUA monthly charges to CLF for payroll, postage and mailing supplies, telephone, and expenses incurred for CLF activities at General Assembly.
- Monthly reconciliation of CLF operating and money market bank accounts.
- Monthly reconciliation of PayPal credit card account which processes CYF membership payments and CLF Religious Education online courses.
- Monthly financial reporting on CLF and CYF operating budgets to CLF Board and CYF Steering Committee.
- Reconciliation of Point of Sale merchant accounts used for processing CLF retail shop, Church on Loan and Religious Education Express.
- Monthly reconciliation of income recorded in QuickBooks Accounting System with income recorded in Raisers Edge database.
- Monitoring and monthly reconciliation of postage, jewelry and other retail inventory accounts.

I enjoy working at CLF. The work is challenging and my co-workers are wonderful to work with. Although the responsibilities of a fiscal administrator require that I work mostly independently, I feel well-supported here at CLF and I'm very appreciative of the good advice offered to me by CLF Treasurer, Brad Bradburd. I am happy to be a part of the CLF team and look forward to continuing to grow both professionally and spiritually.

Report from Iris Hardin, Membership Administrator and *Quest* Publication Manager (24 hrs per week)

Email and Phone Inquiries

- I receive all email sent to clf@clfu.org, the email address advertised on our website and in our literature/PR. I forward the messages I can't or shouldn't answer to the appropriate staff. I answer the majority myself. Due to the increasing number of inquiries we receive (*see chart below*), responding in a timely fashion is a real challenge. We have much greater visibility at GA, religious/spiritual seekers on the Internet find us easily, and we are increasingly seen as a resource to the Districts for membership information and to smaller congregations and fellowships for worship materials. This is all very good news, of course! The only problem is that my ability to respond hasn't changed with the increase in interest. The CLF gets email on a tremendously wide range of topics, including questions about :

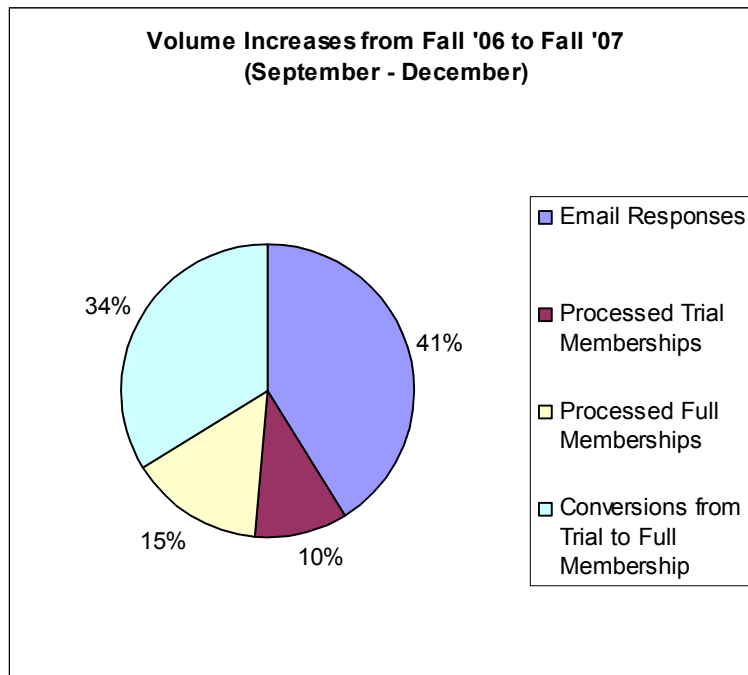
→ Unitarian Universalism in general, how an online religious community works, how the CLF accommodates religious professionals, membership fees and other requirements for membership, whether we will be more welcoming than a local congregation was to someone of particular religious/political beliefs, where our members are located, how we may support members living in areas of the world where it's dangerous to be a UU.

We also get:

→ requests for pastoral support, feedback on *Quest*, feedback about something the UUA is doing, requests from District Execs for membership lists, inquiries about our RE program ...and the list goes on!

In order to keep up with the current volume of email, I need to respond to 30-40 inquiries/day.

- I participate in the “phone ministry” of the church. Both members and others looking for information often call the CLF. I love connecting with people in this personal way.



Membership Administration

- I perform the following tasks: process new CLF/CYF member applications, discontinue members who no longer wish to affiliate as CLF members, and update member information in the UUA database. Periodically, I work with the CYF to do a sanity check relative to their membership rolls. I handle all “tricky” membership cases.
- As with email inquiries, there has been an increase in membership activity during the last year. (*See the above chart.*) **Even with our 200-member purge in the spring of 2007**, where we discontinued members who had not made a contribution in 2 years, **we still certified a membership of 3301 members with the UUA, up from 3020 from the previous year.** Note: Before discontinuing memberships, we sent letters to non-givers, asking them to re-commit to the CLF with a donation, let us know of a need for a financial waiver, or indicate their wishes to end membership.

Quest Publication Management

- *Quest* is identified by many of our members as the most important aspect of their CLF membership.
- It is my job as publication manager to produce a monthly calendar/schedule of where we are and should be with the 3 *Quest* issues that are always in the pipeline, reminding the Editor and other team members what they should be reading, writing, and editing at any particular time.
- I secure permissions for publication from ministers and other authors and do the recording with ministers who wish to come into the office to prepare their podcasts.
- I track layout and artwork issues, and I have responsibility for getting *Quest* out the door each month.

General Support and Special Projects

- I provide support to other staff members who need to mine data from the Raiser’s Edge database.
- I moderate one of the CLF’s online SIGs – Special Interest Groups. I typically lead or at least motivate the discussions for the group for Parents and Friends of Special Needs Children.

Report from the Program and Marketing Administrator, Beth Murray (21 hrs per wk)

Library

With so many CLF resources now available online, library requests have diminished. However, books, curriculum and video tapes are still mailed on a regular basis.

CLF Groups

We currently have 2 CLF International groups, and 48 Church on Loan groups. This is 7 groups higher than the fall. I have established a more stream-lined application and renewal process such that groups can begin using CLF resources immediately, rather than having to wait for material to be mailed.

New Member Packets

126 new full members have received membership packets since last fall. I mail out their packets.

Jewelry

From October – February, 351 jewelry orders have been fulfilled from October 1, 2007 – March 4, 2008. The process for ordering has been stream lined, such that we now have a better means of authorizing credit cards, tracking inventory, generating invoices, generating mailing labels, etc.

RE Express Plus

133 people are currently subscribed to RE Express Plus, 26 of whom have paid the \$129 subscription fee.

Advertising

Church on Loan Contacts, email

2007/10/01	www.thegreatstory.org/UU-practices.html
2007/11/01	CLF Library -- new materials
2007/12/01	Gifts
2008/01/01	Spirit of Life, from LFD
2008/02/01	KidTalk

Congregational Mailing, pdf flyer

2007/10/04	Note Cards, & Order Serv. Covers
2007/10/25	Gifts
2007/12/06	Quest
2008/01/03	Fundraising
2008/02/07	Order of Serv. Covers

District Executives, email

2007/10/04	Church on Loan
2007/11/15	Jewelry
2007/12/06	Quest
2008/01/10	Cantata: Sources
2008/02/15	RE Express Plus

Emerging Congregations, email

2007/10/25	www.thegreatstory.org/UU-practices.html
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Interconnections, email text

2008/01/10	Cantata: Sources
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LREDA, flyer

2007/10/30	Shared Interest Groups
2008/03/10	Spring gifts, Ord. Svc. Covers

Newsletter Fillers, email

2007/10/25	New Lapel Pins
2007/11/29	Note Cards
2007/12/18	Quest
2008/01/24	KidTalk

Religious Leader, pdf flyer

2007/08/30	Prison Ministry
2008/01/10	Cantata: Sources

Starting Small, email list for groups

2007/09/04	“Congregations Count: Evaluating Your Membership Process.” from Susanna Whitman
2007/09/27	www.thegreatstory.org/UU-practices.html
2007/10/29	CLF Library -- new materials
2007/12/03	CLF Gift Shop
2008/01/03	Spirit of Life, from LFD

UNIFIER, (EUU) email

2007/10/30	CLF Online Courses
2008/01/31	Invite a Friend

UUMA, email and flyer

2007/10/30	Shared Interest Groups
2008/01/31	KidTalk

Young Adult News, email

2007/09/18	CLF Online Courses
2007/10/23	CLF Library -- new materials
2007/11/20	Gifts
2007/12/18	Quest
2008/01/17	CLF Online Courses

Report from the Minister for Lifespan Learning, Lynn Ungar (21 hrs per wk)

Covenant Groups are doing exceptionally well at moment. After a rough spot during which we suddenly lost two facilitators and some months of having no new facilitators available, we now have three new groups starting. Particularly exciting is the fact that these facilitators will be running these groups on our Online Learning Center (OLC), rather than using the UUA Mailman server like our other CGs and SIGs. This new format not only allows CG members to post profiles with pictures and to share documents, it also means that these groups are no longer dependent on the UUA's time frame in order to be approved for start-up. Jane and I have been talking for some while about what might be the best platform to host our online small groups, and this is a very exciting experiment, and feels like real progress.

Shared Interest Groups (SIGs) are under review. While we have a wide variety of groups, and a large number of people enrolled, for many of the groups there is little ongoing interaction.

RE on the Web Site has been revised, making the range of resources clearer, easier to search and more tailored to the needs of particular groups. Coming up with monthly content for the KidTalk web page takes a chunk of my time, but it is well-received. We are in the final stages of consideration for a grant from LREDA to expand Between Sundays and create a web page oriented toward DREs.

On-Line Courses are going well, although support for (nagging of) teachers is labor intensive.

Recent/current classes include:

Leach/An Introduction to Ralph Waldo Emerson – 14 participants

Kane/Spirit of Life —9 participants

Aikman/Sacred Depths of Nature — 15 participants

Shaffer/The Courage to be Liberal — 13 participants

Two more classes will start in June/early July, with another two starting in the fall.

We received a grant of \$3,000 from the UUWF to sponsor a set of three classes by Elizabeth Lerner on ancient and modern feminine religious images, and a grant of \$10,000 from the Fund for UUism to pilot offering a custom-made version of our For New Unitarian Universalists class for congregations to host on their own congregational websites.

CLF Forums are not heavily trafficked, but we do get a steady stream of responses to the questions that I post for the *Quest* Forum.

Curriculum takes substantial portion of my time, with the creation of the CLiF Notes: A Curriculum for Families and Small Groups each month. This year the curriculum focuses on the great theological questions such as “What (if anything) is God?” and “What happens when you die?” This curriculum is emailed out to the 285 members of the CLF-RE list, and to the 133 subscribers to RE Express Plus (of whom 26 are paid subscriptions).

Report of the Director of Development (consultant), Lisa Kielt (20 hrs per wk)

A little over one year in for me, it continues to be a thrill and a pleasure to working with the CLF team--staff and board alike. Everyone has played a role to ensure financial contributions keep pace with the continual evolution of programmatic and administrative elements in this unique gem of a church.

Some of my work involves:

- Developing and implementing paper and electronic fundraising appeals.
- Working with the Board on the identification and cultivation of select CLF members and other outside major donor prospects.
- Fundraising messaging.
- Fundraising committee member conversations and meetings.
- Further identifying and developing potential revenue sources beyond the CLF membership.
- Streamlining donation booking procedures to better reconcile Raiser's Edge with QuickBooks, reducing processing time.
- Providing more in-depth fundraising analysis allowing for better fundraising strategic planning.
- Ensuring CLF compliance with IRS mandates and rulings, including donor substantiation, gifts of securities and marketing special giving initiatives.

In 2007 the CLF exceeded budgeted fundraising expectations of \$279,000 by \$33,000. This year there is \$57,500 increase in fundraising expectations, totaling \$336,500, even as 2008 is showing its colors as a year with an uncertain US economy. There is no question that the CLF has a unique and compelling mission. Again, the challenge is to maximize the CLF brand to leverage fundraising in numerous, new and different ways. Sustaining CLF's rich history and expanding its outreach can only be accomplished through increased monetary support. Major individual donations are one critical area where I will need the help of the Board more than ever before.

Report from the Intern Minister, Dan Kane (20 hrs per wk)

I am the sole ministerial intern this year at the CLF. Like previous interns, my time is split between the CLF and Arlington Street Church, approximately 20 hours per week at each site. I am performing many of the duties that prior interns have, which includes working on the editorial team of Quest to locate, edit and write pieces for publication, creating eight complete worship services for the Church on Loan program, and communicating with and providing pastoral care to CLF members and friends via telephone, email and written correspondence.

I am also co-moderating the CLF's existing GLBT online shared interest group and have created an online shared interest group for CLF members who are providing care to ailing loved ones. I also monitor the online Quest forum discussion groups.

A project very near and dear to my heart is one that I am working on with Rev. Patty Franz, leading a correspondence course for our prisoner members. We are offering the nine session *Spirit of Life* curriculum created by Rev. Barbara Hamilton-Holway. We started out with 18 class participants and at the half-way point of the course have 15 class participants, including an incarcerated husband and his free

world wife. Following Patty's practice, I compile excerpts from each class session's responses that we send out to class participants with each successive new session. I have also created a separate document of the participants' poems, prayers and writings that will be given to class participants upon their completion of the course. Class participants are unaware that this booklet is being created so it should be a pleasant and inspiring surprise reflecting their efforts in completing the course. I am also leading this same curriculum as an online course through the CLF Online Learning Center.

Finally, I am also involved in CLF's ongoing effort at becoming an officially-designated Welcoming Congregation. The details of this effort will be more fully explored during the Board meeting itself.

Report from the Director of Ministries for CLF Prisoner Members, Patty Franz (15 hrs per wk)

The CLF Prison Ministry continues to grow in numbers and program offerings with each passing year.

Our **Correspondence Courses** have been met with enthusiasm! and half of our prisoner members are either taking a course, have completed one, and/or are on a wait list to start one. In the year and a half since we began our 'trial run' of **NewUU**, over 50 prisoner members have completed this three-lesson correspondence course and received a Certificate of Recognition for their efforts. Other students who didn't complete the full course still benefited from receiving the information in the lessons.

The first dozen prisoner members in our 11-lesson **World Religions** correspondence course just finished it after more than a year of mailing lessons back & forth; another 20 students began the second 'class' last July and are halfway through. Intern Minister Dan Kane is leading another dozen 'pioneers' in our correspondence course adaptation of the **Spirit of Life** course recently posted on the UUA website.

One of my priorities for this year is offering more courses to more students on the waiting list. I'm ready to offer **UU History** to the 20-30 students who've been *asking* for this course; **World Religions** to another 20-30 students who joined before 2007; and **NewUU** and **Spirit of Life** to others. Reading all students' responses to the questions in each lesson, and excerpting their responses onto a '*Reflection and Response*' sheet that's sent with every next lesson, continues to be one of the favorite parts of my job.

I've also secured approval from Skinner House Books to download a few of their UU 'starter' books and re-format the texts so they can be printed on loose-leaf sheets and mailed like letters to our prisoner-members ~ thus bypassing prisons' increasing restrictions against prisoners receiving 'books' in the mail. I already have a waitlist of prisoner members eager to receive chapters of these texts later this year, and hope to expand this **Book Project** in the future to include more Skinner House and Beacon Press books.

I've also arranged with the UU Christian Fellowship, Interweave, and CUUPS to send their newsletters to our prisoner-members for free on request, and hope to add more groups in the coming year.

Our **Letter Writing Ministry** continues strong: about half our prisoner-members are writing to 'free-world' UUs, and the CLF forwarded over 1,400 pieces of 'penpal' mail last year. Most of our free-world letters writers are non-CLF members - so the benefits of this ministry are being shared with UU congregations around the country - and many of them are becoming long-term volunteers in the Letter Writing Ministry, so they're growing in experience and commitment with each new 'match' they're given. A dozen of them also gathered for a 'penpal lunch' and spirited conversation at General Assembly last summer.

Over 350 prisoners across the country have joined the CLF, and they now make up over 10% of the CLF's membership. As they are members who cannot (with notable exceptions) make donations to cover the cost of the services they receive, I continue to be aware of the need for careful stewardship of the prison min-

istry's resources in funds and staffing. We're glad that we can still offer a free membership in the CLF to any prisoner who asks to join - but after careful consideration of the services we offer and the needs we try to address, we've just begun a practice of having new prisoner members join for a one-year 'starter' membership. As in the past, they will receive CLF's *Quest* every month and *UUWorld* magazine 4x/year, and they will be encouraged to complete our 'NewUU' correspondence course. New prisoner members who don't complete 'NewUU' will still be able to continue their membership and receive our publications, but only those prisoner members who have gained 'a solid footing' in UUism by completing 'NewUU' will then be able to take additional correspondence courses and/or apply to our Letter Writing Ministry.

I continue to be grateful for the strong support that the Prison Ministry receives from the CLF Board and staff. Funding for my position was increased significantly last year, and the CLF continues to find funds for our paper-and-postage-intensive programs. The CLF is providing a valuable and life-saving ministry to folks who have few others ways to connect to Unitarian Universalism, and I continue to be grateful for the opportunity to give my time and energy to growing and strengthening this important ministry.

Report from the Office Assistant, Sue Conley (10 hrs per wk)

I have been working as a part-time office assistant at the CLF since January 2007. I have enjoyed working for such a wonderful organization and with such friendly hard-working co-workers.

The bulk of my job is processing pledges and gifts from CLF members and a few non-members. I process both checks and credit card donations, including automatic credit card gifts and bank deposits.

I also enter all gifts in the CLF/UUA data base. I work closely with the Fiscal Administrator and Development Director to make sure that the gifts are recorded with information that can be used for financial reports and solicitations.

A much smaller part of my time is spent contacting donors about expiring credit cards or other problems or questions about their gifts. If I have time I help out with miscellaneous office tasks.