

Report from the Senior Minister
March 11, 2007

You are a board of directors that embraces change. Luckily, you work with a staff that also embraces change. The usual clichés—“we’re all afraid of change,” “change is scary and hard,” “institutions resist change”—those really don’t apply to the CLF in most of the ways that count.

Interns who served us a year or two ago don’t recognize the place when they come back to visit. They see us working on programs we hadn’t yet envisioned, using technology we hadn’t yet learned. Super-Sized RE Express? Segmented financial appeals? *Enhanced* podcasts? Correspondence courses for prisoners? Off-site accounting software; ftp sites for *Quest, uu&me*, and podcasts; automated production scheduling. They wonder what that stuff *is!*

I have heard about a newsletter column by my colleague John Nichols that conveys an obvious message, though it is a message that’s never been obvious to me: No matter how many gazillion excellent programs a congregation offers, members and potential members will always want more.

While I am, frankly, prone to the seduction of new adventures in the service of the CLF’s mission, in many ways I am an old-fashioned minister. And so I do my best to serve the religious needs of our members, to provide religious education for children and adults, to offer spiritual community for our young adults and fellowship for our membership, to help in working for the good, and to provide outreach on behalf of us all. Fundamentally, in spite of the zip and dazzle of our newest offerings, the ministry of the Church of the Larger Fellowship is much the same success story that the Rev. George Marshall enjoyed in the early days, only more so. We are a congregation like no other, and having you in the CLF board room is what’s behind it all. I thank you for that.

Jane Rzepka

Report to the CLF Board
Lorraine Dennis, Executive Director
March 2007

Though everyone on the staff except Jane and me is part-time, they are all very committed to their work and the CLF. You will see as you read their reports that each staff person has important pieces of program or administration or both that they manage and that everyone has a large portfolio, even though they work only 5-26 hours per week. We are an energetic motivated staff group and I am honored to work with everyone.

The big news for me this month has been the departure of our long-time Fiscal Administrator, Donna Dudley. She has been here just a few months fewer than I, so we have been partners in the financial management of the CLF for a long time. We will miss Donna so much around the office and it will be difficult to replace her. We have begun a search and will report to you all when we find someone – either a new Fiscal Administrator or we will hire a temp since we cannot let the financial tasks linger.

I am optimistic about 2007 for several reasons. Our new fundraising initiatives will soon begin influencing the bottom line. We have some board members working on fundraising, and with Lisa's expertise and enthusiasm, this year and next can provide a badly-needed infusion of new contributions to the CLF for our work in the world. At General Assembly in June, the CLF Ingathering will bring CLF members, board, and staff together at the beginning of GA and the CLF Worship Service will take place on Sunday morning, which should give us excellent visibility. We continue to provide quality programs and services to CLF members, our small groups, and the movement.

It's also time to say goodbye to several of you. I will miss you all. Donna and I have worked very closely with John Lees, our Treasurer, on the financial management of the CLF. Alicia Forsey has lent her quiet expertise around fundraising and planned giving. Tad Crawford has worked to increase our visibility and communication with our members, as well as serving as our official Clerk. And Ken Gross, who had to leave us last fall, shared his expertise around fundraising and investments. On behalf of all the staff, our best wishes to all.

Thanks so much to all of you for the work you do for the CLF and for Unitarian Universalism.

Report to the CLF Governing Board
Donna Dudley, Fiscal Administrator, 26 hours per week
March 14, 2007

This will be my last report to the GB, as I prepare to depart for work at the Unitarian Universalist Service Committee. It has been a great blessing, both personally and professionally, to work for the CLF.

I started work here just over six years ago, working 8 to 10 hours a week. I was trained by Donna Clifford, who was the CLF accountant for the previous 14 years! After a few months I was able to take on all of Donna C's work as she transitioned out of CLF, and I believe I increased to 15 hours. At that time I was the single parent of two young children, 6 and 12 years old. I sure did need the money, but without the enormous flexibility of scheduling that I was afforded, I could not have done it. As the complexities of the job increased along with responsibilities, I took on more hours, finally arriving at the magical number that entails benefits. It's a credit to the CLF that when considering staffing and budget decisions, fair compensation and economic justice issues prevailed. The Fiscal Administrator position has been 'professionalized' by these changes and this can only help in making it more attractive to a future candidate.

I don't underestimate the value of going to work every day for an organization whose mission is to make the world a better place. Perhaps that is why I chose not to stray too far from this type of organizational mission. Of course, there are no 'get rich quick' opportunities in such choices, but the good life can be had in so many other, more meaningful, ways.

If you're still reading along, I've saved the best for last. I'm sure you long-time board members will not be surprised to hear that the best part of working for the CLF are the people who work here. For you newer board members, you will see what I mean soon enough. If, in the future, I find myself working in a group that is only half as good, I will feel fortunate. I leave with the fondest of memories.

So as to not short change the business component of this report, I would like to share with you what I feel are my two most important contributions to the CLF:

* Identified inadequate mitigating controls and instituted new and improved internal-control structures, particularly around cash receipting, record-keeping, and reconciliations across systems. Changes to processes and procedures, along with high degree of work accuracy, has resulted in increased integrity and confidence in operating and balance sheet reports.

* Recommended and implemented changes to the way income/expenses are recorded and presented so as to be in conformity to accounting best practices and GAAP when appropriate. Developed specialized Excel spreadsheets to facilitate ancillary record-keeping (deferred revenue, etc) and intra-organizational reconciliations.

I have also included below the current Fiscal Administrator job description. It's a good overview of the position and will give you a general idea of what I do:

- Process & record, accurately and timely, all CLF/CYF financial transactions in Quickbooks. This includes accruals, reconciliations, invoices, UUA charges, payroll, POS, PayPal, Authorize.net, transfers, journal entries, etc. That is, all bookkeeping functions from data entry through trial balance. Generate monthly financial statements, or special reports as requested, for CLF and CYF activity. Regularly assess Quickbooks along with the processes in place for collecting, recording, and presenting financial activity, so that relevant financial information can be reliably and accurately reported.
- Post, or oversee posting, of all pledge and constituent contributions to records in Raisers Edge database. Generate reconciling Cash Receipts Journals for all gift postings to properly allocate and record income to QB and reconciling to bank deposits. Periodically reconcile member, Minister, PenPal, COL donations between QB and RE.

- Raisers Edge: Query/Database: know, run, maintain, update or create a variety of queries and exports for: Quest, gift/contribution reporting, Statement mailing, membership information.
- Assist in development of Budget. Spread budget by month as well as expanding totals into component parts through use of sub- and contra-accounts if necessary.

Farewell to you all and best wishes as you steward CLF into the future.

Donna

Report to the CLF Board, March 2007
from Iris Hardin (24 hours)
Membership Administrator and *Quest* Publication Manager

I continue to divide my 24 hours each week amongst a variety of responsibilities.

Membership Administration and Email Inquiries

- I continue to perform or delegate the following tasks: process new CLF/CYF member applications, discontinue members who no longer wish to affiliate as CLF members, update member information in the UUA database. Periodically, I work with the CYF to do a sanity check relative to their membership roles. I handle all “tricky” membership cases.
- I participate in the “phone ministry” of the church. This remains one of my favorite aspects of working at the CLF.
- I continue to receive all email sent to the CLF mailbox; triage is the name of the game when it comes to managing email inquiries. (Note: We are increasingly seen as a resource to the Districts for membership information and to smaller congregations and fellowships for worship materials.)

Quest Publication Management

- 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 and podcasting from ministers and other authors and am Toby Rzepka’s Boston backup recorder for podcasting.
- I track layout and artwork issues, and I have responsibility for getting *Quest* out the door each month.

General Support and Special Projects

- I continue to develop my Raiser’s Edge knowledge and put it to use by providing support to other staff members. For example, I recently worked with Patty Franz to add codes to prisoners’ records and develop queries that will allow her to more efficiently contact segmented groups of the prison population.
- This month’s “special project” is the non-givers’ purge, which we decided to postpone until after the annual canvass. Roughly 250 members/households who have not made a donation in 2 years will receive a letter asking them to affirm their commitment to the CLF with a donation or let us know of their desire to discontinue membership. (The letter makes it clear that no action will result in discontinuation.)
- I recently took on the role as moderator for the new Special Interest Group for Parents (and friends) of Special Needs Children.

Report to the CLF Board
March 2007
from Lynn Ungar, minister for lifespan learning, (20 hours)

Covenant Groups continue to gradually expand, with one new group about to start, and more than enough people for another group on the waiting list. I have created an online training course for covenant group leaders, which is proving to be helpful.

Special Interest Groups (SIGs) have expanded to include groups for UU humanists, people with special needs children, and full-time RVers, as well as previously existing groups for retirees, GLBT folks, people dealing with physical illness, people dealing with mental illness, UU Christians, UU pagans, writers and people living outside the US.

RE on the Web Site continues to evolve as we work to make resources more complete and easier to find. Menus are under revision, as well as pages describing and pointing to various resources. Coming up with monthly content for the KidTalk web page takes a chunk of my time, but is well-received by folks I talk to about it.

On-Line Courses are going well, although support for teachers can be labor intensive. Recent/current classes include:

Killoran/The Art of Balanced Living – 15 participants

McDonald/Passing it On: The Legacy of your Life Experience —8 participants

Aikman/This I Believe— 8 participants

Hurto/Healthy Families: A Systems Approach—9 participants

Hurto/Healthy Churches: A Systems Approach – 12 participants

Four more classes will start in March or April, with another planned for July or Aug.

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 another chunk 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 “sources of our living tradition.” This curriculum is emailed out to the CLF-RE list, but is available by subscription to non-members. We are about to up the subscription rate for RE Express (which includes this curriculum) to \$129/year and include the RE Index of online CLF RE materials, which will be behind a password.

REsources in *Quest* is also included in RE Express.

A **Grant** I wrote to the UU Sunday School Society is providing \$2000 to produce last year’s CLiF Notes curriculum on disc.

Respectfully submitted,
Lynn Ungar

Report to the Board
Fundraising Consultant
Lisa Kielt 20 hours per week

First off, thank you all for welcoming me so warmly! What a thrill for me to have the pleasure of working with the CLF team. Staff and board alike have proved to be just as Jane and Lorraine promised--an enthusiastic and talented group. Mindful of your demonstrated depth of commitment to the CLF, in my work I am most certainly going to take advantage of you all!

Since starting in January, some of my projects include:

- Auditing and modifying current development processes to reflect “best practices” methodology.
- Reviewing fundraising history and messaging.
- Redesigning and implementing Raiser’s Edge coding modifications.
- Preliminary fundraising analysis.
- Canvass 2007 re-mail.
- Statement mailing to members giving \$250+ during 2006.
- Board follow-up materials packet for cultivation of select CLF members.
- Fundraising committee member conversations and meeting.
- CLF member and other major donor prospecting.
- Framing the landscape of future membership appeals.

While continuing to build and maintain smoothly flowing development operations, my “top line” work will now be directed toward the identification and cultivation of major donor prospects, electronic member messaging and solicitations, implementing fundraising committee resolutions, planned gift marketing, and incorporating fundraising messaging wherever I can.

There is no question that the CLF has a unique and compelling mission. 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. I am most pleased to be here to help CLF contributions grow.

Report to the Board, March 2007
Beth Murray (21 hours)

Library

Since October, 36 books or video tapes have been mailed
 In addition, sermons are sent as email attachments on a regular basis

CLF Groups

We currently have one CLF International group, and 35 Church on Loan groups.

New Member Packets

109 New Member packets have been mailed from October – March 13 (each packet weighs 1.25 lbs.!)

Jewelry

340 jewelry orders have been placed online since September. Many more orders via telephone and snail mail.

RE Express

76 people are subscribed to RE Express, 12 of whom have paid the \$99 subscription fee

Advertising

Church on Loan Contacts, email

2006/09/01	New Library materials
2006/10/01	Letter Writing Ministry
2006/11/01	Gifts
2007/02/01	More Gifts
2007/03/01	Changing password

**Congregational Mailing, pdf flyer
 (to all congregations)**

2006/09/12	Letter Writing Ministry
2006/10/11	Gifts
2006/11/10	Jewelry with photos; Gifts
2006/12/11	Online Classes
2007/01/10	Invite a Friend
2007/02/12	Shared Interest Groups
2007/03/12	Between Sundays

District Executives, email

2006/10/15	COL
2006/11/27	Note Cards
2006/12/15	Online Courses
2007/01/15	Library
2007/02/15	Shared Interest Groups
2007/03/15	Between Sundays

Emerging Congregations, email

2007/02/15	COL
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**Interconnections, email text
 (goes to congregational leadership)**

2007/01/19	RE Express Plus
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LREDA, flyer

(UU religious educators)

2007/03/15	Limerick poster
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News You Can Use, email

(UUA staff and district staff)

2006/09/01	Online Courses
2006/10/10	Interns at CLF
2006/11/03	Note cards
2006/12/08	Online Classes
2007/01/08	Invite a Friend
2007/02/12	Coming of Age Curric.

Newsletter Fillers, email

(CLF subscription service for use in church newsletter)

2006/09/01	Podcast
2006/10/01	Letter Writing Ministry
2006/11/01	Gifts
2006/12/01	Jewelry
2007/01/01	Online Classes
2007/02/01	Invite a Friend
2007/03/01	Shared Interest Groups
2007/04/01	Link to home pg, & Jewl.

**Religious Leader, pdf flyer
(to UU ministers, religious educators,
musicians, administrators)**

2006/09/15	Letter Writing Ministry,
2007/01/15	CLF-What's in it for me?

**UNIFIER, email
(European UUs)**

2007/02/01	Invite a Friend
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**UUMA, email and flyer
(UU ministers association)**

2006/11/01	Gifts
2007/02/01	CLF-What's in it for me?

Young Adult News, email

2006/09/01	Get Our Name Out There
2006/10/01	Use Quest archives to find readings, sermons
2006/11/01	gifts: jewelry, note cards
2006/12/01	CLF Library -- new materials
2007/01/02	Online Courses
2007/03/01	Shared Interest Groups

2007 Report from the Director of CLF's Prisoner Ministries, Patty Franz, 8 hours

This has been an exciting year of growth for the CLF Prison Ministry!

Letter Writing Ministry

A year ago I reported that, of the 120 pairs on CLF's list of 'penpal' matches, I found only 40-45 that were still corresponding. In the wake of my research, we began using "Letter Writing Ministry" as a more accurate description for our program, revised the "Guidelines" to make them clearer and stronger, and put more energy into publicizing the program in the wider UU world.

Since last spring, our Letter Writing Ministry has grown to 133 active matches, which means that almost half of our prisoner-members are in active penpal matches. The CLF continues to forward most letters from prisoners to their penpals, so I regularly monitor the matches and take the initiative to contact penpals when any match appears to be faltering, to offer my assistance in either reviving the match or bringing it to a 'caring conclusion'.

Almost all our 'free-world' UU penpals are on an email list/chat that I use frequently for announcements and education, and penpals often email me off-list to ask for my advice about their matches. About 2/3 of our 'free-world' UU penpals are members of UU congregations all around the U.S., and all penpals who are not members of CLF are regularly solicited for an annual donation.

Most penpals ~ both 'free-world' and incarcerated ~ report that they are "*getting more than [they] ever expected!*" from their participation in our Letter Writing Ministry. I plan to continue expanding our outreach efforts in the wider UU world, with the goal of being able to match our prisoner-members with more than one 'free-world' UU penpal at a time, if they desire this...

Correspondence Courses

As the CLF, the UUA, and the world move more resources onto the web, prisoners (with no access to the web or email) are being left in the backwater. To address this, I've begun developing "correspondence courses" that our prisoner-members can take on-paper through the mail. We ran a successful trial-run of a 3-lesson "NewUU" course last fall, and I recently mailed Lesson One of "NewUU" to another 50+ prisoner-members who requested to take it. We've just begun offering an 11-lesson "World Religions" class, and I've already got waiting lists for this course and two other correspondence courses I'm hoping to develop ("UU History" and "Building Your Own Theology").

Every lesson ends with 'Reflection & Response' questions to encourage students to articulate their own thoughts, beliefs, etc., and when students mail back their responses by a given deadline, I choose excerpts from every student's writings to compile into a whole-class "R&R" sheet that is mailed with the next lesson. This allows prisoners to see their own words in print (something they almost never get to see) and also allows them to read what other students are thinking/writing.

The compilation of the "R&R" sheets, plus the photocopying (on a desktop copier), collating, and mailing of individual lessons, makes this program very labor-intensive and time-consuming, but it is - and will continue to be - one of the most valuable services we can offer our prisoner-members.

Overview

The CLF now has 300 incarcerated members (almost 10% of CLF's membership), although our rate of growth has slowed as we've gotten clearer with inquirers about the limitations of our 'penpal' program. With the help of a grant from the UU Women's Federation, we recently sent a mailing to the chaplains at 95 women's prisons around the U.S., in an effort to reach more women inmates (as our word-of-mouth outreach has brought us almost no women-prisoners over the years). I continue to have concerns about the sustainability of the CLF's prison ministry programs, as the growth I've described above has been possible only because I regularly 'volunteer' 20+ unpaid hours/week beyond the 8 hours/week for which I am compensated by the CLF.

~ Rev. Patty Franz (aka, 'Chaplain Pat')

March 2007 CLF Board Report:
Quest Podcast and Make Your Own Sunday Database
Toby Rzepka, Projects: Podcasting and Worship Materials (5-10 hours per week)

Since March, 2006, the CLF has been providing *Quest* in digital audio format in two ways: via direct downloads of mp3s from our website, and via subscription to our *CLF Quest Podcast*. Our podcasts deliver digital audio to dedicated subscribers on a monthly basis, while our direct downloads give casual listeners access to segments *a la carte*. Since September 2006, we have also been giving iTunes users the option of switching to Apple's enhanced m4a format, which allows for separate chapters for each individual segment of the issue and photos of each contributor.

Each month, I work with contributors to provide recordings of segments in the authors' own voices, and where this is not possible, I record the material myself. Most contributors embrace the opportunity to work with someone who can walk them through the process of recording and uploading their pieces. This not only allows us to provide material straight from the source, but also gives contributing UU ministers and lay leaders the skills to digitally record and manipulate their services in the future.

We now have podcast subscribers in Albania, Armenia, Canada, China, Denmark, Germany, Great Britain, Japan, Mexico, Portugal, Qatar, Singapore, Spain, Turkey, and the US. This only includes people who have subscribed to our podcast for regular delivery. I am working to compile reports on the number of *a la carte* audio downloads from our website as well. According to figures collected last year, thousands of listeners downloaded audio material in this manner from all over the globe. Although the vast majority of users currently grab audio segments *a la carte* instead of subscribing, podcasting is a relatively new way of receiving content (the word *podcast* was only coined in 2003), and as we continue to publicize this service, more and more people will subscribe. Around 140 subscribers receive our iTunes-compatible enhanced podcast, and anywhere between 68 and 400 receive the standard version.

I have recently incorporated a survey into our podcast webpage which encourages users to give us feedback on the quality of our podcasts as well as information about themselves. When the number of responses reaches a statistically relevant level, I will be able to make changes based on subscriber input. We currently publicize this survey in our podcast, and we are considering other means of increasing listener response as well. You can subscribe to our podcast at www.clfuu.org/podcasts, and download segments *a la carte* at www.clfuu.org/quest.

In addition to the podcast, I am compiling the CLF's "Make Your Own Sunday" searchable online database of UU worship materials. After a long hiatus, the CLF has managed to put MYOS funding back in the budget for fiscal year 2007, and I have been working to expand the content of the database and streamline its structure and functionality in cooperation with Jonathan Craig of Revolution Media. Though most of the listings are entered and searchable, the content (i.e. the text of the pieces) is being added one segment at a time. When it is complete, the database will contain hundreds of discrete opening words, hymn listings, readings, meditations, sermons, closing words and children's stories, formatted consistently and edited where necessary for individual use (that is, out of the context of the original service). These segments will be searchable by subject, author, holiday, geographic region and other criteria to give maximum control to the user.

A lifelong UU, I am proud to be helping my church get in on the ground floor with podcasting. This new method of audio distribution is already giving many more religious liberals around the world access to our message, and the numbers will continue to grow. In addition, the MYOS database will give small groups an easy way to put together high quality worship services straight from the web.