



Executive Director's Report – P.DeJesús – March 2020

March 26, 2020

Since the previous board meeting on January 25, UUSJ has engaged in the following:

- ❖ Covid-19 and its effects present challenges for UUSJ, both in terms of what our organization is positioned to do and its financial and fundraising footing.

Highlights:

- 1) The Board voted and adopted our strategic planning **Covenant** and new organizational **Values** on March 12, 2020. Thank you to those teams for their work.
- 2) We began interviews for the joint UUSJ/Reeb non-partisan voter mobilization project. We will frame a memorandum of understanding in the weeks to come.
- 3) We applied for a **UU Funding Program (UAFP)** grant of \$12,000 for “Storytelling for Public Policy Change: Case Study Videos and Workshop”. This includes \$6,000 as direct grant with a \$2,000 for \$2,000 challenge grant and \$2,000 from our budget.
- 4) We convened a team in response to Lavona Grow’s counsel to disband the Advocacy Oversight Committee. They began looking at budget and functionality implications.
- 5) We completed our March WHWN on Temporary Protected Status (TPS) with the **UU Service Committee (UUSC)**. It was very successful, with close to 1,000 letters.
- 6) The Membership Committee met twice and has articulated six proposals that are directly relevant to long-term financial sustainability considerations. See that report.
- 7) The Finance Committee has met and collaborated to articulate a draft FY 2020-2021 budget for the Board's consideration. Please review the assumptions cover note.
- 8) We completed administrative tasks: we applied for CFC, we issued donation receipts for 2019, also FY 19-20 Fair Share requests, and we began clean-up of our database.

Management Activity:

Our **Board composition** has changed slightly. Serena Lowe assumes duties as All Souls Church, Unitarian Board alternate, as does Kathleen Nickel for Bull Run UUs. We welcome Serena and Kathleen and thank them for their willingness to serve.

The **Executive Committee** and **Core Group** composition remains the same, handling much activity, between Board meetings. Charlotte Jones-Carroll, Board Secretary, has provided minutes of Core Group meetings to the Board. We deeply appreciate the Core Group.

It is also important to note that the episodic and ad-hoc teams have stepped up to meet the activity asked of them. Thank you all for your participation and leadership.

- ❖ Covid-19 has not affected UUSJ management deeply during the first two weeks of social distancing, as we collaborate remotely. Going forward that might change.

Since the previous meeting, I have collaborated with the volunteers of UUSJ, and we have:

- 1) Posted a [job listing](#) and have begun to interview candidates with **UUA's UU the Vote staff** and the **Reeb Project for Voting Rights**.
- 2) Completed our March WHWN on Temporary Protected Status (TPS) with **UU Service Committee (UUSC)**. It was very successful, with close to 1,000 letters.
- 3) Planned towards climate justice in May with **UU Ministry For Earth (UUMFE)**.
- 4) Participated with **the CUUSANS**, Coalition of Unitarian Universalist State Action Networks, in their bi-monthly briefings.
- 5) Continued concept discussions towards program and fundraising ideas linked to our **20th Anniversary**. Thank you Development Team.
- 6) Started more in depth discussion of our database structure needs. Thank you Martha and **Membership Committee**.
- 7) Framed a draft budget for FY 2020-2021. Thank you Charlotte, Nancy Sorden, David Strauss and John Gubbings. Interest remains in seeing a mission-based budget.
- 8) Convened an ad hoc team to look at advocacy oversight issues. The team began by discussing their charge and how that fits into budget development and our strategic planning process. They met with Evan Junker on the matter.

Needed actions:

- Completion of a memorandum of understanding for the 2020 Reeb Project/UUSJ Voting Campaign Organizer and related project.
- Continued search for a Board Treasure and a Vice Chair.
- Discussion on the implications of the January 2020 Program Committee report.
- Consideration of a fall 2020 UU Funding Program grant submission as well as what UUSJ needs to do to better position our organization to solicit non-UU funders.

Advocacy & Related Activity:

Lavona Grow continues as leading our advocacy programs and strategizing our advocacy posture on most of our priority policy issues. We do not have an advocacy consultant assisting the Capitol Hill Advocacy Corps (AC), and “Write Here! Write Now! (WHWN)” programs. Pablo DeJesus has been assisting with AC outreach. The Finance Committee and the Core Group have been discussing how to manage the situation.

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- ❖ Covid-19 impacted our March outing with cancellations. Our April AC outing was canceled completely. Things are somewhat in flux as we adjust to the situation and strategize how to accomplish our advocacy.
- ❖ Forecasting what participation will look like for our three key, face-to-face, advocacy activities -- AC, WHWN and voter mobilization -- is difficult at the moment.
- ❖ It is unclear if witness events will resume with the typical force of the spring/summer rally season.
- ❖ We must monitor the situation and prepare to alter advocacy (or witness) plans. We must also highlight how our work is related to Covid-19, failure to do so may have fundraising implications.

In this area:

- 1) We continued our Capitol Hill AC, with WHWN in February, and March 2020. Topics included: (a) Food Insecurity for our Military Families, and, (b) legislation supporting solutions for holders of Temporary Protected Status (TPS) in collaboration with **UU Service Committee (UUSC)**, yielding close to 1,000 letters.
- 2) Discussions are underway, led by Lavona Grow, for collaborations with UU Ministry For Earth (UUMFE) during April and May. An ad hoc team “the Salon” has been meeting on **Environmental and Climate Justice** to support our work in this priority area. Thank you to those who assist Lavona for this purpose. The salon team led our response to the **Council on Environmental Quality on National Environmental Policy Act** (#1k4-9fh0-8whg, visible on [regulations.gov](#)).
- 3) The **Immigration Task Group** has been active. They supported the March AC TPS outing, signed interfaith petitions, and provided UUSJ comments on Procedures for Asylum and Bars to Asylum Eligibility (#1k4-9ekr-m8a9, visible on [regulations.gov](#)).
- 4) With UUA's **UU the Vote staff** and the **Reeb Project for Voting Rights** we collaborated to frame concepts, goals and roles as well as clarify geographic areas for engagement and keys to collaboration. We have begun interviews for the [post](#).

Needed actions:

- Strategies to manage our response to Covid-19 and its impacts on our advocacy.
- Continued discussion and planning to adjust to Lavona Grow's transition out of volunteering for AC and WHWN.

Operational Activity:

Since the previous board meeting, we continue on-boarding our **Administrative Assistant Paulette DeMers** and transitioning tasks to her. At the start of April Paulette completes her first 90 days. Be sure to welcome her if you have not done so already, her email is

paulette@uusj.org. Please note, an email from Paulette is an email from UUSJ.

- ❖ Covid-19 has not affected UUSJ operations deeply so far. We did convert the spring Board meeting from a face-to-face gathering to a Zoom, which means the Board last gathered in September 2019 for our previous strategic planning session at WES.
- ❖ It is unclear when UUSJ congregations will be fully open and at capacity. This may have near term implications for events such as our strategic planning retreat in May 2020 and downstream effects on matters such as Fair Share requests.

In this area we have:

- 1) Completed our eNews and various eBlasts, with Paulette taking on more function on these tasks with each passing month.
- 2) Filed our 2020 Combined Federal Campaign application and we expect approval.
- 3) Issued donation receipts for 2019 donors. Follow-up is needed. We need to address some technical difficulties with recurring donations.
- 4) Transitioned to a new bookkeeper, **Tom Hutton**, Washington Ethical Society (WES).
- 5) Met our FY 2019-20 challenge grant of \$4,000 and will be claiming funds shortly.
- 6) Issued Fair Share request letters to both Board members and the congregational contacts we have on file. Follow-up is needed. At the moment we have received about 35% of projected revenue. During the spring and early summer, many of our congregations typically collect Fair Share support through share the plate activities. Therefore, it is unclear how social distancing will impact UUSJ's Fair Share revenues. Further, a broad realignment is occurring among many social justice funders, including congregations, and charitable donations are being re-targeted, or carved out, to support Covid-19 related activities. We must monitor the situation and prepare to alter our plans and, especially, show how our work connects to Covid-19.
- 7) We have begun long overdue clean-up of our database with an eye towards structuring the database to meet reporting and supporter growth needs. Martha Ades has been helping assess how we might structure our database and the Membership Committee has been considering some related implications.

Needed actions include:

- Claiming our \$4,000 challenge grant funds.
- Continued housekeeping on the database to set up gratitude and donor cultivation.

Forward Looking:

Our strategic planning process is more important than ever. We need to take hold of its various aspects but also keep an eye on how we advance our new values, how we communicate what we do, and why we do it, and how it all links to our value proposition.