

# Unitarian Universalist Funding Program

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Post-Grant Final

**Interim Report Form X (as of March 19, 2020)**

Please send **two** copies **by the due date listed in your award letter** (about 14 months after receiving your grant) **or, if you are applying for new funding, send along with your new application.** Please limit your narrative report to two pages, and your financial report to one page. Feel free to attach any brochures, newspaper clippings, or other relevant materials. Please do not send audio- or videotapes unless the grant was for their production. Thank you!

Date of Report: 03/19/2020

Grant awarded: Spring 2019 -- Start date July 1, 2019

Fund for (check one):  A Just Society  UU Social Responsibility  UUism  International UUism

Organization: Unitarian Universalists for Social Justice

Address: 7750 16th St.

City, State, Zip: Washington, DC 20012

Contact Person: Lavona M. Grow, Advocacy Program Chair Phone Number: 703-786-5206 cell

Email address/website for your project/organization? Project contact: [lavona@uusj.org](mailto:lavona@uusj.org)/ [www.uusj.org](http://www.uusj.org)

Project Title: Lifting UU Voices: Mobilizing Advocates to Protect Democracy

Grant Amount: \$12,000 + Challenge Grant: \$4,000 Final Project Income/Expense Total: \$ \_\_\_\_\_

Final Organization/Church Annual Budget: FY18-19 \$83,863

**1. Please describe the major activities of the project. If there were significant changes in your activities, please share with us the reasons you needed to make changes.**

**A. Advocacy Program: Continuing monthly Advocacy Corps (AC) visits to Capitol Hill and “Write Here! Write Now!” (WHWN) letter-writing campaigns -- all designed to give voice and visibility to living out our UU Principles.** UUSJ serves as a national UU advocacy messenger at the federal level for the values and issues vital to UUs nationwide. The AC celebrated its third-year anniversary in February 2020. Volunteers visit congressional offices on the second Tuesday of every month to discuss key issues and amplify UU voices. Essential to the program’s success and sustainability is having dedicated staff or a consultant, with proven Capitol Hill experience to formulate strategy, identify partners, conduct briefings, and provide guidance to optimize the volunteers’ ability to convey messages to the right people on the right issues at the right time.

Support activities include: selecting the issue focus, preparing background materials with talking points and a leave-behind letter with our position, scheduling appointments for volunteers (about 20 each month) with 8-10 key Hill offices, convening and prepping volunteers, and gathering pictures and post-meeting reports. Tracking all the information with GoogleSheets and forms is a challenge.

A key activity that strengthens our monthly Hill visits is **conducting WHWN letter-writing campaigns with a growing list of WHWN partner congregations.** These letters -- usually around 200 per month -- amplify UU support for our visits and allow UUs to voice their concerns and share personal stories.

**B. Ramping up our strategic outreach and communications.** Not yet started. We need to develop a better plan for WHWN outreach to address problems such as lack of contact information for congregational social justice coordinators, standardized script and email/phone call invitations, and an improved feedback mechanism. This is a priority for the remainder of the grant year.

**C. Develop and deliver a Beta storytelling workshop to deepen our spiritual connection:** In process, 50% completed. The Power Point presentation for the three-hour “Storytelling as Advocacy” workshop is in final review (see attached). We have a trainer and a pool of two co-facilitators to conduct the Beta 1 and first workshops in spring 2020. We have the location for the Beta 1 workshop. Due to the Coronavirus, plans are on hold for the April training and the first workshop -- planned for about eight weeks after the Beta. Storytelling can be a spiritual practice. Personal stories can be shared through writing letters to elected officials (for our WHWN), op-eds and letters-to-the-editor as well as face-to-face meetings, testimony at hearings and posting on social media. During this election year, personal stories can also be shared at candidate forums and town hall meetings. We believe this is an important part of citizen engagement.

**D. Developing a plan for long-term financial sustainability.** Not yet started. We have increased our end-of-year and special event funding thanks to our energized Development Team. We need expertise to develop a long-term plan that provides firm financial footing for our Advocacy Program. We will explore working with other UU groups -- specifically the Unitarian Universalists for a Just Economic Community -- to identify strategies for financial sustainability since our donor bases are relatively small and cannot solely support the advocacy and witness

work of our organizations. We have hired a management consultant -- Evan Junker, Reach Our Goals -- to work with our Board on strategic planning and financial sustainability. This work is months behind schedule due to Mr. Junker experiencing a serious illness. Thankfully he has recovered and resumed work.

**Changes/Delays:** The application start date on this grant was July 1, 2019. We didn't get fully underway until October for two reasons. First, we weren't able to complete work on the previous grant until August 31, 2019 because of delays caused by contractor staffing changes. We requested and received an extension of the 2018-19 grant to end August 31, 2019. We didn't realize until working on this interim report that we also needed to request a revised start date. Second, we also got behind due to our participation in planning and implementing the UU conference on "Economic and Climate Justice: Mobilizing for a Green New Deal" on September 15-17, 2019.

In addition, a new contractor hired in May 2019 to support the work of the Advocacy Program did not work out and resigned by mutual agreement effective October 31. We have not yet filled the position. This has stretched our volunteers, who have risen to the challenge. The UUSJ Executive Director is now arranging for the Hill meetings. We are reassessing the skills needed for these tasks and what work existing UUSJ staff can do. It has been difficult to find one person with all the right skills.

## **2. What were the project's major accomplishments? In what ways, if any, did you feel you didn't meet your goals?**

We are about mid-way through the grant, so have not accomplished all of our goals. We have:

- Developed the PowerPoint for the "Storytelling as Advocacy" workshop. (attached)

- Continued our monthly Advocacy Corps and support of the AC members (29) and support team members (7) -- a pool of 36 people as of March 15. We add about one new AC volunteer per month. The core workload is time-consuming and we lack contract assistance. Preparation of the WHWN handout, monthly leave-behind letters, and talking points/background documents takes time. We need to find efficiencies. (Summary attached of AC Hill visits and WHWN letters)

- Maintained the regular and reliable involvement of WHWN partner congregations providing letters from UU constituents on the wide array of issues we address. This has strengthened our AC program. Since September, we added nine new partners from Colorado, Washington, Michigan, North Carolina (3), Iowa (2), and Washington State. We cannot expand the WHWN program without finding funding for additional staff or simplifying the program.

- Developed and tested ahead of schedule a GoogleSheets-based data management system of congressional contact data. This allows us to easily assemble a "walk list" of congressional offices to visit. We are also able to quickly select priority members to visit along with committee assignments on our four priority issues. We can also access the number of WHWN constituent letters received, phone numbers and e-mails for key congressional staff members to request meetings, and other pertinent information. The most important committees are different for each issue, and even for the same issue, depending on the status of legislation. We want to simplify this complex process. Commercial directory services cost from \$3,000-\$6,500 per year (some with research feeds) and still do not generate the walklists we need.

### 3. Final Project Financial Statement

This information is mandatory for all grantees. If you use your own budget forms, they must include the information requested below.

Organization: Unitarian Universalists for Social Justice

Report Date: March 19, 2020

Grant Made: 2019 Spring

Expense Category	Organizational Budget (if applicable)	Final/Interim Project Budget	Use of UU Funds
Consultants Advocacy/strategic planning/outreach	\$0	\$6,398	\$6,398
Consultants (financial sustainability)	\$0	\$0	\$0
UUSJ Staff Support	\$1,420	\$1,420	\$0
Equipment	\$140	\$140	\$0
Travel	\$50	\$50	\$0
<b>TOTAL</b>	<b>\$1,610</b>	<b>\$8,008</b>	<b>\$6,398</b>

Income Source	Source Total	Amount Applied to Project
Requested From UU Funding Program:		
UUFP-Direct Grant	\$12,000	\$6,398
UUFP-Challenge Grant*	*see note below	\$0
Major fundraising event (new donors towards challenge grant)	\$1,960	\$0
Faithify (direct appeals towards challenge grant)	\$2,444	\$0
UUSJ 2019-2020 Annual Budget	\$6,000	\$1,610
<b>TOTAL **</b>	<b>\$22,404</b>	<b>\$8,008</b>

Please use the space on the next page to explain any vague expense categories, plans to spend money that has not been spent yet, and in-kind contributions.

**\*Note:** Income Source, line item “UUFPP-Challenge Grant” UUSJ has yet to claim the **\$4,000** in UUFPP challenge grant funds associated with this project. We anticipate doing that in the near future. We have raised **\$4,404** from two efforts, a fundraising event and fundraising appeal to support unlocking the grant challenge grant.

**\*\*In-kind:**

**\$754** - The UUSJ Board Chair and UUSJ Advocacy Program Chair were invited and participated in the North Carolina’s UU Forward Together NC state action network annual conference in November 2019. They tabled an exhibit about the Write Here! Write Now! letter-writing campaign and advocacy program.

We did not conduct the Faithify as anticipated when we applied for the grant. Instead it was included in a direct appeal.