



Executive Director's Report – P.DeJesús – March 2021

March 15, 2021

Since the previous board meeting on December 19th 2020, UUSJ has done the following:

Highlights:

- 1) Held a fabulous “[Expert Opinion Briefing - Federal Fight For \\$15](#)” ([video](#)) with guests from SEIU, PPC, EPI and Florida Fight for \$15, and about 70 attendees.
- 2) Conducted a “full tilt” advocacy outing under auspices of our **Economic Justice priority issue** on the Fight for \$15. Without a formal convener and functional team, an ad-hoc group led by Pablo and Serena completed [10 meetings](#). These had about 30 lay folks, 5 ministers (NC, VA, PA, NJ), and 2 SANs (IA, NC).
- 3) Leaned into coalition advocacy work with [Faithful Democracy](#) (FD) led by the **Democracy Action Team (DAT)** after its first “full tilt” outing in December 2020.
- 4) Deepened collaborations with **UU Ministry for Earth** and **UUs for a Just Economic Community** through action alerts ([\\$15/hr.](#))([Green Fund](#)), and planning towards a tri-partite venture with the **Environmental Action Team (EAT)** for Earth Month.
- 5) Resumed communications with **UU Service Committee (UUSC)** on the prospects for collaboration with the **Immigration Action Team (IAT)**, with an eye towards a June “full tilt” outing as well as the IAT’s webinars. [Register](#) for Mar. 24.
- 6) Completed our **IRS Tax form 990 filing**, which was more onerous this year without a volunteer certified tax preparer. Special thanks to Paulette, Tom and our reviewers.
- 7) Submitted our 2021 **Combined Federal Campaign** (CFC) application. We expect to hear word on eligibility during June, 2021. We need to evaluate participation in CFC.
- 8) Started planning on our **UU Funding Program, grant**. We have work to do here.
- 9) Released and promoted our priorities survey. **We have 194 responses** as of Sun. Mar. 14, so we are within striking distance of our threshold goal of 200.
- 10) Convened board members and other UUSJ stakeholders to discuss our advocacy approach with our executive director.
- 11) Issued the required **2020 tax year receipt** correspondence to individual donors.
- 12) Special thanks to **Charlotte** for delivering a budget proposal for FY 21-22, in lieu of a **Finance Committee**. Thanks to those who consulted with her to make it possible.
- 13) Developed an advocacy followup team, **Jula Kinard** and **Micheal Thorn**, that managed to get all the Feb. meetings recorded in the AC spreadsheet database.

Management:

Our board composition remains unchanged as did the **Executive Committee** which handles much activity, between board meetings. Charlotte has shared minutes.

In addition the **Nominating**, the **Development**, and the **Membership Committees** continued their activity, as did the **Communications Team** and our **Database Team**.

The **Finance Committee** did not reconstitute to develop the FY 21-22 budget proposal. Instead, Charlotte led the way on drafting and preparing in consultation with others.

Thank you all for your participation and leadership.

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

- 1) Formally established the time-limited **Policy & Advocacy Review Committee (PARC)**, which supersedes the Ad-hoc Committee on Advocacy Program Oversight and Sustainability. PARC membership has been established, and its first meeting set.
- 2) Contracted with **Paula Cole Jones** for two sessions on Widening the Circle of Concern. We are in the process of selecting our first date (likely **Fri. April 2nd**).
- 3) Started the early **Nomination Committee** work of convening, confirming and reengaging its members. In addition to the [4 non-trustees](#), confirmed in December 2020, 2 members are being proposed in March 2021, [1 non-trustee](#), and 1 trustee: Jan **Meslin**, and David **Strauss**.
- 4) Convened our **UUSJ grant management team** and began discussing strategic and outreach dynamics. Much remains to be done here: non-UU partner outreach will be a challenge, and has been slow to start. Yet Earth Month activity with UUMFE and UUJEC will likely qualify and may yield leads.
- 5) We have also been reminded of a need to develop or update and post whistleblower policies and some other **good governance steps**.
- 6) We have begun work on the **UUSJ Work Plan** in relationship to our Strategic Plan. Meetings are being scheduled on this topic and some conversations have begun.
- 7) Began filling subcommittees to manage **GALA** awards criteria and the mechanics of the event, tentatively scheduled for Sat. Oct. 2nd.
- 8) Two **Membership motions** have been delivered, one on Fair Share the other on a uniform congregational membership policy and process

Needed actions:

- Follow-through and ramp up on various issues or projects.
- Initiate some forensic booking/accounting checks.

Advocacy:

We continued the transition which began in August 2020 to more management by staff with support by volunteers in “AIM style” interactions. See the staff advocacy [report](#).

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

- 1) Held an intelligence gathering call with **Sen. Bookers's** office in preparation for our tri-partite Earth Month 2021 outing with UUMFE and UUJEC. Both organizations had folks present. This work has ties to our UUFP grant.
- 2) DAT members joined in [Faithful Democracy](#) (FD) briefings, as well as advocacy calls with **Senator Warner** and **Senator Collins'** staff, and have invited FD participants to their calls next week with Senator Capito, Hassan and Burr. Both UU constituents and FD participants are being included.
- 3) Organized a Webinar: **Immigration Policy - Past, Present & Future** - March 24, 7:30pm ET ([Register](#)), the first of two.
- 4) Responded to a request by UU State Action Network of Arizona ([UU Justice AZ](#)) and participated in a coalition call with **Senator Kelly**, joining [CORAZÓN](#) a [Faith in Public Life](#) to speak to issues centered on immigration status and working families.
- 5) Participated in CUUSAN calls, receiving a briefing from UUSC as well as **Nicole Presley**. Nicole spoke to UUA's intentions for scaling up national UU engagement and collaboration with UU communities/congregations and UU State Action Networks. UUSJ was recognized in both instances. **UU the Vote** subsequently requested our participation in a [national] “collaboration on a series of pro-democracy/anti-voter suppression” [actions]. The DAT endorsed participation.
- 6) Were invited to a briefing with **Rep. Sarbanes** key staffer on H.R.1/S.1 negotiations as part of [Washington Interfaith Staff Community](#) (WISC) and [FD](#).
- 7) Participated in the **UUA's PPC Leadership Council** work each month.
- 8) Updated the presentation on overarching organizational strategy considerations for advocacy ([deck](#)). And delivered a talk on the matter open to the board and others
- 9) Participated in WISC calls and a multi segment annual retreat.

Needed actions:

- Encouragement of coalition behavior and participation as in case of DAT and FD.
- Follow up on the UU the Vote action, Earth Month, and for immigration in June.
- Ramp-up outreach and planning in support of Grant.
- **Develop a UUSJ posture/policy on the Filibuster.** This will likely be a factor on S.1 and potentially other legislation. DF is counseling orgs. get clear on the matter early.

Operations:

We were consumed by preparations on the 2021 Combined **Federal Campaign (CFC)** application and the related **2019 IRS Tax 990 filing**, which was harder this year without **Linda Collyer** as our volunteer Certified Public Accountant and financial consultant.

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

- 1) Executed more action alerts than ever before. Nine (9) in total see the [report](#).
- 2) Completed our eNews and various eBlasts. However, with **Rev. Karen Scrivo's** editorial assistance, UUSJ has been incurring cost overruns against our budget on eNews. Functionally, Rev. Karen is a staff person, leveraging consistent but unplanned for assistance in rendering our primary communications tool. We have sunk costs through March 2021, but we will need to establish better controls and parameters for April and beyond. And it raises questions about our capacity to live without her editorial hand. No easy answers here, but a conversation is needed.
- 3) Filed our **2021 CFC application** and we expect approval in June. Linked to this was preparation and submission of our **IRS Tax form 990 filing**. Bob Denniston signed the 990 document and Pablo was listed as the preparer. Deep thanks to Paulette and Tom for their assistance as well as the Executive Committee and two additional Board members for their thorough review. We fill out the 990 long form voluntarily, in order to qualify for CFC, and it does gain us transparency recognition for doing so, and serves as a preemptive protection as we do advocacy work. However, without a certified CPA, we will need to evaluate the cost benefit of continuing with a 990.
- 4) The CFC and 990 combined with the FY 21-22 budget development process revealed a need for forensic analysis of where charges get “booked” against our budget.
- 5) Issued individual donation receipts for 2020 donors.
- 6) Sent **Fair Share** letters to UUSJ congregations
- 7) We have begun planning for a 2021 Spring Appeal focused on developing recurring donors. We've also begun to discuss a challenge match strategy for our UUSJ grant.

Needed actions:

- Follow-up with Rev. Karen as contract editor and seeks to better control costs.
- Search for a CPA, and make preparations for work on UUSJ's 2020 990 in the new FY.
- Development of an annotated booking budget.

Looking Forward:

We have lots to do and follow-up on.