

Review of First Parish in Concord Social Action Giving

Draft April 8, 2018

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Timeline of SAC Funding

SAC Grants Timeline: Funding

1968

- First Social Action line item in FP budget

1971

- Rev Greeley recommends, and First Parish allocates 5% to 7% of subscriptions to Social Action

1976

- Recession, and giving drops to 2-2.5% of subscriptions

1980

- Giving stabilizes at 3.3% of subscriptions

1990

- Annual meeting votes to allocate 5% of pledge income

1996

- Annual meeting votes to allocate 7.5% of pledge income

Timeline: SAC Grant Process

?-FY2015

- Separate SAC Grant Committee with at least 1 member in common with SAC Board
- 2 grant cycles per year

FY2009

- Criteria: developed and posted grant criteria that were approved by Ministers

FY2010

- Transparency: posted applications and put copies in the office for 2 weeks of congregational review

Timeline: SAC Grants Process, cont.

FY2015

- Grants Committee became part of SAC Board to promote integration between activities and grants

FY2015

- Single grant cycle
- Recruited and trained readers who rate some proposals against our criteria. Ratings and comments considered by Allocation Committee

FY2016

- Financial Information: required applicants to submit their Form 990s or an organizational budget to provide a basis for assessing their need for a grant

SAC Grants Timeline: SAC Staff Person

2005

- Very part-time SAC Coordinator

2006 -2009

- Standing Committee and SAC Board agree to hire a SAC staff person with salary phasing from SAC pledges to regular budget over 4 years. This didn't happen.
- Faith Bade reported to Jenny and worked 16 to 20 hours per week.

2010-2011

- Standing Committee approves a 2 year trial of allocating 1/3 of 7.5% to SAC Board for SAC Coordinator salary and other SAC activities.
- This agreement included the regular budget contributing to the cost of the SAC Director beginning in 2011

SAC Grants Timeline: SAC Staff Person

2012

- Interim Minister hires Bethany Lowe at 30 hours per week, with her salary covered entirely by the regular budget.

2013 -
2016

- Interim Minister asks for SAC to again support the SAC Coordinator salary from 7.5% SAC pledges

2016-
2017

- Vacancy from one spring to the next

Spring
2017

- Hiring committee (2 SAC Board and 2 others) recommend 2 finalists
- Howard hires Zach Roe 30 hours per week with salary from SAC pledges.

2017-
2018

- Contract with UUMassAction to support a Community Organizer working with Environmental Leadership Team

Assessment Criteria

Criteria for Assessing Giving Models

- ▶ Total amount given
- ▶ Types of grantees (small, medium, and large grants)
- ▶ Breadth of grantees to support
- ▶ Ability to evaluate/vet grantees
- ▶ Effort to administer
- ▶ Continuity of relationship with grantees
- ▶ Flexibility to respond to unexpected needs
- ▶ Ability to involve members
- ▶ Congregation opinions

Data Collection

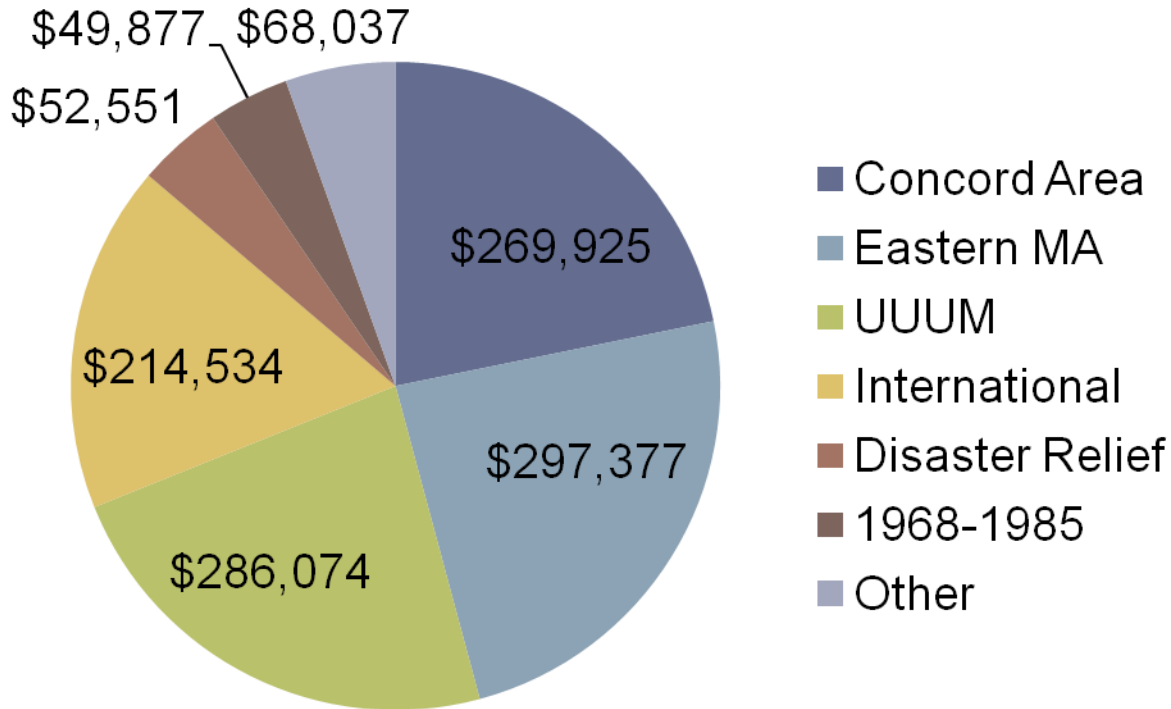
- ▶ SAC Grant Data
- ▶ First Parish accounting records of SAC Reserve
- ▶ Survey of Congregation
 - ▶ Standing Committee Open House Discussions – Fall 2017
 - ▶ 4 sessions with 2 - 10 attendees over four weeks
 - ▶ Standing Committee Congregational Survey – February 2018
 - ▶ Paper survey on STP distributed before service and collected after service.
 - ▶ Sunday March 14 – 46 responses
 - ▶ Survey of SAC Grant Sponsors from past five years
 - ▶ Last 2 weeks in March – 9 responses

Summary of SAC Giving

SAC Grant Allocation Criteria

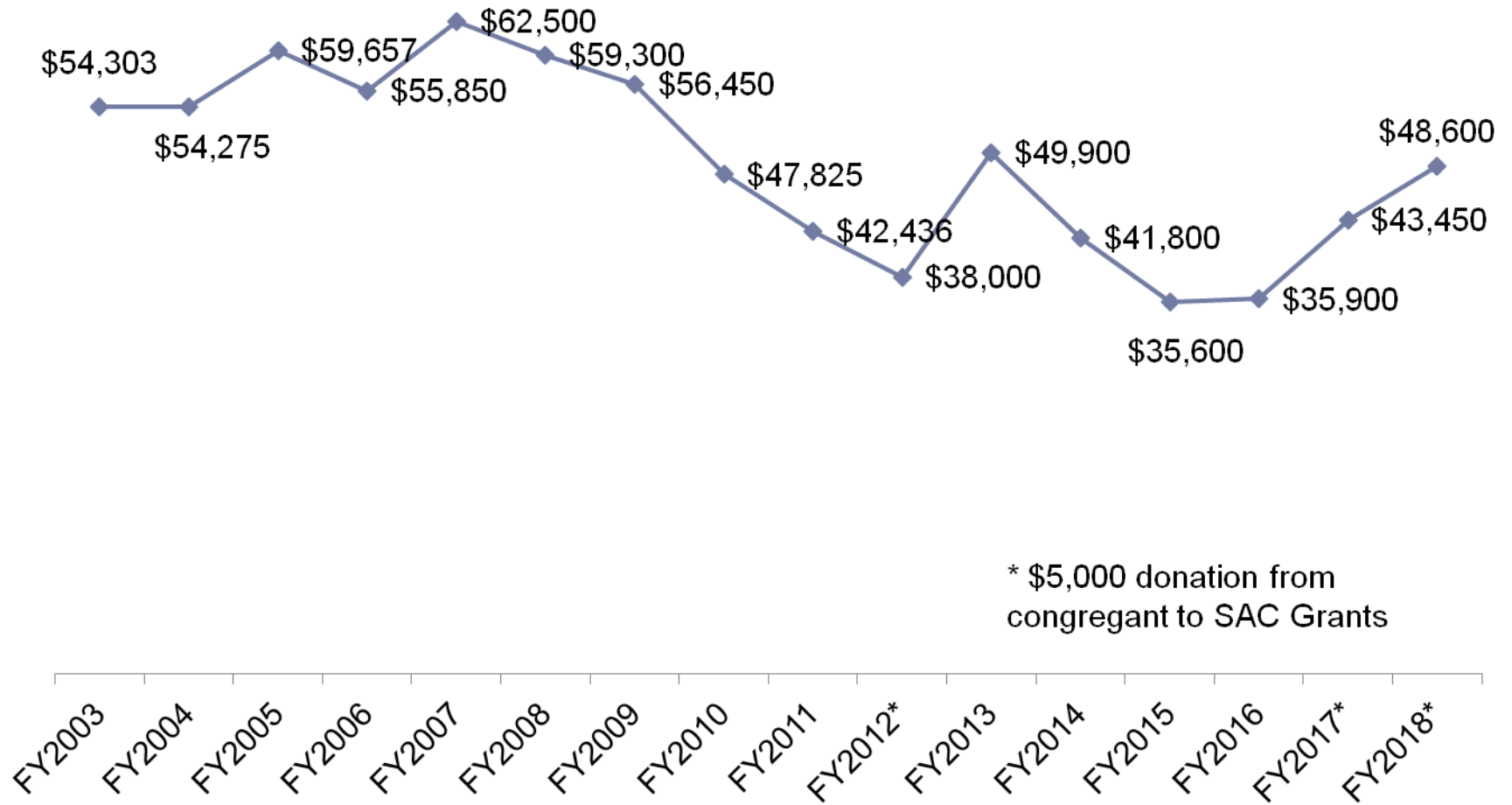
- ▶ **Eligibility Criteria**
 - ▶ Sponsored by a pledging member
 - ▶ Sponsor may not be a staff person of the organization
 - ▶ SAC Allocation Team members may not sponsor an application
 - ▶ Not required to be a 501©3
 - ▶ May not be a scholarship
 - ▶ May not support First Parish social action activities
- ▶ **Selection/allocation Criteria**
 - ▶ Goal of the project specific, attainable and realistic
 - ▶ Desirable:
 - ▶ the project provides seed money and support new ideas or a new project
 - ▶ the project includes or will create opportunity for significant First Parish connection and participation
 - ▶ Amount of grant will make a meaningful contribution to project's success
 - ▶ Seek a balance between local, regional, national and international projects
- ▶ **SAC Allocation Team members excuse themselves from decisions on any organization with which they have a direct association.**
- ▶ **We document our rationale for the decision on each application.**

SAC Grants 1968 through 2018



Over 32 years, over \$1.2M dollars have been given from the allocated pledges.

Total SAC Grants: FY2003-FY2018

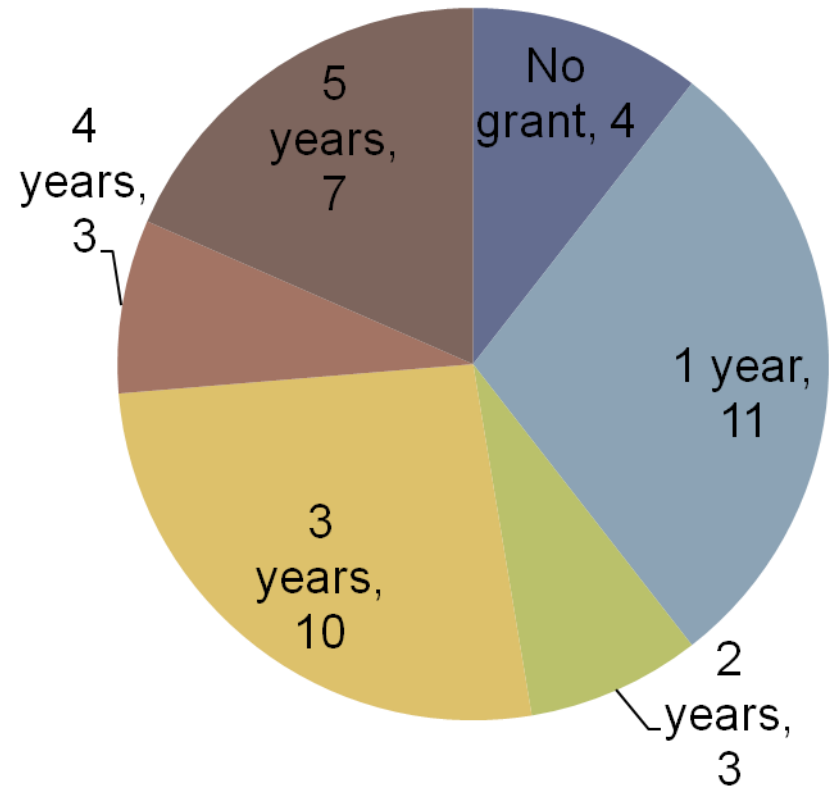


SAC Grants: FY2014-FY2018

Many Grantees receive grants regularly

- ▶ First Parishioners have sponsored applications for 38 different organizations
- ▶ 7 organizations received grants in all 5 years
- ▶ Over half (20) received grants in 3 or more years
- ▶ 4 applicants did not receive a grant

Applicants by Number of Years Received Grants



SAC Grants FY2014-FY2018: Four and Five Time Recipients

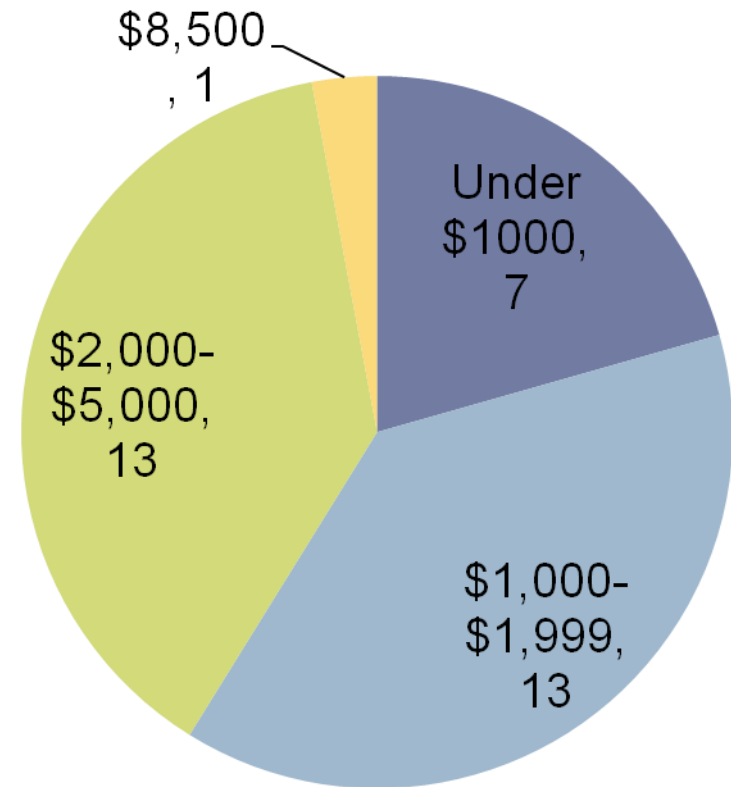
Recipient	Purpose	Total Grants
Unitarian Universalist Urban Ministries	Family shelter, afterschool programs for youth and teens	\$42,500
Open Table	Serve an increasing population at Maynard Pantry and OT Community Dinners	\$18,500
Conc. Prison Outreach	CPO programs for prisoners	\$14,000
Mil Milagros	Meals program for indigenous Maya women and their young children	\$12,000
Louis D Brown Peace Institute	Violence prevention and support for families of murdered victims and families of people incarcerated for murder	\$12,000
Restoration Project	Training & employment experience for people with mental illness or brain injuries	\$10,000
Dignity in Asylum	Safe and free housing, food, transportation and overall caring community support to people seeking asylum	\$10,000
Budget Buddies	Provision of financial literacy program to low income women in Lawrence and Lowell	\$8,500
Nature Connection	Engage at-risk youth in a variety of nature-based activities	\$7,500
Children's Island	Meals program for families in need in Capilla Del Monte, Argentina	\$6,300

SAC Grants: FY2014-FY2018

Most grants are \$2,000 or less

- ▶ Two-thirds of grants averaged from \$1000 to \$5000 over the five year period.
- ▶ The UUUM receives the largest grants
- ▶ Some applications request or receive several hundred dollars.

Applicants by Amount of Average Grant



FY2018 SAC Grants

Recipient	Purpose	Grant Amount
Amnesty International Group 15	Raise awareness of human rights issues, participate in human rights campaigns, and to bring Sister Helen Prejean	\$ 500
AWE	Meals for Rosie's Place	\$ 1,400
Budget Buddies	Financial literacy program for low-income women in the Lowell area	\$ 2,000
Center for Parents and Teachers	Raise awareness about the increased use of heroin in Concord and offer tools for parents to talk with teens	\$ 500
Children's Island	Support meals program for families in need in Capilla Del Monte, Argentina	\$ 1,200
ConcordCAN! – The Concord Climate Action Network	Support our public events, meeting costs, website and newsletter expenses, and participation in collaborative projects	\$ 1,000
Concord Prison Outreach	Support for CPO programs	\$ 4,000
Dignity in Asylum	Provide safe and free housing, food, transportation and overall caring community support to people seeking asylum	\$ 3,000

FY2018 SAC Grants, cont.

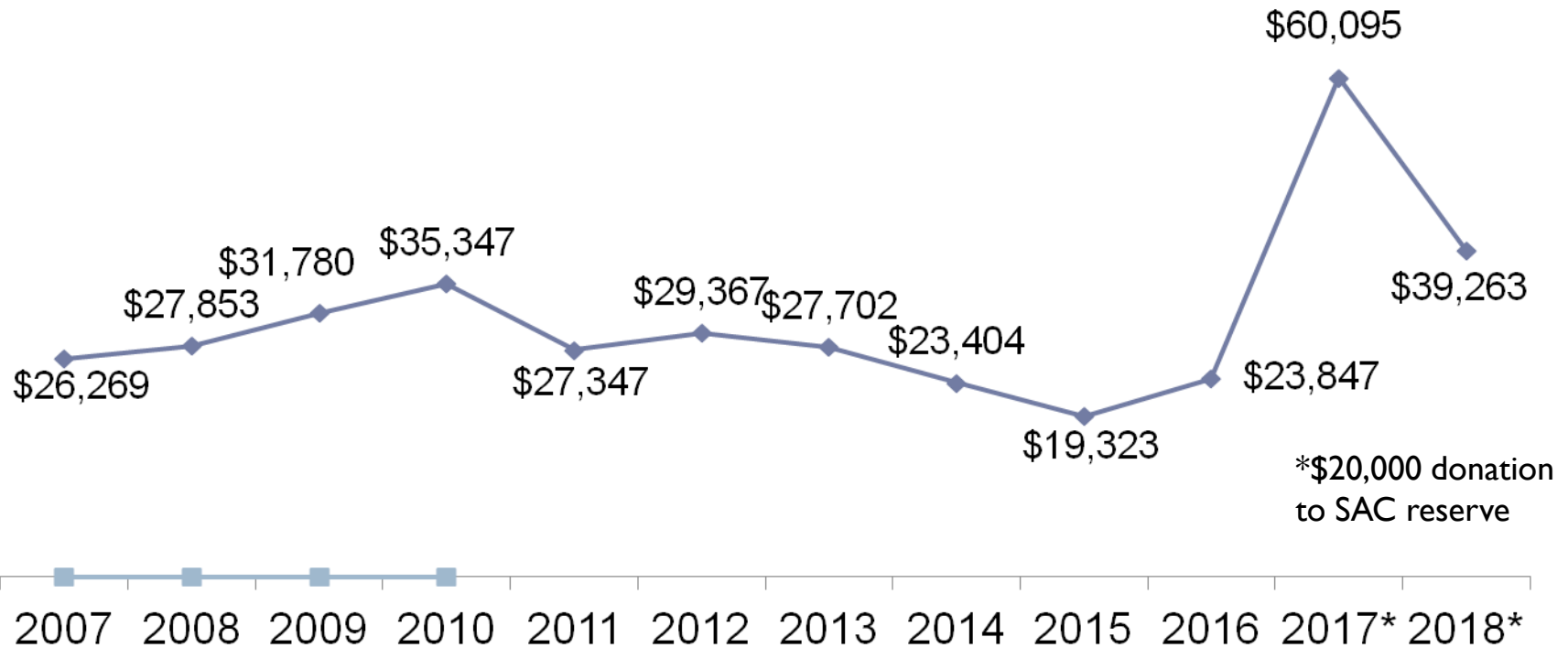
Recipient	Purpose	Grant Amount
Merrimack Valley Project	Provide legal resources and support for undocumented immigrants throughout the Merrimack Valley	\$ 5,000
Mil Milagros	support indigenous Maya women to improve the healthy development of young children and prevent malnutrition.	\$ 3,000
Open Table	Support Maynard Pantry and Maynard and Concord Community Dinners and serve an increasing population	\$ 4,000
Restoration Project	Training & employment experience for people with mental illness or brain injuries	\$ 2,000
RIA House	Financial assistance and recovery services for women survivors of the commercial sex trade upon prison release	\$ 2,000
ROCA	Provide the digital platforms for dual-generation education with high-risk young mothers and their vulnerable children	\$ 2,000
STEM-Up	Bring intensive after-school STEM tutoring to public housing youth	\$ 5,000
The Nature Connection	Engage at-risk youth in a variety of nature-based activities	\$ 1,500
Unitarian Universalist Urban Ministry	Support low-income survivors of domestic violence, to heal and prepare for skills training, work, or secondary education.	\$ 10,000
	Total	\$48,600

Giving Outside of the Grant Cycle

Date	Recipient	Purpose	Amount
Disaster Relief			
1/2010	UUSC-UUA Haiti Fund	Haiti Earthquake Relief	\$5,000
8/2010	UUSC-UUA Pakistan Fund	Pakistan Flood Relief	\$5,000
3/2011	UUA Japan Relief Fund	Japan Tsunami relief	\$2,500
11/2014	Doctors Without Borders	Ebola relief	\$5,000
5/2015	International Medical Corps	Nepal relief	\$2,500
10/2015	UUSC	Refugee Crisis Fund	\$2,500
12/2016	St. Boniface Haiti Foundation	Hurricane Matthew relief	\$4,000
09/2017	First UU Church of Houston	Hurricane Harvey Relief	\$5,000
10/2017	Peces Inc.	Hurricane Maria relief	\$4,707
	Proyecto Enlace		\$4,706
	Proyecto Matria, Inc		\$4,707
11/2017	Casa Pueblo de Adjuntas	Hurricane Maria	\$4,931
1/2018	Jennipher Burgess	Hurricane relief for Jamaica	\$2,000
		Total	\$52,551
Other			
5/2015?	UUA	Support GA programming on race	\$1,000
12//2016	Oceti Sakowin Camp	Assist Standing Rock protest	\$2,000
Spring 2017	Santuario Luterano	Legal representation for asylee	\$1000

SAC Reserve

- Any unspent balance of the 7.5% was put into a reserve fund, and remained available for future expenditures.
- The 2010 peak reflects payment of the SAC Director's position from the regular budget.
- The 2017 peak reflects the vacancy in the SAC position.



SAC Grants Compared to Share the Plate

Criteria for Selection of Share the Plate Pilot Recipients

▶ **Eligibility Criteria**

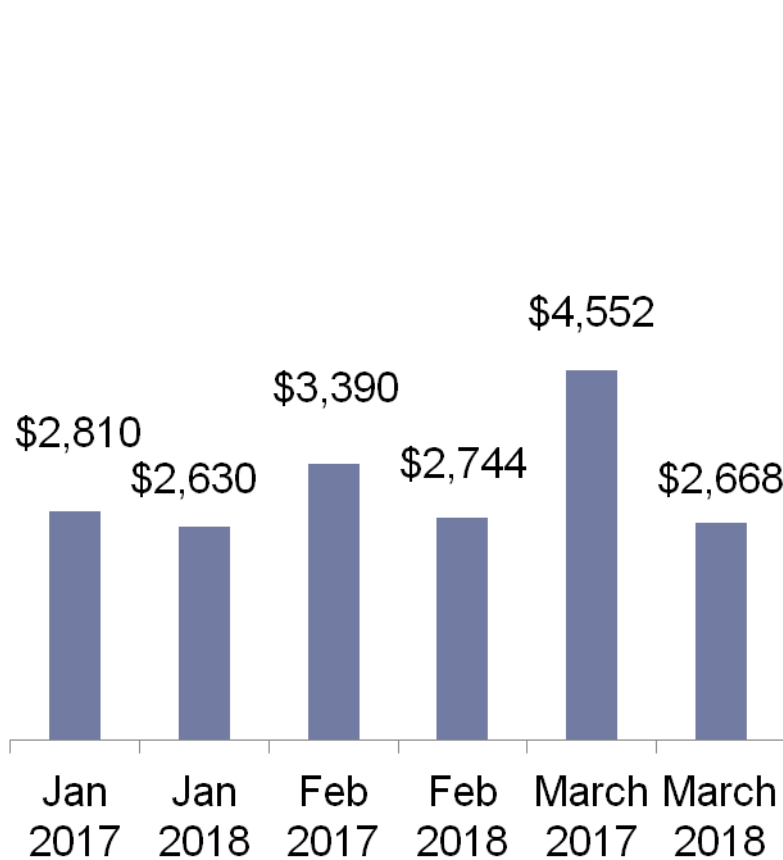
- ▶ Nominated by a First Parish program or a pledging member/s
- ▶ Mission consistent with UU principles
- ▶ Non-profit (501c3) status
- ▶ Likely share of collections would make a meaningful difference to the organization

▶ **Selection Criteria**

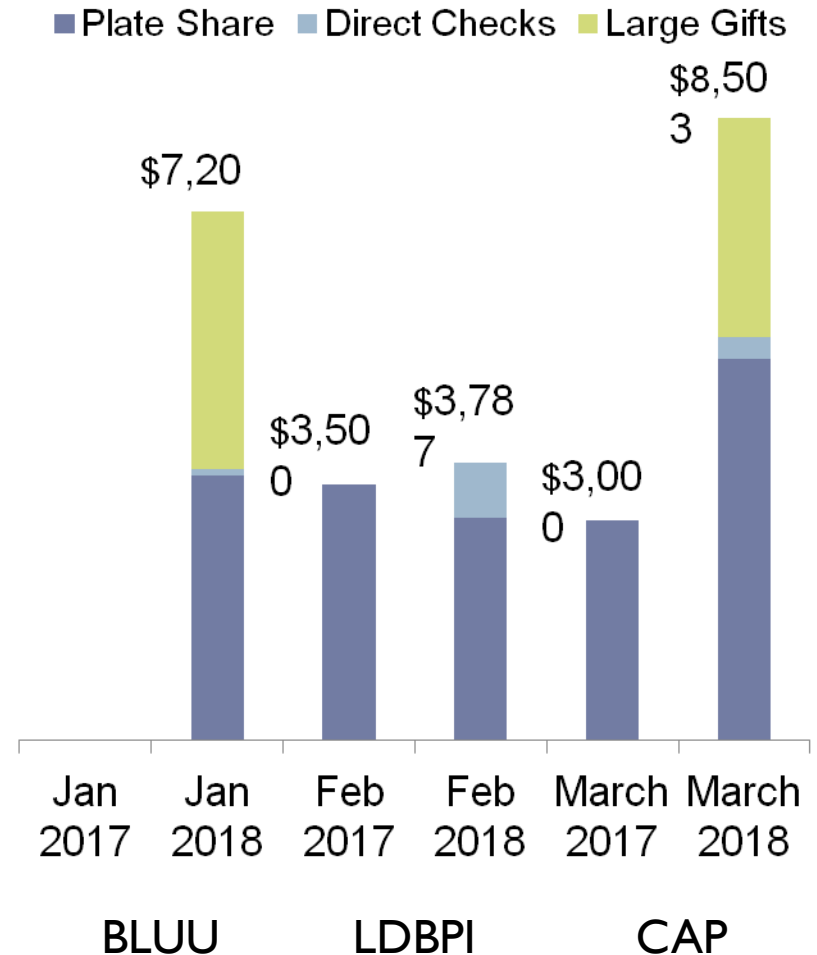
- ▶ Extent of support from the congregation (*# of nominating sponsors, # of FP programs nominating, opportunities for generating matching funds*)
- ▶ Opportunity for congregants to build a relationship with the recipient organization (*opportunities for partnership, volunteering, or further fundraising*)
- ▶ Selecting recipients to contribute to a variety of local, national, and international target populations and to different social justice missions
- ▶ Opportunity to align collections with themes of sermons and social action events
- ▶ Degree to which collection would support the priorities of the UUA

STP Collections (so far) Compared to SAC Grants

First Parish Plate



Grants vs Donations



SAC Grant Sponsors Have Concerns About STP

- ▶ It is a lot of effort and work to plan an STP with possibly reduced financial returns.
- ▶ The exposure to the congregation during the STP period will likely increase the FP Congregation's awareness of the organization, but it is unclear if the financial return will also increase.
- ▶ The goal should not be so focused on increasing FP's plate collections, but, on the organization needing the funds and exposure.
- ▶ To do Share the Plate effectively there needs to be an information sheet in the order of service about the group. It should also be in FP Announce and in the MHN.
- ▶ I am surprised to learn ... how few people understand the need right here in Concord. I hope that we continue as an organization and a church to address the stigmas that are alive and well - figuring out how we as a church create a compassionate place to worship and care for others within.

Ability to evaluate/vet grantees

- ▶ **SAC Grants are designated for specific purposes**
 - ▶ Cover sheet and 2 page narrative
 - ▶ Form 990 or budget which helps to better assess the likely impact of the grant requested
 - ▶ Accountability – grantees report on accomplishment of goals
- ▶ **STP Collections are unrestricted**
 - ▶ Cover sheet and 2 brief questions
 - ▶ We check 990s when they have been posted publicly – not available for all organizations
 - ▶ Most congregants (87%) say that they received enough or very complete information
 - ▶ But they wanted more information in multiple formats
- ▶ Both processes involve a group of parishioners considering and coming to consensus on which organizations best meet explicit selection criteria
- ▶ The limited information available in these selection processes is not sufficient to fully vet the quality of potential recipients

Effort to administer

- ▶ **SAC Grants process has become burdensome**
 - ▶ Application process could be done less than annually for organizations that are well known to First Parish
- ▶ **STP requires more of the sponsor and nominee, and less of the SAC Board**
 - ▶ Sponsors complete a brief nomination form – the organization may not be involved ahead of time
 - ▶ But nominees will usually be more involved with the congregation through a visit during or after the collection period
- ▶ **Data collection and record keeping can be simplified**
 - ▶ Use Survey Monkey to collect contact and summary information, automatically creating the database needed for recordkeeping and generating and sending checks
- ▶ **As STP develops, we should consider how to build transparency into the selection process**

Continuity of Relationship with Grantees / Recipients

▶ SAC Grants

- ▶ Many organizations apply every year and count on some First Parish support
- ▶ Larger organizations, like Household Goods and Gaining Ground, have been weaned off FP support over a year or two

▶ Share the Plate

- ▶ Pilot period will have unique recipients for at least 2 years
- ▶ We don't yet understand how collections will run over time and whether organizations will feel that STP is worth the effort
- ▶ High collections so far have rested on a few large individual donations

Flexibility to Respond to Unexpected Needs

▶ SAC Grants

- ▶ Single application period
- ▶ Have used reserve to match special collections for disaster relief
 - ▶ With the reserve spent down, there will be less ability to match collections

▶ Share the Plate

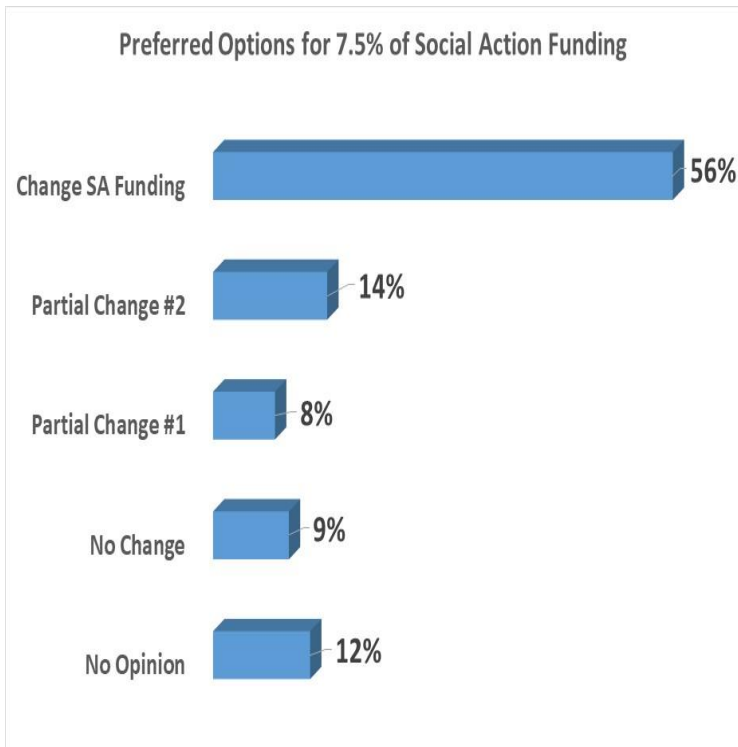
- ▶ Anticipated to be conducted throughout the year
- ▶ Expect to select recipient organizations at least 6 months ahead of time
- ▶ Could leave some months open or change schedule to respond to unexpected needs

Congregational Feedback

Congregation Opinions

- ▶ Open Houses found
 - ▶ First Parish community strongly supports social action, defined broadly to include:
 - ▶ activities,
 - ▶ grants, and
 - ▶ relationships to our own and other social action organizations.
 - ▶ And it wants more Social Action
 - ▶ There is support for a Social Action Coordinator
 - ▶ However, there was concern about the 7.5% allocated to SAC grants.
 - ▶ Administrative burden
 - ▶ Having the 7.5% outside the operating budget is a governance issue.

Congregation Survey Preferences for SA Funding



Change SA Funding:

Eliminate 7.5% of pledges social action allocation. Move Coordinator and budget to regular FP programs. Coordinator, in consultation with SM, SAC Board, and parishioners administers budget to support social justice efforts which may include grants.

Partial Change #2:

Reduce portion of 7.5% to fund Coordinator's salary, keep remaining amount to fund Social Action Grants only.

Partial Change #1:

Retain 7.5% of pledges to go only to Social Action Grants. Coordinator position may be eliminated unless money is found in budget.

No Change:

Retain 7.5% of pledges to Social Action to be where part is used for Coordinator's salary and part is used for Grants.

Ability to involve members

▶ SAC Grants

- ▶ Opportunity for congregation to review applications is important for transparency, but very few members do review the applications.
- ▶ Approximately 9 readers have participated over the past 5 years, but it takes considerable effort to summarize and use their input.
- ▶ Many grantees have deepened volunteer commitment or had more volunteers participate
- ▶ Grantees also report that being a grantee has increased awareness of their program and the issues they address
- ▶ However, this can probably also be achieved by STP

▶ STP

- ▶ Funds come directly from parishioners, who can decide how much to give
- ▶ Our survey found very positive feedback on STP
 - ▶ It is a good idea
 - ▶ I really like share the plate
 - ▶ I love this idea - Please update us on how much is raised
 - ▶ Well done. Meaningful part of the service.
- ▶ 68% of respondents indicated that they might or would nominate an organization for STP

Preliminary Conclusions

Preliminary Conclusions

- ▶ **The strengths of the SAC grant process should be carried forward**
 - ▶ Transparency
 - ▶ Group decision making process
 - ▶ Opportunity for comments from congregation
 - ▶ Using Form 990s to assess where our resources can make most difference
 - ▶ Accountability for consistently applying selection criteria
 - ▶ Finding a balance in supporting a variety of social justice goals
- ▶ **Share the Plate has been well received by the congregation and will likely succeed in**
 - ▶ increasing congregational involvement in Social Action giving
 - ▶ increasing awareness of the organizations involved and the issues they address
 - ▶ continuing to help organizations recruit volunteers and deepen their commitment
- ▶ **STP is not currently planned to allow for annual giving**
 - ▶ Organizations like Open Table, Concord Prison Outreach, and UUUM would be among those most affected
- ▶ **The commitment of 7.5% of pledges ensured a certain level of First Parish giving**
 - ▶ The long term ability of STP to raise equivalent or more funds than what has been given through pledges is not yet known.
 - ▶ First Parish should set a goal for social action giving that is equal or exceeds what has been given through SAC grants, and adjust its methods for giving until the goal is reached
 - ▶ These data on SAC giving can provide a baseline for evaluating future funds given