

## C. Application Narrative

### 1. Please give a fifty word summary of the project.

UUSJ will re-establish UU presence at the federal level by becoming the group that advances UU principles by engaging UUs in the National Capital Region. Activities in this proposal are necessary implementation steps toward making this commitment to advocacy a reality.

### 2. Describe your group and its recent history.

**History and Background:** In 1998, Unitarian Universalist Association (UUA) President Rev. John Buehrens, initiated an exploratory effort to engage UU congregations in the Washington, D.C., area to consider a regional social justice organization similar perhaps to the historic UU Urban Ministry in Boston. Rev. Buehrens hired Bob Johnsen, community organizer, to discern interest in a regional social justice organization. After conducting more than 30 one-on-one meetings with area ministers, UU organization leaders and lay leaders, Bob convened an organizing meeting. The leaders decided to support the interests of the urban-based organizations and congregations, joined with the suburban congregations, to serve members' social justice efforts through technical assistance, networking, education, and training opportunities. UUSJ incorporated in April 2000.

UUSJ's first educational programs focused on skill building -- establishing and growing congregational-based social justice programs - around public education issues. The focus expanded in 2003-04 to include needs of children and families. UU Legislative Ministry - Maryland grew out of a February 2005 UUSJ advocacy workshop in which participants expressed a need for UUs to have a voice in Annapolis. For 14 years, UUSJ has held a series of forums on selected topics to educate attendees and encourage participation in social justice activities. In addition, UUSJ recognizes outstanding social justice efforts through its annual awards gala banquet, the proceeds of which support grants for social justice projects.

UUSJ's current priority areas are immigration, the environment, economic justice, and LGBTQ issues. Areas of focus are reviewed periodically to determine whether adjustments are required. UUSJ selects areas of focus and legislative issues using a lens that takes advantage of legislative opportunities that are grounded in our liberal religious faith and reflect our UU principles, are a good fit for UUSJ, and can be supported by available resources. UUSJ is flexible and opportunistic as current events develop.

**UUSJ Begins Planning for Change:** UUSJ engaged in a strategic planning process from January through June 2013. UUSJ Board members considered the strengths, weaknesses, opportunities, and threats (SWOT) facing UUSJ if UUSJ made a change from education to direct advocacy. They took into consideration UUSJ's strategic location in the Capital region where there are strong non-profits and interfaith groups, where there is the highest concentration of UUs of any area in the country (approximately 6,500 in 25 congregations), and where many UUs have significant public policy experience and may be willing to step up to the opportunity to advocate for UU principles. Since its inception, UUSJ has been involved with educating *about* advocacy. **Now UUSJ decided to *do* advocacy. The basic purpose of this shift was to engage**

**capital region UUs in bringing critical issues to the attention of *national* policy-makers. This work complements the activities of state legislative ministries, the Unitarian Universalist Service Committee and the Unitarian Universalist Association and Congregational Advocacy and Witness programs (UUA Washington Advocacy Office closed in 2010).**

**UUSJ Begins Implementing its Strategic Plan: In July 2013, UUSJ began a two-year** implementation phase, first focusing on enhancing its internal communication, information technology, organizational infrastructure, and then developing specific strategies and tactics to implement each goal. The plan included an upgrade in information technology and enhanced our use of social media to reach out to generate new members and connect more effectively with current members. UUSJ engaged services through Salsa Labs for a robust contact management system allowing UUSJ to better manage and communicate with its members and the social justice community, track funding, manage events, and conduct action advocacy alerts at the state and national level. The website [www.uusj.org](http://www.uusj.org), and our bi-monthly e-News were completely redesigned including relevant issue resources. These enhancements were completed within the first year.

The Strategic Plan milestones began to slip and the UUSJ Board quickly became aware of challenges of its limited human resources (i.e. two part-time staff totaling 25 hours per week-15 hours for the Administrator and 10 hours for the Executive Director), volunteer workers and limited financial resources (e.g. \$35K flat budget contributed by 14 congregations that make substantial contributions and individual memberships). By January, 2014, the Board realized that its organizational structure, volunteers, employees, and financial resources were not up to the task of implementation. Expanding from education and networking to advocacy and witness was more demanding upon the volunteers and staff than anticipated.

Retirement of UUSJ Executive Director Rev. Terry Ellen effective June 30, 2014, also complicated implementation of the Strategic Plan. In formulating plans to conduct a search for a new Executive Director, UUSJ believed it would be helpful to think of its succession planning in a similar fashion to that of a congregation conducting a search for a new settled minister. The process must begin with an evaluation of the needs and desires of the organization. It has been ten years since UUSJ hired an Executive Director, and UUSJ believes it is essential to conduct a thoughtful examination of the way it has been functioning and to determine what changes, if any, are required to help UUSJ fulfill its new vision.

The UUSJ Board determined that professional help would be necessary to ramp up efforts to take UUSJ to the next level. Organizational capacity-building became a priority. On June 22, 2014, UUSJ held a facilitated “deep chair” meeting to decide how it should advance its vision to become an organization that would engage more people in social justice work, amplify our UU voices and increase our influence in the public arena. The Board re-committed itself to its vision. A “Core Group,” consisting of the Executive Committee, two UUSJ Board members and a UUSJ individual member with non-profit and advocacy experience, comprise the group, formed to start the hard work of looking at the organization from the ground up. There was consensus that the

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Core Group would start with a thorough review of governance structure, Board and staff roles and responsibilities. To help jump-start this review, the Core Group is now exploring pro-bono and/or paid consultant assistance.

### **3. Describe your project more fully. Describe the issue(s) your project addresses.**

With this grant, UUSJ will fill a gap left in the halls of the federal government that has existed since the closing of the UUA's Washington Office for Advocacy. **Specifically, we propose to become the national advocacy arm for the issues vital to UUs throughout the United States.** These issues are formulated at the General Assembly and are considered each year by congregations and districts throughout the country. We will seek to represent the views of the congregations in the National Capital Area in Congressional visits and at the Executive branch. We will develop trainings for congregations here and, over time offer and facilitate visits for those that send people to Washington to communicate their UU values to their government. The activities we outline in this proposal are all necessary steps toward making this new commitment to advocacy on the federal level a reality.

UUSJ has determined that there is interest on the part of several state legislative ministries in using UUSJ's capability to send UU representatives to national legislators and organizations on their behalf, representing UU values that are relevant at both the state and national levels. For example, at a recent UU In-Gathering co-sponsored by UUSJ for the "No More Deportations" event in Washington, D.C., the UUSJ Board chair spoke with an executive director of a state legislative ministry in the southwest. Upon learning about UUSJ and the possibility that UUs in the D.C. region would act on their behalf with public policy-makers, they decided to conduct a pilot where UUSJ would deliver letters and speak on their behalf.

Working with Susan Leslie, UUA Congregational Advocacy and Witness Program Coordinator and the Witness Ministries Staff in Washington, D.C., we have established working relationships to support Standing on the Side of Love witness activities. We have provided a UU presence at some interfaith meetings, and conducted Hill office visits with interfaith groups, and engaged in actions in D.C. such as the recent Dreamer Moms Vigil in front of the White House. And we are in communication with Pam Sparr at UUSC.

UUSJ is evolving and needs a new organizational structure and additional staff resources to support its new vision of widespread engagement in social justice advocacy and witness work - to amplify our voices. The grant will be vital to that process.

### **Be specific about goals, activities and timelines.**

Project Sub-Goals or Objectives:

- to provide a monthly visit by UUs to legislative offices to advocate on national issues;
- to organize UUSJ members and their fellow congregants in visiting and contacting legislative offices, and writing to policymakers and media outlets;
- to organize and coordinate UU participation in witnessing and advocacy opportunities;
- to collaborate with interfaith and other organizations that share our concern on issues;

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- to develop an Implementation Plan with the following goals:
  - a. Effective Board governance, including oversight and operations.
  - b. Clear delineation and coordination of Board and employee roles.
  - c. Shared vision, mission, purpose and goals for all leaders in the organization.
  - d. Structures and processes to guide the Board and employees toward achieving the new vision.
  - e. Stronger financial management, analysis and decisions-making.
  - f. Stronger advocacy, including research and promotion.
  - g. Enhanced credibility and image among stakeholders.
  - h. Overall, more proactive direction-setting, decision-making and problem-solving.

### **Timeline for Project Activities:**

January 2015: Receive the grant. Solicit proposals for consultant(s).

March 2015: Hire consultant(s). Begin the following activities:

- a. Conduct interviews with key leadership
- b. Assess feasibility and organizational wherewithal
- c. Develop recommendations on how to implement strategic plan
- d. Develop recommendations on how to strengthen organization
- e. Develop organizational chart, job descriptions, volunteer facilitation, etc.
- f. Develop recommendations for development plan and procedures
- g. Introduce fund raiser consultant specialists
- h. Introduce partners and collaborators
- h. Develop recommendations for leveraging current sources of funding and other assets

July 2015: Receive an Implementation Plan with at minimum the following components:

- a. Tasks, timelines, tactics and indicators to achieve Goals set forth in the Strategic Plan (revised as needed) and a monitoring and evaluation plan.
- b. A Staffing Plan with job descriptions for paid and Board member positions; an Organization Chart with Executive Committee, employee(s) and Board roles; Executive Committee, employee and Board performance management system, including comprehensive guidelines and materials for all critical leadership and supervisory activities; and a handbook of Personnel Policies.
- c. A Communications Plan that specifies communications capabilities required and how they are to be used, including a comprehensive media plan.
- d. A Development plan.

Note: The UUSJ Executive Committee has conferred with six non-profit professionals to explore what UUSJ needs in the way of professional help. Our estimate of cost and immediate next steps are based on these conversations.

**4. Who will carry out the project's plan? What are their relevant skills and experiences?**

The best qualified consultant(s) with demonstrated experience responding to an RFP will execute the project. Management and/or organizing consulting skill and experience helping non-profits to maximize their performance will be primary selection criteria. The plan produced by the project consultant(s) will be carried out by the "Core Group" consisting of the UUSJ Executive Committee supplemented by two Board members and an individual member with special expertise. Some aspects of the work under this grant cannot wait. UUSJ plans to use \$2,000 from its budget to hire consultant(s) to get started.

**Lavona Grow** (Board Chair): Twenty-one year member UU Church of Arlington, VA: served as Social Justice Coordinator, Social Action Council co-chair, Green Action co-chair, Search Committee chair, Nominating Committee chair. AAUW: Lobby Corp member, branch Board co-chair, and State Public Relations chair. Executive Director and Lobbyist for Common Cause, Indiana. Served 17 years with the US Dept. of Education in several positions including as a program analyst, deputy director and program director, Office of Postsecondary Education.

**Al Carlson** (Board Member): Twenty-five year member of UU Church in Reston, VA. 2013-14 UUSJ co-chair. Served as president in two UU congregations, and as secretary and treasurer in another. Served as secretary of the Long Island Area Council of UU Congregations and president of the Greater Washington Association of UU Congregations. Engineering career included project manager on contracts with government agencies, and university faculty positions.

**Jim Alcauskas** (Board Member): Twenty-five year member of Bull Run UU, Manassas, VA: serving on the Board of Directors, current Finance Committee chair, member Social Justice Committee and Membership Committee. Former member of the Endowment Committee, and Maintenance & Aesthetics Committee. UUSJ serving on the Finance and Development Committee. Twenty-two years experience in the administration of technical and administrative organizations as a civilian employee of the U.S. Navy including project and staff management, and project planning. Experience as a small business owner.

**Bill Alsmeyer-Johnson** (Secretary): A life long UU, attended many different UU churches, 13 years at Mt. Vernon Unitarian Church, Alexandria, VA, served as Social Justice Coordinator, Green Sanctuary Task Force chair, served on Board of Trustees. UUSJ Communications and IT chair. Manages UUSJ's website. Worked as an IT Systems Analyst for 36 years.

**John Gubbings** (Treasurer): Forty-one year member Cedar Lane UU Church, Bethesda, MD: served on the Board of Trustees, Personnel Committee, Endowment Committee, Search Committee that called Rev. Abhi Janamanchi, and many others including Social Justice Council. Served on the JPD Growth Committee and JPD Chesapeake UU Growth Committee, including as chair. Thirty-one years in systems management and information technology with the U.S. Navy, Lockheed Martin, and CTA Inc.

**David Strauss** (UUSJ individual member): A UU for 30 years. Member of the UU Congregation of Rockville, MD: Immigration Action Group co-chair. Member of the steering committee of the Greater Washington Immigration Film Festival. Retired in 2012 from a twelve year career as

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Executive Director of the Association of Farmworker Opportunity Programs, in Washington, D.C.

**5. Who do you define as your community and how do you reach them?** UUSJ's community consists of UU congregations and congregants. UUSJ reaches them through an email bi-monthly newsletter, direct email, advocacy alerts, social media (Facebook and to a limited extent Twitter) and its website [UUSJ.org](http://UUSJ.org). Face-to-face communications takes place at quarterly Board meetings, UUSJ programs hosted by member congregations.

**How has your UU congregation, district, or denomination been involved in the creation of your project?** UUSJ's governing Board is made up of one delegate and alternate representatives from participating congregations and at-large members. Some of these members developed the strategic plan, and all approved it.

**How are you working to increase the involvement of UU individuals and institutions in the issues your project addresses?** This is addressed extensively in the answers to question 3 above. UUSJ is also currently conducting visits with D.C. area congregation ministers, social justice chairs and their UUSJ Board member to build relationships, inform them of UUSJ's new vision and to seek their buy-in and support of UUSJ's implementation of its vision, both financially and through membership participation.

**6. How representative are your volunteers and staff of the communities you work with?** UUSJ's Board, volunteers and staff are all members of UU congregations supporting UUSJ's work, and represent their congregation's interests and perspectives. Our current part-time administrator is a UU minister. Our volunteers include persons of color.

**7. List the individuals, committees or organizations that have contributed significantly to this project through money or other support.** There are 14 congregations contributing significantly, currently totaling \$20,399 in 2013-2014, plus \$19,823 from contributions of individuals in these congregations (includes contributions through Combined Federal Campaign (CFC) of which \$5,700 will be recognized in 2014-2015) and additional individual UUSJ members of other congregations that donate \$40 or more (totaling \$2,020 in 2014). Congregations financially supporting UUSJ:

### District of Columbia

All Souls Church, Unitarian  
Washington Ethical Society

### Maryland

Cedar Lane Unitarian Universalist Congregation  
Goodloe Memorial Unitarian Universalist Congregation  
Paint Branch Unitarian Universalist Church  
River Road Unitarian Universalist Congregation

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Unitarian Universalist Congregation of Rockville  
Unitarian Universalist Congregation of Columbia

### Virginia

Accotink Unitarian Universalist Church  
Unitarian Universalist Church of Arlington  
Bull Run Unitarian Universalist  
Unitarian Universalist Congregation of Fairfax  
Mt. Vernon Unitarian Church  
Unitarian Universalist Church in Reston

**What UUA resources have been consulted?** UUA Funding Program booth personnel at GA 2014 and the UUA Funding staff.

Not in relationship to the grant application: UUSJ has been with the UUA Director of Congregational Advocacy and Witness, Susan Leslie, and the Director of Multicultural Growth and Witness Taquina Boston and her staff at the Washington, D.C. office. UUSJ intends to consult and coordinate with the UUA Witness Ministries staff regularly, and other UU advocacy groups and leaders, as appropriate that are mutually beneficial and will give voice to its UU principles. The Board chair has met with Pam Sparr of UUSC and Paula Cole Jones, Director for Social and Racial Justice, JPD.

**If applicable, list funding sources and dollar amounts for your organization/project for the last two years.** The UUSJ budget, as presented in Attachment D, shows stable income of about \$35K over the last two years and has been stable for many years.

**8. Please describe your specific plans for raising income in addition to the proposed UUSJ grant.** The anticipated result of this grant is greater organizational effectiveness leading to greater income from new and current congregations and more individuals to support it. The additional \$2,000 cited in Attachment D is planned for help in preparing for the professional consultant provided for by the grant. UUSJ conducts a Gala every year to recognize social justice leaders and to raise funds to support social justice grants to local congregations. .

**How do you plan to sustain the project?** As answered in question 7 UUSJ has reliable income. If UUSJ continues on its current trajectory, that income will increase. Much of the intended use of project funds from the grant do not require annual funding.

**9. Describe your plan for evaluation. What outcomes are you working to create?**

**Outcome:** The anticipated outcome of this grant is a strong organizational infrastructure that will support widespread engagement of Unitarian Universalists of the capital region in national social justice issue advocacy and witness.

**Program Strategies:** UUSJ will carry out the actions contained in the Implementation Plan described in paragraph 3 to achieve the above goal.

**Give the criteria/measures/tools you will use to evaluate the success of the project.**

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We will look at what we did (performance); how well we did it (quality); and whether it mattered (impact). We will establish metrics for accountability for our various target audiences. We will conduct interviews of key stakeholders, use online surveys and evaluation forms at events and meetings. As part of the Implementation Plan an evaluation plan will be developed.

Within four months there will be a viable Task Force for each of the four UUSJ focus areas: immigration, the environment, economic justice, and LGBTQ issues.

Within the first year there will have been six UUSJ advocacy visits to congressional offices. Within the first year UUSJ will have a strong complementary partner organization in the regional community for each of the four UUSJ focus areas. Within the first year UUSJ will have actively participated in one UU community event for each of the four focus areas.

How will you know you have succeeded? We will know we have succeeded if we have substantially achieved these objectives within two years of receiving deliverables listed in question 3 and UUSJ will be recognized as a viable advocacy organization with growing engagement of congregational members.

### **10. Describe the organization's or group's social responsibility philosophy.**

a. The work of UUSJ is grounded in and is expressed through a spiritual and moral commitment that reflects deep UU roots and is expressed through its seven guiding UU Principles. It links to current UU values as expressed in the aspirations of our members and their congregations. It draws upon commitments to social justice as expressed in resolutions passed by the UU General Assembly and similar faith-based statements of conscience. In all its activities UUSJ shall remain mindful of the moral imperatives that call us to action.

b. UUSJ activities shall honor the dignity and worth of all human beings and shall take into account their impact upon people of color, low-income communities, and other groups marginalized by mainstream society. In all things, UUSJ shall seek to promote diversity and empowerment in its own organization, in its member congregations, and in its communities.

c. Being located in the Nation's Capital region, UUSJ occupies a unique niche. UUSJ has the potential to bring together the power and influence of more than 6,500 UUs and others who share our Vision to shape public policies in ways that reflect our UU principles and values. By providing regular opportunities to engage with public policy makers and leaders, UUSJ can capitalize on the wealth of talent and expertise of UUs who have worked in the public policy arena. UUSJ will give them opportunities to put their values into action.

### **Now Is the Time!**

Our liberal religious voice is needed now more than ever. **UUSJ will strive to engage congregations and congregants in giving voice to our UU principles.** UUSJ's advocacy work will be spiritually grounded and speak to the moral imperative of our social justice issues. The vision herein is bold, but we believe we need to do everything we can now to make a positive and more just world. It's up to all of us to make this potential a reality.