

The Unitarian Universalist Veatch Program at Shelter Rock

Manhasset, NY

<http://www.uucsr.org/veatch-program>



Q: How do the faith values of the congregation motivate its giving?

A: While Unitarian Universalism counts itself a faith tradition of deeds, not creeds, all UU congregations affirm and promote seven principles, which constitute the faith values we share:

1. The inherent worth and dignity of every person.
2. Justice, equity and compassion in human relations.
3. Acceptance of one another and encouragement to spiritual growth in our congregations.
4. A free and responsible search for truth and meaning.
5. The right of conscience and the use of the democratic process within our congregations and in society at large.
6. The goal of world community with peace, liberty and justice for all.
7. Respect for the interdependent web of all existence of which we are a part.

These principles and the values they embody provide a solid foundation for the grantmaking priorities of the UU Congregation at Shelter Rock. They give us a reliable lens through which to evaluate the work of groups working for social change in America.

Q: Why is community organizing your main funding priority?

A: The congregation's philanthropic strategies have changed somewhat over the 55 years that the UU Veatch Program has been making grants. During



In August 2013, the Coalition of Immokalee Workers Women's Group protested outside Wendy's in Estero, Florida, accompanied by allies from the local Unitarian Universalist congregation. Photo courtesy of the Veatch Program.

this time, a "theory of social change" has emerged, which posits that people most directly affected by social realities such as poverty, discrimination, oppression, marginalization and injustice are precisely the people to advocate for and achieve remedies to these problems. Community organizing is a social change strategy that employs organizers to work with individuals in their churches, synagogues, mosques, as well as unions, student groups and other community-based organizations to develop powerful civic leaders, conduct effective advocacy campaigns and put real pressure on government and corporate leaders to redress grievances and expand justice.

We fund so many community organizing groups because we believe they represent the power to bring about the kind of future our faith inspires us to

envision and work toward. We also fund networks that foster collaboration among local groups, as well as support groups that conduct research, train leaders, deepen communications expertise, expand effective use of technology and increase the capacity of grassroots groups to meet their goals.

Q: Why did you do away with asking grantees to submit budgets?

A: We made this breakthrough thanks to the encouragement and leadership of Carol Cantwell of Fun with Financials. Carol's assessment after 10 years of consulting with foundations and nonprofit organizations is that many foundations rely too heavily on grantee budgets to assess financial health. Carol worked closely with the Veatch Program to develop the Financial Health Indicators (FHI) tool, which pulls three years' worth of data directly from each grantee's IRS Form 990. The FHI provides us with a more realistic picture of the trends in actual financial performance than a static budget ever could, showing total revenue and expense, trends in net assets and whether an organization has a diverse base of financial support. This approach is especially helpful because all of the organizations complete the same form and the data is more consistent across diverse groups in a way individual budgets are not. The result has been increased confidence from our board, increased satisfaction from program officers and innumerable hours of time freed for our grantees to advance the issues and concerns we care about. ■