

Unitarian Universalist Association

Staff Report June 2009



**William G. Sinkford-President
Kathleen Montgomery-Executive Vice President**

INTRODUCTION

The Association's mission for the staff is to:

1. Support the health and vitality of Unitarian Universalist congregations as they minister in their communities.
2. Open the doors of Unitarian Universalism to people who yearn for liberal religious community.
3. Be a respected voice for liberal religious values.

Typically this annual report outlines for you, by staff group, the work that has been done on your behalf during the year by the staff of the Unitarian Universalist Association. This year though, we have asked each staff group director to also outline the changes and accomplishments in his or her area of responsibility since 2001, the beginning of this administration.

This comes with great appreciation for the extraordinary work of the staff at a time of great change and many challenges.

If you have questions in response to the information contained here, please feel free to contact Kay Montgomery (kmontgomery@uua.org).

William G. Sinkford, President
Kathleen Montgomery, Executive Vice President

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ADVOCACY AND WITNESS

The mission of the Advocacy and Witness Staff Group is to take Unitarian Universalist values out into the wider world for the purpose of changing public policies and practices. This work is done in three ways:

- 1. Legislative and grassroots advocacy on key strategic issues where we can exercise influence.*
- 2. Support for UU congregations, organizations, and partners in building capacity and strength for effective work in the world. This may be local, state-wide, national, or international work.*
- 3. Strategic relationships with secular and religious partners with whom we can have greater influence on shared values.*

History: The Advocacy and Witness Staff Group was established July 1, 2002. The staff group emerged from a UUA restructure. International offices including the UU Holdeen India Program joined the Washington Office, parts of the former Faith in Action Department, and—from 2002 to 2006—the Information and Public Witness Office comprise the staff group. The Washington Office Social Justice Internship Program which had been piloted beginning in January of 2002 joined the new staff group, affectionately known as “A & W.”

Initiatives:

The Advocacy and Witness Staff Group works on a variety of initiatives, both in the U.S. and internationally.

The UU Holdeen India Program (UUHIP) works with organizations of India’s most excluded and oppressed peoples: women, dalits (so-called “untouchables” who fall outside the caste system); and the adivasis or tribals who are India’s indigenous peoples, especially migrant, bonded and landless agricultural laborers. UUHIP supports their efforts to participate fully in the social, economic, and political life of India. UUHIP provides funds, support, and creative strategic help to these organizations, and facilitates partnerships between the oppressed groups and others, including UU congregations, who may be of assistance. Holdeen@uua.org

The Office of International Resources (IRO) supports congregations as they respond to the call of the UUA’s Sixth Principle, “to affirm and promote the goal of world community with peace, liberty and justice for all.” The IRO coordinates international ministry efforts with other organizations, and maintains linkages with historic and new UU judicatories around the world, based upon principles of right relationship. The IRO data-base shows approximately 150 congregations involved with international programs, and congregational profiles are available online to read and learn from. The Faith Without Borders program invites congregational involvement. Several bi-monthly email updates are subscribed to by over 1200 people around the world.

The IRO maintains relationships with interfaith partners around the world, especially in Japan, and has an “Ambassador” program with three historic judicatories: Transylvania, NorthEast India, and the Phillipines. www.uua.org/international

The Advocacy team (A-team) is made up of staff in the UUA's Washington Office for Advocacy as well as the Congregational Advocacy and Witness office in Boston. The A-team supports UU activism in legislative and grassroots campaigns to influence public policy in strategic areas where we determine that we have the best grounding, fit, opportunity, and accountability. This work is done in coalitions with other religious and secular partners. Because much of this work has been funded by generous donors and is responsive to opportunities which are current, the areas of work have evolved and will continue to evolve.

The work generally focuses on the rights of historically marginalized people such as women, glbt people, people of color, immigrants, and people in international crises. Anti-oppression analysis is a key part of all work, since many people carry multiple identities.

Hundreds of staff communications with elected officials in Congress and in the Administration have been enhanced by congregational activism. Over 12,000 UUs signed a petition for peace in Iraq that was delivered to Congress in 2007. Thousands of UUs have gone on district visits to Congress members or contacted their officials to voice UU perspectives on important issues of public policy.

Fifty-two congregations or clusters have been part of the Social Justice Empowerment program since 2003 and more than 50 have engaged in the Inspired Faith, Effective Action workshop which help them to be more effective. Eight hundred Social Action chairs and others receive the monthly SAC-news (Social Action Chair news) via email. 641 congregations have reported involvement in some aspect of social justice work to the A-team, and more than 6,500 people receive the weekly A-news (Advocacy news). About 2500 receive the Journey Towards Wholeness' JTWnews and over 2,000 are part of the Socially Responsible Investing list.

The A-Team supports congregations in communicating with one another to learn best practices and share initiatives. Over 120 UU congregations have put themselves on the map at www.FaithinPublicLife.org where they may be found by other activists, by journalists, pollsters, and policy-makers. Over 120 are involved in Congregationally Based Community Organizing and are supported by multiple materials in this work. www.uua.org/socialjustice

This year the Advocacy and Witness staff group will produce a DVD and book entitled *A People So Bold* which explores theologies underlying social justice work and supports social justice committees and other UU leaders in reflection upon activism.

All work done from A & W is grounded in theological reflection. The Social Justice Internship Program in the UUA Washington Office for Advocacy, for example, is staffed by young adults who engage in theological reflection as part of their advocacy work. Since 2002, a quarter time minister has worked with two to-three young adults per year in legislative advocacy positions. Those young adults have gone ahead to seminary to study for UU ministry (three interns); law school (two interns); journalism school (two interns); social justice non-profit work (three interns); government service (two interns); and Peace Corps volunteer work (two interns). These women and men provide inspiration and leadership which will sustain our movement for decades to come!

CONGREGATIONAL SERVICES

Inspired by urgency, justice and a passion for Unitarian Universalism, Congregational Services supports the health, growth and transformation of individuals, communities and congregations as they fulfill their purpose in the world.

At the time of the election of Bill Sinkford as President of the UUA, the Department for Congregational District and Extension Services included District Staff serving 20 UUA districts as well as the offices of Extension, Education and Research, Extension Ministry, Services to Large Congregations, Young Adult and Campus Ministry, and Congregational Fundraising Services, as well as offices of the Director, Deputy Director and Department Administrator. The total number of staff was 47. (30 district staff and 17 home office staff)

Immediately following the election, the Extension Ministry Office was reorganized to create the Office for New Congregation and Growth Resources. This new office was the result of the planned end of the Extension and New Congregation Ministry programs as we had known them, and incorporated some of the responsibilities formally done by Extension, Education and Research.

With the UUA staff reorganization in the year following the election, CD&E was divided into District Services and Congregational Services, with a Director for each of the new staff groups. The offices of New Congregation and Growth Resources, Young Adult and Campus Ministry, Services to Large Congregations, Congregational Fundraising Services continued in Congregational Services.

During its first year (2002-03), Congregational Services incorporated a number of changes.

- The Office of the Director took on responsibilities for the Office of Ethics in Congregational Life and for the test of a marketing outreach campaign.
- The Office of Congregational Justice Making moved into this staff group from the Department for Faith in Action which was disbanded as responsibilities for our anti oppression and advocacy work were spread across the organization and the Identity Based Ministries Staff Group was created.
- The Office for Lay Leadership Development was created and a Director hired.
- The UUA and Canadian Unitarian Council (CUC) were engaged in negotiations for a significant change in relationship resulting in most services for Canadian congregations being the responsibility of the CUC.

Following the successful and promising marketing outreach campaign test in 2002-2003, the decision was made to hire a marketing outreach consultant for the UUA. This position was filled in early 2004.

In 2005 two more offices were reorganized and a new office created.

- The Office for Growth Services: with responsibility for resource development, marketing outreach and the Planning for Growth and Vitality program

- The Office for Congregational Justice Making: which included a new consulting resource – JUUST Change. A consultant who had been working with us in the development process stayed on to lead JUUST Change and provide additional leadership for our anti racism, anti oppression and multicultural work.
- Due to the success of our marketing outreach efforts and the intention to continue to develop these resources and support such outreach, the position of consultant for marketing outreach was created – the Director for Marketing Outreach.

Come the 2007-08 year, however, there were more changes:

- The Office for Congregational Fundraising Services became the Office for Congregational Stewardship Services following the publication of *Beyond Fundraising* written by the Offices Director.
- The Office for Large Congregations added support for large mid-size congregations.

For 2007-2008, the Congregational Services Staff Group included the Director’s Office (with responsibilities for growth initiatives, ethics in congregational life, ARAOMC consulting and support for marketing outreach), Congregational Services Program Manager (ARAOMC, Ethics in Congregational Life, administrative support for the Director), Growth Services Program Manager (includes administrative support for the Marketing Outreach and Large Congregation Directors), Congregational Stewardship Services (Director, Administrator), Services to Large Congregations (Director), Marketing Outreach (Director, part time administrative assistant for FY08), JUUST Change Consultancy (Lead Consultant part time with ten consultants available on a project basis), Growth Consultant (Consultant part time - new regional group project), Young Adult and Campus Ministry (aka YACM - Director, Campus Ministry and Field Organizing Director part time, Administrator part time, Program Associate full time)

For several years prior to 2007, there had been informal conversation about deeper and more structured collaboration between the Youth and YACM offices. At the end of FY07 the Director of the Young Adult and Campus Ministry concluded his service, having accepted a call to parish ministry. The Consultation on Ministry to and with Youth was underway. It seemed a good time to formally explore how the Association needs to be structured to support youth and young adult ministries in the immediate future. After a period of dialogue and review, a new structure was proposed to take effect as of July 1, 2008: The Office for Youth and Young Adult Ministries in the Life Span Faith Development Staff Group. Though implementation of the plan was delayed until July, 2009, clearly more change was coming to the shape of Congregational Services.

There were significant changes in the mission and ministries of Congregational Services 2001-2007 as the culture of UUism changed:

- Culture change in access and development of resources with the shift to web based resources allowing broader congregational access to more relevant and flexible resources as well as stream lined development and production processes allowing resources to remain more current
- Culture change from “why grow” to a focus on “hospitality and inclusion” as part of our mission

- Culture change in our ARAOMC work from a perceived approach of “one right way” to “meeting congregations where they are,” strategies for multicultural competency; assessing readiness and movement; reaching a tipping point with engagement deepening and broadening
- Culture change from fundraising to stewardship and generosity supported by appreciative inquiry (a shift from a “what’s broke and how can we fix it” to “where are our strengths and how can we build on them”)
- Culture change from “marketing is a bad word” to marketing outreach being part of our mission and calling
- Shift in the nature of concerns under the umbrella of ethics and safety and increase in the number of congregations who are addressing these concerns proactively

Priorities for 2007-08 included: marketing outreach and hospitality; moving toward to an ARAOMC tipping point; continue experimentation, continue learning, apply lessons learned – as we continue to grow UUism; support for emerging congregations; begin to incorporate a multigenerational lens.

In the spring of 2008, responsibility Green Sanctuary, a program of Ministry for Earth (MFE) was given over to the UUA, becoming part of Congregational Stewardship Services (CSS).

In the late summer and fall of 2008, an evaluation of the recently concluded national marketing campaign (Time Magazine and Time on line; Google ads) and the powerful impact of the July tragedy at our congregation in Knoxville, TN led to a shift in national marketing. It was clearly time for a values based visibility campaign focusing more on earned media, with responsibility for national marketing outreach shifting to Advocacy and Witness.

For a staff group to function effectively as an internal organizational structure it needs an effective collective identity and mission **AND critical mass**. With Young Adult Ministries moving to Life Span Faith Development; with the shift of marketing to Advocacy & Witness, fiscal year 2010 would find Congregational Services to be three offices plus the office of the Director. All of the ministries of those offices are critically important - mission critical. The role of Director for Congregational Services under these circumstances seemed less so. Each of the offices/ministries could have a home and connection elsewhere in the organization, be nurtured and supported there, continue to provide excellent service from that new home base; and perhaps be better served by a new location in the organization with different kinds of connections and relationships.

In the context of the economic stresses of the fall and winter of 2008-09, the Director for Congregational Services proposed a re-organization of the staff group and the elimination of the Director position. With the announcement of the Director’s resignation in early March, the shift in marketing strategy clear, and the plans for the new combined Youth and Young Adult Office complete, the reorganization of the continuing Congregational Services offices began.

As of July 1, 2009, Growth Services, Services to Large Congregations and Congregational Stewardship Services will become part of District Services. With this reorganization and the expanded staff and office structure, this staff group takes on a new name, becoming

Congregational Growth and Vitality. Congregational Justice Making (JUUST Change Consultancy, Jubilee 1, Jubilee 2 and other ARAOMC resources) will become a new office in the Identity Based Ministries Staff Group. Congregational Safety and Ethics will be reviewed during the fall of 2009; with the Congregational Services Director and Congregational Service Program Manager continuing in their responsibilities until a new plan can be implemented.

The changes reflected in the Congregational Services story offer some clues about the importance of agility and flexibility in structure, the constancy of mission informed by experience and reflect three things core to our mission: hospitality to one another and the guest; steadfast commitment to our ARAOMC transformation; and striving to lead from the best of who we are and can become.

DISTRICT SERVICES

At the highest level, the mission of the district staff team is the same as the larger UUA staff: It is to 1) support the health and vitality of Unitarian Universalist congregations as they minister in their communities; 2) open the doors of Unitarian Universalism to those who yearn for a liberal religious community; and 3) be a respected voice for liberal religious values. District staff members contribute to this mission in a myriad of ways, and almost always in partnership with others, primarily by serving as leaders, consultants, advocates, and educators in our Association of Congregations. District staff members often serve as the "first call for help" by congregations needing UUA resources. District staff members perform direct service to UUA congregations, including consultations on a wide variety of congregational issues such as mission-vision creation, long-range planning and organizational development, ministerial transitions, leadership training, and conflict management.

Structural Changes Since 2001

In 2001, Congregational Services, District Services, and Extension Services existed as one department. A restructuring took place in 2002, after the election of the Rev. William Sinkford. Among other changes, it separated Congregational and Extension Services from District Services, each having their own director. For eight years, this new structure existed. Currently a reorganization is taking place for the purpose of further enhancing services and support to congregations. A new staff group is being created named Congregational Growth and Vitality. It will include what is currently called District Services plus portions of Congregational Services including Congregational Stewardship Services, Growth Services, and Services to Large Congregations. Other portions of Congregational Services have been incorporated into other staff groups.

In 2001, there were 20 district executives (DEs) serving 20 districts. Today there are 19 DEs serving 19 districts. (New Hampshire/Vermont and Northeast districts jointly created a new district called the Northern New England District.) In 2001 there were 10 program consultants, all focused on religious education. Today there are 16 program consultants, many of whom have responsibilities for growth and/or leadership development in addition to responsibilities for lifespan faith development; the latter includes youth and young adult ministries.

In 2001, all district executives and most program consultants reported to the director for Congregational, District, and Extension services. Today 13 of 16 program consultants report to their respective district executive. This has simplified the reporting relationship, enhanced the clarity of roles and responsibilities, and made the number of direct reports supervised by the Director for District Services more manageable.

By 2001, districts had organized organically into four "regions," primarily for the purpose of meeting annually to share common concerns and continuing education. Today they've organized into five regions, some with shared leadership schools, combined leadership development conferences, shared staff, and strong partnerships -- in addition to more frequent meetings for sharing and advancing shared learning.

Major Shifts in Congregational Support

Increased use of technology: Virtual meetings, videoconferencing, web technologies such as Persony which enables webinars as well as other technological advances have enabled online

collaboration and training to occur in ways unimaginable in 2001. Lay and professional leaders now have 24-hour access to online training programs led by experts on both the national and district staff and those outside UUA staff on such topics as governance, multigenerational worship, membership integration, meeting management, UU evangelism, and shared leadership.

Increased use of media resources: The creation of over a dozen DVDs and CDs for the purpose of leadership development is another new development since 2001. A CD series entitled Drive Time Essays Volumes 1, 2, and 3 has provided nearly sixty 3- to 6-minute spoken essays on all aspects of leadership development. The most recent volume was created specifically for the leaders of small congregations which make up 60% of the congregations in the UUA. Additionally, DVDs on worship, governance, growth, and leadership have enabled thousands of Unitarian Universalists to benefit from the knowledge of experts from around the country, both inside and outside the Association.

UU University: UU University was created in 2006 to provide in-depth leadership development training to lay leaders in the days preceding the Association's General Assembly. In 2009, for the first time, UU University will be incorporated into the main body of General Assembly so that potentially 4000 rather than 400 people can participate. UU University was created partly to address the quest for more in-depth training that can't be achieved in traditionally short workshop settings.

Breakthrough Congregations: There is increased sensitivity to the fact that the wisdom of current congregational leaders, both lay and professional, has not adequately been tapped to enhance the skills and abilities of others. The Breakthrough Congregation initiative was launched in 2005 as part of a larger strategy to address that fact. District staff members, in partnership with others including national staff members, each year identify four congregations that have achieved significant and sustained numerical growth and provide them with the opportunity to share their stories of success and struggle at General Assembly, district assemblies, and through mentoring relationships with the leaders of other congregations. The average adult membership of Breakthrough Congregations increases at a rate of six times that of our average UU congregation. Benefiting from their experience only makes sense.

Clusters and Networks: The creation of clusters of congregations within districts for purposes of training and collaboration, while not new, has been enhanced. Additionally, technology has enabled "virtual clusters" or networks of congregations that "meet" through listservs, Facebook, and other social networking creations. District staff members actively support the creation and maintenance of these clusters. Connecting congregations with congregations is one of the highest priorities of district staff members.

IDENTITY-BASED MINISTRIES

History: Identity-Based Ministries staff group was established July 1, 2002 as part of the UUA's restructure. The purpose of the staff group is to advocate, support and provide access to resources for Unitarian Universalists who are marginalized, excluded or oppressed based on the social group identities of ability/disability, class, gender identity/gender expression, race/ethnicity, and sexual orientation. In addition, we collaborate with other UUA staff groups to define and develop relationships of accountability, grounded in the values of anti-oppression/anti-racism/multiculturalism, with Unitarian Universalist religious professionals, lay leaders, and affiliate/affinity groups from the above social group identities.

In 2009, the restructure of staff functions has resulted in the incorporation of several Congregational Justice-Making programs into Identity-Based Ministries, specifically Jubilee 1 (Introduction to Anti-Racism), Jubilee 2 (Anti-Racism Power Analysis Training), and the JUUST Change Anti-Oppression Consultancy.

Support for UUA Mission: Program and initiatives of Identity-Based Ministries support leadership development, community building, and resource access (retreats, continuing education, GA scholarships) to identity-based constituent groups as core to the mission of opening Unitarian Universalism to all who yearn for a liberal religious home. Programs and initiatives are intended to foster increased welcome, inclusion, and affirmation for persons from the identity groups listed above. Identity-Based Ministries recognizes that the diversity of membership that has been expressed as a general longing in Unitarian Universalism requires diversity of ministry. The staff group collaborates with other UUA staff groups to develop the knowledge, skills and competencies that increase this faith community's effectiveness in creating justice-centered, multicultural ministries.

Organization: Identity-Based Ministries includes the following program areas:

Office of Accessibility Concerns: to increase the multicultural welcome and inclusion of persons with physical, intellectual, and mental and/or emotional disabilities and to dismantle systemic ableism in Unitarian Universalist ministry and congregations. Services include technical assistance for Equal Access, consultation for congregations, districts, committees, and staff groups.

Office of Bisexual, Gay, Lesbian and Transgender Concerns: to increase the multicultural welcome and inclusion of bisexual, gay, lesbian, and transgender persons; to dismantle institutional homophobia and heterosexism. Programs include (a) Beyond Categorical Thinking, a workshop for congregations in search to increase their capacity to call/settle a minister who identifies as a person of color, Latina/o/Hispanic and/or multiracial; bisexual/gay/lesbian/transgender; and/or person with disabilities (b) Welcoming Congregation and (c) Living the Welcoming Congregation programs to make Unitarian Universalist congregations more welcoming and inclusive of LGBT persons and to dismantle homophobia and heterosexism. OBGLTC also resources the Association's Marriage Equality public witness as well as other Public Witness campaigns and initiatives, and the General Assembly.

Office of Racial and Ethnic Concerns: to increase the multicultural welcome of persons who identify as people of color, Latina/o/Hispanic and/or multiracial by advocating policies and

practices that strengthen their leadership and community building. In addition, the Office of Racial and Ethnic Concerns provides consultation to congregations, committees, and staff groups on anti-racist/multicultural transformation, education and consultation on cultural appropriation/misappropriation, and collaboration on the “Leading Congregations Into a Multiracial/Multicultural Future” conference (2007, 2008, 2009).

Identity-Based Ministries Accomplishments and Initiatives from 2002 – 2009 include the following:

- **Diversity of Ministry Initiative:** led by Identity-Based Ministries Office of Racial and Ethnic Concerns to help create sustainable ministries for ministers who identify as people of color, Latina/o/Hispanic, and multiracial. Goals include 12 congregational settlements in 5 years; annual retreat for ministers, seminarians and religious educators from above racial/ethnic identity groups; support for seminarians of color; intentional multiracial/multicultural congregation new start. A Program Coordinator for Multicultural Congregations was added in 2008
- **Mosaic Project:** an assessment of ministry to youth and young adults of color results in staff position for ministry to youth and young adults of color in Youth Office/Lifespan Faith Development and a report and recommendations on effective ministry to this population.
- **Building The World We Dream About curriculum on race and ethnicity** is developed as part of Tapestry of Faith Lifespan Religious Education Curriculum and with guidance from stakeholder constituents (to be distributed July/August 2009)
- **JUUST Change Anti-Oppression Consultancy** receives training and orientation from Id-BM staff on accessibility/anti-ableism, anti-homophobia/anti-heterosexism, and anti-racism. Id-BM staff provides consultation and training to board appointed committees, elected leaders, and ministerial candidates.
- **UU with Disabilities Organizing and Leadership Development** is initiated through electronic media such as Access-L, General Assembly gatherings, and technical assistance to Equal Access affinity group.
- **Promotion of Accessibility in Congregations** through Assistive Listening Demonstration Kits, consultation on combining Green Sanctuary with Accessibility retrofits, and UU World electronic circulation to blind and visually impaired Unitarian Universalists.
- **Beyond Categorical Thinking** recruits and trains 12 new facilitators/trainers, revises workshop with assistance of experienced BCT Trainer, develops new educational resources on race/ethnicity, disability, bisexual, and transgender identity.
- **Anti-oppression/anti-racism/multiculturalism performance appraisal** added to UUA employee and supervisor performance review process
- **Journey Toward Wholeness Transformation Committee (JTWTC):** Id-BM serves as liaison between General Assembly/board-appointed committee and UUA President’s office, provides consultation on monitoring and assessment, and supplies staff support for the JTWTC.

History of Identity-Based Ministries Staff and Structure

Number of Id-BM staff in 2002: 8 (1 FT Director, 2 FT Program, 2 PT Program, 1 FT Administrator, 1 PT Administrative, 1 Administrator shared with the Advocacy and Witness Washington Office)

Number of Id-BM staff in FY 2009: (1 FT Director; 5 FT Program Staff – 1 Accessibility Concerns, 1 BGLT Concerns, 1 JUUST Change, 2 Racial and Ethnic Concerns, --1 Consultant (JUUST Change); 1 FT Administrator, 1 Administrator shared with Advocacy and Witness Washington Office)

LIFESPAN FAITH DEVELOPMENT

Lifespan Faith Development Mission

Guided by Unitarian Universalist Principles and a commitment to the UUA's goal of becoming an antiracist, anti oppressive, multicultural organization, we provide lifespan resources for education, worship, advocacy and social action that nurture UU identity, spiritual growth, a transforming faith, and vital communities of justice and love.

A New Name

A new era was heralded in 2001 with a change from “Religious Education Department” to “Lifespan Faith Development Staff Group” to emphasize the goal of our work (faith development) rather than one tool (education), and to urge a cultural shift in our congregations from “RE is for children, on Sunday morning, in classrooms” to faith development is a lifelong process, a community responsibility, and a journey with many possible paths. The change from “departments” to “staff groups” encouraged collaboration among staff groups and defined our mission (such as social justice and congregational growth) as shared responsibilities, not the sole responsibility of one “silo.”

A New Curriculum Era: Tapestry of Faith

An innovative new era of curricula for preschool through adulthood was launched. Embodying a faith development focus for our congregations, Tapestry of Faith is a series of programs and resources for all ages that nurture Unitarian Universalist identity, spiritual growth, a transforming faith, and vital communities of justice and love. The result of extensive preparatory assessment and visioning, these programs are available **free online**. Lifespan Faith Development and Information Technology Services collaborated to design innovative software and specialized templates to make these searchable, downloadable, adaptable curricula available to congregational staff and leaders, volunteers and parents, seekers and anyone with access to the world-wide web. Tapestry of Faith, which is at least 60% developed, has been enthusiastically received by our congregations of all sizes.

Curricular initiatives also included expanding development and public presence of **Our Whole Lives**, our sexuality education program. A new age level was added – OWL for Young Adults and Sexuality and Our Faith for Young Adults; the video and slide visuals have been transferred to more current media (DVD and CD); a part-time OWL consultant has been retained; OWL advocacy training (SEAT) is offered annually; and OWL continues to enjoy positive national media attention.

Youth Ministry

Another major initiative was the Consultation on Ministry to and with Youth – a five-year process of evaluating and envisioning a revitalized and comprehensive youth ministry. This process engaged 5,000 Unitarian Universalist youth and adults in congregational, district and stakeholder conversations and targeted surveys for youth and youth advisors. The input process culminated with a Summit gathering and report submitted to the UUA Board of Trustees in October 2007. In 2008, the continental structure of YRUU was discontinued and its last Steering Committee was asked to participate in the Youth Ministry Working Group established by the Administration and comprised of both youth and adults. The charge of the working group was to make recommendations to the Board and Administration. Their report, submitted in March of 2009, calls for all Unitarian Universalist congregations, districts, organizations and staff to play a role in our youth ministry. A Youth Ministry Advisory Committee will be established to assess

the Association's progress and make recommendations annually. Implementation of key recommendations began in LFD in 2008. One relevant initiative of note is the award of a \$100,000+ grant from the UU Congregation at Shelter Rock for interfaith youth work in partnership with the Interfaith Youth Corps founded by Beacon Press author, Eboo Patel.

Credentialing for Religious Educators

Lifespan Faith Development staff and the Liberal Religious Educators Association worked together to realize a long-held vision for a significant credentialing process for religious educators to prepare for service and receive recognition as lay professionals. The creation of this credentialing program coincided with an important change in the mission of the Ministry Department to include support of non-ordained religious education professionals. The department was renamed the Ministry and Professional Leadership Staff Group. The inclusion of lay professionals in the staff group once serving only ordained staff was boldly prophetic and a breakthrough in service to our congregations.

Chrysalis Youth Leadership Training Program

Leadership development programs for youth and adults who work with youth were expanded, upgraded, and consolidated into a program with quality standards and Associational recognition.

Renaissance Program

The Renaissance Program – a series of training programs for religious educators – returned from Meadville Lombard to the UUA where it began. It is an important piece of preparation for religious education credentialing. In another example of staff group collaboration, LFD oversees the content; MPL administers the trainings.

Web Resources

Web resources for lifespan faith development have greatly expanded as the technology has grown and as decisions have been made to replace print resources with electronic publications. In addition to the ambitious curriculum series, Tapestry of Faith, new resources include material for families, religious educators, teachers, discussion guides to film and books, timely responses to special events or crises, OWL support, expanded websites for youth, and new list serves.

UUA Pamphlets came into LFD and an interdepartmental team has published new pamphlets and revised and updated many others.

Staff and Structure

On July 1, 2009, after a two-year transitional process, the UUA's ministry to young adults will move to Lifespan Faith Development from its current life as the Young Adult and Campus Ministry Office of the Congregational Services staff group.

The new **Youth and Young Adult Ministries Office** will help us help congregations provide seamless ministry across all ages, and better support families and multigenerational faith communities. A new staff position was added this year in anticipation of this new structure: the Ministry to Youth and Young Adults of Color Associate. The new office will also include a Youth and Young Adult Ministries Office Director, Leadership Development Associate, Bridging and Campus Ministry Director, Technology Associate, and Administrator.

The **Resource Development Office** of LFD has been staffed and structured for maximum expertise and efficiency in the production of quality curricula and resources, both electronic and print, for our congregations.

The number of staff in the Religious Education Department in 2001 was 12. The number of staff in the Lifespan Faith Development staff group on July 1, 2009 will be 13. The number of freelance authors, editors and consultants LFD worked with in FY 09: approximately 30.

Culture Change

These years can justly be called transformational, with more significant changes in structure, culture and mission than in any previous period of comparable length. The vital work of religious education has been expanded in scope and grounded in faith. Expectations have been raised, and the mission for congregational growth and vitality has been clear and urgent. The result is a highly motivated and integrated LFD team working with focus and passion in partnership with our congregations and lay and professional leadership.

MINISTRY AND PROFESSIONAL LEADERSHIP

The Ministry and Professional Leadership (MPL) Staff Group assists Unitarian Universalist (UU) ministers, religious educators, congregational administrators, and music directors from discernment through retirement and beyond. Directors within MPL and their assistants provide credentialing and settlement services, offer counsel in career development, congregational relations, worship and music resources, and financial planning, manage scholarship and aid funds and insurance programs, work to maintain collaborative relationships with our constituents' professional organizations, strengthen collegial relations among professional leaders, and, in collaboration with other UUA staff groups, strive to deliver excellent services to our congregations.

In 2002, the Department of Ministry was expanded to become the Ministry and Professional Leadership Staff Group (MPL) with a broadened mission to include services to DREs, Music Directors & Church Administrators. In 2006-08 MPL helped the Ministerial Fellowship Committee (MFC) in complete revision of its rules and policies. In 2007-09 a quarter-time intern was engaged to help assess the state of our community ministers and seminarians in order to better monitor and support them, better link them to our congregations and the larger UU movement, and better acknowledge and leverage community ministers as “the face of UUism” for thousands of people in communities they serve in our name. Since the discontinuation of independent affiliates, MPL has worked even more closely with the leadership of seven professional organizations to cultivate positive relationships among them and between each of them and the UUA. The Military Ministry program was developed in 2007 to establish a clear process for the endorsement of military chaplains and approval of military chaplain candidates and to create better coordination between the MFC process and the various branches of the military's requirements. A volunteer Committee on Military Ministry guides and supports UU military chaplains and their families. There are currently six endorsed chaplains and eight approved candidates in preparation. With a generous three-year grant from a donor, the Worship and Music Resources Office was established in 2008 to provide resources and training to help congregations deepen their worship experiences.

The Ministerial Credentialing Office relates to all aspirants and candidates seeking fellowship with the UUA, helps prepare future ministers to serve as leaders in anti-racism, anti-oppression and multiculturalism, and supports the Diversity of Ministry Team (DOMT) through nurturing specific internship opportunities. The MC Director works closely with theological schools, convenes the UUA Scholarship Committee, serves as a liaison with the Regional Sub-Committees on Candidacy (RSCC) and the MFC (MFC), and is Executive Secretary of the Panel on Theological Education (POTE). Over the last eight years, the work of the Internship Clearinghouse has increased significantly, the appointment process of RSCC members has shifted to the UUA Board's Committee on Committees, and the financial accountability of the RSCC system has been modified to control costs following evaluation of the RSCC system in 2003. Criminal background checks were instituted for candidates prior to interviewing with the MFC. With funding from and in cooperation with the Panel on Theological Education, the Excellence in Ministry conversation has become a primary focus for the MC Director resulting in the Summit in Feb. 2009 and an in-care program for seminarians in non-UU identified schools currently being field tested in partnership with four districts and with funding from Shelter Rock via the Panel on Theological Education.

The Ministerial Development Office provides consultation and training programs to assist clergy, congregations, and agencies in planning for ongoing ministerial development, manages continuing education funds, supports ministers through preliminary fellowship and in times of crisis, and provides staff support to the MFC. In the past eight years the First Year Ministers' seminar has returned to Boston for three days of orientation, spiritual renewal and enrichment with follow-up at GA and a listserv. The Addictions Ministry Task Force, initially created to respond to UU clergy who had disclosed substance abuse to the MFC, has evolved into a committee considering support for both lay members and professional leaders dealing with addictions. The Sankofa Project (online archive) was established to record and preserve the lives and ministries of UU ministers and laity of color and of Latin/Hispanic ancestries. Programs have been created in collaboration with the UUMA's C.E.N.T.E.R. committee and other stakeholders to help ministers prepare for service to large congregations, assist ministers in shaping the final years of their ministries, and develop skills in adaptive leadership.

The adaptation of the UUA ministerial search and settlement process to web-based technology has been an overarching theme of the **Transitions Office** (formerly Settlement) during the past eight years. The re-conception and revision of the late 1990s designed on-line settlement system will be completed by 2010, allowing search committees and ministers to independently take all appropriate initiative in their decisions about ministry. *Responsible Staffing: Guidelines on Screening Practices* was published and has been widely adopted, giving congregations a comprehensive set of recommendations on developing and checking references and conducting criminal background checks for when engaging new staff and volunteers. The demand for interim ministry has almost doubled and the Accredited Interim Ministry program has grown both in size and in professionalism. Consulting ministries have been developed to serve congregations when neither interim nor settled ministry is suitable. The interim and consulting ministry placement process has become more automated, although still under the close supervision of the Transitions Director. The Transitions Office actively participates in the Association's DOMT initiative.

The Religious Education Office, added to MPL in 2002 to support the Religious Education Credentialing Committee (RECC) with oversight for the DRE credentialing process, was expanded in 2008-09 to the Religious Education & Music Leadership Credentialing (RE&MLC) Office when support for the Music Leadership Credentialing Program (formerly a program of the UU Musicians Network) and the Music Leadership Credentialing Committee were added to the job description. The RE&MLC Office provides support and guidance for the religious education and music leadership credentialing committees and programs, to individuals who participate in those and other professional development programs, and to congregations and religious professionals who are involved in the search for a professional religious educator or music leader. The Director has worked to develop scholarships for religious educators, become liaison to LREDA, developed an online settlement system for religious educators, begun advising congregations, district staff and individuals on RE staffing issues, taken responsibility for delivery of the Renaissance program, and developed an Interim DRE training program.

During this period, the **Office of Church Staff Finance** (OCSF) developed and instituted the new UUA Health Insurance plan, hired appropriate staff, and developed a Health Plan Trust to administer it. OCSF has expanded the Compensation Guidelines program to include guidelines for all major congregational staff and the Compensation Consultants program to support congregations in achieving fair compensation. OCSF is currently providing staff guidance to evaluate competing proposals by Fidelity Investments and TIAA-CREF for management of the

ten year old UU Organizations Retirement Plan with an anticipated decision by the UUA in October, 2009.

In its first year, the **Worship and Music Resources Office** (WAMR) launched an online survey to help prioritize expansion of Worship Web and begun its expansion, become liaison to the UUMN, begun collecting existing resources and cultivating new ones, and gotten off to an excellent start on a very exciting project to improve UUA support for the worship experience.

COMMUNICATIONS

The Communications Staff Group serves the Association of Congregations by publishing and distributing books and periodicals that inform, inspire, and educate their readers; by developing and maintaining a UUA presence in cyberspace via the World Wide Web, email, and social networking; by raising the visibility of Unitarian Universalism in the public arena; and by counseling and supporting our congregations in their various communications efforts. Communications staff also serve as resources on UU history and as liaison to the Harvard Divinity School library that holds the Association's historical archives.

As part of the restructuring following Bill Sinkford's election, two offices from the Communications Department were moved: the Information Office was renamed the Office of Information and Public Witness (IPW) and shifted to the new Advocacy and Witness staff group; the Office of Electronic Communication (OEC) moved to Information Technology Services. Both IPW and OEC rejoined the Communications Staff Group in 2006.

Though the vehicles of communication have changed significantly, the Communications staff carry on the mission of early American Universalists and Unitarians to spread the good news of their faiths to all who are open to that message. The four office reports that follow detail how we do so.

Office Information and Public Witness

When Bill Sinkford took office, he brought a strong commitment to advance the Association's public witness efforts. He revived the position of Information Officer to expand public relations capabilities in the two-person Information Office. The office soon began doing more pro-active media outreach and developed an online press room for news reporters and a public relations how-to manual for congregations. The creation of the Public Witness Specialist position in 2007 further enhanced the capability of the office.

The office's work continues to focus on three major areas: providing timely information about Unitarian Universalism to members, the news media, and the general public; crafting and circulating messages from the UUA President; and developing resources and training opportunities for lay leaders and clergy in UU congregations. Increasingly, this work has relied on new media platforms for all tasks from disseminating press releases to archiving news clips. With the addition of the Public Witness Specialist, the IPW office extended its communications work into the areas of online video, social networking, and podcasting.

During the last eight years, the Office of Information and Public Witness has been responsible for much of the Association's messaging on issues such as marriage equality, environmental justice, Darfur, the Iraq and Afghanistan wars, transgender equality, racial and economic justice, and immigration reform.

Office of Electronic Communication

The Office of Electronic Communication (OEC) strives to support the health of Unitarian Universalism and the Association by offering news, information, resources, and connections between and among congregations, districts, and individuals.

The Office of Electronic Communication was created in 1998, but it came into maturity during the Sinkford administration. In 2001, the UUA sponsored about 200 email lists; now, we have over 350

lists, with more than 25,000 ‘unique subscribers.’ Since 2002, daily unique visits to UUA.org have increased by more than 300%; currently, there are 4,600 visitors coming to UUA.org every day. Just as important, each week more than 8,000 people search UUA.org for a congregation to attend. In 2001, we had about 12,000 pages of information on our website. Now, we have close to 30,000 pages, plus dynamic applications which generate information that respond to specific user queries.

In July, 2001, the OEC had two staff people, and, in early 2002, a third staff person was added to the office. Staffing has remained static since that time. Additionally:

- Our September 11, 2001 website is now archived as part of The Minerva Project at the Library of Congress as an example of an outstanding website commemorating the events of this national disaster.
- In 2005, we decided to not only redesign our website, but move all of our 20,000+ pages to a content management system. The ‘new’ UUA.org debuted in April, 2007, and we continue to make improvements to the site.
- Congregations now report that over half their visitors find them on the web, and nearly all UUA congregations have web pages connected to the UUA.
- In 2007, we debuted RSS feeds (*Really Simple Syndication*), which helps deliver targeted web content directly to interested users, in 2007. RSS now feeds UUA content into Twitter.
- For the last year, we have run targeted campaigns through Google AdWords, drawing thousands of new visitors to UUA.org pages targeted to particular keywords, which are both cost-effective and successful at reaching new audiences.
- Our UUA Facebook page debuted about a year ago; we now have nearly 7,000 “fans.”
- We’re using YouTube to promote UUA video content, including a special “Standing on the Side of Love” video which generated more than 9,000 visits in few days in late 2008.

This year at General Assembly, you’ll find us providing more than twenty-four hours of live video, and we plan to be reporting, photographing, live-blogging our plenaries, and “Tweeting” as well. We’re focused on using all new technologies that will serve and support the Association’s mission, in ways designed to move us forward, creatively, cost effectively, and in partnership with member congregations.

PERIODICALS

The Periodicals staff group is responsible for producing *UU World*, the magazine for members of UU congregations, and *InterConnections*, the newsletter for congregational leaders. As the only service the UUA provides directly to all members of congregations, *UU World* connects individual UUs to their larger religious community. *UU World*’s website, uuworld.org, introduces UU voices to a broader audience of religious liberals. *InterConnections* serves congregational leaders by sharing tips and resources from other congregational leaders.

The past eight years have been marked by reductions in the frequency and paper quality of *UU World* as the magazine’s budget has been cut and as the cost of postage has continued to rise. In 2001, *UU World* was published six times a year as a full-color magazine on glossy paper. In 2003, *UU World* cut printing costs by switching to newsprint and publishing half of the magazine in black and white. In 2005, *UU World* cut costs again by eliminating two issues a year. The quarterly magazine is now distributed to 126,000 households. The Periodicals staff included seven full-time employees in 2001. The office now has six full-time employees and two part-time employees.

InterConnections was published five times a year in 2001, but shifted to four issues a year starting in 2002. In 2009, the UUA announced that *InterConnections* would no longer be printed and mailed; *InterConnections* will become a monthly email newsletter with weekly updates published on UUA.org.

These changes have reduced the printing and postage costs from \$518,000 in 2002 to \$328,000, despite major postage rate increases.

With the shift to quarterly publication in 2005, *UU World* launched a weekly website, *uuworld.org*, which publishes news and other online-only content. By May 2009, the website's email newsletter had 2,500 subscribers and the website saw approximately 26,000 visitors a month.

In 2006, *uuworld.org* was named the Best Faith-Based Online Campaign in the Web Marketing Association's Internet Advertising Competition. In 2009, *UU World* was named a finalist for an Utne Independent Press Award.

Publications Office and the UUA Bookstore

The Publications Office is responsible for developing, producing and marketing Skinner House Books and UUA publications. The UUA Bookstore is the primary retail arm of UUA publishing. Publications and Bookstore staff share responsibility for business and inventory management tasks.

Over the past eight years, music has become increasingly important in our faith community and thus in our publishing. *Singing the Journey: A Supplement to Singing the Living Tradition*, published in 2005, has sold more than 60,000 copies to date. The focus on music continued in 2008 with the publication of the family songbook, *Come Sing a Song With Me*, and in 2009 with the Spanish songbook, *Las Voces del Camino*, both from the UU Musicians Network.

The Association's transformational work on anti-racism, anti-oppression, and multiculturalism is the subject of an important new Skinner House book, *The Arc of the Universe Is Long: Unitarian Universalism, Anti-Racism and the Journey from Calgary*, published in May 2009.

Skinner House Books began distributing to the trade in 2001. Since then, more than 35,000 Skinner House books have been sold in public venues such as Borders, Barnes & Nobles and Amazon.com. Top sellers to the trade include *In Memoriam: A Guide to Modern Funeral and Memorial Services* by Edward Searl, *Writing the Sacred Journey: The Art and Practice of Spiritual Memoir* by Elizabeth J. Andrew, and *In Nature's Honor: Myths and Rituals Celebrating the Earth* by Patricia Montley.

The UUA Bookstore's online presence has become more robust in recent years. The number of Bookstore orders coming in via the Web has more than doubled since 2001, and the Bookstore's website has expanded to include excerpts, reviews, author interviews, and even music to listen to.

Overall, UUA publishing has flourished in the last eight years. More than 120 new titles were published, and Bookstore sales increased more than 15 percent.

BEACON PRESS

Mission of Beacon Press:

To publish serious trade, nonfiction books that affirm and promote the principles and purposes of the UUA, adopted as Bylaws by the 1984, 1985, and 1995 General Assemblies.

**To publish exceptional books that clearly represent longstanding issues of importance within Unitarian Universalism, including, but not limited to: the role of religion in a progressive society; anti-racism / anti-oppression work; gender equality; economic justice; advancing the rights of lesbian, gay, bisexual, transgender, and queer people; and environmental justice.*

Structural Changes:

No major structural changes in the press over the past eight years, but continuous adjustments within departments, including reallocation of resources in response to both opportunities and challenges: economic conditions, marketplace shifts, media trends, the political climate, and the culture in general. Staff has fluctuated from a high of 29 full-time to current level of 25 full-time employees.

Reclaiming Our History:

BP celebrated its 150th anniversary in 2004 (with the help of a Veatch Foundation Grant) by producing a chapbook history of the press and successful media outreach.

*BP celebrated the 35th anniversary of the landmark publication of *The Pentagon Papers* (again with the help of a Veatch Foundation Grant) with a chapbook history of the event and a highly visible panel at GA in 2007.

Changes to Publishing Program:

Shift of focus and emphasis in primary list categories, including:

Strengthening and reinvigorating the dormant ecology / environmental list: Beginning in about 2002 BP began to refocus resources on this list, assigning an editor to acquire for this list as a primary responsibility beginning in 2005. Notable titles and authors on this list include: Fred Pearce's *When the Rivers Run Dry: Water—The Defining Crisis of the Twenty-first Century*; Mark Winne's *Closing the Food Gap*; Amy Seidl's *Early Spring*; Steven Apfelbaum's *Nature's Second Chance*; and Claire Hope Cummings' *Uncertain Peril: Genetic Engineering and the Future of Seeds*. BP made the decision to drop the CONCORD LIBRARY SERIES around 2004 so that a focus on current environmental concerns, rather than classic nature writing, could prevail.

Refocusing the religion list, moving from theoretical, strictly academic books to accessible books about the ways in which Americans live and experience their religions, including: Eboo Patel's *Acts of Faith: The Story of an American Muslim, the Struggle for the Soul of a Generation*; Hella Winston's *Unchosen: The Hidden Lives of Hasidic Rebels*; Susan Campbell's *Dating Jesus: A Story of Fundamentalism, Feminism, and the American Girl*; Joe Mackall's *Plain Secrets: An Outsider Among the Amish*; and Timothy Beal's *Roadside Religion: In Search of the Sacred, the Strange, and the Substance of Faith*. BP also continues to publish big-argument books in the field as well as trade books by well-known UUs, including Rebecca Parker, Forrest Church, and John Buehrens.

Augmenting the racial justice list with books examining the intersections of race and class, race and gender, and race and history, including: Robin D. G. Kelley's *Yo'Mama's Disfunktional!*; Vijay Prashad's *Everybody Was Kung Fu Fighting: Afro-Asian Connections and*

the Myth of Cultural Purity; Michael Patrick MacDonald's *All Souls: A Family Story from Southie*; Thomas DeWolf's *Inheriting the Trade: A Northern Family Confronts Its Legacy as the Largest Slave-Trading Dynasty in US History*; and Kai Wright's *Drifting Toward Love: Black, Brown, Gay, and Coming of Age on the Streets of New York*; Beverly Daniel Tatum's *Can We Talk About Race* was the inaugural book in an annual lecture series (produced jointly with Simmons College) called "Race, Education and Democracy."

Reinventing the women's studies list, from works of feminist theory such as Mary Daly's *Gyn/Ecology* to books examining the place of women in society, including women's memoir. Examples of this new focus include: Kathryn Joyce's *Quiverfull: Inside the Christian Patriarchy Movement*; Helen Benedict's *The Lonely Soldier: The Private War on Women Serving in Iraq*; Saleemah Abdul-Ghafur's *Living Islam Out Loud: American Muslim Women Speak*; Kay Trimmer's *The New Single Woman*; and Meredith Hall's *Without A Map*.

Broadening and deepening the LGBTQ list, by adding memoir, and a new series of books, *Queer Ideas / Queer Action*, designed to challenge received notions about the LGBTQ community and to provide resources especially for youth in that community, including: Sue Hyde's *Come Out and Win*, Lisa Keen's *Out Law*, and Nancy Polikoff's *Beyond (Straight and Gay) Marriage*. Memoirs exploring the contemporary realities of these communities include: Terry Galloway's *Mean Little deaf Queer*; David Plante's *The Pure Lover*; Martin Moran's *The Tricky Part*; Matt Kailey's *Just Add Hormones: An Insider's Guide to the Transsexual Experience*; Kate Clinton's *I Told You So*; and Kevin Jennings' *Mama's Boy, Preacher's Son*.

Focusing the history list, on lesser known figures in America's past, going much deeper than the standard "founding fathers" narrative, including: *Three Strikes: Miners, Musicians, Salesgirls, and the Fighting Spirit of Labor*; *The Many Headed Hydra: Sailors, Slaves, Commoners, and the Hidden History of the Revolution*; and *The Boston Italians*. BP added a new list in African American history that includes: *The Sounds of Slavery*; *African Voices of the Atlantic Slave Trade*; and *Epic Journeys of Freedom*. A new "ReVisioning American History" series of books about US history from minority perspectives, is forthcoming, and will include *An Indigenous History of the United States* and *An LGBT History of the United States*.

Changing the approach to sociology and anthropology, from academic books to writing for a general audience that includes accessible books on a broad range of topics of concern in our contemporary culture, such as *The Lonely American*; *60 On Up*; *The Daddy Shift*; and *Hollowing Out the Middle: The Rural Brain Drain and What It Means for America*.

Investing in Education: This list became very important to the press after the publication of Deborah Meier's *The Power of Their Ideas* in the early 1990s and developed over the past 8 years to include some of the most powerful and visible thinkers in the field of progressive educational reform, including Ted Sizer, William Ayers, Alfie Kohn, and Robert Moses.

Adding new subject areas to the publishing program, including:

Science & Society: In response to the speed of technological and scientific advances, far outpacing careful ethical consideration of their impact on society, BP has begun acquiring books on the intersection between science and society, in areas including psychiatry, genetics, and reproductive technologies. Recently acquired books include Jonathan Metzl's *The Protest Psychosis: How Schizophrenia Became a Black Disease*, Carl Elliot's *White Coat, Black Hat* on eroding medical ethics, and Beth Whitehouse's *The Match*, on preimplantation genetic diagnosis.

Middle East Studies: In response to an urgent need to better understand the Middle East in light of America's deepening involvement there, BP has been developing a strong list on the history, politics, and religions of the region. The list already includes three of esteemed scholar Rashid Khalidi's books; Khaled Abou El Fadl's **The Place of Tolerance in Islam**; Philip Winslow's *Victory For Us is To See You Suffer: In the West Bank with the Palestinians and the Israelis*; and a memoir by Malcolm Garcia, *The Khaarijee: A Chronicle of Friendship and War in Kabul*.

Sports & Society: This list allows BP to focus on issues of race and gender as well as issues impacting America's children, in a whole new way. Mark Hyman's *Until It Hurts* looks at kids' sports and its increasingly detrimental effects on their well-being. BP has also recently acquired *Whiteout* on the history of segregation in baseball, *The Washington Blitz* about the last NFL team to integrate, and *A Lush and Level Field*, about Mexican immigrants on a U.S. soccer team.

Immigration studies: In response to the explosive issue of immigrants in the U.S., this list focuses on immigrant rights and social justice, and includes such books as Aviva Chomsky's *They Take Our Jobs!: And 20 Other Myths about Immigration*, David Bacon's *Illegal People: How Globalization Creates Migration and Criminalizes Immigrants*, and Margaret Regan's *The Death of Josseline: Immigration Stories from the Arizona-Mexico Borderlands*.

Law & Society: In response to the dramatic conservative turn in the federal courts, BP developed this list to include books on the religious rights' attempts to commandeer the courts, (such as Jay Feinman's *Un-Making Law* and Fred Lane's *The Court and the Cross: The Religious Right's Crusade to Reshape the Supreme Court*), on the all important separation of church and state (including Welton Gaddy's *First Freedom First* and Jay Wexler's *Holy Hullabaloo*), on lgbtq rights (including Carlos A. Ball's *From the Closet to the Courtroom*), on free speech (including Wendy Kaminer's *Free For All*) and a new series, which is growing out of Chris Finan's *From the Palmer Raids to the Patriot Act: A History of the Fight for Free Speech in America* and will debut with a history of free speech for youth.

Economic Justice: In response to the difficult economic hurdles now faced by a majority of Americans, BP has begun a list that examines these challenges and proposes positive changes, including Chuck Collins' *Wealth and Our Commonwealth*; Stacy Mitchell's *The Big Box Swindle*; Alan Collinge's *The Student Loan Scam*; Katherine Newman's *The Missing Class*; and Nan Mooney's *Not Keeping Up With Our Parents*.

The MLK Legacy: BP became the Exclusive Publisher of the Estate of Martin Luther King, Jr. in May 2009. The books, beginning with at least 4 titles in 2009, will become the definitive editions of MLK's work in trade markets and will include new scholarship. Along with the King titles, BP will publish other books on the figures and legacy of the civil rights movement, and has recently acquired biographies of Rosa Parks and Howard Thurman as well as a landmark account of the March on Washington.

Using new mediums to reach larger audiences, including:

E-books: In anticipation that a small wave of demand might grow exponentially, BP now makes its books available in electronic format. Among these platforms and vendors are Kindle, eBrary, and Net Library. BP is also moving many older titles into print on-demand programs, allowing them to be available even at very low sales levels, and in large print as well as standard format.

Graphic books: In response to the growth in demand for graphic works, and in order to reach a younger audience (though the audience for graphic books is by no means limited to younger readers), BP has begun acquiring books and commissioning adaptations of backlist classics in graphic format. Already underway are graphic adaptations of Octavia Butler’s novel about slavery, *Kindred*, and Geoffrey Canada’s ground-breaking memoir of growing up in the South Bronx, *Fist, Stick, Knife, Gun*. Also under contract, a Lesbian memoir and a book about transsexuals in graphic format.

Audio books: BP has, through a grant-funded program (Caravan), produced audio versions of a number of recent titles which are now available as digital on-demand audio downloads as well as producing CDs of both Kate Clinton and Mary Oliver. The market for both e-books and audio books is still quite modest, but allows BP to make titles much more accessible to disability communities and to prepare for either or both markets to grow significantly.

The Blog: beaconbroadside.com allows BP to reach readers quickly and effectively with ideas, commentary, and calls to action from authors and stakeholders. The blog effectively extends the reach of printed books and gives BP the opportunity to tie in to news and developments in the culture and effectively join the conversation.

Using new strategies to promote the public presence of Beacon Press:

In addition to **beaconbroadside.com**, regular **e-newsletters** targeted to librarians, educators, and UUs, a presence on **Facebook** and other **social networking sites**, as well as participation in **Twitter**, has given BP new tools both to promote books and to promote the values they represent. BP has also recently been experimenting with **book videos** and may be expanding that initiative as appropriate.

Stabilizing finances through careful management, including:

Adopting new reserve policies and conservative estimating practices which have allowed BP to avoid dramatic highs and lows typical of a seasonal business captured in a single fiscal year report.

Carefully reviewing and revising all policies on pricing; revisiting and renegotiating contracts with suppliers and distributors; offering more modest advances.

Improving skills in estimating income and expenses.

Taking back paperback rights to key backlist titles that had been on license to other publishers, notably Victor Frankl’s *Man’s Search for Meaning* and Michael Patrick MacDonald’s *All Souls*.

STEWARDSHIP AND DEVELOPMENT

Mission:

In 2004, growing out of the twin commitments of the staff group's work, new vision and mission statements emerged:

- *Vision: A Unitarian Universalist culture of abundance financially nurturing our congregations, our organizations and our Association.*
- *Mission: Helping Unitarian Universalists make their dreams come true through the UU institutions and Association they love.*

Staff Culture:

Stewardship & Development staff has had the privilege of working with more than 22,400 individual donors and 1,047 donor congregations this year, each of whom has a shared commitment to Unitarian Universalism, unique reasons for giving and dreams for our future.

There is an intentional understanding among our staff group that we are first and foremost “donor advocates.” Whether in person or on the phone or online, our first priority is to invite the donor into relationship and engagement with the larger movement. We take seriously our customer relations role and are looking for ever better ways to feed back into the UUA system what we are hearing from our constituents.

Funding Areas:

The Stewardship and Development staff group has been responsible for four major areas of income for the Association. The annual financial goals for these areas are set by the Administration with input and advice from the Board of Trustees.

- **Annual Program Fund** (“Fair Share”) – congregational giving
- **Friends of the UUA Program** – annual individual giving
- **Legacy Giving Program** – planned giving
- **Comprehensive (Capital) Campaigns** – special giving and major gifts

During the period of President Sinkford's administration, Stewardship and Development has raised \$56.2 million through the Annual Program Fund, \$10.9 million through Friends of the UUA, and \$5.3 million in unrestricted bequests. Add to that the \$14.1 million in cash and restricted legacy gifts received during those years from previous campaigns, and the \$50 million that the Now is the Time Campaign will raise and the grand total raised by the UUA from 2001-2009 is \$136.5 million!

Initiatives:

Though each of the four income areas has their own financial goals, many of our initiatives are meant to support multiple strategies and funding targets.

- President's Council meetings – The Council serves to provide the UUA with suggestions and feedback on stewardship of the Association and the movement, with leadership for resource development efforts, and with support through advocacy with individuals and congregations. Its annual meetings are tightly run and are financially successful gatherings.
- President's Roundtable meetings – These regional initiatives have served to develop and fund projects to strengthen Unitarian Universalism in that area. There have been eight total Roundtables holding more than 40 meetings.

- Regional Marketing Projects – After the pilot marketing project in Kansas City in 2002-2003, we sought local donors to help fund professional marketing campaigns in targeted regions. We have completed a total of seven regional marketing campaigns to date.
- APF quarterly newsletter – This is prepared as part of a multi-faceted, ongoing effort on the part of our staff and the APF committee to provide relevant and concrete tools and information.
- Stories of Generosity – We have implemented a multiple-prong approach to celebrating donors of all levels and the gifts they give to our Association. Our Annual Report on Giving, weekly Leadership Council Reports, web stories, and the APF newsletter are some of the venues for lifting up the names and passions of our donors.
- Association Sunday – In 2007, we implemented a new program to help strengthen the bonds of common purpose among our congregations and combine our resources to support our faith. More than a thousand special Association Sunday services have been held over the last two years.
- Giving and Generosity E-Newsletter – We began in 2007 a bi-weekly e-newsletter that circulates to approximately 10,000 constituents. This is an avenue for us to keep in touch with our donors and offer them a regular opportunity to support our work with financial gifts.
- Umbrella Giving – This program enables the Association to offer “one-stop giving” to donors who wish to give to any UU organization. Donors contact the UUA Stewardship & Development office to arrange gifts of all kinds, including stock gifts, bequests, trusts, and other gifts to congregations, UU theological schools, the UU Service Committee, and other UU entities.

Comprehensive (Capital) Campaigns:

- **Campaign for Unitarian Universalism (1999-2004)** – A successful \$32 million campaign launched by President Buehrens and completed by President Sinkford.
- **Now is the Time Campaign (2004 – 2009)**– Inspired by national focus groups, the President’s Council, a survey of 5000 UUs and the UUA President’s Leadership Council, a new comprehensive fund raising campaign (Now Is the Time) was conceived beginning in 2004. President Sinkford articulated this three-part vision to frame the campaign:
 - Encourage the health and vitality of our congregations and their ministries.
 - More widely open the doors of Unitarian Universalism to those who yearn for liberal religious community.
 - Become a more robust respected public voice for liberal religious values.
 From 2004-05 the new campaign focus and priorities were explored—including focus groups, online survey, Board and leadership consultation. In 2006, the Now is the Time Campaign launched with a \$50 million goal and five targeted areas of growth. We are now on track to meet the \$50 million campaign goal by June 30, 2009—a whole year ahead of schedule.

INFORMATION TECHNOLOGY SERVICES

We manage the technology that supports connections and information sharing among the UUA staff, districts, congregations, and the public. We provide strategic guidance, high-availability computing networks, software tools and systems, consulting services, and technical training and support to UUA and District staff located throughout the United States. We manage and safeguard the constituent database.

We are nine technology professionals with a broad range of specializations and with overlapping skill sets and responsibilities. Our tenure ranges from six months to seven years. Our turnover rate is about one-third less than that of the national average for "information" workers. (Source: US Bureau of Labor Statistics, Job Openings and Labor Turnover Survey, 4/24/2009).

Over the last eight years, we have evolved our business model from one based on tactics and reaction to one of strategy and pro-action. Like the UUA, we are mission-driven, and facilitating connections between people, rather than managing technology, is our primary objective. Our planning and project management focus has shifted from tasks to deliverables. Our service philosophy has moved from fixing broken systems to collaborating with and empowering colleagues. We measure our success based on outcomes as experienced by our internal and external "clients".

Operationally, we have improved basic computer and network system availability and capacity several-fold. We have virtualized our data center reducing our energy consumption by about 25%. Now our strategic focus is shifting from improving internal efficiencies to extending services to districts and congregations. Among the new systems and services we've helped launch in recent years are:

Virtual Meetings - Using the Persony software, over 2,000 people have attended some 350 online meetings, trainings, and webcasts saving hundreds of hours of travel, significantly reducing our carbon footprint, and making participation possible for people who otherwise could not attend. Recently, forty UUA and District employees around the country joined their Boston-based colleagues in the UUA chapel for a live video Question & Answer session with the UUA Presidential Candidates.

Online Curriculum - The Lifespan Faith Development staff group uses software built by us to publish and maintain some fifty programs in the new Tapestry of Faith curriculum at uua.org. **myUUA.org** - Church administrators use this new online system to update the contact information for their members on file at the UUA, ensuring that UU World magazine reaches every UU on a timely basis. This system is presently being tested in production in twelve congregations with plans to be available to all congregations within six months.

Website Content Management - This web based software allowed us to expand website content authoring from three computer specialists overseeing one website to over forty five content providers running two websites, and to more than triple the number of web pages under management.

Document Management - The Ministry and Professional Leadership staff group is using the DocStar software to create and index a digital archive of thousands of pages of paper records spanning over fifty years, and they're doing the same with new documents flowing into their

domain. This will protect valuable files from destruction and make them far more accessible and searchable.

Data Security and Privacy - This portfolio of projects will ensure the UUA is meeting our ethical obligation to protect the privacy and identity of our constituents (including youths), and to be in measurable compliance with laws and industry standards governing the safe handling of personally identifiable and sensitive information.

Finance and Operations

The Office of the Treasurer is responsible for the oversight and safekeeping of all of the Association's assets – financial and physical – including endowment investments, facilities, trusts, building loans, and operating funds. In addition, the Office oversees assets held for the benefit of others. These include the investments of congregations in the UU Common Endowment Fund, trusts benefiting congregations and other UU entities, the UU Organizations Retirement Plan, and planned gift vehicles benefiting donors during their lifetimes. We treat this responsibility as a sacred trust with our congregations, their staffs, the employees of the Association, and all those affected by the actions of the UUA.

Financial Services serves all Association staff groups and districts. This staff group is responsible for the UUA's financial records and reporting; issuing timely payments to staff, volunteers and vendors; accounting, administration and reporting for the UU Common Endowment Fund; billing, collecting and reporting to the Congregational Properties and Loan Committee on the financial status and results of the building loan program; and the administering of the financial aspects of the UU Organizations Retirement Plan.

The Operations / Facilities staff group supports the UUA staff, as well as the Association's members, by providing services for the daily operation and overall maintenance of the UUA's properties in Boston. These properties include the Association's offices at 25 Beacon St. and 41 Mt. Vernon St. as well as the guest accommodations and meeting spaces at the Eliot and Pickett House at 6 and 7 Mt. Vernon Place.

An ongoing process of continual improvement in **Financial Services** that began in the previous administration has resulted in more reliable financial records, better financial controls, more transparency, and more efficient processes. The Financial Services team understands that's its role is to support the mission of the association and to do so at the highest level of professionalism. This has resulted in seven consecutive clean opinions from the independent auditors who review the Association's books and records each year. In each report, they have stated that the UUA's financial statements "present fairly, in all material respects, the financial position of the Association" without qualification. Among the improvements made during the last eight years are the following:

Financial statements – With the guidance of the Audit Committee and our auditors, KPMG, the year-end financial statements were reformatted and simplified to provide a clearer picture of operations. Operating and non-operating transactions are now presented separately in line with best practices among large nonprofit organizations.

Financial reports on current operations are issued monthly and consolidated statements (including Beacon Press, building loans, and endowment) are issued quarterly.

The Employee Benefits Trust was established as a separate, nonprofit trust with its own board of trustees. Financial Services created systems and reporting procedures to properly account for the EBT as a separate entity with discreet books and financial statements. The independent auditors have issued clean opinions for the first two fiscal years.

UU Common Endowment Fund – The Association's endowment fund is a resource for congregations that wish to pool their endowment investments with the UUA's, thus achieving

greater diversification and more consistent oversight. Formerly known as the General Investment Fund, it is now called the UU Common Endowment Fund to reflect its purpose as a shared resource available to all Unitarian Universalist congregations and organizations. In recent years, the UUCEF has issued a new Investment Information Memorandum, undergone a legal review of compliance with federal and state securities regulations, and revamped its reporting system so that monthly values and cash flows are now possible. While the Fund has experienced significant losses during the recent market declines, when benchmarked against other nonprofit endowments of our size, the UUCEF has performed above average. This is important because it positions the Fund to benefit from any recovery.

Shareholder advocacy – The UUA has been an active shareholder, filing or co-filing dozens of shareholder resolutions and casting thousands of proxy votes. The Association has used its financial assets to witness for UU values on an array of issues including: climate change, sustainability reporting, sexual orientation and gender identity/expression non-discrimination, and excessive executive compensation. While the UUA is a small investor, in some cases our proposals have received sufficient support from other investors to achieve majority votes and in other cases companies have agreed to our requests, allowing us to withdraw our resolutions.

Community investments – The UUA now commits 1% of its endowment, or over one million dollars, to community investments. Community investments create resources and opportunities for economically disadvantaged people and communities underserved by traditional financial institutions. The UUA’s program for matching community investments by congregations up to \$10,000 now has over 50 participating congregations investing over \$400,000.

Facilities Condition Assessment – In 2007, the Operations staff with outside consulting support conducted a thorough review of the UUA’s physical plant and identified the investments necessary to keep our buildings in good condition over the coming decade. The FCA will be updated annually and will help to shape the annual capital budget.

Capital investments – Significant investments have been made in the UUA’s buildings to prevent deterioration and to make them more comfortable, energy efficient, and safe. These include new windows on 41 Mount Vernon Street; storm windows, fire safety systems, and a new kitchenette in Eliot & Pickett House; and temperature control and fire suppression systems for our computer server center.

Energy audit and plan – The UUA commissioned an environmental engineering firm to conduct an energy audit of our three buildings on Beacon Hill and to prepare a plan for making them more energy efficient. At the same time, we worked with a leading green architectural firm to develop a plan to achieve LEED certification for our main headquarters building at 25 Beacon Street. (LEED is a rigorous certification program for green buildings.) His report showed that with modest investment, basic LEED certification was possible. We are now working to achieve this goal.