

UNITARIAN UNIVERSALIST ASSOCIATION

Staff Report, June 2012



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Executive Summary

As the Unitarian Universalist Association (UUA) moves into the future, we take this opportunity to review the past year, lifting up our accomplishments and looking forward to the year ahead. We acknowledge new challenges, we recognize new possibilities, and we appreciate the growing need for a strong, liberal religion that is inclusive and welcoming to all.

Our mission this year has been to harness the full potential of our religious movement by focusing on three priorities:

1. Deepen our spirituality—"Get Religion."
2. Develop exceptional religious leadership—"Grow Leaders."
3. Spread our values across cultural, class, national, and political lines—"Cross Borders."

The Rev. Peter Morales, President of the UUA, first defined these three ideas during the 2011 General Assembly, and further detailed them in an article in [UU World](#). These priorities center our attention on the practical ways we can grow and affirm our denomination through programs, projects, and other initiatives.

Using these three important priorities as a framework, this report will describe the background, goals, and outcomes by UUA staff groups in Fiscal Year 2012 (FY12)—July 1, 2011 to June 30, 2012.

A special "thank you" to our generous donors, congregations, and constituents for their dedication, financial support, energy, and feedback that helps to shape and guide our work—without them none of this would be possible. Thank you!



Priority #1: Get Religion

Our religion is about what we love passionately, about how we aspire to live, about what moves us at the center of our being. Religion's source is our experience of being loved, of loving, of belonging, of feeling awe, and of feeling connected to all creation... It is through the practice of our religion that we create community, that we strengthen the bonds that sustain us, and that we build compassionate connection to the wider world. – The Rev. Peter Morales, [UU World](#)

Congregational Life

The **Congregational Life staff group** includes all district and regional field staff members, Congregational Stewardship Services, Green Sanctuary, Growth Strategies, and Services to Large Congregations. Our mission is to foster the spiritual and institutional health of Unitarian Universalism by serving as leaders, consultants, advocates, and educators in our community of congregations. The focus of our staff group efforts this year have been in these areas:

- Creating Learning Communities within and between congregations: focusing on congregations as the drivers of growth, these efforts seek to unlock the inherent capacity for change within our congregational leadership by providing partners across congregations.
- Developing agile staff and support structures to be relevant to current congregational needs. New economic and cultural realities require us to provide more specialized and specific resources for congregations grappling with a changing world. New technologies allow us to provide innovative programs and services that are more accessible to congregational leaders.
- Bringing a holistic vision of congregational life to all we do. By breaking down silos between professionals, departments, areas of ministry, we model a vision of beloved community in which all strive together toward fulfillment of a common mission.

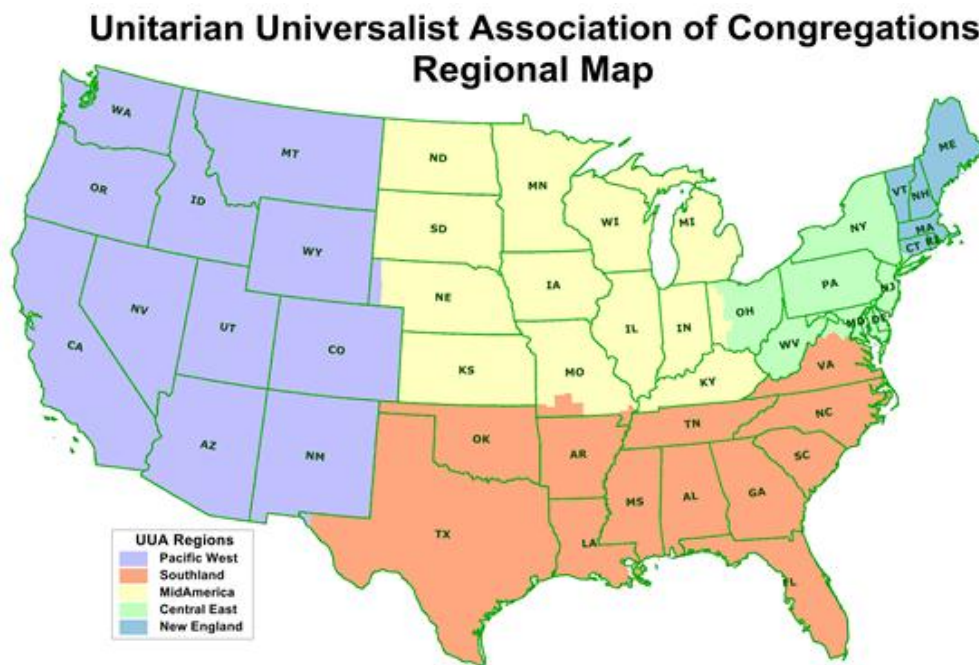
Regional Staff Structures

Our regional staff structures are growing in depth and breadth. The move toward this structure has allowed us to combine district resources, thereby avoiding duplication of effort and expenses; to respond with a greater breadth of services in different areas of specialties; and to provide greater technologically-based resources.

The five regions are MidAmerica (Central Midwest, Heartland, and Prairie Star Districts), Southern (Southeast, MidSouth, Florida, and Southwestern Districts), Northeast (Clara Barton,



Mass Bay, Northern New England, and Ballou Channing Districts), Pacific Western (Pacific Northwest, Pacific Central, Pacific Southwest, and Mountain Desert Districts), and the Central East Regional Group (CERG) (Metro New York, St. Lawrence, Ohio Meadville, and Joseph Priestley Districts).



Major accomplishments include:

- “Threshold Congregations” in the CERG – nine growing congregations that were chosen in recognition of their growth potential and assigned to one of the CERG specialists to help them identify new strategies and areas of learning about their congregational dynamics.
- Two highly acclaimed Leadership Schools in different areas of the Southern Region to equip lay leaders with understandings of theology, polity, systems, and covenantal behaviors.
- Web resources, in partnership with CLF, for congregations in the MidAmerica region that are too small for ministers.

Services for Large Congregations

During the past year, Stefan Jonasson, Director for Large Congregations, provided on-site consultation to nine congregations, where he offered leadership training events, governance training, stewardship advice, strategic planning assistance, transitions guidance, and staffing assessment and consultation. He also consulted extensively with twenty-nine congregations



through electronic means. He represented the UUA at the annual meetings of the Senior Ministers of Large UU Congregations and LREDA-Large, the professional association for religious educators in larger congregations; facilitated an alumni retreat for participants in the “Dreaming Big” program; supported the [Leap of Faith](#) initiative; and offered presentations at General Assembly and other conferences.



Stefan Jonasson,
Director for Large
Congregations

In September 2011, the UUA established its new Office of Growth Strategies to encourage the strategic mobilization of resources and partnerships to grow current and future congregations. Incorporating the work of the existing Large Congregation Program, the new office is paying particular attention to developing strategies to help congregations grow through successfully negotiating size transitions, to increase and support emerging congregations, and to exploit technological innovations for growth.

Breakthrough Congregations Initiative

Breakthrough Congregations are congregations that have experienced significant and sustained numerical growth by overcoming some obstacle that had prevented them from growing in the past—a lack of hospitality, inadequate space, conflict, or a culture of exclusiveness.

The four Breakthrough Congregations selected in 2012 were:

- First Parish in Bedford, MA
- UU Church of Bowling Green, KY
- All Souls Unitarian Universalist Congregation of New London, CT
- Unitarian Church of Sharon, MA



Breakthrough Congregations on
UUA.org

Leap of Faith Initiative

Leap of Faith is a pilot project promoting long-term numerical growth. Based on a consultation with large and growing congregations, [Leap of Faith](#) is more a methodology than a program, inviting congregations into learning communities with larger congregations.



[The response to this program](#) has been very positive. One congregation committed to a new building after decades of struggle with a historic building. Another learned how to maximize their sanctuary through appropriate use of technology and is now filling it twice each Sunday. Yet another Leap team led a congregation out into the community where they are now actively and regularly engaged in sharing UU values.



Members of the Leap of Faith initiative visit their mentor congregation.

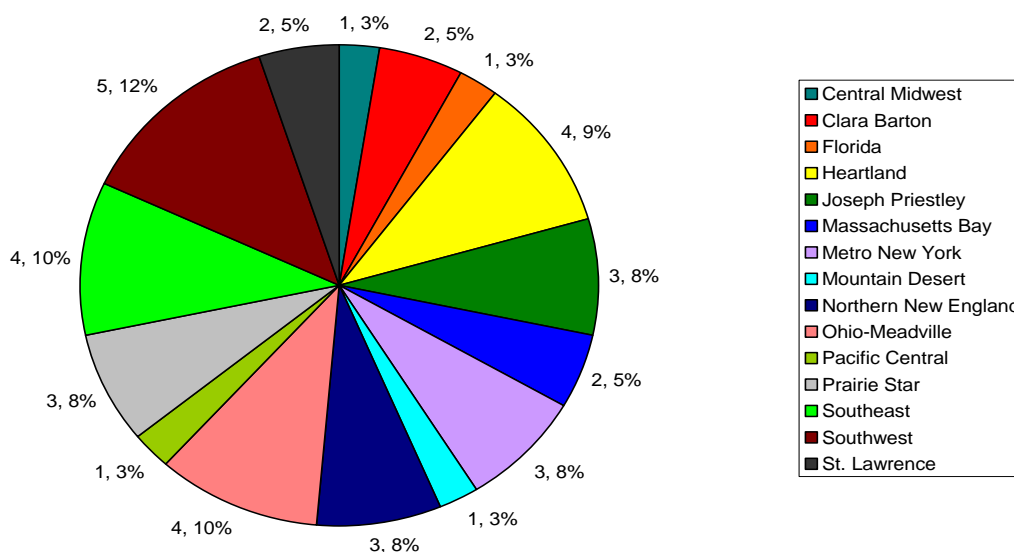
A story from a lay leader at All Souls in New London, CT:

"We in All Souls New London have started taking leaps. ...We decided that we should use this opportunity to bring our DRE from 3/4 to full time. After all we have increased RE registrations by 25% this year to a total of 92 and we really understand the need to staff for growth. We set a goal of raising \$10,000 and had only 2 months to do it. Needless to say that there was some concern. The short story is that so far, instead of raising \$10,000 we raised \$14,100 to date! AND there are still some donations that are yet to come in!!!! Thank you to Rev. Sue Phillips for coming down to help us celebrate, for the gift from Mass Bay, for the wonderful sermon, and for pointing out that we have been a congregation who has taken leaps of faith in the past and for helping us get back to that. My advice: LEAP!!"

Forward Through the Ages

[Forward Through the Ages](#) (FORTH) is a multi-year stewardship development program that the UUA launched in July 2011, after four years of input from hundreds of congregational leaders. FORTH helps congregations discover the links between growth and financial support, and promote stewardship within the congregation. Since July, over 400 lay leaders have completed a congregational self-assessment and 44 congregations have qualified as FORTH Partners.





FORTH Partners Distribution by District

In FY12, 232 lay leaders attended five different workshops and 152 lay leaders attended four webinars. FORTH staff ran 104 *Champions of Change* coaching sessions, signed 90 contracts, and coached 66 congregations in 26 states and 18 districts.

Financial Sustainability for Congregations

Ensuring the long-term financial sustainability for our member congregations is essential to strengthening our religious movement. In working towards this goal, Stewardship and Development staff led more than 60 fundraising consultations and workshops with congregations and organizations—for free! We advised in a variety of fundraising areas including annual canvas, major gift cultivation, capital campaigns, and endowment building.

Highlights from these consultations include:

- Harvard Divinity School, Cambridge, MA – Full day stewardship class for 19 religious professionals and seminarians.
- UU Fellowship of Anchorage, AK – Stewardship workshop weekend for 10 members on canvass, legacy, and more.
- First Unitarian Church of Rochester, NY – Two separate stewardship workshop weekends for 20 members each.
- UU Fellowship of San Luis Obispo, CA – Stewardship workshop weekend for over 40 members.



The map below represents all of the individuals with whom we have had consulting conversations over the past year.

Testimonial from Judy Eng, of the UU Fellowship of Anchorage, AK

“We had our first stewardship dinner to set up a matching challenge fund. We already have two more donors at that 10K level and a \$20,000 challenge fund so far. There was lots of good conversation that was “healing” from past difficulties. One young couple increased their pledge from 5K to 10K! Thanks for your help... we often refer to the weekend with you!”



Each flag represents a donor in the continental United States with whom we've held a conversation in the past year

Stewardship and Development staff also coordinate the UUA's umbrella giving program, which allows donors to make donations to their congregations or other organizations through the UUA. The UUA facilitated 155 gifts, totaling \$746,940, for other UU entities this year.

The Gathered Here Initiative



Gathered Here Logo

Gathered Here is a joint initiative of the UUA Board of Trustees and the UUA Administration in which all UUs are invited to discover our common aspirations and unleash the power of our faith.

UUA staff has had conversations in over a hundred congregations—capturing meaningful moments, times of growth, and positive developments. The board and staff will reflect on how



these positive experiences are relevant to our larger faith and how they might be applied to our collective future. Input will help to shape a collective vision for the UUA and help professional and lay leaders shape the future of Unitarian Universalism.

So far 117 people have volunteered to conduct these Community Conversations in their home congregations or the communities of which they are a part and it is hoped that 200 or more congregations and communities become involved before the initiative is wrapped-up in October of 2012.

Congregations and Beyond

In the UUA President's essay "[Congregations and Beyond](#)," President Morales points out that our core values appeal to far more people than are attracted to (or likely to be attracted to) our congregations. In February, we brought together a spectrum of people doing innovative work both within and beyond congregations, including board member the Rev. Jeanne Pupke. Out of this consultation we identified three primary areas of focus:

1. Congregational transformation—looking primarily at how to help congregations “lower their walls” and become more focused on their surrounding communities. One possible initiative will be holding a conference on “Congregations as Community Centers.”
2. New modalities—identifying technological and future-oriented tools for connecting potential and identifying Unitarian Universalists. We envision a social network “hub” that will allow users to seek out and connect with others in small groups, in congregations, or as individuals interested in common cause and community.
3. Culture change—we are examining all of our current practices through this lens of how we are reaching people both within and beyond congregations. We are also developing partnerships with key stakeholders and innovators such as Church of the Larger Fellowship, UU Ministers Association, Liberal Religious Educators, etc.

The Rev. Terasa Cooley, Director of Congregational Life, is in charge of ushering a series of initiatives forward. She is assembling a cross-staff group team who will implement new ideas and bring this lens to the work of their staff group. We recognize all of this work as “shared ministry” which invites others into leadership.



Priority #2: Grow Leaders

Growing leaders “is about learning to trust and empower one another. Vital, healthy communities identify, nurture, mentor, and empower leaders.” –The Rev. Peter Morales, [UU World](#)

Ministries and Faith Development

The Strategic Review of Professional Ministries (SRPM) was accomplished in 2010 to carefully review our ministry and to explore the way the UUA can best direct our resources to further excellent ministry in the future. The follow up report, [Strategic Plan for Professional Ministries](#) (PDF, 64 pages), presented eight recommendations:

1. Aggressively recruit leaders.
2. Support multicultural immersion learning.
3. Re-imagine and evaluate our credentialing efforts.
4. Expand transition systems.
5. Support advanced learning for all religious professionals.
6. Be more strategic in the use of scholarships and grants.
7. Measure what is truly important.
8. Go deeper: partner with related UU organizations.

The Office of Ministries and Faith Development (MFD) focused mainly on recommendations one and five for FY12. To work toward recommendation one, the UUA produced over a [dozen recruiting videos](#) for ministry (parish, community, and military), religious education, and music leadership.



Recruiting Video: “So You Think You Have a Calling...”

To further recommendation five, MFD consulted with the Education Development Corporation to create an assessment framework for UU parish ministers. This 18-month project will gather a small panel of ten, mostly made up of diverse ministers who are excellent and creative practitioners in the field. Together we will create a rubric of the skills, behaviors, and knowledge that enable a minister to perform ministry effectively. The framework will be future-oriented and will lay out four levels of development

through the arc of one's ministerial career: Novice, Approaching Proficiency, Proficient, and Excellent.

Resource Development Office

The objectives of the Resource Development Office (RDO) are to foster multicultural, multigenerational congregations and to nurture spiritual, ethical, and faith development in UUs of all ages. We seek to meet these goals by producing accessible, flexible programs and resources for all ages, including children, youth, young adults, adults, multigenerational groups, and religious professionals and lay leaders.



Tapestry of Faith logo

The RDO created several new programs and resources in FY12. A few highlights include:

- “Wisdom from Hebrew Scriptures” (multigenerational), by the Rev. Thomas R. Schade and Gail Forsyth-Vail. October 2011. For a multigenerational setting, with eight workshops based on biblical stories. All these stories offer wisdom that can help people of all ages grow in spiritual depth and understanding while building Bible literacy.
- “Ethics” (adult), by the Rev. Amber Beland and the Rev. Manish Mishra-Marzetti. January 2012. Ten workshops invite adults to clarify and expand their ethical understanding, independent of a personal crisis, through an intentional examination of ethical concepts, dilemmas, and questions.
- “Building Bridges” (youth), by Mary K. Isaacs. In field test. New Tapestry of Faith world religions program for youth in Grades 8 and 9 continues the legacy of previous UU world religions programs, with 23 workshops geared to our contemporary, pluralistic communities and world.
- “From the High Hill: Odyssey Writing for Elders” (adult), by the Rev. Anne Odin Heller. September 2011. This program offers two weekend retreats—one for preparation, one for presentations—that frame an individual period of remembering, sorting, reflecting, and writing. Participants are encouraged to use photos, mementos, and music as they mine the stories of a lifetime to create a presentation to share with peers, loved ones, and co-congregants.
- “Adapting Small Group Ministry for Children,” by Gail Forsyth-Vail. August 2011. This resource for religious educators and lay leaders describes an alternate model to traditional Sunday religious education classes, based on insights from the small group ministry model offered by many congregations for adult, young adult, and youth groups.
- *Acts of Faith* Discussion Guide, by Gail Forsyth-Vail. October 2011. This guide supports the 2011-12 UUA Common Read, Eboo Patel’s memoir *Acts of Faith*. Three adaptable, 90-minute sessions for congregational, cluster, or District programming for adults of all ages and life stages, for campus groups or young adult groups, for youth groups, or for cross-generational groups.



- “Cooking Together: Recipes for Immigration Justice Work.” [Crowd-sourced online project](#) offering resource development for congregations. Blog and UUA.org web pages launched October 2011. This expanding collection of resources in support of Justice GA 2012 is organized in four categories: Religious Education, Theological Reflection, Worship, and Faithful Witness and Action; it is refreshed at least weekly.

Youth and Young Adult Office

The Youth and Young Adult Ministries Office (YaYA) completed a strategic plan for FY12 in October 2011. Roughly half of the work that the YaYA office does is related to institutional development, improvement, and interconnection in the youth and young adult ministry fields; the other half is focused on entrepreneurial-style projects that aim to promote dynamic youth and young adult ministry. Here are a few accomplishments from the strategic plan:

- *Launched youth and young adult ministry blog*—[Blue Boat of Youth and Young Adult Ministries](#) has had thousands of visitors since launched last fall.
- *Published a young adult fundraising guide*—One of the latest resources published by the YaYA office to assist young adults with service trips, [this guide](#) (PDF, 21 pages) can also be used by young adults and youth who are interested in other faith-based projects or for raising funds to attend General Assembly.
- *Developed a youth leadership recognition program*—After six focus groups comprised of diverse youth across the country, reactions have been uniformly positive towards our project to develop a national youth recognition program. “[Luminary Leaders](#)” will begin accepting nominations and applications in June 2012.
- *Publish a comprehensive campus ministry guide*—Adapted from an older guide, the revised edition of “Being More Visible, Changing More Lives” provides a wide range of strategies and suggestions for campus ministry programs. It is already receiving rave reviews from campus ministry leaders and practitioners in the field.



Carey McDonald, Director of
the Youth and Young Adult
Ministries Office

Credentialing and Professional Development Office

The Credentialing and Professional Development Office provides a continuum of support from the first blush of a “call” to ministry through the formation and credentialing process, and on throughout a career. The team also includes the Professional Development Associate for Religious Education and Music Leadership, who provides support for certification programs and advanced learning for UU religious educators and musicians.



The Ministerial Credentialing Office supported 78 candidates who came before the Ministerial Fellowship Committee in the past year, as well as streamlined the structure of the Regional Subcommittee of the MFC. Approximately 500 people are at some stage of preparation for UU ministry.

The first ever UU Military Chaplain retreat was held in Florida in February. We currently have 9 chaplains and 1 chaplain candidate serving our ministry. A strategizing meeting was also held in advance of the retreat with Fred Garcia, representatives from the CLF and MFD, and chaplains to look at how we can expand our welcome for military members and their families, as well as for veterans.

Church Staff Finances

The UUA Health Plan provides comprehensive health insurance benefits, consistent with UU values, to 867 employees and 673 family members. During the Fall Open Enrollment, the Plan added 61 employees, an overall 7.5 percent gain. The Plan also added 4 new congregations, bringing the total number of participating congregations to 323, roughly half of all congregations with staff who would qualify for the Plan.

During the past year, the Office of Church Staff Finances (OCSF) continued to work closely with TIAA-CREF to ensure smooth administration of the UU Organizations Retirement Plan in the months following transition from Fidelity to TIAA-CREF. As of February 29, approximately 2,800 retirees, survivors, and staff working in more than 600 participating congregations had \$210 million invested in the UU Organizations Retirement Plan.

More than 1,150 employees in over 500 congregations and organizations are covered by our long-term disability plan which provides 66.6 percent of pre-disability income and other benefits for an affordable premium. Another 860 employees are covered by life insurance (twice the enrollee's annual salary) while close to 600 are enrolled in our dental insurance plan.

During 2010-2011, the OCSF was able to distribute more than \$652,698 in aid funds to working ministers, other religious professionals, retired ministers, and their surviving partners. Aid



requests remain high. Of particular concern is the rising amount of divinity school debt borne by individuals entering our ministry. Among debt reduction grant recipients, average ministerial debt increased from \$33,291 (2003) to \$54,173 (2012) or an increase of 63 percent in just ten years. Even more disturbingly, the number of recipients carrying student loans exceeding \$50,000 increased from 21 percent (2003) to 48 percent (2012). For the 71 recipients this year, their total student debt is \$3.4 million. Their average seminary debt totaled \$46,855. Debt reduction grants totaled \$103,000 during 2011-2012. In addition, the Unitarian Service Pension Society provided approximately \$509,497 in service gratuities for distribution to ministers with a minimum of 20 years of service who have reached 66 years of age and their survivors. The OCSF also works closely to coordinate aid requests with the Society for Ministerial Relief and the MA Congregational Charitable Society. During the past year, \$163,905 was contributed to the Living Tradition Fund – up 49 percent from the previous year.

Finally, the Office of Church Staff Finances worked closely with each of the professional organizations and the aid societies to re-envision the Council of Church Staff Finances. The Council helps identify compensation-related issues affecting religious professionals and congregations and works to educate religious professionals about the importance of financial literacy.

Association Sunday

Association Sunday began in 2006 as a way for congregations to take special collections for innovative programs and initiatives of the UUA. Since then we have raised \$2.7 million; almost all of those funds have gone, in turn, to support our member congregations.

This year, the UUA partnered with the Unitarian Universalist Ministers Association (UUMA), the Unitarian Universalist Musicians Network (UUMN), and the Liberal Religious Educators Association (LREDA) to support scholarships, continuing education, and a comprehensive assessment of our ministries and their needs. During 2011, 476 congregations participated in Association Sunday, raising a total of \$312,861.



Priority #3: Cross Borders

Our challenge is to learn to reach beyond the confines of our personal social and cultural experience. This is what I mean by learning to “cross borders.” We particularly need to learn to cross the borders of race, culture, and social class... We need to understand that learning to cross borders is a spiritual practice. –The Rev. Peter Morales, [UU World](#)

Multicultural Growth and Witness

In the area of social justice, the goal of the office of **Multicultural Growth & Witness** (MG&W) is to enable UU congregations and leaders to engage in effective witness, advocacy, and social action in relationship with oppressed and marginalized communities who are also working for social change and transformation in local, state, national, and international spheres. Towards this goal, MG&W staff provides congregations resources, relationships, and support that will enable them to engage in interfaith and community-based partnerships to advance social justice in their localities and beyond.

In the area of multicultural growth and ministry, MG&W’s goal is to develop congregations’ capacity to do effective ministry in a multicultural world. This goal is advanced by the MG&W staff who identify, connect, partner with, and provide leadership development and learning opportunities for congregations and leaders committed to diversifying their ministries and congregational communities.

In fiscal year 2012 the MG&W team, composed of Janice Marie Johnson, Multicultural Growth Director; Rev. Alicia Forde, Multicultural Congregations Program Coordinator; Tracy Ahlquist, Multicultural Growth Program Coordinator; and Alex Kapitan, Congregational Justice Administrator, contributed significantly to helping our congregations build the capacity to stand in opposition to systemic racism, by working directly with UU congregations and UU leaders and religious professionals



Janice Marie Johnson,
Multicultural Growth Director



and providing resources, programming, and opportunities for skill-building, community-building, and collective visioning around anti-racism, anti-oppression, and multiculturalism.

Mosaic Makers Conference and Multicultural Leadership Institute

MG&W delivered the first “Mosaic Makers: Leading Vital Multicultural Congregations” conference. Mosaic Makers was a partnership between the MG&W team of the UUA and All Souls Church, Unitarian in Washington, D.C.

This brand new conference in March 2012 brought over 100 leaders together, representing 11 UU congregations committed to intentional multicultural ministry, for a Multicultural Leadership Institute conference to engage with four core ministries of multicultural congregations: community life, worship, leadership, and justice ministry.



The conference was followed by a day for ministers, devoted to engaging with what it means to do anti-racist, multicultural ministry. This conference energized and connected congregational leaders to share their learning in their home congregations, develop strategies for incorporating their learning, and engage in accountable relationships with communities of color as part of their multicultural ministry.

MG&W is creating a video series from a Mosaic Makers plenary session featuring the Reverend Gordon Dragt. Each video in the series will feature one of Dragt’s [“16 Tips for Turning Your Congregation Around,”](#) first featured in his book *One Foot Planted in the Center, the Other Dangling Off the Edge.* These videos will provide brief, compelling suggestions and reminders for engaging in intentional multicultural ministry, and we intend to share them widely—as does Rev. Dragt.

An updated [“Keep Talking, Start Doing: Ten Ways to Deepen Your Congregation’s Multiculturalism Journey”](#) is now available at UUA.org. This resource is designed to enable



congregations at various stages of their anti-racism/multiculturalism journey to engage in intentional multicultural welcome and inclusion in their ministries.

Building the World We Dream About

In FY12, MG&W staff delivered Building the World We Dream About programming to congregations, conferences, and camps, to energize and empower UUs to build skills to form relationships across racial and ethnic lines and dismantle racism in their lives and congregations. We also provided support to congregations utilizing the Building the World We Dream About series of workshops.

Targeted programming was delivered by Janice Marie Johnson in three forms so far this fiscal year: A 5-day workshop track at Star Island's Lifespan Religious Education Conference in July 2011; a weekend-long retreat at First UU Church of Nashville, TN, in January 2012; and a 3.5-hour-long training and consultation with congregational leadership at the UU Church of Silver Spring, MD. At Star Island, a dozen participants were able to experience some of the Building the World We Dream About workshop series through a 5-day workshop track and left the conference energized and excited to take next steps toward anti-racist multiculturalism in their congregations. In Nashville, Janice led a consultation with congregational leaders and strategic planning for an anti-racist multicultural future, an experiential half-day Building the World We Dream About intro workshop for 45 participants, and a worship service on the theme of Building the World We Dream About. In Silver Spring, 30 congregational leaders got to experience an interactive introduction of Building the World We Dream About and left with an understanding of the philosophy undergirding the program.

In October 2011, MG&W piloted a new model for Jubilee Anti-Racism Trainings. In collaboration with Joseph Priestley District staff, the first district Jubilee training was delivered at the Unitarian Society of Germantown in Philadelphia, PA, facilitated by Dr. Leon Spencer and Jyaphia Christos-Rodgers. It was attended by a district-level team and two congregational teams. This powerful 3.5-day training offers participants an analysis of the individual, institutional, and cultural manifestations of racism. It gives them a common language and a context for doing anti-racism work at the congregational and district level.



In the fall of 2011, MG&W helped to provide start-up weekends for three newly settled ministers of color. JUUST Change consultant Rev. Hope Johnson worked with district executive Andrea Lerner to provide a start-up weekend for the UU Fellowship of Poughkeepsie (Rev. Walter LeFlore), JUUST Change consultant Rev. Sofia Betancourt worked with district executive Kenn Hurto to provide a start-up weekend for the UU Congregation of Miami (Rev. Wendy Pantoja), and MG&W provided funding to bring Rev. Bill Sinkford to speak at First Unitarian Church of Honolulu (Rev. Jonipher Kwong). These start-up weekends offered congregational leaders and stakeholders a workshop and a chance to establish healthy norms between their congregation and their new minister, with a particular eye for how their congregation can move forward with an anti-racist consciousness and in right relationship with their minister of color.

Diversity of Ministry Initiative

In March 2012, MG&W staff hosted the fifth annual retreat for UU religious professionals of color. It was held in New Orleans. Along with the usual activities of community building, workshops, and supporting each other in the work, this year it included a direct service component with the support of the Center for Ethical Living and Social Justice Renewal and also a Peoples' Institute for Survival and Beyond interactive antiracism workshop for people of color called "Race, Culture, and Recovery." Dr. Mark Hicks offered a dialogue workshop focused on manifestations and ramifications of identity, self-identity, and beyond. This year's retreat had more than 60 ministers, religious educators, seminarians, and directors of music in attendance.

Each year, attendees express their gratitude and say that the retreat is vital for enhancing their commitment to and comfort in the UU community. In the Diversity of Ministry Team's August 2011 survey of religious professionals of color, respondents listed this retreat as the *single most valuable and effective support* offered to them by the UUA.

Lesbian, Gay, Bisexual, and Transgender (LGBT) Ministries

In January 2012, LGBT Ministries staff offered a 2-hour guest presentation for a Meadville Lombard class on Safe Congregations taught by Rev. Qiyamah Rahman. The presentation was a training session on LGBT identities and issues of violence, power, and safety for LGBT people in



society and in UU congregations. In April 2012, our staff served as guest speaker at a pilot Welcoming Congregation Leadership Summit in Princeton, NJ, a joint Joseph Priestley District and Metro NY District event to form a coalition of congregational teams taking next steps around being welcoming to people with historically marginalized identities.

LGBT Ministries Staff have also offered the following workshops and trainings: In November 2011, training in Boston for 35 UUA staff on transgender identity, on behalf of the STAAR team; and a workshop on transgender identity and welcome at First Parish Cambridge UU in Cambridge, MA in February 2012. More than 50 members and leaders attended.

In November 2011 LGBT Ministries staff attended Transcending Boundaries, an annual conference in Springfield, MA, and led a workshop on finding common ground on labels.

In May 2012, Alex Kapitan will be a presenter in the spirituality track of the annual Philadelphia Trans Health Conference, the largest transgender conference in the world, helping to lead the interfaith workshop “Beyond Inclusion: Creating Trans-Celebratory Faith Communities” and another workshop called “Queer/Trans and Spiritual: Creating an Authentic Path”

In May 2012, a LGBT youth ministry program development guide will be released by OUTreach Resource Center in Ogden, UT, with collaboration from LGBT Ministries, the Office of Youth and Young Adults, and the Resource Development Office. By fall 2012, a webinar will be developed to give voice to UU congregations that have started effective LGBT youth ministry programs, including OUTreach.

MG&W staff is also working in collaboration with TRUUsT and Interweave to create educational resources on transgender identity and welcome. By fall 2012 the first of a series of short educational videos will be released. Workshop templates and webinars are also being planned and developed.

The UUA is creating more new or substantially revised resources to aid in welcome and inclusion efforts, including 10 Things Your Congregation Can Do to Become More Welcoming to



LGBT People and LGBT History & Facts for UUs. There are several more resources in process, including an inclusive language guide; 10 Ways to Celebrate Pride; and 10 Ways to Observe Transgender Day of Remembrance

There are now a total of 694 UUA-recognized **Welcoming Congregations**, or 64% of all UU congregations in the United States. In fiscal year 2012 (through the end of April), LGBT Ministries recognized 25 new Welcoming Congregations in 13 districts.

The UUA also passed major milestone: With the recognition of All Souls Church UU in Sioux Falls, SD, there are now UUA-recognized Welcoming Congregations in all 50 U.S. states!

In addition to the 25 congregations recognized this fiscal year, one congregation officially renewed its Welcoming Congregation designation: Peoples Church UU, Cedar Rapids, IA. For the first time, we now offer congregations the option to apply for official renewal of their Welcoming Congregation status.

Congregational Advocacy and Witness

The UUA has worked to **support Congregation-Based Community Organizing (CBCO)**. Witness Ministries staff and UU CBCO Ministers Council Executive Team members represent the UUA in the national Interreligious Organizing Initiative (IOI) coalition of organizing networks, denominational staff, CBCO clergy and lay practitioners, and funders. The IOI helps deepen and broaden congregational engagement with organizing through collegial support and shared strategies. The work CBCOs are engaged in for immigrant rights, including stopping detention and deportations, state and national DREAM Act legislation, and support of immigrant communities, is a particular focus given the UUA's advocacy priority for immigration reform. There are currently 150 UU congregations involved in CBCO.



The UUA's CBCO team



In November 2011, Susan Leslie, Congregational & Advocacy Witness Director, and the Rev. Craig Roshaven, Witness Ministries Director, participated in the People Improving Communities through Organizing (PICO) Clergy Gathering and IOI meeting. There they met with 15 UU ministers involved in PICO affiliates and identified needs, concerns, and best practices. Out of this meeting a series of webinars for supporting CBCO practitioners was planned.

In September 2011, Congregational Advocacy and Witness co-sponsored a New England training with the InterValley Project (IVP), a New England-based network, and the UU Church of Nashua, NH, a member of the Granite State Organizing Project, for UU clergy and lay leaders interested in learning about CBCO. Approximately 50 UUs, including social justice district staff, attended from five New England states and received training in one-to-one meetings, storytelling, and the cycle of organizing. Very positive evaluations were received and several new congregations are now working with IVP.

National Restoring Trust Campaign

The Witness Ministries Director is part of a six member core team for a national campaign called “Restoring Trust: Breaking ICE’s Hold on our Community.” The Witness Ministries Director initiated this campaign in consultation with Sarahi Uribe, the National Campaign Director of the National Day Laborers Organizing Network (NDLON). The core team has assembled a number of resources including an Advocacy toolkit, a webinar which has been converted to video and posted to YouTube, a national map showing the location of active campaigns and campaigns in formation. The campaign is sponsored by the Interfaith Immigration Coalition (IIC) and NDLON. The purpose of the campaign is to create and equip interfaith teams across the country to meet with and persuade their local officials to change their policy on respond to ICE hold requests. ICE requests local law enforcement to “hold” prisoners up to 48 hours after they would normally be released. The goal is for local policies to be as close to Santa Clara County, CA’s policy as possible. Santa Clara’s policy is to only comply with hold requests for prisoners convicted of crimes on the country’s list of serious crimes. The major problem with the Secure Communities Program is that people who are only guilty of minor offenses are being detained and deported. The core team is actively supporting teams across the country with monthly conference calls and free legal and organizing advice.



Reproductive Justice

Starting in January of this year, the UU Women's Federation Clara Barton Intern, Jessica Halperin, worked with interfaith and secular coalitions in Washington DC to track, advocate, and issue action alerts against federal legislative proposals that would undermine reproductive choice and other issues related to reproductive justice. The UUA signed on to interfaith and secular advocacy letters to elected officials about these issues and participated in the leadership of the coalitions.

Since the UUA started working on these issues in January, several issues have yielded successes for the progressive community. Of the issues that the UUA advocated for and offered action alerts on, three – the defeat of the Senate's "Blunt Amendment," the renouncement of the Susan G. Komen Foundation's decision to defund Planned Parenthood, and the necessary number of Senators signed on as co-sponsors of the Violence Against Women Act – have been successful thus far, with several currently unresolved.

Standing on the Side of Love



Dan Furmanky,
Campaign Manager

Standing on the Side of Love (SSL) is the UUA's public advocacy campaign, which seeks to harness love's power to stop oppression. SSL Campaign Manager Dan Furmanky provides direct support to UU congregations, state networks, and activists in key states with LGBT initiatives, as well as to [allied LGBT organizations](#). Currently, Standing on the Side of Love is providing direct support to Maryland LGBT activists and interfaith leaders to support marriage equality and transgender anti-discrimination laws and to help coordinate UU clergy involvement in projects. We recently granted \$1,000 to the UU Legislative Ministry of Maryland for these efforts. In North Carolina, SSL is acting as a portal for communications between local UU leaders and a network of more than 1,000 UUs statewide who want to help defeat the anti-LGBT amendment on the May ballot. In addition, SSL is providing direct support to the Protect NC Families Campaign to defeat the amendment, specifically the leaders of the interfaith effort. We recently granted \$2,500 to the campaign to Protect NC Families. SSL has also provided financial support to the Minnesota UU Social Justice Network to help defeat the



anti-LGBT amendment on the November ballot in Minnesota. In the next month, SSL will partner with the UU State Networks to host a strategy webinar for UUs in states working on marriage equality. We will also be recruiting activists nationwide to phone bank against the anti-LGBT amendments in North Carolina and Minnesota.

In the past year, SSL has provided strategic support to clergy and congregations across the country, advising them on how to apply for an effective SSL grant, helping to craft letters to the editor or testimony for anti-discrimination measures, and how to put on effective public witness that will amplify the messages of equality and justice. In November, SSL partnered with CLF to put on the first-ever virtual [Transgender Day of Remembrance](#) service.

SSL uses its blog and social media networks to promote LGBT issues including repeal of 'Don't Ask Don't Tell, passage of statewide employment non-discrimination acts, and repeal of the Defense of Marriage Act. Often, we are ahead of the curve. For instance, we issued an early call to action on the SSL blog when the Chicago Catholic Archbishop compared LGBT activists to the Ku Klux Klan, reaching out to Faith in Public Life, HRC, New Ways Ministry, and Equally Blessed with the story. New Ways Ministry praised the UUA's effort in this [blog post](#).

In September and October 2011, SSL spearheaded the UUA's involvement in the interfaith DREAM Sabbath campaign. The event, organized by the Interfaith Immigration Coalition and the office of Senator Dick Durbin, was envisioned as "an initiative enlisting churches, synagogues, and mosques around the country to dedicate time during their regular weekly worship service to a conversation about the DREAM Act." SSL recruited UU congregations to participate, particularly in states with senators who have historically been on the fence about the DREAM Act, and compiled a [resource page](#) to help congregations plan their DREAM Sabbath services. All told, 58 UU congregations in 26 states took part in the DREAM Sabbath campaign.

SSL's [blog](#) has been a vehicle for promoting education about immigrant and migrant issues. Last year, we ran multiple articles from individuals participating in border tours; from clergy participating in fasts to protect copycat SB1070 laws; from UUs protesting a "ban ethnic studies



law” in Arizona; from UU clergy working in interfaith partnership in Alabama and Georgia; and many, many more.

Story about Judy Cardenas of Denver, CO:

Last year, SSL was contacted by Judy Cardenas in Denver. Her husband, Raul, is undocumented, and was scheduled for deportation. SSL Campaign Manager, Dan Furmansky, worked with Raul, Judy, their minister, and members of the congregation’s immigrant justice task force to create an awareness and advocacy campaign to keep Raul with his children and wife and in his home. SSL provided \$250 in funding to produce a video about the family, and helped draft the script. Then, SSL created a multi-tiered campaign of urging SSL supporters to communicate with members of Congress to intervene, as well as to reach out to immigration officials.



Raul Cardenas and his daughter

SSL supporters generated thousands of faxes, emails, phone calls, and petition signatures to immigration officials on behalf of Raul with the goal of keeping his family intact. In November 2011, Immigrations and Customs Enforcement (ICE) agreed to a motion to administratively close Raul’s deportation. Read more [here](#).

Thirty Days of Love

SSL created and promoted the “[30 Days of Love](#),” a month long campaign that ran from Martin Luther King, Jr. day in January 2012 to Valentine’s Day in February 2012. Every day they sent out emails with reflections, stories, connections, and action items to promote love and our shared values. The response to this initiative has been overwhelmingly positive.



College Campus Initiative

Standing on the Side of Love is embarking on an exciting new initiative focused on promoting social justice and advocacy work on college campuses. SSL has been engaging in dialogue with the UUA Youth and Young Adult Office, UU campus ministry leaders (both professional and student), and other stakeholders on increasing the SSL presence on college campuses. To formalize this process, SSL and the UUA Campus Ministry Associate, Kayla Parker, are putting together an advisory team to help guide this vision. The budding partnership between SSL and the Youth and Young Adult Office on this initiative was formally announced to the wider SSL community in early February.



Office of International Resources

The **Office of International Resources (IRO)** works with congregations and international partners to uphold our sixth principle: “The goal of a world community with peace, liberty, and justice for all.” Their goals are:

- To provide resource to congregations for their international engagement.
- To manage historic and new international UU and interfaith relationships according to principles of right relationship and mutuality.
- To assist the diverse coalition of UU organizations with international missions in collaborative strategies.
- To promote UU values through international human rights work at the United Nations and through other international program partners.



UUA International Office Staff: (l-to-r) Holly Sarkissian, Nicole McConvery, Celestine Cox, Eric Cherry, Derek Mitchell, Bruce Knotts

The [UU Holdeen India Program \(UUHIP\)](#) has moved into a new stage of its development in FY12 as the director of the program has changed for the first time in the 27-year existence of this terrific program. Transition issues that have been managed include relationships with long-term partners, developing service-learning opportunities, and expanding connections with UU congregations. The service-learning opportunities and a UUHIP “roadshow” both launch in the late spring of 2012.

UUA relationships with UU partners around the world benefited from a gathering of the five largest UU groups (from Canada, India, the UK, Transylvania, and the USA) at the UUA in November 2011. Gathered together by the International Council of Unitarians and Universalists (ICUU), we were able to identify areas for collaboration for the sake of the global UU community in areas like ministerial training, service/learning, and social justice. Similarly, the



Derek Mitchell, new director of UUHIP.

International Office has managed UUA relationships with interfaith partners in Japan, especially Rissho Kosei-kai, which we hope will lead to close collaboration in social justice work internationally.



Faith Without Borders

The Faith Without Borders program is designed to assist congregations in creating and sustaining effective ministries of international engagement. The International Resources Office hopes that this program will provide a useful framework for all congregations: those that are already deeply engaged in international ministries; those who are only beginning to develop a vision of international ministry; and those anywhere else on the spectrum of engagement.

Faith Without Borders invites congregations to create, maintain, and expand their international ministries in seven program areas:

1. Spiritual Support
2. Education
3. Justice-making and Advocacy
4. Partnership
5. Faithful Stewardship
6. Pilgrimage and Witness
7. Associational Leadership

Congregations participating in the Faith Without Borders program receive practical assistance and consultation in all stages of their international engagement from the IRO.

Similarly, the IRO will celebrate the international engagement of Faith Without Borders congregations with denominational recognition.



UU-UNO Merger

The UU-United Nations Office (UU-UNO) represents UU values at the United Nations by advocating for issues such as LGBT rights, peacemaking, international rights for women and children, and climate change. The UU-UNO, which has operated as an independent organization since 1971, recently finished merging with the UUA. Both the UUA and the previous UU-UNO board signed the merger agreement in June 2011, and in most operational ways we are acting as a merged (or actively merging) organization. The UU-UNO is now legally a part of the UUA and an office of our International staff group.



In addition to the legal matters related to the UU-UNO/UUA reintegration, the programmatic integration has also been an important goal for FY12. UU-UNO staff are growing in familiarity with UUA culture and policies, and systems integration (for website, databases, communications, and financial/fundraising) is proceeding well.

UUA/UU-UNO LGBT Uganda Fund

The objective of the UUA's relations with Uganda is to support UUs and LGBT human rights activists in expanding safety and rights for Ugandan LGBT people. Because of the challenging situation in Uganda, the [Rev. Mark Kiyimba](#), minister of the UU Church of Kampala, Uganda, has



The Rev. Mark Kiyimba and
President Morales

spent nearly all of FY12 in the United States, which has been an excellent opportunity for him to share his struggle, hopes, and dreams with UUA congregations. He participated in classes at Meadville/Lombard Theological School which was a benefit for all involved. He was keynote speaker at the LGBT Human Rights event organized by the UU-UNO and held at Union Theological School.

After the Rev. Kiyimba has returned to Uganda, the UUA will continue to support the Ugandan LGBT human rights organization Eddoboozi in its coalition building, advocacy, and safe-space creation work. We will also be a partner in an interfaith theological conference that is planned for the summer of 2012 with LGBT human rights as a theme.

UUA/UUSC Japan Relief Fund

The objective of the [Japan Relief Fund](#) was to support UUA and Unitarian Universalist Service Committee (UUSC) partners as they responded to the earthquake and tsunami that struck northeastern Japan in March 2011. This fund raised over \$500,000 and was directed through three of our historic faith partners: Rissho Kosei-kai, the Konko Church of Japan, and Tsubaki Grand Shrine. Each of these partners contributed to direct relief efforts for their members and the religious buildings that were impacted and destroyed by the earthquake. Key constituencies served through these partnerships are marginalized groups and, specifically, women. Outcomes included direct relief, the creation of a community center, and a telephone hotline for non-Japanese women in affected areas.



In March 2012, President Morales traveled to Japan to visit with our partners there. He met with members of the UU congregations in Japan, toured the Rissho Kosei-kai facilities, and commemorated the victims of last year's earthquake and tsunami in a memorial service.

Service/Learning Opportunities

The International Office has developed [service/learning opportunities](#) for key constituencies, especially seminarians, in variety of contexts in FY12. Opportunities now exist with faith partners in Uganda, northeastern India, Japan, and the UK. By the end of FY12, opportunities will exist in Transylvania, as well as with social justice partners through the UU Holdeen India Program and the United Nations Office. Related to these programs is the development of a joint-venture between the UUA and the UUSC for service/learning. And, in that effort, the UUA has contributed to service/learning experiences in Haiti and developed service/learning trips on the US/Mexico border.

The process of developing a Joint Venture proposal between the UUA and the UUSC has been rich in learning and lessons. Most importantly, it has been an exercise in effective collaboration between two organizations. We've learned about changing capacities, expertise, and organizational focus. The new venture, named the College of Social Justice, was announced to the public by both organizations in April 2012.

Beacon Press



Beacon Press is the independent publishing arm of the Unitarian Universalist Association, founded in 1854 to promote social justice in the wider world. Ever since, the press has fulfilled its role as the denomination's respected public voice for expressing its liberal religious values. Beacon books illuminate UU values to people everywhere and help motivate UUs and others to work toward social change by engaging them in the issues the books address.



On the 20th anniversary of the Clarence Thomas senate confirmation hearings in which Anita Hill courageously defended the rights of women in the work place, we published *Reimagining Equality*, Hill's critical look at the foreclosure crisis and the historical and present day issues of gender, race, and finding a home in America.

In the field of environmental justice, we will be publishing an important book by young activist Rajeev Goyal – *A New World is Calling*. With a focus on environmentalism and “bottom-up” instead of “top-down” activism, former Peace Corp volunteer Rajeev Goyal passionately argues that we can no longer rely on outdated models of foreign aid, and shows how architects and designers, farmers, teachers, activists, builders, and environmentalists, especially young Americans, are in a unique position to powerfully contribute to the world. Peter Hessler, who is also writing a foreword to the book, wrote a [New Yorker profile](#) of Goyal.

Also in environmental justice we will be publishing Eva Saulitis's *Into a Great Silence*, which follows a pod of orcas and tells the story of coming to understand these whales before and after the Exxon Valdez oil spill. Through the story of this pod, the reader gets an up-close and in-depth look at how ocean oil spills can devastate marine life. Elizabeth Gehrman's *Rare Bird*, which we will publish next fall, tells the story of David Wingate, the “birdman of Bermuda,” who single-handedly brought the Bermuda petrel back from the brink of extinction by restoring the pre-colonial ecosystem of an entire island.

Joining our economic justice list this summer is *Billionaire's Ball* by Linda McQuaig and Neil Brooks. The concentration of wealth today in such a small number of hands inevitably created a dynamic that led to freewheeling financial speculation—a dynamic that produced similarly disastrous results in the last great age of inequality, the 1920s. In *Billionaire's Ball* McQuaig and Brooks take a look at the history of political decisions that helped create the world's billionaires, and at the dangers that concentrated wealth poses. As McQuaig and Brooks illustrate, it's no accident that the United States claims the most billionaires but suffers from among the highest rates of infant mortality and crime, the shortest life expectancy, and the lowest rates of social mobility and electoral political participation in the developed world.



One of our classic books, Octavia Butler's *Kindred*, was selected as one of 30 titles to be given away during the first-ever [World Book Night](#) held in the U.S. on April 23rd, 2012. Over 50,000 volunteers distributed 1 million free copies of these books to non-regular readers in communities across the country. Many Beacon Press employees signed up as volunteers.

Socially Responsible Investing

Socially Responsible Investing (SRI) ensures that our investments are reasonably consistent with our values. The UUA has been strongly committed to SRI for over forty years. Our commitment springs from our faith, and from our deep conviction in the dignity of all human beings. The UUA is constantly engaged in SRI activity from shareholder resolutions, to community investing, to affordable housing and other justice initiatives.

As of 12/31/11, \$1,059,155 of [UU Common Endowment Fund](#) (UUCEF) assets are invested in community investments. Over fifty congregations participate in the UUA matching program whereby the UUA will match a congregation's community investment up to \$10,000.

48% of the UUCEF has some type of screen for securities selection, from as little as eliminating tobacco companies to a fully screened portfolio that favors good corporate citizens and avoids those which are not, based on UU values.

The UUA's investment committee has encouraged our investment consultants, New England Pension Consultants (NEPC), to bring managers that have more focus on environmental, social, and governance (ESG) issues to the table. This has been an ongoing process for several years and has led to discussion with other investors about pushing leading consulting firms in this direction. The new approach would be to collectively put more pressure on consultants, such as NEPC, to use ESG factors in their evaluation of managers and performance results. We would also urge them to include managers with ESG expertise in their list of recommended managers.

Shareholder Advocacy is focused on results that change corporate policy in order to have broad impact. This year [Wal-Mart adopted the gender identity nondiscrimination policy](#) requested in the resolution that the UUA filed. As a result of this new policy employees across the country are



now empowered to address discrimination when they encounter it. Because Wal-Mart is the largest employer in the United States, we believe that this raises the bar for corporate best practices and will thus have an effect far beyond a single company. In a private conversation, a member of the company's Pride Committee told us that the UUA's consistent pressure as a shareholder was instrumental in raising the policy question and ultimately leading the company to revise its nondiscrimination policy and training program. Shareholder annual meetings are held in the spring and we will see more results for 2012 filings at that time.

In addition, the UUA has been filing a resolution at Verizon for the last five years asking that the company add "gender identity or expression" to its non-discrimination policy. This provides protection to transgendered people and those in transition, among others. This resolution received support from 34% of the shares voted two years ago and last year was omitted by Verizon on a technicality. We filed it again this year.

Very recently, UUA Treasurer and Chief Financial Officer Tim Brennan received a letter from Verizon's office of the general counsel saying that the company has agreed to adopt the policy. Therefore, we will be withdrawing our proposal from consideration at the annual meeting. This is a significant victory for the UUA's shareholder advocacy program. Results for 2011 filings are in [Appendix 1](#).

Over the last five years, shareholder resolutions that the UUA has filed or co-filed have pushed companies to add gender identity or expression protection covering 2,954,000 employees.

The UUA's program in socially responsible investing requires significant resources to support the work of the Committee on Socially Responsible Investing as well as a significant portion of the time of the Treasurer and the Assistant to the Treasurer.

Technological Advancements

UUA staff is also working on transcending technological boundaries as well. First, the **Information Technology Service** staff group has expanded myUUA.org. This online resource makes it easy for congregations to review and manage their membership data on file at the



UUA. In nearly 900 congregations, administrators routinely login to myUUA.org to add, delete, and make changes to the contact information of their members and lay leaders. That information is used to publish the online UUA Directory and to stay in touch with our constituents for a variety of purposes, including accurate delivery of *UU World*.

Secondly, the UUA is partnering with technology providers to make a suite of free or low-cost online “cloud” services available to congregations and individuals. Already available are an [online service](#) that allows you to send files of up to 2 GB in size to people without requiring large email attachments, and a [service](#) that supports web conferencing for online meetings, trainings, and webcasts.

UUA Communications

The **Communications Staff Group** serves the Association 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.

Office of Information and Public Witness (IPW)

Highlights of the work in media relations over the past year include a front-page feature story and color photos in the *Charlotte Observer* during the 2011 General Assembly and several Associated Press wire stories covering President Morales’ trial in Phoenix that appeared in hundreds of media outlets throughout the country. Immigration reform continues to be a hot—often controversial—topic for Unitarian Universalists and the general public, and the UUA’s work in that arena is attracting substantial media attention. President Morales’ essays on this issue have been featured in the Huffington Post.



Other public witness topics that garnered significant coverage over the past year were economic justice, environmental justice, and LGBT and transgender rights, especially in relation

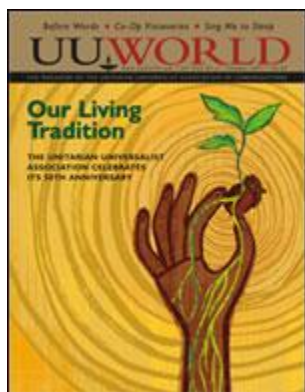


to the UUA's Socially Responsible Investing. These and other news stories about the UUA are catalogued on UUA.org.

Social media continues to be a valuable arrow in IPW's communications quiver, and the UUA's official Facebook and Twitter feeds now serve more than 30,100 Facebook fans and more than 4,250 Twitter followers.

Periodicals

UU World marked the UUA's fiftieth anniversary with a special issue reflecting on the past half-century ("Our Living Tradition," Summer 2011), a report on the fiftieth anniversary General Assembly (Fall 2011), and a feature package drawn from the Minns Lectures about Unitarian Universalism's future (Winter 2011). The first issue of 2012 focused on the issue at the heart of the 2012 Justice GA: immigration justice ("Human Borders," Spring 2012).

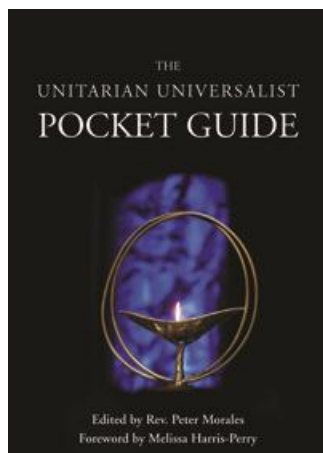


UU World features inspiring stories about Unitarian Universalists, their congregations, and the living tradition they share. Highlights of the past year included an essay by 20-year-old Zach Wahls about his marriage equality speech to the Iowa legislature that became a YouTube sensation, a profile of an intergenerational book group at an Illinois church, and a history of the UUA's sexuality education curricula. *UU World* also helps readers grapple with Unitarian Universalism's contemporary challenges: A new series of infographics showed the membership growth rate by state, the number of congregations by state, the size of congregations, and the age of congregations. Articles examined the rise of universalism among contemporary Evangelicals, the trend toward religious disaffiliation in the United States, and the investment extremist groups make in youth.

InterConnections, our monthly email newsletter of practical advice for congregational lay leaders, drew its largest readership to articles about an innovative young congregation in Mason, Ohio, and about a Detroit congregation's decision to give its building to a local nonprofit. The newsletter currently reaches more than 9,000 congregational leaders.



Publications Office

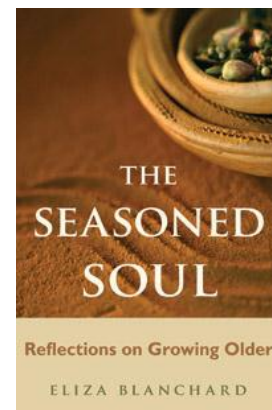


The Publications Office published 14 new titles in 2011-2012, including nine under the Skinner House Books imprint. This year saw a flurry of new outreach resources, spearheaded by the fifth edition of Skinner House's *Unitarian Universalist Pocket Guide*. Edited by UUA President Peter Morales, this version features a foreword by MSNBC commentator and lifelong UU Melissa Harris-Perry as well as new essays from 2011 Frederic G. Melcher Award winner and Ralph Waldo Emerson Unitarian Universalist Association Senior Lecturer of Divinity Dan McKanan and President of Starr King School for the Ministry Rebecca Parker. Other contributors include UUA Vice President Kay Montgomery; UU ministers Jane Ranney Rzepka, Mark Belletini, John Crestwell, Rosemary Bray McNatt, and Gail Geisenhainer; and UUA Curriculum Director Judith Frediani. The *Pocket Guide* is also available in Spanish. The new pamphlet *To the Point* and the *Welcome Wallet Card Variety Pack* are also great for introducing visitors and seekers to the essence of Unitarian Universalism. And Ervin Barrios has written the pamphlet *Bienvenidos a la comunidad unitaria universalista* to welcome Spanish speaking people to our congregations. Social justice and multiculturalism have been publishing priorities. Michelle Bates Deakin profiles UUs doing extraordinary things for change in *Social Action Heroes*. A new anthology, *Voices from the Margins*, edited by Mark Morrison-Reed and Jacqui James, is a multicultural collection of meditations by UU ministers about their challenges and sources of strength. (The development of this manuscript was funded by the UU Funding Panel.) In his new book *Reclaiming Prophetic Witness*, Paul Rasor urges us to remind the world that religious conservatives don't hold a monopoly on religious values.

Skinner House has published several new titles on spiritual growth and practice, such as *Listening Against the Stone* by spiritual memoirist Brenda Miller, including all six of her Pushcart-Prize winning essays. Kathleen McTigue's *Shine and Shadow* has become one of the most popular titles in the meditation manual series, and Angela Herrera's promising meditation manual *Reaching for the Sun* debuted in May. Christine Robinson and Alicia Hawkins reprise



their beloved model for small group ministry in *Soul to Soul*. Eliza Blanchard's *The Seasoned Soul* addresses the spiritual dimensions of aging, and *The Pen and the Bell*, by Brenda Miller and Holly Hughes, guides readers into a spiritual practice combining mindful attention and creative writing. Finally, Kathleen Rolenz has edited a gorgeous collection of readings from and about the six Sources, called *Sources of Our Faith*.



UUA Bookstore

The [UUA Bookstore](#) is the primary retail outlet for UUA publishing. The Bookstore can be found on Facebook and Twitter. We are producing videos about our new titles, audio interviews with our authors, and weekly email newsletters. Last year, to support congregations in their bookselling, the Bookstore introduced our Book Fair program that allows smaller churches and churches without book tables to share our books with congregants and make money for the congregation in the process. Last year the Bookstore helped thirty congregations host Book Fairs and as of early April 2012, has another thirty planned.

This year UUA Bookstore is proud to be participating in the social justice work of General Assembly by raising funds for the Comités de Defensa del Barrio (CDBs) and Puente AZ, organizations that perform vital human services and migrant justice work in Arizona. The Bookstore will donate 5% of all purchases made with the special discount code **PhoenixGA** these organizations. If sales using this code exceed \$100,000, the Bookstore will donate 10% of each additional sale—up to a total contribution of \$15,000! The Bookstore is also carrying most of the books that will be donated to Tony Diaz's Librotraficante, an organization that is committed to making sure that books removed from the Tucson Unified School District's Mexican American Studies Program are available to Arizona's youth.

Communications Task Force

The administration of the UUA recognizes the need to evaluate, examine, and reorganize its current communications strategies and tactics among its various staff groups in order to better reach and serve our various constituents and, in doing so, to implement our principles. If our



movement is to grow and thrive, it is imperative that we examine and improve how we communicate with our various stakeholders.

The Communications Task Force has developed a set of recommendations specific to UUA communications. Key recommendations include:

- Create managerial system to evaluate communications, with goal of constituent involvement.
- Evaluate public perception of Unitarian Universalism and devise a strategy to raise understanding, awareness, interest, engagement, and excitement in our faith and in the UUA.
- Develop and implement UUA branding.
- Implement a unified email marketing system.
- Enforce and enable use of Raiser's Edge for contact data management.
- Align online material with UUA communications goals.

The challenge of reimagining UUA communications on a broad scale may seem daunting at first; however, with careful planning, faithful collaboration among all staff groups, and steady measures of progress, change is possible. UUA leadership has an opportunity to improve UUA communications; the processes and attitudes UUA staff carries to their work; and—most importantly—the world's understanding of Unitarian Universalism as a relevant, growing, vitally important religious movement for the 21st century.

UUA Fundraising

Like many nonprofits today, fundraising at the UUA faces many challenges including the economic downturn, greater industry competition, growing costs of fundraising, and donor fatigue. The UUA has big dreams and wants to achieve real change. But real change needs real funding. If we are going to be the religion for our time, if we are going to be the religion of choice for individuals who seek a welcoming, liberal faith community, then we must have the financial resources to effectively institute policies, practices, and programs that create real growth, momentum, energy, and change.

Therefore, the **Stewardship and Development** staff group is currently in the exploratory phase of the feasibility of a multi-year comprehensive campaign. The purpose of this campaign would be to empower donors and member congregations to generate more cash and planned



gifts for the wider UU movement, the UUA, and UU affiliate organizations in order to strengthen our movement for years to come. This exploratory process is helping us understand the opportunities and challenges of initiating a comprehensive fundraising campaign and shape our messaging, identify areas of funding that interest our donor population, gauge enthusiasm, and discover potential prospects.

In FY12, at their fall 2011 meeting, the President's Council, an advising body of the UUA, donated \$100,000 in matching gifts to the Friends of the UUA program. Stewardship and Development combined that with \$100,000 of the \$900,000 FY12 grant from the UU Veatch Program at Shelter Rock in order to create a triple match challenge. Thanks to the generosity of our friends of the UUA, the goal was met! Each dollar raised (up to \$100,000) was matched by the President's Council and the UU Veatch Program at Shelter Rock. These matching gifts helped the UUA create and strengthen the programs and projects that support the three priorities outlined above. Each dollar went three times as far to promote *getting religion* (through programs like the [Leap of Faith](#)), *growing leaders* (through resources like the [Diversity of Ministry Initiative](#)), and *crossing borders* (through [service/learning trips](#) and [social justice work](#)).



Conclusion

UUA staff has worked tirelessly to create programs that support our congregations and promote our liberal religious values to the world. As we move forward, the UUA will continue to lift up our top three priorities: Get Religion, Grow Leaders, and Cross Borders! Our dedicated staff and partner organizations have worked hard to make our voices heard on social justice issues and to nurture our denominational growth. Together we have the passion, the compassion, the spirit, and the determination to face the tests of our times. We can ensure that our religious movement continues to grow and thrive as we raise awareness, change minds, and shape policy. Our shared values will help us create a better world.

Again, a special thank you for all the dedication, commitment, passion, and energy of all UUs everywhere who give so much of their time, talent, and financial support to make this work possible and help us achieve our goals and fulfill our principles. Thank you!



Appendices

Appendix 1: Socially Responsible Investing

Shareholder Advocacy 2011-2012 Season			
Corporation by Issue	Filing Deadline	Primary Filer	Result
Climate Change			
SunTrust Banks	Raise issue of climate change to board and shareholders; affect public policy debate; encourage company to prepare sustainability report	UUA	After two years of increasing levels of support for the resolution, the company decided to launch a serious effort to prepare a sustainability report, therefore we did not file. We are continuing the dialogue with them and monitoring their progress.
Alpha Natural Resources	Raise issue of climate change to board and shareholders; affect public policy debate	UUA	Similar story to SunTrust. We have been filing with Alpha and its predecessor company, Foundation Coal, for 5 years. Now they are making a serious disclosure effort, so we will not file.
Separate CEO and Board Chair			
<u>Chevron</u>	Provide better oversight of top management to better align interests of management with those of shareholders and society at large.	UUA	Dialogue with company; resolution will go to a vote. The concerns are primarily around their international operations, especially in Ecuador and Burma.
Sexual Orientation / Gender Identity Non-discrimination			
<u>Verizon</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	UUA has been filing for five years with increasing support. The company has refused to change their policy or enter into dialogue.
Wal-Mart	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	Following last year's annual meeting, the company decided to change their policy.
<u>ConocoPhillips</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	Dialogue with company; resolution will go to a vote. Management transition will prevent them from addressing the issue this year.
<u>Exxon Mobil</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	New York State Common Retirement	Company has requested permission from SEC to omit the proposal.



		Fund	
Political Spending			
<u>Chesapeake Energy Corp</u>	Draw attention to contributions of companies to California Proposition 24 that would have overturned most greenhouse gas legislation.	Service Employees International Union	Have not heard from company.

Shareholder Advocacy 2010-2011 Season			
Corporation by Issue	Filing Deadline	Primary Filer	Result
Climate Change			
<u>SunTrust Banks</u>	Raise issue of climate change to board and shareholders; affect public policy debate; encourage company to prepare sustainability report	UUA	31% approval
<u>Alpha Natural Resources</u>	Raise issue of climate change to board and shareholders; affect public policy debate	UUA	27% approval
Separate CEO and Board Chair			
<u>Goldman Sachs Group</u>	Provide better oversight of top management to better align interests of management with those of shareholders and society at large.	Christian Brothers Investment Services	Withdrawn; company and shareholders agree to policy change
Sexual Orientation / Gender Identity Non-discrimination			
<u>Verizon</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	Omitted from proxy on technicality
<u>Dr. Pepper Snapple Group</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	Withdrawn; company and shareholders agree to policy change
<u>ConocoPhillips</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	30% approval
<u>Wal-Mart</u>	Encourage companies to provide non-discrimination protection based on gender identity and expression.	UUA	14.6% approval
Human Rights			
<u>Chevron</u>	Make board, shareholders, & public aware of the Company's support for repressive regimes, e.g. Burma	International Brotherhood of Teamsters	24% approval
Political Spending			
<u>Occidental</u>	Draw attention to contributions of companies to California Proposition 24 that would have overturned most greenhouse gas legislation.	Green Century Capital Management	Prop 24 was defeated.
<u>Valero</u>	Draw attention to contributions of companies to California Proposition	UUA	Prop 24 was defeated.



	24 that would have overturned most greenhouse gas legislation in the state.		
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Appendix 2: Collaborations

The UUA recognizes that in order to achieve our goals and uphold our principles we must strategically integrate our most vital work with that of like-minded organizations, coalitions, and congregations. Here are a few examples of our ongoing collaborations and partnerships.

Congregational Growth

- Hartford Institute for Religious Research at Hartford Seminary
- Institute for the Study of Secularism and Society at Trinity College
- Church of the Larger Fellowship

Association Sunday

- Unitarian Universalist Ministers Association
- Unitarian Universalist Musicians Network
- Liberal Religious Educators Association

Multicultural Growth and Witness

- AZ Immigration Ministry – identifying and preparing service and witness opportunities for the Justice General Assembly.
- Domestic Human Needs Working Group
- Environmental Justice Working Group
- Faithful Budget initiative
- Gamaliel on immigration reform organizing
- Grassroots Leadership
- Interfaith Immigration Coalition
- Interfaith Worker Justice (also funded by UU Veatch Program at Shelter Rock in FY12)
- National Day Laborers Organizing Network (NDLON) (also funded by UU Veatch Program at Shelter Rock in FY12)
- New Sanctuary Movement
- PICO (also funded by the UU Veatch Program at Shelter Rock)
- Shoulder to Shoulder Campaign
- State Advocacy Networks/UU Legislative Ministries
- Transportation Equity Network and Inter-religious Organizing Initiative
- UU Ministry for Earth
- Washington Interreligious Staff Community

Standing on the Side of Love

- No More Deaths (NMD)
- UU Legislative Ministry of Maryland
- Protect North Carolina Families
- Minnesota UU Social Justice Network
- UU State Networks

GA 2012

- Puente
- Somos America
- Humane Borders



- Mi Familia Vota
- Arizona Interfaith Alliance for Worker Justice
- Arizona Advocacy Network
- Arizona Immigration Ministry

Office of International Resources

- UU Service Committee (UUSC) (also funded by UU Veatch Program at Shelter Rock in FY12)
- UU Partner Church Council (UUPCC)
- International Council of Unitarians and Universalists (ICUU)
- International Convocation of UU Women (ICUUW)
- Project Harvest Hope (PHH)
- Unitarian Universalist Global AIDS Network (UUGAN)
- Religions for Peace (Int'l and USA)
- International Association for Religious Freedom (IARF)
- Churches for Middle East Peace (CMEP)
- Multiple U/U and interfaith partners around the world.
- Multiple secular justice partners, especially in India and Ghana.

Socially Responsible Investing

- Interfaith Center on Corporate Responsibility
- Ceres
- Investor Network on Climate Risk
- Social Investment Forum (US SIF)
- Service Employees International Union and
- New York State Common Retirement Fund
- NY City Office of the Comptroller



Appendix 3: Report on UUA Equal Employment Opportunity as of December 31, 2011

The 1973 General Assembly resolved that the UUA report annually on its efforts to provide employment opportunities to women and racial “minorities” at all levels of its staff, said report to include a statistical summary similar in scope and content to those reported by Federal agencies and most U.S. corporations.

2011 Statistical Summary

American Indian or Alaska Native
Asian
Black or African American
Hispanic or Latino
Native Hawaiian or Other Pacific Islander
Two or More Races
White
TOTAL

All Employees				Grades 4 - 7				Grades 8 +				Ungraded			
Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	5	0	0	1	1	0	0	1	1	0	0	3	3	0	0
16	10	6	0	6	2	4	0	10	8	2	0	0	0	0	0
5	3	2	0	2	2	0	0	2	1	1	0	1	0	1	0
1	1	0	0	0	0	0	0	1	1	0	0	0	0	0	0
4	3	1	0	1	1	0	0	2	1	1	0	1	1	0	0
175	114	61	0	11	7	4	0	137	87	50	0	27	20	7	0
206	136	70	0	21	13	8	0	153	99	54	0	32	24	8	0

American Indian or Alaska Native
Asian
Black or African American
Hispanic or Latino
Native Hawaiian or Other Pacific Islander
Two or More Races
White
TOTAL

All Employees				Leadership Council				First/Mid-Level Managers				Professionals				Sales Workers				Administrative Support Workers				Service Workers			
Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other
0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	5	0	0	0	0	0	0	1	1	0	0	1	1	0	0	0	0	0	0	3	3	0	0	0	0	0	0
16	10	6	0	1	1	0	0	3	3	0	0	1	1	0	0	0	0	0	0	7	5	2	0	4	0	4	0
5	3	2	0	1	0	1	0	1	0	1	0	0	0	0	0	0	0	0	0	2	2	0	0	1	1	0	0
1	1	0	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	3	1	0	0	0	0	0	1	0	1	0	1	1	0	0	0	0	0	0	2	2	0	0	0	0	0	0
175	114	61	0	10	4	6	0	35	18	17	0	68	43	25	0	2	1	1	0	58	48	10	0	2	0	2	0
206	136	70	0	12	5	7	0	41	22	19	0	72	47	25	0	2	1	1	0	72	60	12	0	7	1	6	0

Percentages*

	All Employees	Grades 4 - 7	Grades 8 +	Ungraded
American Indian or Alaska Native	0.0%	0.0%	0.0%	0.0%
Asian	2.4%	4.8%	0.7%	9.4%
Black or African American	7.8%	28.6%	6.5%	0.0%
Hispanic or Latino	2.4%	9.5%	1.3%	3.1%
Native Hawaiian or Other Pacific Islander	0.5%	0.0%	0.7%	0.0%
Two or More Races	1.9%	4.8%	1.3%	3.1%
White	85.0%	52.4%	89.5%	84.4%
Female	66.0%	61.9%	64.7%	75.0%

Staff Group Analysis

STAFF GROUP

STAFF GROUP	All Employees				American Indian or Alaska Native				Asian				Black or African American				Hispanic or Latino				Native Hawaiian or Other Pacific Islander				Two or More Races				White			
	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other	Total	Female	Male	Other				
Administration	7	4	3	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0	6	4	2	0		
Beacon Press	27	21	6	0	0	0	0	0	3	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	23	17	6	0
Communications	22	12	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	22	12	10	0	
Congregational Life	7	5	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7	5	2	0	
District Services	35	25	10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	0	0	1	1	0	0	33	23	10	0
Finance	10	7	3	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	9	6	3	0	
General Assembly and Conference Services	4	3	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	4	3	1	0	
Information Technology Services	12	4	8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	12	4	8	0	
International Resources	8	5	3	0	0	0	0	0	0	0	0	0	1	1	0	0	2	1	1	0	0	0	0	0	1	1	0	0	4	2	2	0
Ministries and Faith Development	32	24	8	0	0	0	0	0	0	0	0	0	3	2	1	0	1	1	0	0	0	0	0	0	1	0	1	0	27	21	6	0

Multicultural Growth
and Witness

Operations/Pickett & Eliot

Stewardship and
Development

UU Funding Program

TOTAL

13	10	3	0	0	0	0	0	1	1	0	0	4	4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8	5	3	0
12	3	9	0	0	0	0	0	0	0	0	0	7	2	5	0	1	1	0	0	0	0	0	0	0	0	0	4	0	4	0	
15	11	4	0	0	0	0	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	0	0	14	10	4	0	
2	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	0	0	
206	136	70	0	0	0	0	0	5	5	0	0	16	10	6	0	5	3	2	0	1	1	0	0	4	3	1	0	175	114	61	0

The UUA practices Equal Opportunity and Affirmative Action for women and persons of color in the recruitment process for all staff positions. Under the current Affirmative Action policy, a review of hiring and termination vis-à-vis race and gender is conducted annually. Copies of the Affirmative Action policy and past reports are available on request from the Director of Human Resources.

* PERCENTAGES MAY NOT TOTAL EXACTLY TO 100% DUE TO ROUNDING.

