

STAFF REPORT
TO THE BOARD OF TRUSTEES
JANUARY 2010

Beacon Press
Helene Atwan, Director

I am pleased to report that **Eboo Patel** has just been awarded the **2010 Louisville Grawemeyer Award** in Religion for his memoir *Acts of Faith*, which **Bill Clinton** has called "A beautifully written story of discovery and hope." Patel is the founder and executive director of **Interfaith Youth Core**, a Chicago-based organization active on seventy-five college campuses that encourages young people of different religions to perform community service, explore common values, and build bridges among their diverse faiths. He is also a member of **President Obama's** Advisory Council on Faith-Based and Neighborhood Partnerships and the Religious Advisory Committee of the Council on Foreign Relations. In October, *U.S. News & World Report* named him one of **America's Best Leaders** in 2009. With the help of a Veatch grant, Patel's organization is now working with the LFD staff group on youth trainings.

In recent honors, environmental journalist **Claire Hope Cummings** won the 2009 **American Book Award** for *Uncertain Peril: Genetic Engineering and the Future of Seeds*, an account of the rise of industrial agriculture and plant biotechnology and the privatization of the Earth's seed stock; activist **Geoff Canada**, author of **Fist Stick Knife Gun**, and his organization the **Harlem Children's Zone** were the subject of a **60 Minutes** feature; and **Vice President Joe Biden** chose to read **Mary Oliver's** poem "Wild Geese" at the 9/11 remembrance at Ground Zero this year.

With their new books just published, authors **Carol Joffe**, **Danielle Ofri**, and **Adele Barker** have become regular contributors to the media. Joffe, whose book *Dispatches from the Abortion Wars* **Barbara Ehrenreich** has called "a rare and privileged look into the beleaguered world of abortion providers," has a new series at *Ms. Magazine* online about escalating abortion clinic violence in the aftermath of Dr. George Tiller's murder. Danielle Ofri has launched her blog *Medicine in Translation*, also the title of her new memoir about caring for immigrant patients, on *Psychology Today*. Finally, Adele Barker will be corresponding from Sri Lanka for the *Huffington Post* on the cusp of their elections in January. Her book *Not Quite Paradise* chronicles the time she spent living on the island, both before and after the tsunami of 2004.

Also recently published, *Hollowing Out the Middle* by sociologists **Patrick Carr** and **Maria Kefalas** examines the emptying out of small towns nationwide and the accompanying phenomenon of "rural brain drain." Supported in their work by a grant from the **MacArthur Foundation**, Carr and Kefalas have done extensive research on how to create sustainable, thriving communities in rural areas. In a **starred review**, *Library Journal* called their book "deftly researched and written," and highly recommended it for "anyone concerned about the future of this country." The authors

have appeared on **C-Span Book TV**, the **Leonard Lopate Show**, **On Point**, **Midmorning** (Minnesota Public Radio), New Hampshire Public Radio, and **Radio Times**, a program of Philadelphia's NPR affiliate **WHYY**, and have written about the rural brain drain for *The Chronicle Review*.

Margaret Regan's *The Death of Josseline* reports from the front line of the Arizona-Mexico borderlands, the site of massive human migration and human rights abuses. Including the voices of migrants, Border Patrol, ranchers, activists, and others, Regan, according to *Kirkus Reviews*, “puts a human face on the multiple problems created by desperate, poverty-stricken people entering the United States illegally to look for work.” She has received praise from **Ana Castillo** and **Sandra Cisneros**, who notes that “this book should be required reading for everyone—from President Obama and the director of Homeland Security to the border patrol agents, the vigilantes, and migrant rights activists.”

The Young and the Digital by media expert **S. Craig Watkins** explains how and why digital media is transforming youth culture, identity, and everyday life. Watkins, who participated in the **MacArthur Foundation's** digital media and learning initiative, went on to lead a research team that collected over 500 surveys and conducted 350 in-depth interviews with young adults, parents, and educators to assess the use and impact of social media on the first generation of digital natives—those who have always had technology in their lives. The **Austin Chronicle** featured a long piece on the author and book, noting that “*The Young and the Digital* is remarkably readable. Maybe even more remarkable is what a focused account Watkins has produced about a media climate that is still in flux, in which he ponders questions that may not be answered until this moment in media history has long passed.” Watkins has also recently been interviewed by **ESPN the Magazine**, **Ypulse.com**, and the **Chronicle of Higher Education** about digital youth culture.

We are delighted to announce the third acquisition in our ReVisioning American History series, *A Disability History of the United States* by historian and noted Helen Keller biographer **Kim E. Nielsen**. Nielsen reveals the prominent role that disability has played in the American experience, from shifting cultural expressions of care-giving to medicinal and technological breakthroughs to education and labor reform.

Also recently acquired, *The Accordion Family: How Globalization Reshapes the Private World* by acclaimed sociologist **Katherine Newman** examines the “failure to launch” phenomenon both here in the US and abroad. Since the 1970s, there has been a 50% increase in the proportion of thirty to thirty-four year-old Americans living with their parents, and the trend is similar in European countries. In response, “accordion families” are stretching to accommodate kids who never left or who tried and have since returned. Newman examines what this shift means for the economy and globalization and how it is rewriting relationships between parents and children, sometimes in surprising ways.

Identity-Based Ministries
Taquienna Boston, Director

Beyond Categorical Thinking (BCT)

A recent evaluation of Beyond Categorical Thinking found that congregations that use the workshop and BCT process are more likely to call a minister from one or more of the social group identities: bisexual, gay, lesbian, transgender people; people with disabilities, people of color, Latina/o/Hispanic and multiracial. Ninety percent (90%) of congregations that settled full-time ministers for this congregational year used BCT.

Office of Accessibility Concerns

Anti-Oppression/Anti-Ableism Education: Rev. Devorah Greenstein, Program Associate, has been teaching a course on aging and disability at Starr King School for the Ministry to 15 seminarians who will take what they have learned about accessibility and ableism into their future ministries. In January Rev. Greenstein will teach an intensive anti-oppression/anti-ableism class at Starr King.

The Office of Accessibility Concerns is working with the UU Eco-Justice Team to produce fact sheets that connect disability and climate change.

Accessible UU Resources: The UUA “Welcome” brochure is being published in Braille. “Singing the Living Tradition” is being re-issued in large print.

Congregational administrators can now request UU World on tape when they are updating information in Raiser’s Edge.

Seminarians with Disabilities Support: Rev. Greenstein is working with two seminarians with print disabilities to put all the Ministerial Fellowship Committee required readings in electronic format for them and other seminarians with visual disabilities who follow.

Congregational Accessibility: An accessibility manual for small congregations in the Northern New England District is in final edits.

Office of Bisexual, Gay, Lesbian, and Transgender Concerns

Welcoming Congregation Program: There are 642 Welcoming Congregations in the United States. This means that 86 percent of Unitarian Universalists belong to Welcoming Congregations. Of the congregations that have not become Welcoming Congregations approximately 20 have 100 members or less, and only 3 have more than 300 members.

Marriage Equality: Despite the devastating loss in Maine and the inability of the New York legislature to act, work on Marriage Equality continues to move forward, The District of Columbia Council voted to recognize same-sex marriages in other states. Washington State passed a referendum called “everything but marriage,” which means

same sex couples will be given the same states' rights in Washington recognized as "domestic partnerships." Unitarian Universalist clergy and congregations have been actively engaged across the country, and regardless of outcome, are to be commended for their public witness and advocacy on behalf of Bisexual, Gay, Lesbian, and Transgender rights.

Office of Racial and Ethnic Concerns

Catalyst is an electronic newsletter that publicizes events and significant developments in the Unitarian Universalist people of color community related to religious professionals, seminarians, lay leaders, family ministries, and youth and young adults. To receive the newsletter contact Janice Marie Johnson, Director of Racial and Ethnic Concerns (jmjohnson@uua.org).

UUA Religious Professionals of Color: A UUA professionals of color group is being organized to collaborate in identifying and modeling best practices for supporting multicultural professional leadership at the UUA and in Unitarian Universalist congregations.

The UU Religious Educators of Color Network is being created to foster supportive relationships, vision/mission for multicultural religious education, professional development, and self-care among religious educators. The group will seek collaborative relationship with LREDA and the LREDA Integrity Team.

Diversity of Ministry Initiative/JUUST Change: JUUST Change consultants are providing start-up support for Rev. Alma Crawford and Senior Minister Rev. David Herndon at the First Unitarian Church of Pittsburgh, PA Rev. John Crestwell and Rev. Fred Muir at the UU Church of Annapolis, MD and Rev. Manish Mishra at the Unitarian Universalist Church of Cherry Hill, NJ.

The UU Church of Miami, FL is working with JUUST Change consultancy in their interim ministry process.

The UU Church of Long Beach, CA will be partnered with a JUUST Change consultant to work with them in the Diversity of Ministry process.

Finally JUUST Change consultants are working with 9 to 10 UUA districts to support systems change to advance anti-oppression/anti-racism/multicultural work in Unitarian Universalist congregations.

Mosaic Project: Office of Racial and Ethnic Concerns staff is collaborating with Rev. Monica Cummings (Lifespan Faith Development) on a Youth and Young Adults of Color Leadership Conference scheduled for August 13 – 17, 2010. The Office will provide curriculum design and delivery for the teaching of leadership skills to youth, and advisor/youth coordinator skills and strategies to young adults.

Communications
John Hurley, Director

Office of Information and Public Witness

IPW has been promoting the Association's witness priorities, including immigration, marriage equality, and health care reform. The most successful media results this quarter came from congregational participation in the International Day of Climate Action. The complete list of 20+ articles is at <http://www.uua.org/pressroom/mediakit/350/>.

Shelby Meyerhoff offered new media trainings for UUA staff and district leaders and launched the UUA's new media blog: <http://newmedia.blogs.uua.org/>. Shelby reports that the UUA's Facebook page now has more than 10,000 fans and the UUA Twitter feed reaches about 1,000 followers.

Rachel Walden has been making the first floor of #25 Beacon more inviting and hospitable to visitors as well as implementing new security procedures for the main entrance to the building. Rachel is also revising historical and visitors' information on uua.org and developing new guidelines for the annual spring Coming of Age Tours.

Office of Electronic Communication

Since our UUA blog service debuted in the fall, we've added several new blogs to our list. They include the InterConnections Tipsheet (<http://tipsheet.blogs.uua.org/>), Congregational Stewardship (<http://congregationalstewardship.blogs.uua.org/>), and New Media for Unitarian Universalists (<http://newmedia.blogs.uua.org/>). The Inspired Faith, Effective Action blog of the Advocacy and Witness staff group will be moving to the UUA's blog platform as well, and the General Assembly Office is about to debut their new blog to help promote General Assembly. Changes to the UUA home page design, debut of a new Resources page (for both UU congregation members and their leaders), the addition of social media and video links on all 30,000 of our pages, and a "Most Viewed" listing of popular pages on UUA.org will debut on February 1. Information on these changes has been included in the January congregational packet; look for our ad on the inside front cover of UU World's winter issue. A second phase of our redesign work to begin February 1 will involve examination of our search engines and the implementation of changes to make our search mechanisms more user-friendly.

Periodicals Office

We introduced paid banner advertising on uuworld.org in October, beginning with ads for the UUA Bookstore and General Assembly. Other departments, denominational organizations, and independent organizations may now place advertisements on our website in one of four formats; text advertisements are also available in our weekly email newsletter, which reaches 2,820 subscribers every Monday. Contact advertising@uua.org for rates and specifications.

The Periodicals and Publications offices are working together to launch a "UU Parenting" blog on uuworld.org to help promote a new Skinner House book on the topic and to generate new content for UU parents. We anticipate promoting the blog for eight weeks in the spring.

InterConnections, which became a monthly email newsletter in September, now has 8,960 email subscribers, down from 15,623 print subscribers in May. We are working to promote this free newsletter to lay leaders who have not provided their email addresses through their congregations' annual update. Anyone may subscribe at www.UUA.org/interconnections

Publications and UUA Bookstore

UUA Publishing News: Upcoming Titles

The Growing Church: Keys to Congregational Vitality, Thom Belote, ed. Practical and inspiring advice from ministers of thriving congregations. (Jan. 2010)

Sunday and Every Day: My Little Book of Unitarian Universalism, Patricia Frevert, ed. For worship, RE and everyday use: prayers, stories, songs and more. Illustrated. Ages 5 and up. (Jan. 2010)

Tending the Flame: The Art of Unitarian Universalist Parenting, Michelle Richards. Practical and proactive advice for raising children in our faith tradition. (March 2010)

Serving with Grace: Lay Leadership as a Spiritual Practice, Erik Walker Wikstrom. Leadership development with a spiritual focus. (May 2010)

Stone Blessings, Robert Walsh. The UUA Meditation Manual for 2010. 72 pages, \$8.00 (May 2010)

Story, Song and Spirit: Fun and Creative Worship Services for All Ages, Erika Hewitt. Fully-scripted services that are easy to follow and engaging for the whole congregation. 128 pages \$12.00 (May 2010)

Sales

Sales have held steady. For the 12 months ending November 2009, UUA Bookstore revenue was \$1,095,470, up 1% from the same period one year ago. For the two comparative periods, Skinner House titles are up 10%.

Lifespan Faith Development

Judith Frediani, Director

Tapestry of Faith

New Children's Programs

Love Surrounds Us-(K-1)

In Love Surrounds Us children engage in activities that emphasize the love they feel in community. The Beloved Communities of family/ home, school, congregation, neighborhood and world is paralleled with our Unitarian Universalist Principles. Manuscript complete: being prepared for Jan/Feb publication online.

Love Will Guide Us-(2-3)

In Love Will Guide Us children explore life questions through the lens of our Unitarian Universalist sources, with an emphasis on love. Together we ask: “Where did we come from?” “What is our relationship to the Earth and to other creatures?” “How can we respond with love, even in bad situations?” “What happens when you die?”
Manuscript complete: being prepared for Jan/Feb online publication.

Love Connects Us (tentative title)-(4-5)

In Love Connects Us, children discover their own agency in building community and grow in their understanding that Unitarian Universalist community is founded in love, peace, truth and service. Through stories both from our heritage and from traditions around the world they see the connection between our Unitarian Universalist values and ways of living in the world that promote healthy relationships, both in the immediate and in the larger world community.
Manuscript complete: being prepared for Jan/Feb online publication.

Our Whole Lives

The visuals that are part of *Sexuality and Our Faith: A Companion to Our Whole Lives for Grades 7-9* have been converted from slides to a DVD, much to the relief and acclaim of our congregations. It is available in the UUA Bookstore to qualified congregations.

We are exploring a significant revision of Our Whole Lives: Sexuality Education for Grades 7-9 that will not only update data, but add new material on areas such as electronic media, drugs and alcohol, and parent workshops. We will be soliciting feedback, suggestions and current practices from users.

Youth Programs

Collaboration: IFYC – UUA Interfaith Program

Response to this new interfaith initiative has been very enthusiastic. In October, two members of LFD attended the biannual Interfaith Youth Core’s (IFYC) Conference “Leadership for a Religiously Diverse World”. In November, the interfaith team in LFD met with IFYC’s Hannah McConaughay in Boston. Shortly thereafter, both a training of interfaith leaders and a Call for Authors for an interfaith curriculum were announced. The training will take place in the Atlanta area, January 15-18, 2010. 35 youth/adult teams, representing 69 individuals applied. 19 teams were chosen to attend the training, which will equip them to lead interfaith service projects at their home congregations and in their communities. Teams will be asked to share their experiences with the wider UU world, at district, regional, or continental gatherings.

The Call for Authors resulted in our largest pool of youth curriculum authors yet. We are currently reviewing the 11 applications. Writing is scheduled to begin in January.

Interfaith Training

Plans are in place for additional ways to spread the interfaith message and resources to UU communities. An additional youth training will take place at The Mountain Retreat and Learning Center in August. A GA workshop on service learning will include information on the interfaith program. We are in discussion with both the UUSC and

LREDA to disperse information about this program and the upcoming curriculum to our congregations. The LREDA Professional Day at GA is focusing on interfaith work.

Adult Programs

What Moves Us: Unitarian Universalist Theology by Rev. Dr. Thandeka is published and has generated much interest in the field. The program invites participants to do their own theological work by using primary sources to engage with the thinking of ten historic and contemporary Unitarian, Universalist, and Unitarian Universalist theologians. Twelve groups are field testing, including a cluster of eight Houston-area congregations who have established a lay theological institute.

Harvest the Power: Developing Lay Leadership, now in field test, has also generated strong interest in our congregations and districts and will be used for training district leaders as well as congregational leaders. A training is planned for the Northern New England district.

We have developed and offered a webinar on adult faith development and programming for congregational leaders. It has been presented twice; forty-two lay and professional leaders from the MidAmerica region have participated.

Staff

We welcomed Deborah Neisel-Sanders as our new Youth and Young Adult Ministries Office Administrator on December 14, 2009. Deborah brings professional administrative experience and a commitment to UUism to our work.

Family Pages in *UU World*

The Resource Development Office has now generated a four-page insert for three issues of *UU World*. The theme for Winter, 2009 was the wisdom of our Sources; the theme for the forthcoming Spring, 2010 issue is "Recycle, Repurpose, Renew." These pages draw from the extensive resources of Tapestry of Faith.

Collaboration with Facing History and Ourselves

The Resource Development Office began the collaborative development of a curriculum to support a PBS film, now in production, about UUs Waitstill and Martha Sharp, by attending a symposium of scholars and educators hosted by Facing History and Ourselves.

Multicultural Religious Education Renaissance Module- This module has been revised; its content is strengthened and the culminating activity is a positive and useful tool that can be used to enrich the work of religious educators in our congregations.

Groundwork AR/AO Training Program

Staff met with Groundwork trainers at General Assembly and formed a staff-volunteer convening team to make decisions about the future of this anti-racism, anti-oppression training program. After several attempts at follow-up conversations, it is clear to both staff and trainers that significant changes to this work are needed. Staff is looking at other

UUA programs, the Mosaic Project Report, and feedback from Groundwork trainers as we envision how we can meet the AR/AO/MC and racial identity development training needs of youth and young adults in new ways.

Youth Ministry Advisory Committee

Applications are now being accepted to serve on the Youth Ministry Advisory Committee (YMAC). Applications are due January 15, 2010. Candidates will be selected shortly thereafter. The YMAC Transition Team and the Administration developed the following charge for the Committee:

The Youth Ministry Advisory Committee will support Unitarian Universalist youth ministry by:

- serving in an advisory capacity to the UUA President on Associational progress in implementing the recommendations of the Youth Ministry Working Group, the future needs of Unitarian Universalist youth ministry, and the creation of a truly multigenerational faith;
- communicating a vision of vibrant youth ministry to our congregations and leaders; and
- reviewing current best practices in youth ministry and faith identity development within and outside of Unitarian Universalism.

The new advisory team will include a diverse group of youth and adult lay leaders and religious professionals.

Final Youth Ministry Working Group Report User Guide

The Congregational User Guide to the Youth Ministry Working Group Report has been published and is online at UUA.org. This is the third and final user guide. The [User Guide for Youth](#) and [User Guide for Staff](#) are also available online. These guides highlight recommendations of specific interest, provide context or clarification, and make suggestions for discussion and implementation.

Internal Services

Tim Brennan, Chief Financial Officer

The Internal Services Staff Group consists of Financial Services and Operations and is overseen by the Treasurer. The following are highlights from the previous three months.

Office of the Treasurer

- The UU Common Endowment Fund has recovered much of the value lost last year. The fund is up 21% for the 10 months ending October 31. The Fund's one, three, five and seven year returns all rank in the top third of comparable endowments tracked in a proprietary database.

- The UUA filed twelve shareholder resolutions this fall addressing climate change, excessive executive compensation, and gender identity and expression non-discrimination.
- At the direction of the Audit Committee, we issued an RFP for auditing services for FY11 and received seven proposals. KPMG, our current auditor, elected not to make a proposal. The Committee will interview the finalists and select the new firm in January.

Financial Services

- FY 09 audit was completed. KPMG, our current audit firm, issued a letter stating there were no material weaknesses. The partner told the Audit Committee that he was “thrilled” with the progress the accounting staff has made over the last year.
- The department, under the leadership of Controller Javier Caban, is redesigning our chart of accounts in order to improve our ability to track projects. Furthermore it will enable us to produce financial statements more efficiently. This will go into effect for FY11.

Operations

- The department’s director, Mike O’Herron, is working with green architect Eric Kluz to get 25 Beacon LEED certified under their “existing building” program.
- Several steps have been taken to improve the security of our buildings. Most recently, security cameras have been installed in all of our buildings. These can be monitored through the computer network from several workstations.

Stewardship & Development

Terry Sweetser, Director

SUMMARY

Unrestricted Income	As of 12/15/09
Annual Program Fund	\$2,496,840
Friends of the UUA	\$394,722
Legacy Gifts	\$465,000 ¹
<i>Subtotal Unrestricted Income</i>	<i>\$3,356,562</i>

¹ Actual unrestricted Legacy income YTD \$608,360

ANNUAL PROGRAM FUND

Year to date as of December 12, 2009:

FY	Actual	Goal	% of Goal
2010	\$2,496,840	\$6,608,048	37.8%
2009	\$2,592,194	\$7,166,004	37.7%

Current projections indicate that APF contributions are on track for fulfilling the established income goals for the year. The APF Committee met in September for focused time with UUA Administration leaders as well as visioning, goal-setting, and planning for the year.

In November, the APF Committee and staff began identifying those congregations that had not yet pledged or are pledging less than fair share which have the greatest capacity and inclination to contribute at higher levels. In consultation with the executive staff of each district, District APF Representatives will focus their efforts in contacting these congregations to strengthen relationships, secure pledges, provide information, and offer encouragement. Each contact will be documented and reports submitted to the APF staff for tracking and follow up.

FRIENDS OF THE UUA

Year to date as of December 15, 2009:

FY	Actual	Goal	% Goal	Avg. Gift	Donors	Avg. per Donor	Median Gift	Largest Gift
FY10	\$394,722*	\$1,140,968	34.6%	\$53	4,197	\$94	\$25	\$20,100
FY09	\$460,892*	\$1,650,000	29.5%	\$54	5,694	\$84	\$25	\$25,000

**excluding gifts for New Orleans Volunteer Relief Center and GNOUU*

As the combination of the recession and general changes in direct mail donation patterns continue, we have downgraded our expectation for FY10. We are grateful for the continuing support of our 22,000 donors who make up the core of the Friends program.

Both the average gift size and the amount given per donor have held strong despite a lack of consumer confidence, which tells us that our current most loyal donors are motivated to contribute to our mission despite the economy. Donor lapse continues to be a problem. To counteract recent donor loss, several longer-lapsed Friends populations will be receiving letters with variable text. These will focus on requesting participation rather than increasing donation size in an effort to grow the total number of donors.

This winter we are testing our first comprehensive multichannel Friends appeal. Friends of the UUA donors will be receiving both a direct mail package and an email appeal. In addition, the direct mail portion of this appeal drives donors to our new Friends of the UUA online giving page enabled by Kintera.

LEGACY GIFTS

Year to date as of December 17, 2009:

	UUA		UU Entity	Total
	Unrestricted	Restricted		
Matured Gifts – YTD	\$ 608,360	\$ 18,849	\$ 56,106	\$683,315
New Gifts* - YTD	\$ 20,000	\$ -	\$ 62,500	\$82,500

** New gifts listed at face value; remainder value at maturity generally will be less*

The legacy office has received an unusually high number of income distributions during the first two quarters of this fiscal year. Matured gifts for unrestricted purposes in the first half of FY10 total \$608,360.

Interest in life income gifts is starting to return as stock values increase from their 2008 lows. Increased promotion of the UUA's Umbrella Giving program is also leading to an increase in interest of these types of gifts. All of the life income gifts received so far this fiscal year were made through this program.

“NOW IS THE TIME” COMPREHENSIVE CAMPAIGN AND MAJOR GIFTS

Stewardship and Development continues to test and improve upon our new online fundraising capabilities using the new Kintera system. We have completed several successful online giving campaigns, most notably raising \$7,000 for the new Skinner House book, *Bless All Who Serve: Sources of Hope, Courage and Faith for Military Personnel and Their Families*. In conjunction with the Friends multichannel appeal previously mentioned, we are contacting selected campaign donors as part of that mixed media campaign for end-of-year giving.

Association Sunday exceeded its goal of raising \$250,000 and, as of press time, raised \$274,127 with 544 participating congregations.

The team continues to work on major gifts fundraising and is working diligently in a tough environment to meet its goal of raising \$1.1 million by June 30, 2010: \$860,000 in major gifts and \$250,000 from Association Sunday.

Ministry and Professional Leadership **Beth Miller, Director**

Since my last report was written, I have participated in two Ministerial Fellowship Committee meetings and I managed follow-up work on a number of confidential issues coming from the MFC Executive Committee. The Leadership Council has retreated and had several day-long meetings and I, (along with other LC members), am working on initiatives born out of those meetings - the foremost items having to do with assessing our current vision in light of the budget and other concrete factors. Several of the teams I serve have met and follow-up tasks are underway, including the Panel on Theological Education, Diversity of Ministry Team, Large Congregations Team, UU Society for Ministerial Relief, the Compensation, Benefits and Pension Committee, and the new C-2020 Ministry Review Team. I have also met several times with my own MPL Directors and the Ministries and Congregational Services Team (MCS - staff group Directors under Harlan Limpert's leadership) for consultation and team work. The search for a new Transitions Director is underway with an application deadline of 1/15/10 and the announcement expected by mid-March. I attended the UUMA Convo in Ottawa in November. I visited Andover Newton's UU Polity class to talk with seminarians about excellence in ministry. I have consulted in person and on the phone with several religious professionals and church lay leaders. The rest of my time is devoted to

providing guidance and support for the work of the six Directors who report to me. Their reports follow...

Religious Education and Music Leadership Credentialing

The RE Credentialing program has increased by three new candidates, one candidate returning from a previous withdrawal, and one previously credentialed religious educator now seeking the Master level. This brings the total number of active candidates to thirty-eight. The Music Leadership Credentialing Committee has been busy evaluating the progress of the candidates based on the goals the candidates have set for this church year. The following curricula is planned to be offered this summer at the UU Musicians Network Conference in Madison, WI: Professional Development Day – “How Churches Really Work – and How to Get Things Done Anyway,” presented by Rev. Jonalu Johnstone (Oklahoma City, OK); “Developing and Managing a Music Program,” facilitated by Ed Schell (Rochester, NY) and Ruth Palmer (St. Paul, MN); and “Music and Worship in the UU Tradition,” facilitated by Rev. Erik Wikstrom (UUA) and Kellie Walker (Chandler, AZ).

Ministerial Credentialing

Since the October 2009 Board meeting, I have visited with students from the Starr King School for the Ministry, the Pacific School of Religion and Andover Newton Theological Seminary. The Ministerial Credentialing Office has just recently completed support for the December 2009 Ministerial Fellowship Committee meeting.

As a consequence of the RSCC FY2010 budget changes, I have visited with the West and Mid-West RSCCs who now meet in two separate panels. While there was some expected anxiety related to the change in format, both RSCCs worked effectively although neither were fully subscribed. During my sabbatical, Jory Agate, Ministerial Development Director, will meet with the New England RSCC (March 2010), and oversee concerns and questions in tandem with Chris May, Ministerial Credentialing Office Administrator. Kim Wilson will continue to handle internship related matters and concerns.

The Internship Stipend Grants Program will support seven new congregations as internship sites for 2010-11, presuming they are able to locate an intern. Currently, the Internship Clearinghouse records show that there are sixty-four internships underway, which is comparable with the number recorded last year at this time. Internship site postings on the Internship Clearinghouse web page are down slightly from the same time last year. The expectation is that the number will rise slightly as Learning and Service Agreements (L/SAs) continue to come in for review. Exactly half of the interns have had their L/SAs approved as of this writing, a timing trend that is in keeping with the past. Finally, a letter offering support has been sent to the five current interns who self-identify as persons of color or as being from traditionally marginalized groups. Feedback so far has indicated that the letters are much appreciated.

Ministerial Development

Plans are in motion for the First Year Ministers' Seminar being held in Boston in April. This year's "class" of ministers numbers forty-two with nine working in community ministries and three in RE ministries. The Addictions Ministry Team is planning for their upcoming annual winter gathering in February. They have compiled information collected from a survey of all UU congregations. Of the 154 congregations who responded, only 10% currently have information or resources regarding addictions, but over 50% indicated they would like more.

Dreaming Big, a ministerial study group for ministers aimed at preparing them to serve large congregations, continues to go well with two retreats remaining in the spring. Plans for the retreats are underway and include training with Teresa Cooley. In addition, our office is co-sponsoring a Star Island program with the United Church of Christ which is designed for ministers in their first 10 years of service and is expected to take place in August.

So far this fiscal year, almost \$50,000 in continuing education grants have been made to 100 ministers.

Since our last report was written in September 2009, we have learned of the death of the following ministers:

FORREST CHURCH (1948 – 2009)
POLLY LAUGHLAND GUILD (1924 – 2009)
H. KYLE NAGEL (1929 – 2009)
JOHN NICHOLLS BOOTH (1912 – 2009)
We will remember them...

Friends and colleagues are encouraged to share their reflections on their ministries at this site: <http://uuminmemorialpage.blogspot.com/>

Transitions Office

The bulk of the task of digitizing and electronically storing the files maintained by MPL on all living UU ministers will be completed in December.

Fifty-three congregations are in search for full-time ministry this year. Assuming a 20 percent no-find rate, the number of ministers called will slightly exceed the number called last year. That's pretty good news, considering the times. May it be an economic indicator! Also good news is that few of the positions are offered are below UUA Salary Recommendations, and a good many are above.

Office of Worship and Music Resources

Since the last report I have continued developing the WorshipWeb (www.uua.org/spirituallife/worshipweb). It now houses worship materials developed as part of the Standing on the Side of Love campaign as well as creating resources related to the growing number of worship associates programs in our congregations. As part of this

later effort I have secured permission to post the Rev. Rick Koyle's manual *Building a Worship Associates Program* for free download from the WorshipWeb.

During the UUMA's Convo in Ottawa, I led a 14-hour "chapter" on worship arts with twenty-six ministers that looked at multigenerational worship, lay-clergy collaborations, festivals and special services, and the role of music in worship. The cohort which went through this chapter together are further linked through a wiki site that was originally created for the collaborative development of the workshop and now serves as its record and a site for on-going conversation.

Church Staff Finances

UUA Health Retirement Plan: The plan has assets of \$165 million owned by 2,760 participants. In November, a "Request for Proposal" for investment adviser services was issued with 8 firms submitting proposals by the December 11 deadline. The Investment Advisor will work with us to re-vision our investment platform, identify funds for inclusion, and assist with the final negotiations with Fidelity and TIAA-CREF. Our consultant, Angell Pension Group, is assisting our office in a comparison of the proposals for submission to the Compensation, Benefit, and Pension Committee in early January.

Group Insurance Plans: Long Term Disability (LTD) coverage is provided to 984 employees, Life to 746 employees, and Dental to another 757 individuals (including dependents). Effective January 1, 2010, our LTD and Life coverage will be provided by UNUM while Dental will continue to be provided by MetLife. In making the change, we will be increasing the LTD benefit from 60 to 66.7 percent of pre-disability income and a COBRA wrap-around benefit providing \$600/month for 30 months to individuals to pay their health insurance premiums. In addition, the maximum life benefit increases to \$200,000 from \$150,000 and the insurance will be portable if an employee leaves UUA-related employment. **Health Plan:** During November, our annual open enrollment month, enrollments increased to 790 employees in 310 congregations and organizations – up 40 participants and 10 congregations. The UU Employee Benefits Plan board met twice and increased rates 11.5 percent beginning 2010 while authorizing the plan to pay 100 percent for all diagnostic work (no co-insurance). **Ministerial Assistance:** Aid funds are provided ministers (working and retired), survivors, and a limited number of non-ministers totaling \$450,000 annually. During FY10, we will draw down a portion of the approximate \$1.1 million of reserve aid funds to meet pressing needs. **Compensation:** An "Annual Staffing Census" to identify employees not covered by benefit plans and to ensure compliance with federal non-discrimination laws will occur this year. The current Salary Guidelines will remain effective through 2010.

Information Technology
Mark Steinwinter, Director

Strategic Priorities

Use technology to improve services to congregations, and to deepen connections among congregations, their members, Districts, and the UUA. To be effective and relevant in the

online communications era, the UUA must connect with its staff, stakeholders, and the public over a broad array of channels. Systems and tools need to be both innovative and familiar to capture the interest of trailblazers and empower everyone.

- Achieve and maintain legal and regulatory data security standards. Massachusetts law, credit card industry requirements, and our own ethics oblige us to do all we reasonably can to protect the privacy and security of the personal information we keep about individuals. This applies to paper and information in transit between systems, as well as permanently stored electronic records.

Initiatives

- Website Redesign - Improve the usefulness and appearance of the UUA website.
- myUUA.org - Empower church administrators to view and update the information saved in the UUA's database about the members and leaders of their congregations. To date over 260 congregations are using the system.
- Online Meetings and Webinars – Introduce tools to conduct meetings, presentations, and trainings online (i.e webinars). To date, over 5,000 people have attended over 450 online events using the system.
- Video Production Studio – Construct a video production studio at 41 Mt. Vernon.
- Data Security Compliance – Ensure that the UUA Bookstore, Stewardship and Development, and Human Resources achieve sustainable compliance with relevant Massachusetts laws.
- Ministerial Settlement System - Online system to make the Ministerial Settlement process more efficient, transparent, and manageable.

ITS Mission. We manage the technology that supports connections and information sharing among the UUA staff, congregations, stakeholders, and the general public. We provide high-availability computing infrastructure, software tools and systems, consulting services, and technical support to UUA staff located throughout the nation. We manage and safeguard the constituent data of the Association.

Advocacy and Witness **Meg Riley, Director**

I want to let you know that *A People So Bold: Social Justice Ministries and Theologies*, is now available as a book, as a DVD, and as online curricular support at www.uua.org/APeopleSoBold. If you would like a copy of the DVD please let us know. I am receiving strong positive feedback from congregations that are using the materials. Beyond that, I will let my directors report for themselves:

International Office

- Delivered packet of introductory information about the International Resources Office to 40 newly settled UU parish ministers and followed up with a telephone conversation.
- Developed schedule for Peter Morales' schedule to visit international/interfaith UU partners in 2010.
- Continued planning for Community Capacity Assessment/Building workshops in Burundi and Uganda in Spring, 2010.

UU Holdeen India Program

Some recent highlights of our partners' work:

- Shramajivee Mahila Samity (SMS), the women's organization of Jana Sanghati Kendra (JSK), won the 2009 Harriet Tubman Award from Free the Slaves. The award recognizes SMS's work in exposing slave traffickers, tracing missing people, training slavery survivors in jobs and educating villagers to slave-proof their communities.
- Vivek Pandit of Vidhayak Sansad has been elected as a Member of the Legislative Assembly from his district in Maharashtra.
- SEWA founder Ela Bhatt and her children and grandchildren gathered at a meeting of the Council of Elders in Istanbul. The gathering included Jimmy Carter and Archbishop Desmond Tutu and their families, and its purpose was to remind the world of the risks of climate change to future generations.

Washington Office for Advocacy

- In close collaboration with the Office of Congregational Advocacy & Witness, we've streamlined and updated our electronic communications to be shorter, clearer, and more effective. We've also done some cleaning up and reorganizing of <http://www.uua.org/socialjustice>
- UUA staff are now, with increasingly regularity, initiating and being invited to meetings and events organized by the Administration (White House and Departments). The opportunities for collaboration and providing input are numerous and we plan to take full advantage of them.
- In 2010, we'll be in full campaign mode on our/Peter's top priorities, which are immigration justice (namely passing comprehensive immigration reform legislation) and environmental justice (passing a strong and just climate bill). BGLT justice (passing ENDA and repealing Don't Ask, Don't Tell), Economic Justice (passing a strong anti-wage theft bill) and Reproductive Justice (establishing federal funding for comprehensive sexuality education) round out our 2010 legislative priorities list.

Congregational Advocacy and Witness

- Facilitating congregations' ability to be effective using SSL, CBCO, and UUA Advocacy & Witness resources, with a particular focus on immigrant justice and immigration reform.

- Social justice empowerment workshops are going beyond congregational use to be used by state networks, regions, clusters. We are developing effective models for collaboration.
- Developing – actually breaking down -- SJE Program into resources for web, one hour phone consultations, 2 hour workshops, and training more people in state networks and congregations to use the materials.

Standing on the Side of Love

- We have made the following resources available: SSL grants, media 101 resources, bulk store, and webcast calls for organizers and district.
- Analytics: Our Facebook Page is nearing 10,000 fans, our mailing list is at 25,000, we are nearing 900 followers on Twitter, our website averages 8,000 visits per month, and our actions regularly average over 1,000 action takers.
- February 14th, National Standing on the Side of Love Day, Reimagining Valentine’s Day is our next big day of action. We have already registered the participation of 87 congregations. In support of this day we have created worship, small group ministry, and RE resources. We also have a media packet available and individual assistance for events.

Congregational Life

Harlan Limpert, Vice President for Ministries and Congregational Support

The forty members of the Congregational life staff group recently participated in our annual five-day “Big Complex Meeting” or “BCM”, so named somewhat in jest because it is, well, big and complex. We agreed it's time for a new name because the real purpose of the gathering is to help ensure our team is working most effectively with other staff groups throughout the Association to support our congregations.

The gathering provided an opportunity to meet for over three hours with our new president, Peter Morales, and discuss the priorities of his administration:

- Growth
- Ministry for a New Age
- Public witness and social justice

The gathering also involved spirited discussions on a variety of other topics including:

- Generosity and gratitude
- Emerging congregations
- State Legislative Ministries
- Licensing/ certification of lay leaders
- Measuring the impact of our programs
- Supporting environmental leadership
- Expansion of webinars as training tools for use by leaders throughout our Association

One of the most exciting conversations that took place centered around a booklet entitled "Faith formation 2020 -- Envisioning the Future". The 62 page report, available in its entirety at <http://lifelongfaith.com/ff2020-overview.htm>, pulls together research data from other sources and describes how profound demographic changes in America are already affecting religious life in the US, including our congregations, and will continue to do so for many years to come. Not acknowledging those changes and failing to develop strategies for addressing them is a prescription for denominational irrelevancy. It is clear that this document will serve as the foundation for countless conversations throughout the Association coming year and will help in addressing the challenges we face.