



JUNE 2023

# Widening the Circle of Concern

## 2023 UUA Implementation Plan

Submitted by UUA Staff

# A Roadmap for Unitarian Universalism - *Widening the Circle of Concern*

The *widening the circle of concern* 2023 unitarian universalist association implementation plan is a critical initiative that stems from the final report of the commission on institutional change, which was presented in June of 2020. The commission on institutional change spent three years analyzing structural racism, the workings of power, and white supremacy culture within the UUA at all levels, gathering feedback from thousands of UUs, professional advisors, and community partners.

The final report addressed practically every aspect of our faith community, including theology, governance, accountability, learning and education, leadership, professional credentialing, organizing, and investing in reparations and innovative ministries. The report stressed that anti-racism and anti-oppression are at the core of our faith and provide a vital framework for living out our values within and beyond our congregations.

The *widening the circle of concern* (WCC) 2023 UUA implementation plan highlights specific projects and areas of further discernment to address these issues of racism and white supremacy culture in the most effective and impactful manner. The plan is an opportunity to reflect deeply and take action, leading to the creation of a more equitable and inclusive unitarian universalist association.

## **THE FOUNDATION FOR OUR FAITH TO THRIVE**

As Unitarian Universalists, we acknowledge the fundamental interdependence and interconnectedness of all people. We recognize that we are in a pivotal moment in history, where there is a broad recognition of systemic racism and injustice both in our community and in wider society. Despite the challenges, we view this as a generational opportunity to build a just and anti-oppressive world that aligns with our values.

Dismantling white supremacy and hierarchies of privilege is critical in removing the barriers that have hindered our faith's prophetic message from reaching more people. Building trust amongst ourselves, our leaders, and our communities will allow us to work toward these shifts over the long haul, steadily and systematically, ensuring that the changes made are sustainable and long-lasting with the potential to thrive in the years to come.

Our commitment to this anti-racism work is powerful, beautiful, and liberating. We pledge to center the voices and needs of Black, Indigenous, and People of Color within our faith communities. This fundamental culture change work is both challenging and fulfilling, but it represents the deepest expression of Unitarian Universalist values.

## HOW THE UUA IS IMPLEMENTING THE WCC REPORT

In the 2023 report, the UUA has expressed its commitment towards implementing the recommendations from *Widening the Circle of Concern* (WCC) by embedding them into every aspect of its mission and operations. This process was kickstarted in the fall of 2020 when the UUA formed a cross-staff Commission on Institutional Change Implementation and Mission Alignment Team (CIMAT) to oversee the implementation process across all staff teams.

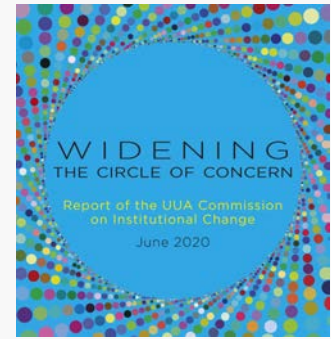
In the first year, the CIMAT ensured engagement from all staff in reviewing the WCC report, identifying staff projects related to implementation, and published the 2021 Implementation Plan. In the second year, the CIMAT reviewed the gaps identified in the previous implementation plan and created two new working groups to focus on Data & Metrics and Anti-Racism Programs & Frameworks, ultimately publishing the 2022 Implementation Plan.

In order to tackle the implementation process effectively, the UUA developed a responsive and flexible five-stage framework that revolves around understanding different stages of multiple projects across a multi-year implementation plan. This approach also provides the UUA with the flexibility to reassess the project plans and timelines as the need arises, ensuring maximum impact and relevance.



This is the UUA's third release of its annual update on the WCC implementation plan, over five years, as recommended in the WCC report. This approach, as opposed to a single plan for all five years, allows the UUA to remain flexible and responsive to changing circumstances. The implementation plan is organized by UUA mission area, with additional sections on theology and governance. Each area includes details on the overall values and goals of the work, current projects and initiatives, a story about a featured project, and gap areas where plans are being developed for the coming year. This third year update includes more detail than previous reports about each project listed by mission area, so that readers have more information on the depth of the UUA's commitments.

Finally, the report includes a chart that maps each of the UUA's projects and initiatives onto the 36 recommendations from WCC, providing transparency and clarity on their progress towards implementing all the necessary changes. The UUA remains committed and steadfast in its resolve to embed the recommendations from WCC into every aspect of its mission and operations.



**Get the report:** The *Widening the Circle of Concern* report is available for all Unitarian Universalists to read. It is available for purchase as a [book](#), [e-book](#), or for [free on uua.org](#). Visit [uua.org/coic-report](#) to get your copy.

## Engaging the Report – CIMAT 2023 PRIORITIES

Over the last year, the CIMAT has focused its attention in three priority areas – data and metrics, reparation and repair, and the Mosaic Hub of anti-racism resources.

### DATA AND METRICS

The CIMAT Data and Metrics team was formed to explore how the UUA can use data and metrics to better understand and advance equity concerns in Unitarian Universalism. The team has focused on identifying key indicators to aid us in assessing the experiences of religious professionals in our movement, as well as modes of measurement that are transparent, effective, and inclusive. We also set out to identify demographic categories that honor the diversity of identities among us, but are broad enough to be effective in helping us track trends.



Living into our values of justice and equity means improving the quality of life for religious professionals who are BIPOC, LGBTQ+, disabled, or from lower economic means. Good data can help us understand the experiences of religious professionals, including disparities that exist across identities and professions. Good data is also essential to measure the efficacy of the UUA's initiatives and as a guide for crafting new policies and practices.

This spring, the team engaged a consultant to help lead focus groups composed of religious professionals with marginalized identities. The goal was to engage impacted communities to discern demographic categories and quality of life indicators for religious professionals. The focus groups elicited useful feedback and we are close to completing this phase of the work. The next step is to create processes to collect and share data in ways that are helpful, regular, and transparent.

## REPARATIONS AND REPAIR



The second area the CIMAT has begun to explore this year is a process of mapping out current efforts and future areas on investment and study into reparations and repair. The team identified three areas of reparations and repair work within the workplace of the UUA, UU Institutions, and our impact in the broader world. These three frames fall within three key time periods in the life of Unitarianism, Universalism, and Unitarian Universalism.

Foundational and historic harms that live at the core of our Unitarian and Universalist legacies, cover a time period leading to the formation of Unitarianism and Universalism in the United States to the merger in 1961. This time period includes tracing the ties to slavery, exploitative labor practices, government subsidies received for indigenous residential schools, proliferation of the ideals of eugenics, and discriminatory practices that prevented the full participation of marginalized communities in the ministries of our root traditions.

The UUA Board of Trustees has also been working to identify specific historic impacts stemming from actions of the UUA, its leaders and its predecessor organizations where repair and redress of harm is needed. This preliminary list includes:

- Resources derived from slavery and related trading industries, both through congregations and higher education and other cultural institutions.
- The American Unitarian Association's role in managing an indigenous boarding school in Montana, as well as its leaders' role in federal policy-making with the Bureau of Indian Affairs.
- Public support and publishing of pro-eugenics information.

The next period of harms identified spans a time period from merger in 1961, to the present. Since the inception of the Unitarian Universalist Association decisions and actions have been made that have further marginalized members of our community. Without the distance of history, harms perpetrated in this time frame are deeply relational, and require us to sit in the discomfort of conflict with those who have been directly involved and impacted.

While working on reparations and repair in the far and recent history, the CIMAT includes the prevention of future harms as a part of this conversation. Harm cannot be addressed and redressed when it is actively being perpetrated.

## MOSAIC HUB

The third major area of work this past year has been the development of the UUA's Mosaic Hub. This initiative aims to provide a range of resources and opportunities for antiracism and full inclusion in the Unitarian Universalism movement and beyond. It includes three anchor components: a resource library integrated into the LeaderLab collection, flexible and accessible "playlist" style curricular resources for antiracism education, and Mosaic Learning and Practice communities for congregational leaders to deepen their learning and share practical challenges.

Overall, the Mosaic initiative seeks to broaden its congregational and community efforts for antiracism and full inclusion by recognizing and amplifying the voices and experiences of those who are often marginalized in society. It seeks to create lifelong antiracism curricula and outreach opportunities to foster an intentional multicultural community and commit to antiracism, anti-oppression, belonging, and liberation.



## Equip Congregations and Communities

The UUA equips congregations and communities for vital ministry to create an ever-widening sense of belonging where no one is outside the circle of love. This means congregations that are:

- **Grounded** in their theological commitments to anti-racism and in covenantal relationships for accountability;
- **Embodied**, practicing anti-racist ministry and leadership, in worship and faith development as well as in the workplace, committees and administration; and
- **Inclusive**, welcoming and meaningful for people of all races, genders and abilities, and through all stages of life, from childhood through older adulthood. This also means supporting communities across our congregations, such as regional and national youth communities, or identity-based groups like DRUUMM and EquUal Access.

## REPARATIONS PRAXIS GROUP

Following from a successful kickoff webinar in August 2021, the New England Region convened 4 congregations already engaging in work on Reparations — Boston, MA (King's Chapel); Brookline, MA; Brewster, MA; and Sherborn, MA for a year-long program. This intensive Reparations PRAXIS Group was organized to support and challenge participating teams in examining implications for accounting and redress of injustices as well as opportunities to engage the labor of repair together. The program reinforced the mandate detailed in the *Widening the Circle of Concern* report, as well as the Recommendation for Identifying Reparation Procedures, and the Recommended Action.

Organizing around "praxis" meant teams committed to dedicated action and then reflected on their efforts, and then iterated the next action. This continuous cycle of action - reflection provided support and accountability for congregational teams to move their Reparations work to the next stages. The group met monthly - one month within their congregational teams and the other with the full PRAXIS group of teams from other congregations (online). Participants reported insight into reparations as a theological imperative within Unitarian Universalism as well as gratitude for an opportunity for rigorous and disciplined inquiry into a topic receiving a lot of attention nationally at the moment.

EQUIP CONGREGATIONS AND COMMUNITIES - AREAS OF IMPLEMENTATION	
Helping Small Congregations Chart Their Future	
<b>Emerging Congregation Status Project (MidAmerica Region)</b>	- This initiative aims to support Emerging and Small Congregations in the MidAmerica Region in clarifying their status as a member congregation or covenanting community within the Association. This has included in some cases helping leaders come to terms with the closure of communities that no longer exist, or that does not find itself in alignment with Unitarian Universalism Principles. <i>Ongoing Commitment</i>
<b>Small and Mighty Event Series</b>	- A national team of UUA Congregational Life field staff oversee offerings specifically geared towards smaller congregations. This can be curated outreach, workshops, libraries of resources, opportunities to gather. <i>Ongoing Commitment</i>
Publications & Media	
<b>Incantations for Rest audiobook</b>	- Audiobook format for Incantations for Rest, by Atena Danner. A book of poems inviting readers exhausted by the demands of a racist, ableist society to slow down and rest. <i>In Implementation</i>



EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)	
Lay Leadership Development	
<b>Widening the Welcome: Multicultural Welcome Workshop</b>	- A Virtual Workshop for Your Congregation's Greeting Team: Build the Beloved Community by Being Inclusive of All. <i>Ongoing Commitment</i>
<b>Spiritual Leadership for Culture Change (New England Region)</b>	- A community of practice for both lay people and religious professionals interested in embedding the practices of Spiritual Leadership - centering in gifts, tending our tradition, doing our inner work, covenanting, and faithful risking - in their congregational life and beyond. <i>Ongoing Commitment</i>
<b>Liberating Governance for Our Times: Community of Practice</b>	- Inspired by the Business Resolution adopted by the 2022 General Assembly to create UUA governance that is “dynamic, accountable, flexible, and responsive,” we invite congregational leaders to consider their congregation’s ways of sharing power and making decisions. We examine how their systems are dynamic, accountable, flexible, and responsive. We explore how they might create liberatory ways of being within their congregation as they work for liberation in the world. <i>Ongoing Commitment</i>
Young Adult Ministry Programs	
<b>Emerging Adult Ministry (Pacific Western Region)</b>	- The Pacific Western Region Emerging Adult Ministries strive to build connection to Unitarian Universalism, gather emerging adults in spirituality, and work to build more inclusive communities of love, respect, and justice. The community actively aims to dismantle oppressive systems and offer programs and resources which are accessible, inclusive, and equitable. <i>Ongoing Commitment</i>
<b>Supporting the Young Adult Revival Network</b>	- The Young Adult Revival Network (YARN) was formed by Young Adult (YA) lay people to build networks of support, resources, and power-building on a continental level. UUA Staff has continued to advise and resource YARN’s leadership team since Spring 2020 by attending meetings, providing transparency about the UUA’s work on YA ministry, and connecting the team to resources that will support their emergent YA community. YARN provides small group ministries, identity-based caucusing, online conferences, worship, leadership support, and a newsletter, and is currently looking for sustaining funding and building out its leadership structure. <i>Ongoing Commitment</i>
National and Regional Youth Programs	
<b>Youth Ministry (Pacific Western Region)</b>	- The Pacific Western Region (PWR) Youth Ministry is a revolutionary movement of Unitarian Universalist youth engaged in creating covenanted communities and dedicated to seeking transformation and the formation of holy space. PWR Youth Ministry actively aims to dismantle oppressive systems and offer programs and resources which are accessible, inclusive, and equitable. <i>Ongoing Commitment</i>

EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)	
<p><b>Young Unitarian Universalist Project</b> - The Young Unitarian Universalist Project (YUUP) is a national network that helps young individuals (youth in 9th to 12th grade and emerging adults in their bridging year) connect with their UU faith and each other through different communication channels such as Slack, newsletters, and social media. The project center focuses on supporting BIPOC, trans/non-binary, and neurodivergent youth through the infrastructure of age-based or multigenerational identity groups, professional youth ministry support, and necessary resources to ensure compliance with UUA youth safety guidelines. YUUP strives to promote a safe, inclusive, and engaging environment for young individuals to explore and strengthen their faith. <i>Ongoing Commitment</i></p>	
<p><b>GA Youth and YA@GA</b> - The General Assembly Youth (GA Youth) and Young Adults at General Assembly (YA@GA) programs aim to create a welcoming community for youth and young adults to gather and participate during General Assembly. The Lifespan Faith Engagement office and current GA youth and young adult staff teams have collaborated and created a new program structure, which will shift from pre-planned to emergent programming. YA GA staff members will create an inclusive and responsive community that co-creates a space for justice-seeking youth and young adults. For multiplatform GA this year, the staff members have been selected from among their peers, hired as temporary UUA staff, and trained to facilitate programming in real-time. <i>Ongoing Commitment</i></p>	
<p><b>Thrive Youth</b> - Thrive Youth, born out of the Multicultural Leadership School and the work of Rev. Elizabeth Nguyen and Rev. Dr. Monica Cummings, is a national retreat/workshop for youth of color. Participants deepen their understanding of their faith at the intersection of their identities, meet older UU adults of color and build relationships with their peers through workshops, conversations and worship. <i>Ongoing Commitment</i></p>	
Ministerial Transitions and Beyond Categorical Thinking	
<p><b>Beyond Categorical Thinking / Bias in Ministry</b> - Beyond Categorical Thinking is a program initiated by the UUA to ensure non-discrimination during the ministerial settlement process. The Transitions Office works towards anti-oppression throughout the entire search process, including the settled, interim, developmental, and contract stages. The Transitions Office is currently in the process of evaluating potential updates and rewrites to the BCT program. <i>Ongoing Commitment</i></p>	
<p><b>AR/AO/MC Search Committee Support Groups</b> - The Ant- Racist, Anti-Oppressive, Multicultural (AR/AO/MC) support groups for congregational ministerial search committees offers two separate caucuses - a Black Indigenous People of Color caucus and a white caucus - to provide peer-based learning, support, and staff guidance for search committees seeking to reduce bias and harm in the ministerial search process. The aim of the groups is to help eliminate bias and create a more inclusive search process for all. <i>In Implementation</i></p>	

EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)
<p><b>Transitions Transformation Project</b> - The UUMA Transitional Ministers chapter (TMC) is working to increase diversity within its membership, with the UUA providing support for interim ministers to promote anti-white supremacy culture within their congregations. The Transitions Transformation Project aims to inspire and assist interim ministers in creating a nurturing and inclusive environment for their congregations during the transitional period. This project provides coaching, continuing education opportunities, individual support, small group ministry, and support for the TMC Executive Team, and now includes a curriculum for anti-racist anti-oppressive multicultural training. <i>Ongoing Commitment</i></p>
<p><b>Special Care Congregations Program</b> - The Special Care Congregations Program provides support for congregations which have a pattern of difficult departures for ministers and religious professionals. <i>Ongoing Commitment</i></p>
<p><b>Welcoming Congregations</b></p>
<p><b>Welcoming Congregations</b> - Engaging congregations through annual renewals of the Welcoming Congregations program, with a focus on trans/non-binary welcoming. The purpose of the Five Practices of Welcome Renewal (FPWR) is to provide a framework for congregations to center LGBTQ+ welcome and inclusion. The goal of the program is to provide modern intersectional resources to support congregations in their intention to be a Welcoming Congregation. <i>Ongoing Commitment</i></p>
<p><b>Hope for Us Conflict Engagement Team</b></p>
<p><b>Hope for Us Conflict Engagement Team</b> - The Hope for Us Conflict Engagement Team helps congregations normalize and work through deep conflicts, and to spread promising practices. Their goal is to equip congregations to become inclusive and vital communities by creating a comprehensive system that addresses conflict as a transformative tool. Hope for Us helps leaders to identify patterns of behavior within their communities and works with them to develop pathways towards deeper understanding and relationship. <i>Ongoing Commitment</i></p>
<p><b>Anti-Racism Resources and Framework</b></p>
<p><b>Learning &amp; Practice Communities</b> – As a part of the Mosaic Hub, the Learning &amp; Practice Communities provide skills, peer connections and inspiration through the COIC report to individuals in congregations, helping them to promote anti-racism work and initiate cultural change in their communities. The program has been successful in providing useful frameworks for participants and connecting them with peer leaders in other congregations. As a result, many participants have become leaders of their Anti-Racism Transformation Team within their congregations, contributing to significant changes such as increased representation of BIPOC people, partnership with local climate justice groups, and a shift from white supremacy culture to collective liberation leadership models. <i>Ongoing Commitment</i></p>

EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)
<p><b>Mosaic Lifespan Anti-Racism Curriculum Series</b> - The Mosaic Lifespan Anti-racism Curriculum Series is a long-term project that aims to develop modular playlist-formatted lessons for various age groups (K-adult) that focus on anti-racism. The project is in response to the Commission on Institutional Change's report, which recommended the creation of an anti-racism curriculum similar to Our Whole Lives (OWL) lifespan curricula. The curriculum aims to create relevant lessons for each age group that are aligned with the goals of faith development, incorporate best practices and justice-centered parlance, and cater to different learning environments. The ultimate goal is to maintain cohesion with all Mosaic projects while promoting anti-racism. <i>Ongoing Commitment</i></p>
<p><b>The Mosaic Hub</b> - The Mosaic Hub is a hub of resources, connection, and support which aims to foster belonging and promote the dismantling of oppression and racism in UU congregations and communities. The hub is focused on empowering lay leaders and religious professionals, including BIPOC and white individuals, and addressing its intersections such as disability justice and trans/non-binary inclusive ministries. The Mosaic Hub is committed to upholding the recommendations made by the Commission on Institutional Change, and it is the evolved version of the original Mosaic Makers Conference, which provided religious professional and lay leadership teams from congregations and communities engaged in multicultural work with experiential gatherings and learning opportunities. The full launch of the Mosaic Hub is planned for the summer/fall of 2023, complete with resources, curricula, and learning communities. <i>In Implementation</i></p>
<p><b>Data Systems for Identity Information on Religious Professionals</b></p>
<p><b>Employee Census of Plan Employers to expand access and participation in UU Retirement Plan</b> - The Employee Census of Plan Employers is an initiative aimed at expanding access and participation in the UU Retirement Plan by collecting employee census information from over 600 participating employers, including dates of service, hours of service, and compensation. This will help ensure that all W2 employees of participating employers receive the opportunity to participate in the plan and gain access to increased economic security with employer contributions when eligible. The project also aims to assist the Retirement Plan and the UUA in understanding wealth distribution and setting up a secure and purposeful system through a partnership with ITS, as an extension to the current Employee Survey. <i>In Implementation</i></p>
<p><b>CIMAT Data and Metrics Team</b> - The CIMAT Data and Metrics Team has worked this year to identify key indicators and demographic categories to understand and address disparities across identities and professions of religious professionals. The team engaged a consultant to lead focus groups composed of religious professionals with marginalized identities to identify quality of life indicators, and the next step is to create processes for regular and transparent data collection and sharing. <i>in Development</i></p>



EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)	
Wealth and Reparations	
<b>Reparations PRAXIS Group</b>	- The Reparations PRAXIS Group is a year-long program that supports and challenges participating teams from four congregations in examining the implications of accounting and redressing injustices and opportunities to engage the labor of repair together. The focus of the Group is to encourage praxis, action and reflection, providing support and accountability for the teams to advance their Reparations work to the next stages. The program reinforces the mandate detailed in the Widening the Circle of Concern report and focuses on generating insights into Reparations as a theological imperative within Unitarian Universalism, while providing a space for rigorous and disciplined inquiry into a topic receiving a lot of attention nationally. <i>Completed Project</i>
<b>UUA Health Plan: current operations</b>	- The UUA Health Plan was created in late 2006 in to offer an affordable, high-quality health plan for congregations grounded in UU values. The UUA Health Plan has adopted new policies for telehealth and travel subsidies for those who need to travel out of state for care due to legislative restrictions on reproductive and gender affirming healthcare. <i>Ongoing Commitment</i>
<b>UU Organization Retirement Plan</b>	- The UUA is Plan Sponsor of the denominational retirement plan, which is an IRS qualified 401(a)/401(k) defined contribution, multiple employer, church retirement plan. By educating and providing resources to our employers, our goal is to help all staff members of our participating employers, regardless of position, to gain access to greater income security by taking advantage of employee and employer contribution options that they are eligible for. <i>Ongoing Commitment</i>
<b>Compensation and Staffing Survey</b>	- The Compensation and Staffing Survey is aimed at gaining better insights into compensation and staffing practices in UU congregations. Having lacked a concrete understanding of actual practices, the survey was developed in 2022 and released in May with a minimum goal of 200 congregational submissions representing diversity across size, region and Geo Index. The collected data will be reviewed and analyzed to inform the evolution of the compensation program, increasing practicality, leading with greater integrity, and ultimately improving equity in UU congregations. For FY 2023, the UUA's overall staff is 32% people of color, 64% women, and 14% trans* and non-binary. The UUA Staff Group Directors are 50% POC and Senior Executive Leadership is 66% POC. <i>Completed Project</i>
Resources, Workshops, and Trainings	
<b>WorshipWeb Library &amp; Collections</b>	- On-demand library of worship materials, many of which center our AR/AO/MZC values. Most resources are reviewed by a 4-person editorial team composed of UUA staff members. <i>Ongoing Commitment</i>

#### EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)

**Reimagining the MidAmerica Large Church Conference** - The Reimagining the MidAmerica Large Church Conference project aims to develop and expand the MidAmerica Large Church Conference program for religious professionals and other church staff from Large Congregations (400+ members) of the MidAmerica Region. The program consists of sharing ideas and building relationships, with presentations from outside presenters often focused on dismantling systems of oppression in large congregations. The project aims to include digital participation options and components, spreading the program beyond in-person events, and making it more inclusive and accessible, while considering building a cohort of support for BIPOC Religious Professionals in MidAmerica who serve Large Congregations. *Completed Project*

**Intentionally Anti-Racist Our Whole Lives Sexuality Education** - The UUA and its Our Whole Lives Sexuality Education (OWL) publishing partner, the United Church of Christ Local Church Ministries, are endeavoring to make OWL intentionally anti-racist. These changes will increase white OWL participants' knowledge and appreciation of perspectives other than their own, and they will make the curriculum more welcoming and worthwhile to participants who are BIPOC as well as educators in religious and secular settings. Additionally we are re-envision the optional Sexuality and Our Faith Grades 7-9 curriculum visuals, to be both trans- inclusive and more racially diverse. This initiative will take several years to complete. *In Development*

**Congregational Compensation Program Evolution** - The continued evolution of our compensation program is helping UU congregations to be ever more faithful employers – faithful to the law and to our values. Pay inequity and lack of sound process tend to disadvantage those with less power and/or privilege in the system. This year, we are introducing a new methodology for the UUA's Salary Recommendations for congregations. Overall goals are to improve practicality, advance equity, and lead with greater integrity. We're putting a greater emphasis on process components and will be basing salary tables on job grades (rather than positions) to compel congregations to give more thought to internal pay alignment. *Ongoing Commitment*

**Congregations as Employers: Proactive Support** - Congregations can have trouble understanding themselves as employers and legal entities, especially when it comes to complicated things like worker classification and benefit plan rules. Although we have many resources available to assist congregational leaders in this area, given leader turnover and lack of training, we recognize that we must provide ongoing, proactive education and support in order to prevent equity and compliance problems, which most often plague those who are already marginalized within their congregational systems. We are boosting organizational competence by reaching out to appropriate leaders with information and resources to help ensure all staff are being treated legally and in accordance with our values. *In Implementation*

EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)
<p><b>Tapestry of Faith Review</b> - The Tapestry of Faith body of curricula has stories, pedagogy, language, and more that need recalibration and sometimes removal to align the UUA's Religious Education offerings with actively antiracist religious education and to incorporate new stories for our faith, told by the people to whom they belong (not appropriated). Lifespan Faith Engagement staff with colleagues from Congregation Life are shaping a process to review, interrogate, and repair, remove, and replace components of the curriculum as needed. <i>In Implementation</i></p>
<p><b>Virtual Hymnal Project Team</b> - The Virtual Hymnal Project Team is designing and building a living collection of song resources through an accessible, equitable, online platform grounded in UU values. Working in collaboration with key stakeholders including the Association for UU Music Ministries (AUUMM), who has a representative on the team, this subscription-based collection will include embedded licensing for congregational usage. Music pieces included in the collection will embody our AR/AO/MC aspirations and can be easily updated. <i>In Implementation</i></p>
Innovative Ministry
<p><b>New Communities Partnerships Fund</b> - The New Communities Partnerships Fund is a new initiative aimed at supporting the sustainable growth of new forms of faith communities designed to serve underrepresented or historically marginalized groups in Unitarian Universalism. The program is divided into two tiers of support, a Collective Support Network, which hopes to launch in the next church year through a partnership with Beloved Garden. This network will provide spiritual and practical support to leaders of new communities, including fiscal sponsorship, expert coaching, and shared learning for teams developing new communities to those experimenting with new community ideas. In the future, the program will include a Movement-Building potential tier, providing deeper and more sustained support with potential for growth and movement building. <i>In Implementation</i></p>
Identity Based Community Support
<p><b>Regional Support for BLUU Havens &amp; Harbors (MidAmerica)</b> - MidAmerica Region is devoting staff time to supporting BLUU Havens &amp; Harbors in the region. Working with Rev. Mikal Slack, MidAmerica will make sure all BLUU Havens &amp; Harbors in the region will have access to all of the resources available to support the formation, growth, and success of these communities. As the BLUU Havens &amp; Harbors continues to develop, MidAmerica staff remains prepared to assist in whatever ways are most helpful. <i>In Development</i></p>
<p><b>DRUUMM Support and Collaboration</b> - In 2019, the UUA signed a memorandum of understanding with Diverse and Revolutionary UU Multicultural Ministries (DRUUMM) <i>Ongoing Commitment</i></p>

EQUIP CONGREGATIONS AND COMMUNITIES - areas of implementation (CONT'd)	
<p><b>EqUUal Access support and relationship</b> - EqUUal Access works to support and empower UUs in the disability community. We completed a Memorandum of Understanding between EqUUal Access and the UUA. The UUA also hired an Accessibility Resources coordinator and a Disability Justice coordinator. <i>Ongoing Commitment</i></p>	
<p><b>Trans/Nonbinary Monthly Gathering</b> - The Trans/Nonbinary Monthly Gathering project provides a safe, welcoming, and accessible space for trans and nonbinary UUs to connect, discuss issues relevant to their experiences, and have spiritual/worship time together. The gatherings are intergenerational and have been held every month. The project has expanded by collaborating with TRUUsT to provide chaplain support, creating an affinity space for trans/nonbinary BIPOC, training adult participants in UUA safety standards to expand trans/nonbinary youth programming, building data management capacity, and planning a retreat for strategic planning. <i>Ongoing Commitment</i></p>	

*Many categories span more than one mission area. Review the chart at the end of this report for the status of these projects, and the WCC recommendations to which each project is related.*

## AREAS TO PLAN FOR IN THE COMING YEARS

- Highlight best practices, consider award and recognition programs, that support the ethos of commitment and accountability.





## Support and Train Leaders

The UUA supports and trains leaders, both lay and professional, for ministry that is:

- **Relational** - affirming the wholeness of the people they serve, across cultures and experiences, including engaging in productive conflict;
- **Adaptive** - leading in inclusive and innovative ways, able to navigate challenges our communities face; and
- **Equitable and sustainable** - especially for leaders from the margins, with a pathway for the next generation.

### Spotlight

#### FUNDRAISING FOR MINISTRY, FORMATION AND SCHOLARSHIP

This has been an ongoing effort to fundraise for scholarships, grants and debt relief to support formation and reduce barriers for diverse UU religious professionals, including BIPOC, disabled, LGBTQIA+, and low-income people preparing for religious professional leadership.

As of June 2023, the UUA has raised:

\$1.3 million for scholarships for those in religious professional formation, the vast majority of which is dedicated to and prioritized for UUs with identities that have been directly impacted by systemic oppression.

\$1.97 million toward debt relief and support for the Living Tradition Fund; and

\$2.25 million for a newly established Fund for UU Theological Education. This fund will distribute grants the Panel on Theological Education, which supports our UU Identity Theological Schools and grants and support for UU scholars. In addition, the Panel on Theological Education has updated its guidelines to specifically incorporate recommendations from the COIC report including in its awarding of grants.

<b>SUPPORT AND TRAIN LEADERS - AREAS OF IMPLEMENTATION</b>
<b>Voices of Marginalized UUs</b>
<b>UU Theology Renaissance Module Update</b> - Revs. Kimberly Quinn Johnson and Emily DeTar Birt and religious educator Jessica Laikeman updated the UU Theology Renaissance Module in 2021 to center more voices of our theologians of color, as well as to incorporate more spiritual practices for embodying our theology. <i>Completed Project</i>
<b>Shared Ethics Panel</b>
<b>Shared Ethics Panel</b> - The UUA is collaborating with the UU professional organizations to develop a shared ethics commitment and a panel to help resolve conflicts among religious professionals. The Shared Ethics Panel Steering Team has been meeting since the historic May 2019 gathering of all the UU professional organizations. The Team has outlined a plan to shape our way toward a Common Ethics Code which will support accountable relationships between and amongst our organizations' members. <i>In Implementation</i>
<b>Direct Support and Start-ups for BIPOC, Trans/NB and Disabled UU Religious Professionals</b>
<b>Regional Support for New Ministries of Religious Professionals of Color</b> – The UUA provides intentional support and engagement with religious professionals from marginalized communities in their early ministry, such as through start-up workshops. This engagement is enhanced through a multiyear commitment. <i>Ongoing Commitment</i>
<b>Finding Our Way Home</b> – Finding Our Way Home is an annual retreat hosted by the UUA for Unitarian Universalist (UU) religious professionals of color. It offers community building, spiritual reflection, and collegial support while connecting participants with local community organizations as partners in service, witness, and advocacy. <i>Ongoing Commitment</i>
<b>Taproot: National BIPOC UU Space</b> – UUA regional staff co-create a network with congregational leaders that support them in this time in emergent ways through Taproot: A National BIPOC Space. BIPOC Leaders rooted in the Unitarian Universalist congregations are invited to take part in this monthly, virtual gathering. <i>Ongoing Commitment</i>
<b>First Year Ministers Seminar</b> – The First Year Ministers Seminar (FYMS) is a program designed for ministers in their first year to learn skills, develop community, meet UUA staff, and develop meaningful relationships. Traditionally, the program was a facilitated week-long seminar in the spring, followed by monthly unfacilitated small group gatherings. A new model has been introduced where ministers meet once a month for six months to develop an intentional habit of taking a sabbath, facilitated by the Center for Courage and Renewal. <i>Ongoing Commitment</i>

SUPPORT AND TRAIN LEADERS – areas of implementation (CONT'd)
<p><b>Religious Education Credentialing Program Assessment for Barriers</b> – The Religious Education Credentialing Committee( RECC) began work with Mmapheu Consulting in Fall 2021 to evaluate the RE Credentialing Program for barriers to access, especially for those who hold marginalized identities. Mmapheu completed focus groups, a broad-reaching survey, and an evaluation of program materials. They met in April 2022 with the RECC to identify vulnerabilities in the program and made recommendations for how the committee can further evaluate the program to reduce unnecessary barriers for entry and completion of RE Credentialing. In April 2023, the RECC drafted a strategic 5-year plan to further implement the suggestions of the consultants. <i>Ongoing Commitment</i></p>
<p><b>TRUUst Retreat</b> – The UUA provides funding to support an annual retreat of trans/nonbinary religious professionals. <i>Ongoing Commitment</i></p>
<p><b>Lay Leadership Development</b></p>
<p><b>Comprehensive Leadership Development Series for Congregational Leaders</b> – To provide a series of Leadership Development opportunities that are accessible, comprehensive, grounded in detentions of faith, theology and System Theory. They will teach a deeper understanding of shared ministry and servant leadership. <i>In Development</i></p>
<p><b>Extended Leadership Experience – MidWest Leadership School</b> – This program, which began in Fall of 2020, is intended to provide a more accessible basic congregational leadership training program in a virtual format. It will run twice per year, 4 Saturday Sessions, with specific training in Dismantling White Supremacy Culture, Healthy Conflict Engagement, Congregational Systems Theory, UU History from a BIPOC perspective, Covenantal Relationship, Mission and Vision, and building the Beloved Community. Each term (fall 100 level and spring 200 level) has room for 75 leaders, and it is intended as an ongoing program of the MidAmerica Region. <i>Ongoing Commitment</i></p>
<p><b>Community Ministry Support</b></p>
<p><b>Endorsement for Lay Chaplains seeking Board Certification</b> – The UUA supported the UU Society for Community Ministry in offering a new program to endorse non-credentialed UU's serving as professional chaplain for the purpose of board certification (required by most hospitals to maintain or gain employment). . <i>Project Completed</i></p>
<p><b>UU Military Ministry</b> - The UU Military Ministry seeks to extend ministry support to military service members, veterans, and their families, as well as provide administrative and pastoral/professional development support to UU clergy serving as military and VA chaplains. The UU Military Ministry also serves as an opportunity for UU to contribute to the diverse religious landscape of military chaplaincy, united in their devotion to pluralism. <i>Implemented</i></p>

<b>SUPPORT AND TRAIN LEADERS - areas of implementation (CONT'd)</b>
<b>Community Ministers In-Person Gathering</b> - The Community Ministers In-Person Gathering is an initiative aimed at bringing together community ministers who have not gathered for six years. These ministers feel like "second class ministers," despite changes in ministry under the umbrella term "community ministry" that now includes innovative ministries. The gathering will also contribute to the transformational work of the UUA's Ministerial Fellowship Committee (MFC). <i>In Development</i>
<b>Innovative Ministry</b>
<b>UU Funding Program</b> - The mission of the UU Funding Program is to promote the influence of Unitarian Universalist principles through grantmaking. Grants are made to support the work of social justice, strengthen Unitarian Universalist institutions, make Unitarian Universalism more visible in the world, and transform gratitude for being into generosity of living. <i>Ongoing Commitment</i>
<b>Anti-Racism Resources and Framework</b>
<b>Guide to anti-ableist writing for Skinner House authors</b> - A guide is in development on anti-ableist writing for all Skinner House authors. <i>In Implementation</i>
<b>Scholarship Programs</b>
<b>Scholarship for BIPOC Seminarians, PhD Scholars</b> - The UUA provides generous scholarships to those with historically marginalized identities, including BIPOCs and trans aspirants/candidates. Empower them to be on the cutting edge of articulating a theology of liberation. <i>Ongoing Commitment</i>
<b>The Office of Lifespan Faith Engagement (LFE) Youth and Young Adult Scholarship Committee</b> - This initiative invests in growing young leadership and community power and move beyond just using UUA money to fund UUA activities. The committee provides funding proposals three times a year and supports youth and young adults to complete their projects or support attendance at regional and national gatherings. <i>Ongoing Commitment</i>
<b>Funding Campaign for Ministries</b> - While not a campaign in the traditional sense, necessarily, this is an effort to fundraise for scholarships, grants and debt relief to support formation and reduce barriers for diverse UU religious professionals, including BIPOC, disabled, LGBTQIA+, an low-income people preparing for religious professional leadership. <i>In Implementation</i>
<b>Resources, workshops, and trainings</b>
<b>Music Leadership Certification Program Course Development</b> - The Music Leadership Certification Committee has contracted authors to write and lead the following course online: Developing and Managing a Music Program, making the course more accessible for part-time and under-resourced congregational music leaders. They have also moved to rolling admissions to the certification program in order to increase accessibility and flexibility. <i>In Implementation</i>



SUPPORT AND TRAIN LEADERS - areas of implementation (CONT'd)
<p><b>Claiming Our Spiritual Leadership (UULI course)</b> - Claiming Our Spiritual Leadership (COSL) is a workshop developed by the New England Region staff team, which introduces the concept of Spiritual Leadership and its five practices. Its equips congregations to shift from white supremacy to antiracist, anti-oppressive, multicultural ways centered in love and justice. The workshop is available online via the UU Leadership Institute and is occasionally offered in-person, aiming to be accessible to more congregational teams in various locations and at more convenient times. <i>Completed Project</i></p>
<p><b>Training Using Principles of Sociocracy (Dynamic Governance) for Congregational Leaders</b> - Sociocracy is a flat governance system. This training teaches how to use rounds and consent decision-making for board and committee work. We will also provide support for congregations looking to move toward a "Community of Communities" model of ministries and feedback loops to be inclusive of marginalized communities within congregations. <i>Implemented</i></p>
<p><b>Practices of Spiritual Leadership</b> - This follows the Claiming Our Spiritual Leadership workshop, and aims to deepen the understanding of the practices so congregations can deliberately develop a congregational culture in practicing their Spiritual Leadership. The ultimate goal is to guide congregations to shift from a white supremacist congregational culture to antiracist, anti-oppressive, multicultural ways centered in love and justice and grounded in UU spirituality and theology. <i>In Development</i></p>
<p><b>PF Flyers (Preliminary Fellowship)</b> - This series was created to connect the new ministers to resources and people that will help them as they begin their professional ministries. They learned finance information, collegial resources and mentoring, information on the annual Renewal Process, how to access regional resources, an introduction to the ministerial search and settlement system, and a chance to meet with the UUA President. <i>Ongoing Commitment</i></p>
<p><b>Tending Covenant: Training for Right Relationship Teams</b> - Tending Covenant: Training for Right Relationship Teams is a training program aimed at helping congregational teams promote faithful communication and creative conflict resolution using the values of mutuality and consent. The program recognizes the importance of addressing microaggressions, and it focuses on providing more materials on how to handle them for BIPOC participants. <i>Ongoing Commitment</i></p>
<p><b>Journey to Jubilee: Stories of Anti-Racism Efforts at the UUA</b> - This online training available at UU Institute consists of interviews with Lutricia Callair, Mel Hoover, Hope Johnson, and Leon Spencer. It also includes reading from the Skinner House book: The Arc of the Universe Is Long: UUs, Anti-Racism, and the Journey From Calgary. <i>Completed Project</i></p>

SUPPORT AND TRAIN LEADERS - areas of implementation (CONT'd)
<b>A Wider Path to Ministry (MFC)</b>
<b>A Wider Path to Ministry (MFC)</b> - The Ministerial Fellowship Committee (MFC): A Wider Path is an initiative focusing on lowering entry barriers for those seeking to become Credentialed UU Ministers. The MFC seeks to shift from a system of assessing competence a candidate's embodiment of a call to the Unitarian Universalist ministry, support received for carrying out the call, accountability in covenant with the Association and professional ministers, and commitment to learning and growth. This initiative recognizes and seeks to address the limitations of the current system in assessing the suitability of candidates for ministerial fellowship. <i>In Implementation</i>
<b>Data Systems for Identity Information on Religious Professionals</b>
<b>Identity and Consent Data System</b> - The UUA is working to create a secure and safe way to track BIPOC identities within our databases along with other identity attributes such as gender and sexual orientation. This system will be built on consent, so that no data will be used without the consent of the individual. <i>In Development</i>
<b>Integrated Data System Across Programs for Religious Professionals and Leaders</b> - The UUA is seeking to provide a more transparent system to track the ministerial formation process from credentialing to settlement. Providing a more robust database system so we can easily access demographics and statistics, especially as they relate to those with historically marginalized identities so we can pay attention to their progress and areas where we can be more inclusive. <i>Ongoing Commitment</i>
<b>Updating Credentialing Materials</b>
<b>RECC Reading List Revision 2021</b> - In summer 2020, the RECC hired three contractors to revise the RE Credentialing Program Resource List. Their goal was to revise the list to center voices of color as a part of the credentialing process. The updated Resource List has been published for candidates. <i>Completed Project</i>

Many categories span more than one mission area. Review the chart at the end of this report for the status of these projects, and the WCC recommendations to which each project is related.

## AREAS TO PLAN FOR IN THE COMING YEARS

- Further reducing barriers and creating alternative pathways to ministry
- Deeper investment in shared ministry and collaborative leadership



## Advance UU Values

The UUA advances UU values in the world in service of justice and liberation, where UUs are:

- **Rooted** in the spiritual and political grounding for our justice work, growing the skills needed for organizing and partnership;
- **Taking Action** – mobilizing in solidarity with and leadership by those impacted by injustice; and
- **Prophetic** – Amplifying the prophetic message and voices of our faith.

### Spotlight

#### UPLIFT ACTION FOR LGBTQIA+, GENDER & REPRODUCTIVE JUSTICE

UPLIFT Action for LGBTQIA+, Gender & Reproductive Justice is Side With Love's newest campaign, focusing on bodily autonomy and grounded in a theology of the sacredness of all bodies. Officially launched in spring of 2022, UPLIFT Action organizes UU individuals, congregations, and organizations to take meaningful action on a range of issues impacting the bodily autonomy of our communities, including abortion access following Dobbs and combating anti-trans and anti-LGBTQ legislation and policies as they proliferate across the US.

Like all Side With Love campaigns, UPLIFT Action uses a distributed organizing model to engage UUs in growing their skills, sharpening their political consciousness, deepening their spiritual grounding, and taking meaningful action in partnership with frontline communities on the local, state, and national level. In its inaugural year, UPLIFT Action offered many public political education events, trained more than 350 congregations in our Congregational Reproductive Justice Organizing Series, partnered with the National Network of Abortion Funds to offer a pilot program of NNAF's Heart2Heart curriculum as a

model for relational organizing, supported and coached congregations and UU State Action Networks in combating harmful legislation, and worked directly with multifaith and frontline partner organizations to build travel networks and offer direct support to people who need to travel or permanently relocate to seek safety and/or access healthcare that has been criminalized in their own states. See our work at <https://sidewithlove.org/upliftaction>.

ADVANCE UU VALUES IN THE WORLD - AREAS OF IMPLEMENTATION	
UU World Editorial Redesign	
<b>UU World Editorial Redesign</b> - Refocusing UU World magazine to amplify the UUA commitments to mission and implementing the WCC recommendations. <i>Ongoing Commitment</i>	
International Engagement	
<b>Unitarian Universalist Curricula on U/U Imperial Legacies</b> - Imperialist ideology and practice is threaded throughout U/Uism, as well as other North American religious traditions. From the justifications of our founding fathers to the faith's everyday practices of money and leadership, the legacy of Empire and its desire to dominate and mark out Otherness has us participate in harmful colonial enterprises. This conference and course will convene scholars and activists to equip lay leaders and ministers with resources and practices to live into the promise of radical, post-colonial, and faithful futures. <i>In Development</i>	
<b>Study Guide with an International Lens: Widening the Circle of Concern</b> - The project Study Guide with an International Lens adds to the powerful observations and recommendations of the Commission on Institutional Change's report, <i>Widening the Circle of Concern</i> . The authors of the addendum have personal and professional experience engaging internationally and interculturally both within and outside Unitarian Universalism. The addendum complements the COIC report by providing an international perspective on how to live more deeply into UU values of inclusion, equity, antiracism, and anticolonialism within the context of our global faith. <i>In Development</i>	
<b>UU@UN Intergenerational Spring Seminar</b> - The UU@UN Intergenerational Spring Seminar inspires Unitarian Universalist youth and adults to take action locally to address global issues and build skills necessary for global activism. Designed to be intergenerational, the seminar provides workshops, panel discussions, community building activities, and worship services to inspire transformation, learning, reflection, and growth while exploring some of the most challenging issues facing humanity today. The seminar is a unique opportunity for collaboration, learning, and engaging with others to create a positive global impact. It is in collaboration with the UU College of Social Justice and the UU Service Committee. <i>Ongoing Commitment</i>	



ADVANCE UU VALUES IN THE WORLD - areas of implementation (CONT'd)	
Side With Love and Organizing Strategy	
<b>Side With Love Action Center</b>	- The Side With Love Action Center is a platform for Unitarian Universalists to take concrete action in support of the UUA's four intersectional justice priorities in real-life situations. The Action Center aims to be a praxis model of engagement through providing opportunities to Ground, Grow, and Act, allowing participants to sharpen their political analysis and deepening spiritually, gain concrete skills and knowledge, and apply them in a spiritually and politically grounded way to take concrete action for impact in solidarity with partners and movements. Since its launch in 2021, the Action Center has engaged thousands of UUs through hundreds of calls to action, political education events, and skill ups. <i>Ongoing Commitment</i>
<b>UU the Vote 2022</b>	- One of the fundamental principles of the Unitarian Universalist Association (UUA) is the use of the democratic process. As an expression of our faith, many Unitarian Universalist congregations engage in voter registration, election reform, protecting voting rights and democracy, and Get-Out-the-Vote drives. <i>Completed Project</i>
<b>30 Days of Love 2023</b>	- This year's 30 Days of Love was a gift to our whole community: a love letter, a warm hug, a spiritual balm for all of the individuals, families, religious professionals, partners and communities that embody our values and work for justice and liberation year round. Each week featured a spiritual theme overlapping with one of Side With Love's intersectional justice priorities, and an array of offerings to help nourish our spirits and give gratitude and affirmation. <i>Completed Project</i>
<b>UPLIFT Action for LGBTQIA+, Gender &amp; Reproductive Justice</b>	- UPLIFT Action for LGBTQIA+, Gender & Reproductive Justice is Side With Love's newest campaign, focusing on bodily autonomy and grounded in a theology of the sacredness of all bodies. Officially launched in spring of 2022, UPLIFT Action organizes UU individuals, congregations, and organizations to take meaningful action on a range of issues impacting the bodily autonomy of our communities, including abortion access following Dobbs and combating anti-trans and anti-LGBTQ legislation and policies as they proliferate across the US. <i>In Implementation</i>
Skinner House Books Equity and Accountability Panel	
<b>Skinner House Books Equity and Accountability Panel</b>	- A stage of the review process for all new Skinner House titles, a diverse and skilled outside panel gives feedback and coaching to help each book best embody the UUA's AR/AO/MC commitments. <i>Ongoing Commitment</i>
Voices of Marginalized UUs	
<b>The Rough Side of the Mountain: Black Women's Ministries in Unitarian Universalism (book)</b>	- Editor and scholar Qiyamah Rahman collects and explores the unique journeys of Black Unitarian Universalist clergywomen, celebrating their wisdom, resilience, and contributions within and beyond Unitarian Universalism.

ADVANCE UU VALUES IN THE WORLD - areas of implementation (CONT'd)
Climate Justice
<p><b>Green Sanctuary Program</b> - The Green Sanctuary Program asks congregations to establish collaborative relationships with front-line communities that confront the reality of climate change. The focus is on building sustainable partnerships with front-line communities battling the effects of climate change and economic and political systems that sustain climate injustice. The program encourages congregations to prioritize climate resilience, to deepen their existing relationships with marginalized communities, and to develop practical steps for action in collaboration with their partners. <i>Ongoing Commitment</i></p>
<p><b>Grounded and Resilient Organizer Workshop (G.R.O.W.)</b> - The Grounded and Resilient Organizers Workshop is 5 years deep into building a community of faithful organizers and healers to share strategy and build skills that make our movements GROW! A cohort of 10-15 young adults move through a curriculum that includes weekly calls to stretch our imaginations and skills for justice, cross-movement relationship building to strategize with and build accountable relationships, spiritual (non-doctrinal) praxis and care space, resources and activities to think through themes of governance, time, care and conflict. <i>Ongoing Commitment</i></p>

*Many categories span more than one mission area. Review the chart at the end of this report for the status of these projects, and the WCC recommendations to which each project is related.*

#### GAPS – AREAS TO PLAN FOR IN THE COMING YEARS

- Establish a strong internal communications strategy for the UUA to connect directly with congregational leaders.



## Governance

To manage our faithful institutions, we strive for a system of governance that is grounded in our commitment to democratic process, reflective of our faithful covenant, and effective at guiding the UUA in its mission and impact. Our institutions must fully embody an anti-racist, anti-oppressive and multicultural approach to leadership to achieve these goals. Just as the UUA trains and supports congregational leaders, leadership at the Association level should also be:

- **Relational** – affirming the wholeness of the people they serve, across cultures and experiences, including engaging in productive conflict; accountable to directly impacted communities within and beyond the UUA
- **Adaptive** – leading in inclusive and innovative ways, able to navigate challenges our communities face; and
- **Equitable and Sustainable** – especially for leaders from the margins, with a pathway for the next generation.

### Spotlight

#### AUDIT & RISK COMMITTEE JEDI COMMITMENTS

The Audit & Risk (A&R) Committee is implementing equity-based risk models to monitor organizational and workplace justice, equity, diversity, and inclusion (JEDI) work, policies, and metrics. The committee has changed the assessment of enterprise risk management (ERM) issues to account for goals related to JEDI concerns, evaluating the impact of each risk scenario on organizational relationships and operational continuity inclusively. For example, when

evaluating risks, we now take into account impacts on our key relationships in addition to the financial and legal impacts. We also have expanded the risk scenarios we evaluate, to include continuing commitment to our mission and values and inclusive personnel practices. By employing a JEDI lens to develop all risk scenarios, the A&R Committee intends to complete a full slate of new ERM reports by November 2023 and update them regularly. The A&R Committee will coordinate with the new Accountability Launch Team once it starts its appropriate role.

GOVERNANCE – AREAS OF IMPLEMENTATION	
Resources for Deepening Covenant	
<b>Annual Program Fund Engagement</b>	- The Annual Program Fund (APF) is the way congregations give to the UUA, and is the UUA's primary funding source. By supporting the APF, member congregations uphold the covenant of connection among Unitarian Universalists and demonstrate their commitment to the larger UU movement and its missional work. The support for the APF goes beyond the financial contribution and extends to factors such as identification with the larger UU movement, decision-making power within the congregation, and stewardship approaches, all tied to the theology and history of the UU movement. <i>Ongoing Commitment</i>
Accountability Launch Group	
<b>Accountability Launch Team</b>	- The UUA Board is preparing with key UU identity groups and stakeholders to launch an ongoing, iterative accountability group to help ensure the UUA follows through in its long-term AR/AO/MC commitments. The UUA is creating a group to monitor the impact of the implementation of the COIC report, and provide real-time feedback and discernment with the UUA's leaders for key decisions based on our shared commitment to anti-oppression and full inclusion. The Board of Trustees has appointed a four-person accountability launch team to begin this work, starting Summer/Fall 2023. <i>Implementation</i>
Audit & Risk Committee	
<b>Audit &amp; Risk Committee: Equity-based risk models</b>	- Monitoring organizational and workplace justice, equity, diversity and inclusion (JEDI) work, policies and metrics. <i>Ongoing Commitment</i>
UUA Culture Change/JEDI	
<b>COIC Implementation and Mission Alignment Team</b>	- Internal cross-staff UUA team to coordinate and manage implementation of the recommendations from Widening the Circle of Concern and publish the annual implementation plan. <i>Ongoing Commitment</i>

<b>GOVERNANCE - areas of implementation (CONT'd)</b>
<p><b>UUA Hiring Practices</b> - The UUA implemented a new set of hiring practices in 2018 designed to make our hiring more equitable and inclusive, to recruit a broader range of candidates, and to bring on staff who are equipped with the anti-racism/anti-oppression skills and understand needed for the UUA's work. This has led to a much more diverse staff at every level, including among senior leadership. As of May 2023, 32% of all UUA staff, 58% of staff group directors and 66% of senior executives are BIPOC. <i>Ongoing Commitment</i></p>
<p><b>UUA Culture Change/JEDI</b> - The UUA is engaged in the work of creating a workplace culture where people of all identities can thrive, and especially where people with marginalized identities can be successful in leadership. The UUA's culture change focuses on policies, practices, and relationships that are grounded in justice, equity, diversity, and inclusion. <i>Ongoing Commitment</i></p>
<b>Regional Connections and Integration</b>
<p><b>Financially Integrate the MidAmerica Region into the UUA</b> - The project Financially Integrate the MidAmerica Region into the UUA aims to explore financial and programmatic integration with the UUA and create a plan to implement the move if the MidAmerica Board decides to do so and if the congregations of the MidAmerica Region approve it. The MidAmerica Region is currently financially separate from the UUA, which creates significant separation in programming. To achieve financial integration, the MidAmerica Board intends to invite a Regional Lead and Financial Administrator from one of the integrated regions to share their experience, invite a UUA Board of Trustees member, and talk with the Director of Congregational Life and the Executive Vice President about the UUA and MidAmerica Region's relationship and the possibility of financial integration. <i>In Development</i></p>
<b>Reimagining General Assembly</b>
<p><b>Reimagining General Assembly</b> - The ongoing work of Reimagining General Assembly aims to overhaul the UUA's General Assembly by utilizing multi-platform event model, virtual assemblies, and regional meetings. The General Assembly and Conference Services office has established accountable partnerships with identity-based ministries while also promoting diversity, equity, and inclusion at General Assembly and reporting on the same across the UUA. Reimagining General Assembly seeks to create biennial GA events while also holding regular teleconferences and regional meetings to ensure consistent engagement with UUA members. <i>Ongoing Commitment</i></p>
<b>Lay Leadership Development</b>
<p><b>Lay Leadership in the UUA: Development and Network</b> – The UUA has hired a Leadership Ministry Associate for the next two years to review and revise support systems for lay leadership, including the creation of a cross regional network of trained lay leaders. <i>In Implementation</i></p>



GOVERNANCE - areas of implementation (CONT'd)
<b>Streamline and Rethink UUA Governance Structures</b>
<p><b>Renewing UUA Bylaws</b> - The Board of Trustees is undertaking a renewal, rewriting and re-imagining of UUA bylaws for theologically grounded and mission focused governance. The intention is to create opportunity for innovation and creativity and broader democratic engagement by reducing complexity of structures, providing greater role clarity, and accountability to our values, including through covenant. The 2022 GA passed a Business Resolution affirming this work, and the creation of a Bylaws Renewal team. The Bylaws Renewal Team, which was created in September 2022, is hopeful to have a draft of renewed bylaws for the 2025 or 2026 General Assembly. <i>In Development</i></p>
<b>Wealth and Reparations</b>
<p><b>Decolonizing Philanthropy</b> - The Decolonizing Philanthropy Initiative is an ongoing project focused on transforming fundraising practices in a way that centers equity, inclusion, and justice. The project includes a review of current fundraising practices and a study of contemporary thinking on how to raise resources, engage with stakeholders, and foster relationships that advance equity and inclusion. Activities include a study group, teach-ins, programs to support development professionals historically excluded by previous structures, consulting support for BIPOC fundraisers, and the clarification of the fundable program budget. <i>Implemented</i></p>
<p><b>Unitarian Universalist Common Endowment Fund</b> - The Unitarian Universalist Common Endowment Fund (UUCEF) offers an active Socially Responsible Investing (SRI) program, allowing the UUA, its congregations, and affiliated organizations to invest their endowments through socially responsible investment decisions aligned with UU values. The UUCEF committee has been engaging with the Investor Statement of Solidarity to Address Systemic Racism calling for a commitment to amplify Black voices and incorporate a racial equity and justice lens in investment decision-making and engagement strategies. <i>Ongoing Commitment</i></p>

*Many categories span more than one mission area. Review the chart at the end of this report for the status of these projects, and the WCC recommendations to which each project is related.*

### AREAS TO PLAN FOR IN THE COMING YEARS

- Build shared commitments to anti-racism and full inclusion with UU related organizations and UU partner groups.
- Develop better historic analysis and foundations, as well as current practices and frameworks for reparations within the UUA.
- Expand understanding about congregational polity.
- CIMAT lead cross-department review of each chapter of the *Widening the Circle of Concern*.



## Theology

Theological reflection is a foundational and critical aspect of Unitarian Universalism, rooted in our covenantal, living tradition. Through theological reflection, we explore our individual and collective experiences and the wisdom of diverse sources to deepen our understanding of the universe and our place in it. This process is not only liberatory, but also essential to our aspiration of creating a beloved community that moves towards justice, compassion, inclusion, and equity. We also recognize that when Unitarian Universalism has failed in the past to live up to these values, it has resulted in harm to marginalized communities. Theological reflection provides the foundation for cultural change and transformation in Unitarian Universalism, leading us towards a more just and equitable society.

The UUA supports theology and theological development through various means, including publishing, leadership development, credentialing, investment in theological education and collaboration with UU seminaries, convening theological conversations, and stewarding the UUA bylaws that formulate the core principles, values and sources of UU faith. It is through covenant that we do this work together, calling ourselves to respond to what our faith demands of us in the moment, and advancing the causes of justice, compassion, equity, and liberation within and beyond our Association.

### Spotlight

#### ARTICLE II STUDY COMMISSION

The UUA Article II Study Commission was established to review and potentially revise the Second Article of the UUA Bylaws, Principle and Purposes. Article II serves as the foundation for all the work of the UUA and its member congregations, and as the covenant to which all congregations pledge themselves upon joining the UUA.

The review process is significant because it is happening in a time of great social, ethical, moral, and spiritual crises. The Commission was charged with ensuring that Article II accurately reflects the diverse and evolving Unitarian Universalist community's values and views. The principles, purposes, bylaws, and rules of the UUA have been reviewed and revised in the past, most notably with the move from six core objectives to seven principles in 1985, but the need for updates continues.

The UUA Article II Study Commission's work is part of the continuing history of our Living Tradition, which allows for change and evolution over time while remaining rooted in the core values of the Unitarian Universalist faith. The review process is about creating a Unitarian Universalism of the future that holds members through difficult times. The commission's work is a critical step towards ensuring that Unitarian Universalism remains a meaningful and relevant faith.

THEOLOGY – AREAS OF IMPLEMENTATION
<b>Resources for Deepening Covenant</b>
<b>Spiritual Leadership Small Group Ministry</b> - The Spiritual Leadership Small Group Ministry project aims to create a Small Group Ministry guide centered around Spiritual Leadership and its practices, including covenant, centering in gifts, tending our tradition, faithful risking, and doing our inner work. The program intends to develop congregational practices that move away from white supremacy culture, offering both adult and youth versions of the guide. Each of the seven sessions includes sharing questions and a designed activity to provide participants with a direct experience of the Spiritual Leadership practices, creating a larger base of participants for this model. <i>In Development</i>
<b>Article II Study Commission</b>
<b>Article II Study Commission</b> - Charged with reviewing the principles, purposes and sources of the UUA, including considering the proposed 8 <sup>th</sup> Principle, and recommending changes to the UUA bylaws. <i>In Implementation</i>
<b>Voices of Marginalized UUs</b>
<b>Panel on Theological Education</b> - In FY 23, the Panel, which provides grants to UU scholars and UU-identity theological schools, updated its overall purpose and goals document, and the guidelines and criteria for its UU Scholars granting program to incorporate the recommendations of the COIC related to theology and the centering of scholarship from BIPOC UUs. <i>Completed Project</i>

Many categories span more than one mission area. Review the chart at the end of this report for the status of these projects, and the WCC recommendations to which each project is related.

### **GAPS - AREAS TO PLAN FOR IN THE COMING YEARS**

- Clearly articulate a UU theological core that grounds UU commitments to anti-racism, anti-oppression, multiculturalism and full inclusion.



01.01 - Engagement with Unitarian and Universalist Theological Legacies	01.02 - Governance and Administrative Training	01.03 - Curation of Unitarian Theologies of UU's with Marginalized Identities	02.01 - Building Convening Practices	02.02 - Development of Common DEI Framework for UU Leaders	02.03 - Congregational Engagement in Association Governance	03.01 - Streamlined Communications for Congregational Engagement	03.02 - Shared Communication and Administrative Training for UU Leaders	03.03 - Congregational Engagement in Association Governance	03.04 - Development of Common DEI Framework for UU Leaders	04.01 - Regional and Cluster Convening for UU Leaders	04.02 - Regional and Cluster Convening for UU Leaders	04.03 - Regional and Cluster Convening for UU Leaders	04.04 - Regional and Cluster Convening for UU Leaders	05.01 - Regional and Cluster Convening for UU Leaders	05.02 - Regional and Cluster Convening for UU Leaders	05.03 - Regional and Cluster Convening for UU Leaders	05.04 - Regional and Cluster Convening for UU Leaders	06.01 - Regional and Cluster Convening for UU Leaders	06.02 - Regional and Cluster Convening for UU Leaders	06.03 - Regional and Cluster Convening for UU Leaders	06.04 - Regional and Cluster Convening for UU Leaders	07.01 - Regional and Cluster Convening for UU Leaders	07.02 - Regional and Cluster Convening for UU Leaders	07.03 - Regional and Cluster Convening for UU Leaders	07.04 - Regional and Cluster Convening for UU Leaders	08.01 - Regional and Cluster Convening for UU Leaders	08.02 - Regional and Cluster Convening for UU Leaders	08.03 - Regional and Cluster Convening for UU Leaders	08.04 - Regional and Cluster Convening for UU Leaders	09.01 - Regional and Cluster Convening for UU Leaders	09.02 - Regional and Cluster Convening for UU Leaders	09.03 - Regional and Cluster Convening for UU Leaders	09.04 - Regional and Cluster Convening for UU Leaders	10.01 - Regional and Cluster Convening for UU Leaders	10.02 - Regional and Cluster Convening for UU Leaders	10.03 - Regional and Cluster Convening for UU Leaders	10.04 - Regional and Cluster Convening for UU Leaders
01.01 - Engagement with Unitarian and Universalist Theological Legacies	01.02 - Governance and Administrative Training	01.03 - Curation of Unitarian Theologies of UU's with Marginalized Identities	02.01 - Building Convening Practices	02.02 - Development of Common DEI Framework for UU Leaders	02.03 - Congregational Engagement in Association Governance	03.01 - Streamlined Communications for Congregational Engagement	03.02 - Shared Communication and Administrative Training for UU Leaders	03.03 - Congregational Engagement in Association Governance	03.04 - Development of Common DEI Framework for UU Leaders	04.01 - Regional and Cluster Convening for UU Leaders	04.02 - Regional and Cluster Convening for UU Leaders	04.03 - Regional and Cluster Convening for UU Leaders	04.04 - Regional and Cluster Convening for UU Leaders	05.01 - Regional and Cluster Convening for UU Leaders	05.02 - Regional and Cluster Convening for UU Leaders	05.03 - Regional and Cluster Convening for UU Leaders	05.04 - Regional and Cluster Convening for UU Leaders	06.01 - Regional and Cluster Convening for UU Leaders	06.02 - Regional and Cluster Convening for UU Leaders	06.03 - Regional and Cluster Convening for UU Leaders	06.04 - Regional and Cluster Convening for UU Leaders	07.01 - Regional and Cluster Convening for UU Leaders	07.02 - Regional and Cluster Convening for UU Leaders	07.03 - Regional and Cluster Convening for UU Leaders	07.04 - Regional and Cluster Convening for UU Leaders	08.01 - Regional and Cluster Convening for UU Leaders	08.02 - Regional and Cluster Convening for UU Leaders	08.03 - Regional and Cluster Convening for UU Leaders	08.04 - Regional and Cluster Convening for UU Leaders	09.01 - Regional and Cluster Convening for UU Leaders	09.02 - Regional and Cluster Convening for UU Leaders	09.03 - Regional and Cluster Convening for UU Leaders	09.04 - Regional and Cluster Convening for UU Leaders	10.01 - Regional and Cluster Convening for UU Leaders	10.02 - Regional and Cluster Convening for UU Leaders	10.03 - Regional and Cluster Convening for UU Leaders	10.04 - Regional and Cluster Convening for UU Leaders

Status of projects and initiatives, per five stage framework:

DS = 1. Discernment  
DV = 2. Development  
IM = 3. Implementation  
CP = 4a. Completed Project  
OC = 4b. Ongoing Commitment

Projects and Initiatives (by mission-related area)	Status	Theology	Governance	Congregations & Communities	Hospitality & Inclusion	Living Our Values in the World	Religious Professionals	Educating for Liberation	Innovations & Risk	Restoration & Reparations	Accountability & Resources
<b>Equip Congregations and Communities</b>											
Anti-Racism Resources and Framework - Cultural Change Teams in Congregations, Knotty Conversations on Dismantling White Supremacy (UUI course), Learning & Practice Communities, Mosaic Lifespan Anti-racism Curriculum Series, National Conferences, Reparations Praxis Group, The Mosaic Hub, Congregational Life Staff AR/AO/MC Resourcing	DV, IM, CP	-	1	1	1	1	1	1	1	1	1
Common Read - 2021-22 Common Read: Defund Fear	CP	1	-	-	-	-	1	1	-	-	-
Data Systems for Identity Information on Religious Professionals - Employee Census of Plan Employers on UU Retirement Plan	DV	-	-	-	-	-	1	-	-	-	1
Helping Small Congregations Chart Their Future - Emerging Congregation Status Project, Small and Mighty Event Series	OC	-	-	1	1	-	-	-	1	1	-
Hope for Us Conflict Engagement Team	IM	-	-	-	-	-	-	-	-	1	1
Identity Based Community Support - DRUJMM Support and Collaboration, EquiUal Access support and relationship, Incantations for Rest: Poems, Meditations and Other Magic (book), MidAmerica Regional Support for BLUU Havens & Harbors, Taproot: National BIPOC UU Space, Trans/Nominary Monthly Gathering, UU Latinx History Project	DV, IM, OC	-	-	1	1	1	1	1	1	1	-
Innovative Ministry - New Communities Fund	DV	-	-	-	-	-	-	-	1	-	-
Lay Leadership Development - Widening the Welcome: Multicultural Welcome Workshop	OC	1	-	-	1	-	-	-	1	-	-
Ministerial Transitions and Beyond Categorical Thinking - AR/AO/MC search committee support groups, Beyond Categorical Thinking / Bias in Ministry, Congregation Life staff support, Transitions Transformation Project	DV, IM, OC	-	1	-	1	-	1	1	1	-	1
National and Regional Youth Programs - Deeper Joy - GA Youth and YA@GA, PWR Youth Ministry, Thrive Youth, Young Unitarian Universalist Project	DS, OC	-	-	1	-	1	-	-	-	1	-
Publications & Media - Beyond Welcome: Building Communities of Love (Nelson)	CP	-	-	-	1	-	-	-	-	-	-
Resources for Deepening Covenant - Spiritual Leadership for Culture Change IM	IM	-	-	1	-	1	-	-	-	-	-
Resources, workshops and trainings - Congregational Compensation Program Evolution, Congregational Staffing for Diversity Resources, Congregations as Employers: Proactive Support, Intentionally Anti-Racist Our Whole Lives Sexuality Education, Reimagining the MidAmerica Large Church Conference, Tapestry of Faith review, WorshipCraft online worship class, WorshipWeb Library & Collections	DS, DV, IM, CP, OC	1	-	-	-	-	1	1	1	1	-
Wealth and Reparations - Compensation and Staffing Survey	IM	-	-	-	-	-	1	-	-	-	-
Welcoming Congregations	OC	-	1	-	-	-	1	1	-	-	-
Young Adult Ministry Programs - Pacific Western Region Emerging Adult Ministry, Supporting the emerging Young Adult Revival Network	DV, OC	-	-	1	-	1	-	1	1	-	-



**Status of projects and initiatives,**

**per five stage framework:**

DS = 1. Discernment

DV = 2. Development

IM = 3. Implementation

CP = 4a. Completed Project

OC = 4b. Ongoing Commitment

Projects and Initiatives (by mission-related area)										Status	Theology	Governance	Congregations & Communities	Hospitality & Inclusion	Living Our Values in the World	Religious Professionals	Educating for Liberation	Innovations & Risk	Restoration & Reparatons	Accountability & Resources			
Support and train leaders																							
A Wider Path to Ministry (MFC)										DV	-	-	-	-	-	-	-	-	-	-	-		
Anti-Racism Resources and Framework - DEI style guide										DS	-	-	-	-	-	1	-	-	-	-	-		
Community Ministry Support - Endorsement for Lay Chaplains seeking Board Certification, UU Military Ministry, Community Ministers In-Person Gathering										DV, IM	-	-	1	-	-	-	1	-	-	-	-		
Data Systems for Identity Information on Religious Professionals - Identity and Consent Data System, Integrated data system across programs for religious professionals and leaders (MFD CRM).										DV, IM, OC	-	-	1	-	-	-	-	-	1	-	1		
Direct Support and Start-ups for BIPOC, Trans/NB and Disabled UU Religious Professionals - BIPOC Senior Ministers Summit, Finding Our Way Home, First Year Ministers Seminar, Regional support for new ministries of religious professionals of color, RECC Program Assessment for Barriers, Start Up Workshop for Dan Miyake and Clark Lake MI, UUA Health Plan - Identity-based health impacts										DV, CP, OC	-	1	-	1	-	-	1	-	1	1	-	-	
Innovative Ministry - UU Funding Program										OC	-	-	-	-	-	-	-	1	-	1	-	-	
Lay Leadership Development - Central East Region Drop In Calls for BIPOC UUs, Comprehensive Leadership Development Series for congregational leaders, Extended Leadership Experience -- MidWest Leadership School										DS, DV, OC	-	1	1	-	1	-	-	1	-	-	-	1	
National and Regional Youth Programs - Ships Ahoy: A Youth Leadership Experience, SOWING Seeds: Youth Justice Workshop										DV, OC	-	-	-	-	-	1	1	-	-	1	-	-	
Resources, workshops and trainings - Braveheart Leadership Experience, Claiming Our Spiritual Leadership (UUI course), Journey to Jubilee: Stories of Anti-Racism Efforts at the UUA, Music Leadership Certification Program Course Development, PF Flyers (Preliminary Fellowshipship), Practices of Spiritual Leadership, Staffing/Compensation/Benefits Webinar for MFC, Tending Covenant: Training for Right Relationship Teams, Sociocracy (Dyanmic Governance) for Congregational Leaders										DS, DV, IM, CP, OC	1	-	1	-	1	-	1	1	1	-	1	-	-
Scholarship Programs - Fundraising Campaign for Ministries, LFE's Youth and Young Adult Scholarship Committee, Scholarship for BIPOC seminarians, PhD scholars										DV, IM, OC	-	-	-	-	-	-	1	-	1	1	-	-	
Shared Ethics Panel										DV	1	-	-	1	1	-	-	1	-	-	-	-	
Updating Credentialing Materials - RECC Reading List Revision 2021, Refreshing Religious Institute courses with AR/AQ/MC lens.										DV, IM	-	-	-	-	-	-	-	-	-	-	-	-	
Voices of Marginalized UUs - UU Theology Renaissance Module Update										CP	1	1	-	-	-	-	1	-	-	-	-	-	
Advance UU values in the world																							
Anti-Racism Resources and Framework - Utilited On-Demand Video Worship Service (2021-2022)										DV	1	1	-	-	-	1	-	-	-	-	-	-	
Climate Justice - Green Sanctuary Program, Grounded and Resilient Organizer Workshop (G.R.O.W.)										OC	-	-	-	1	-	1	-	-	1	-	-	-	
International Engagement - Study Guide with an International Lens: Widening the Circle of Concern, Unitarian Universalist Curricula on U/U Imperial Legacies, UU@UN Intergenerational Spring Seminar										DV, OC	1	-	1	-	-	-	-	1	-	-	1	-	-



[illegible]