

Journey to a Sexually Healthy and Responsible Unitarian Universalist Association: 2014 Review and Recommendations

INTRODUCTION

In July 2009, the Religious Institute, with support from the Unitarian Universalist Veatch Program at Shelter Rock and the leadership staff of the UUA, began a systematic review of the Unitarian Universalist Association's sexuality-related policies, programs, advocacy and commitments. This review included reviewing more than 40 documents and reports, one-on-one interviews with UUA staff members, an electronic survey of all fellowshipped ministers with email addresses, and an electronic survey of district and regional staff.

The following areas, which constitute the foundation of a sexually healthy and responsible denomination, were reviewed and assessed:

- By-laws, policies, and procedures
- Full inclusion of women in denomination leadership
- Full inclusion of LGBTQ persons (then identified as BLGT)
- Sexually healthy religious professionals, including
 - Required competency for ministerial candidates
 - Sexually healthy and responsible seminaries
 - Continuing education and support
- Sexually healthy congregation programs and policies
- Sexuality education, including curricula, training, implementation and supervision
- Sexual abuse, harassment, and misconduct prevention policies and procedures
- Prophetic witness for sexual justice in the public square

"Toward a Sexually Healthy and Responsible Unitarian Universalist Association" (herein referred to as the 2010 Report) stated that "the needs assessment demonstrated that the UUA has both significant strengths and areas that require attention and improvement." During the past four years, the UUA staff has addressed many of the recommendations of the 2010 Report and has

significantly strengthened many of its areas of needed growth. The most significant changes include:

- New full inclusion bylaw
- New competencies in sexual health for ministerial candidates and credentialed religious educators
- Change in the code of conduct on sexual relationships for ministers
- Completion of a major revision of the Our Whole Lives Program, 7-9th Grade and increase in professional staff with responsibility for the program
- Moderator's apology to victims of clergy misconduct and initiation of the revision of the process to investigate allegations of clergy misconduct to fully include those who are bring complaints into the process

This *2014 Review* presents progress on each of the components of a sexually healthy and responsible UUA, updates progress on the 2010 recommendations, and offers recommendations for areas that still remain to be addressed in 2015 and beyond.

The Religious Institute is grateful to the staff and leadership of the UUA who have worked so diligently to make the UUA an even more sexually healthy and responsible denomination. We are especially grateful to the Unitarian Universalist Veatch Program at Shelter Rock for their support of this work for the past six years. As this particular collaboration between the Religious Institute and the UUA comes to a close, the UUA can be proud of its work and commitment to sexual health and responsibility. As we ended the 2010 Report, our faith calls us to be sexually healthy, just, and prophetic – for our members and for the world.

Rev. Debra W. Haffner
President and CEO
Religious Institute

Policies, Bylaws, Procedures Support Sexual Health/Full Inclusion

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- Full Inclusion By-Law and Expanded Non-Discrimination Language
- Human Resources Manual Updated to Best Practice

The 2010 Religious Institute report asked the UUA Board of Trustees to consider replacing Section C-2.3 of the bylaws with a full inclusion policy, rather than one based solely on legal anti-discrimination requirements. In 2010, Section C-2.3 of the UUA bylaws was a comprehensive non-discrimination clause, although it did not specifically name sex, gender identity, or gender expression as protected classes.

Following the procedures for a change in a C bylaw, the revised UUA bylaws now include a full inclusion by-law (Section C-2.3.) as well as a sexually inclusive Rule G-2.3. on non-discrimination.

The new Section C-2.3. on full inclusion reads:

Systems of power, privilege, and oppression have traditionally created barriers for persons and groups with particular identities, ages, abilities, and histories. We pledge to replace such barriers with ever-widening circles of solidarity and mutual respect. We strive to be an association of congregations that truly welcome all persons and commit to structuring congregational and associational life in ways that empower and enhance everyone's participation.

A new Rule G-2.3. further clarifies the new inclusion by-law and, as the 2010 Report specifically recommended, “explicitly name[s] sex (indicating biological sex), gender identity and gender expression.”

The new Rule G-2.3. on non-discrimination reads:

The Association declares and affirms its special responsibility, and that of its member congregations and organizations, to promote the full participation of persons in all of its and their activities and in the full range of human endeavor without regard to racialized identity, ethnicity, gender expression, gender identity, sex, disability, affectional or sexual orientation, family and relationship structures, age, language, citizenship status, economic status, or national origin and without requiring adherence to any particular interpretation of religion or to any particular religious belief or creed.

The UUA Human Resources Manual was extensively reviewed in 2009, and suggestions were made to improve several sexuality-related areas. Changes were finalized before the Religious Institute's 2010 Report was completed and included considerable strengthening of the sexual harassment policies; a new statement of disclosure on romantic, sexual or intimate relationships between a supervisor and an employee and an employee and a member of the Board of Trustees, as well as actions to be taken if conflict of interest occurs; an explicit statement that the UUA prohibits relationships between supervisors and staff who have direct or indirect reporting relationships; and a revision of the definitions, policies, and procedures for responding to a complaint of sexual harassment. In addition, training for all staff and supervisors on sexual harassment, led by Religious Institute staff, has been held biannually.

2015 ADDITIONAL RECOMMENDATIONS:

- The 2004 template for congregations, "Personnel Policy Manual for Religious Organizations" was not revised, as recommended, to be brought in line with the UUA's own personnel policies. At this writing, the 2004 template is still available on the website, with a note that it was "last revised 3/15/2004." It would seem prudent and relatively easy for this document to be brought in line with the UUA Human Resources Manual rather than continuing to promote out of date practices, and its availability should be made to known congregations through the *UU World Online* and other congregational resources.
- The Department of Human Resources should offer sexual harassment training for new staff and supervisors at least once a year, with *separate trainings* for department supervisors. Ongoing employees should be required to take a sexual harassment update training every other year.
- The personnel handbook should be re-reviewed in 2015 to make sure it is still at gold standard for sexuality issues.

Full Inclusion of Women in Denomination Leadership

The Unitarian Universalist Association has seen tremendous changes in the role of women in the denomination in the past thirty years. More than half of clergy and clergy candidates are now women; for many of the past thirty years, the Moderator and the Executive Vice President were women. The UUA has never had a woman President, and staff changes in the past few years actually have resulted in fewer women in top leadership positions. The 2010 Report found that clerical and financial areas were dominated by one gender in stereotypical ways.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments: None

- **The 2010 Report recommended that there be a reassessment of the recently revised staffing at the leadership level with gender equity in mind.** There are now fewer women in leadership than when the 2010 Report was finished. The Leadership Council is now 8 men and 6 women. Three quarters of the top four positions are men, and the moderator is also now a man. It is understood that these five people also publicly identify as heterosexual, and four of them are white.
- **The 2010 Report encouraged the leadership, with new staff hires, to prioritize adding men to administrative/clerical areas and women to financial management areas.** The Director of Human Resources prepares an annual EEO report each December for the Leadership Team that is included in the April Board packet of information. It will be compiled by gender and other demographic variables by department. It was not available for review for this report.
- **The Board was encouraged to continue its commitment to gender balance on Board of Trustees, committees, and district staffing.** This commitment to gender balance on the board and committees appears to be ongoing.

2015 ADDITIONAL RECOMMENDATIONS:

- The Board of Trustees and the Leadership Council should carefully analyze the 2014 EEO report, set goals for greater gender equity in departments and leadership positions over the next five years, and track those goals annually.
- The Board of Trustees and the Presidential Search Committee could influence the UUA having its first female President (joining other mainstream denominations such as the Episcopal Church, the ELCA, and the Disciples of Christ) by selecting two women final candidates for the presidential position.

Full Inclusion of LGBTQ Persons

Since the 2010 Report, there has been significant change in the United States about acceptance of LGBTQ persons, especially related to marriage equality. At this time, 35 states now have marriage equality rights, and 68% of Americans now support a federal law to protect lesbian, gay, and transgender people from workplace discrimination. Lesbian and gay people are now significantly present among UU clergy, seminaries, leadership, and in many UU congregations.

The new UUA Sharing Project, headed by LGBTQ and Multicultural Program Director Annette Marquis, has significant data about welcome and inclusion of lesbian, gay, bisexual, and transgender people in UU congregations, as well as of people of color and disabled persons. Bisexual and transgender people in particular reported feeling not as welcome or included in UU congregations. The next steps planned for the Sharing Project are to bring the process for similar assessments to the local congregation level.

A process for re-envisioning the welcoming congregations project had been planned by staff, but it was put on hold in summer 2014 due to the budget shortfall at the UUA. It should be a high priority to engage key stakeholders in assessing and planning for the future of the UUA welcoming initiative.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- New materials developed for website
 - Increased emphasis on education about inclusion of transgender persons
 - All but smallest congregations have achieved welcoming status
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- **The 2010 Report noted that staffing had decreased for LGBT work and recommended that additional staffing was needed.** Annette Marquis has been the LGBT and Multicultural Witness Director since 2012. Staff of the Standing on the Side of Love (SSL) campaign have also spent considerable time on LGBT justice issues, especially marriage equality

and the intersection of LGT equality with other issues. Funding permitting, additional staffing with expertise on LGBTQ issues would still be beneficial.

- **The 2010 Report strongly encouraged the update and republishing of the *Welcoming Congregation Handbook*, last updated in 1999.** This was not done, but this out-of-date resource was removed from the UUA bookstore in 2014. No written materials substitute for it. The website materials have been significantly updated (see below), and a monthly e-newsletter on welcoming issues began in 2013, although it has not been published since July 2014.
- **The 2010 Report encouraged staff to promote the Interweave curricula on bisexuality and transgender issues to congregations.** These curricula are now included as links on the welcoming section of the UUA web site. It is not clear whether any other promotion was done.
- **Staff were encouraged to update all fact sheets on website.** Since the 2010 Report was written, staff have developed new web pages on definitions about sexual orientation and gender identity; fact sheets on queer, transgender, bisexuality, and asexuality; updated the "10 steps to Take" sheets; and created a resource page on gender neutral bathrooms. There are still no fact sheets or resources on intersex persons or gender-variant children as recommended in the 2010 Report.

The "fact" sheets sometimes take on a tone that moves beyond education into editorializing a particular viewpoint. For example, one definition reads "The cultural expectation is that one's biological sex, gender identity, and gender expression will align in stereotypical ways: that someone who is male will identify as a boy/man and have a masculine gender expression," and another says "The gender binary is dependent on policing people to make sure they don't digress from the system in appearance, anatomy, or behavior." Such comments seem out of place and might be read as dismissive of many cisgender people's experiences and understandings.

- **Create more materials and programming on transgender and bisexual issues.** There has been progress, discussion, and advocacy on transgender issues yet little on bisexuality. Multicultural Ministries and SSL staff prepared and offered a national webinar called "Transgender 101" and actively promoted and supported congregational involvement

with local Transgender Day of Remembrance services. CLF did a virtual service in 2013 with Transunite around the Transgender Day of Remembrance. The UUA might consider selling copies of the Religious Institute's new guidebook "Bisexuality: Making the Invisible Visible" through the bookstore and/or asking for reprint permission for sections for the website.

- **Create more materials and expectation for congregations working with LGBTQ teens and young adults.** There is a new resource for "queer and trans youth" on the website, but it appears that there has not been encouragement to congregations from national or regional staff to develop programs for LGBTQ teens. The Youth Office can do more to encourage congregations to do more for LGBTQ teenagers in their congregations.
- **Promote congregational renewal of welcoming process after five years.** The vast majority of midsize and large congregations have undergone a welcoming process and have achieved the designation. All but one of the large congregations, all but one of the medium size congregations, and all but 21 of the small II congregations have achieved the designation. (See Table A Below.) There needs to be a plan for the smallest congregations (more than half of the total UU congregations) to engage a streamlined process to be certified. Ms. Marquis states that a certifying renewal process has limited impact. The Religious Institute believes that congregations that obtained their designation more than five years ago still need to be encouraged by UUA national and regional/district staff to do more to re-engage their congregation in welcoming and full inclusion, particularly around bisexuality and transgender persons. An unspecified number of congregations have moved to include gender neutral bathrooms; more should be encouraged to do so.

TABLE A: OFFICIAL UUA WELCOMING CONGREGATIONS BY SIZE OF CONGREGATION

Size	Total Congregations	Welcoming Congregations	% WC	Not Yet Recognized
Large (Over 550)	38	37	97%	1
Medium II (400-549)	31	31	100%	0
Medium I (250-399)	105	104	99%	1
Small II (100-249)	325	304	94%	21
Small I (1-99)	533	280	53%	253
	1032	756	73%	276

- **Encourage congregations to undertake increased outreach for LGBTQ members.** Too many congregations still worry that they will be perceived as the “gay” or queer church, and many have not actively reached out for new members among the LGBTQ community. More can be done to increase membership outreach to LGBTQ persons who may still feel hurt by their cradle religions. Ms. Marquis reports that even in the most conservative areas with Unitarian Universalist churches, there are active partnerships with LGBTQ organizations although membership recruitment is not often part of the goal.

2015 ADDITIONAL RECOMMENDATIONS:

- Have 100% of congregations with over 100 members certified as welcoming congregations, and create a streamlined designation process for the 253 not yet recognized smallest congregations, encouraged by regional/district support, webinars, and other resources.
- Regularly conduct educational sessions on new issues in LGBTQ inclusion at General Assembly, region/district meetings, cluster meetings, and UUMA/LREDA chapters. These programs should in particular address new understandings of sexual orientation and gender identities.
- Convene the welcoming congregations re-envisioning task force to make recommendations for the future of the UUA welcoming congregation initiative. Have this group make recommendations about how to create a new print resource to replace the Welcoming Handbook.
- Continue to update the web site on LGBTQ issues with links to the most up-to-date resources for congregations. Consider reprinting parts of and promoting the Religious Institute guidebook on bisexuality to congregations. Have the current definitions and identity fact sheets reviewed by outside sexologists with knowledge in these areas to assure they align with current information and make them more accessible to a wider range of readers. As noted in the 2010 Report, there is still a need to create fact sheets or resources on intersex and gender-variant youth, especially for religious education staff

and volunteers. The materials in the Religious Institute online course for religious educators could be used.

- Explicitly charge the Youth Office to encourage programming and initiatives at the local congregational level for LGBTQ youth.
- Assure that the UUA is represented in key national coalitions and justice efforts to maintain its visibility and leadership on LGBTQ issues.

Sexually Healthy Religious Professionals

The 2010 Report addressed three components for assuring that religious professionals would be sexually healthy and responsible: required competencies for candidates to demonstrate that they are sexually healthy religious professionals, sexually healthy and responsible seminaries, and continuing education and support for religious professionals on sexuality issues.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- Sexual Health Competency now required for ministerial candidates and credentialed religious educators
- UU seminaries now meet designation as “Sexually Healthy and Responsible Seminary”

As a result of this project, the Ministerial Fellowship Committee (MFC) and the Religious Education Credentialing Committee (RECC) now require demonstrated competency in sexuality for credentialing.

In 2010, the Unitarian Universalist Association became the first denomination to include a sexual health competency in its set of competencies for preliminary fellowship for ministerial candidates. In December 2009, the Ministerial Fellowship Committee voted unanimously to require a new sexual health, education, and justice competency for all ministers, effective December 2010, including a requirement for each candidate to take a sexual harassment/misconduct prevention learning opportunity. There was a two hour training for the MFC on how to assess candidates on the new sexual health competency as well as a two hour training on addressing clergy sexual misconduct prevention.

The Religious Institute helped the MFC implement the recommendation, to “develop materials for candidates, including a list of sexual misconduct prevention learning opportunities, sexuality classes, and resources to read.” With support from the UU Funding Program, the Religious Institute developed three new online courses for UU religious professionals: Sexuality Issues for UU Ministers, Sexuality Issues for UU Religious Educators, and a shorter Sexual

Misconduct Prevention online course. Each course had an advisory committee of UU professionals who reviewed it, and each was pilot tested before being promoted widely. The courses provide an opportunity for both aspirants and candidates to develop some of the knowledge base and skills required for the competency as well as a continuing education course for clergy and religious educators who are credentialed. The ministers course, available since October 2011, has been offered eight times, and has been taken by 370 UU religious professionals: 203 candidates, 70 ordained clergy, 74 religious educators, and 23 other seminarians. The clergy sexual misconduct prevention course has been offered twice, and taken by 33 people, including 16 ordained clergy, 12 candidates, and 5 seminarians. The religious education course has been offered twice in 2014, and 19 religious educators have taken it. In total, 417 UU religious professionals have taken one of the Religious Institute online sexuality courses.

In 2014, the Religious Education Credentialing Committee announced changes in the UUA's Religious Education Credentialing Program, including a new requirement that credentialed religious educators will now have to meet a "Sexual Health" competency at the Credentialed Level. (Sexual Health is now one of the eight required competencies.) Credentialed Religious Educators will be expected to have "knowledge and skills" on sexual health, sexual boundaries, sexual justice, gender equity, inclusion of people who are LGBTQ, knowledge and use of the Our Whole Lives curricula, and sexual harassment/misconduct prevention and response. The Religious Institute was consulted on required readings and activities for this competency.

In 2010, neither of the two Unitarian Universalist seminaries met at least two thirds of the Religious Institute's criteria of a sexually healthy and responsible seminary. Both achieved the Religious Institute's designation in January 2012. At that time, Starr King met 83% of the criteria, still needing to offer a sexuality issues for religious professionals course (which is offered biannually at neighboring Pacific School of Religion), require a sexual misconduct prevention class, or have student groups on sexuality issues. Meadville Lombard met exactly two thirds of the criteria in 2012, not having a sexuality issues course, a written policy of sexual harassment by students, a full inclusion policy, student groups, or at least 40% of women on the faculty. According to our review of their website, the faculty is now 42% women, which brings them to 71% of the criteria.

The 2010 Report recommended that the MFC require continuing education of sexuality issues, especially misconduct prevention. There are as yet no requirements for continuing education for religious professionals on any topic. Debra Haffner has been a Center Presenter for the past four years and has offered one, two, and three day workshops on being a sexually healthy religious professional and creating sexually healthy faith communities at some UUMA/LREDA chapter retreats. Of note, 43% of the UU religious professionals taking one of the Religious Institute's online classes apparently did so for their own continuing education as they were already either fellowshipped or employed as religious educators. Many UUMA chapters also used a study guide in consideration of the revised code of conduct on sexual relationships which included some continuing education about boundaries and attractions (see page 20 for more information.)

2015 ADDITIONAL RECOMMENDATIONS:

- In 2015, it will be important to update the reading lists and training opportunities for ministerial candidates in sexuality and sexual misconduct prevention, since they were prepared nearly five years ago.
- The composition of the MFC and its executive committee will change considerably in June 2015. Director of Ministries and Faith Development Sarah Lammert has asked Rev. Haffner to conduct a training for the MFC on assessing the sexual health competency in September 2015. An additional training for the new MFC Executive Committee on sexual misconduct should also be scheduled.
- It is hoped that the UUA staff will continue to promote the Religious Institute courses on sexuality issues for ministers and religious educators to candidates entering the credentialing process. The UUMA is encouraged to consider adding sexuality courses to their biannual institute and to create mentoring around sexuality issues as it has done on other issues.
- Starr King and Meadville Lombard should update their assessments with the Religious Institute and should consider offering sexuality and misconduct prevention courses for their students so they can more easily address the sexual health competency while in seminary.

Sexually Healthy Congregations

As part of the 2010 Report, the Religious Institute conducted a survey of ministers, which included questions about the sexuality-related activities and services of their congregation as well as their own professional preparation. It did not contain individual assessments of congregations or interviews with lay leaders but did provide some insight into what was happening at the local congregation level. The 2010 Report concluded, "Many areas of sexuality-related services are lacking in most congregations. With the exception of ministries for lesbian and gay persons, congregations by and large are not actively engaging many of the sexuality issues faced by congregants." Few ministers had preached on a sexuality topic other than sexual orientation. The OWL program was not being taught in significant numbers beyond the junior high or high school level. Most had not updated their welcoming process or had a task force on LGBT issues. And, as will be discussed on pages 22-27, most were not implementing best practices for safer congregations.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishment: Comprehensive Online Tool Developed and Posted on Website

The Religious Institute developed an online instrument for congregations to assess whether they had policies and programs to assure that they were sexually healthy and responsible. This comprehensive tool was posted on the UUA website and covered each of the building blocks of a sexually healthy congregation. In addition, the checklists were adopted for the Religious Institute's update of its guidebook, *"A Time to Build: Creating Sexually Healthy Congregations."* Although extensive review was sought from national and district staff on the online instrument, it is the Religious Institute staff's sense that the use of the tool was not widely promoted. Several UUA staff have stated that it is too comprehensive and lengthy to be useful, although Religious Institute staff have used it in workshops with congregation leadership around the country.

There has not been funding to update the ministers' survey or to do a more in-depth review of congregation practices. To our knowledge, there has not been any recent training of

district or regional staff on sexuality-related issues although, as noted on page 15, several UUMA chapters have hosted workshops with Reverend Haffner with some district/regional staff in attendance.

2015 ADDITIONAL RECOMMENDATIONS:

- As discussed in other sections of this report, the Religious Institute continues to recommend that the board and national and regional staff encourage higher accountability and visibility for safe congregation policies (see page 27), an emphasis on welcoming renewal process, and the teaching of the full range OWL curricula.
- The Religious Institute recommends that the Board or staff consider commissioning a follow up study with congregations on sexual health policies and programs.

Lifespan Sexuality Education

The Religious Institute 2010 Report called for a recommitment to the Our Whole Lives curricula and program which has indeed taken place. The Religious Institute noted that some levels of the curricula were more than a decade old; that there was not a curriculum for parents as sex educators or one for midlife and older adults; and that the staffing for the OWL project had been reduced from several people to a 10 hour a week associate.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- Complete update and revision of the 7-9th grade OWL curriculum
- New curricula for parents and midlife and older adults in process
- Improved communication with OWL facilitators and trainers

In 2010, Unitarian Universalist Dr. Melanie Davis, a nationally recognized Ph.D. in sexuality education, was hired to coordinate the OWL program. She directed a major revision and update of the junior high school OWL curriculum which has just been published. Six webinars for OWL trainers, facilitators, and DREs have been held to introduce the new 7-9th grade curricula. In addition, as recommended in the 2010 Report, a parenting curriculum is currently being developed. The workshops for a new parenting curriculum have been completed and will be field tested in the spring 2015. Dr. Davis has also begun writing OWL for Older Adults and hopes to field test it during 2015-2016.

The 2010 Report raised several concerns about the support of OWL educators and trainers, which have been remedied. In addition to the OWL listservs at each level, there are now:

- Continuously updated database of OWL educators and trainers
- An email system for regular updating and support of OWL educators and trainers
- Improved monitoring of the OWL listserv
- A private Trainer Resources area online
- A public Facilitator Resources page
- An OWL trainer Facebook group

The 2010 report also encouraged more involvement by ministers and directors of religious education in OWL. As noted above, more than 70 ministers have taken the Religious Institute online course and 93 religious educators have either taken that course or the religious education online course, both of which have units on OWL. In addition, at least one OWL curricula is now required reading for ministerial and religious education candidates.

2015 ADDITIONAL RECOMMENDATIONS:

- The Religious Institute reiterates its concern that there are no continuing education requirements for OWL facilitators after the initial training (which is done before the volunteers actually teach OWL). We know that Dr. Davis has done workshops at the National Sex Education conference, but only a small percentage of OWL educators attend. The webinars for the new 7-9th grade program provide a lower cost model for continuing education, and there are continuing education webinars, podcasts, and videos planned for the coming year. The Religious Institute urges the board and staff to consider instituting a five year requirement for continuing education for those continuing to teach OWL at the K-high school level in their home congregations.
- As noted in the 2010 Report, staff should consider conducting a survey of religious education directors to discover why most congregations do not offer K-1, 4-6, young adult and adult OWL and what would encourage them to do so. In terms of implementation, OWL is primarily being used at the middle school and high school levels, and the excellent lifespan resources that were developed need to be promoted and used.
- Discussions are underway for a longitudinal evaluation of the effectiveness of the OWL 7-9th grade curricula. Although costly to do well, it is hoped that these can move from discussions into a high level evaluation during the coming years supported by foundation funding.

Commitment to Sexual Abuse, Harassment, and Misconduct Prevention Policies and Procedures

Policies and programs to prevent sexual abuse, harassment, and professional misconduct were identified in the 2010 Report as “the weakest area of sexual health for the denomination, our congregations, and our religious professionals.” At the time of the 2010 Report, the ministerial code of conduct allowed for single ministers to have romantic and/or sexual relationships with congregants. One third of congregations did not have a written safety policy and seven in ten congregations did not have a safer congregations committee in place. The process for reporting and investigating complaints of professional misconduct was not easily found on the website and indeed the telephone number to call was not working. There was also a strong sense among survivors of misconduct that the process was flawed and that their needs had not been appropriately addressed despite the work of several task forces since 2000. There was no procedure for an institutional policy, and, unlike other mainline denominations, there was no requirement for ministerial candidates or clergy to take courses on clergy misconduct prevention.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- All candidates are now required to take misconduct prevention class
- New code of conduct for ministers on sexual relationships with congregants,
- Institutional apology for victims,
- Board working group to revise process of investigations nearly completed.

Much has changed in a positive direction during the past five years as a result of the 2010 Report, the advocacy of a group of survivors and clergy called Safety Net, the willingness of the Ministerial Fellowship Committee (MFC) to take seriously the issue of the prevention of sexual misconduct, and the leadership of the immediate past President of the UUMA.

Changes were begun during the first year of the Religious Institute project, including the MFC voting to require that every candidate take a sexual harassment prevention/boundaries workshop (now more accurately called a clergy sexual misconduct prevention workshop) before they saw the MFC. A draft template for an institutional apology to victims was created to be signed by the President to anyone who was found to be a victim of UU clergy sexual misconduct. *The UUA Human Resources Manual*, as noted on page 4, updated its definitions of sexual harassment and created a much clearer workplace policy that contained all of the core elements of a sexual harassment policy, including the investigation and resolution of complaints.

The UUMA President appointed a sexual ethics task force that recommended replacing the 184-word policy on sexual relationships in *The UUMA Guidelines for the Conduct of Ministry* with a short, clear statement (ultimately 21 words.) A two year study process was undertaken by UUMA chapters, and, in June 2013, the UUMA members at their annual meeting almost unanimously adopted the following statement:

I will not engage in sexual contact, sexualized behavior or a sexual relationship with any person I serve as a minister.

Debra Haffner has met several times with the LREDA board to encourage them to similarly change their code of conduct for religious educators to reflect the new ministerial guideline. In September, a LREDA Board member reported to the Religious Institute that "The current LREDA Board has as a priority reviewing our Codes and Guidelines. We are also in conversation, through the Excellence in Shared Ministry Implementation Team, about coordination of our UU professional codes" (one of the 2010 Report recommendations.) In July 2015, Rev. Haffner will conduct a training for the UU Musician's Network which will be designed to lead to them developing a revised code of conduct as well.

The 2010 Report reviewed at least four different task force reports on clergy sexual misconduct and recommended that staff develop a listing of all past report recommendations with status and reasons where action was not taken. In 2014, the Reverend Sarah Lammert, Director of Ministries and Faith Development, did a gap analysis of these previous reports for the UUA Board of Directors. She also identified that in the past 20 years, there had been 23 allegations of clergy misconduct brought to the MFC for deliberation of which only two ministers were exonerated, with others resigning or losing their fellowship.

The 2010 Report recommended that there needed to be a separate key stakeholders convening on sexual misconduct prevention with key participants, include survivors and the development of a streamlined, clearly articulated, standard process for responding to complaints and allegations. In April 2014, the Moderator of the UUA, Jim Key, held a two day meeting on clergy sexual misconduct, including involving two survivors and hearing their stories. The Board of Trustees at their 2014 April meeting directed the UUA staff and the Board's Congregational Boundaries working group to "revise the process for handling allegations of clergy misconduct so that members of the Ministerial Fellowship Committee are not involved in clergy investigations and so that complainants and accused ministers will have equal opportunity to participate in the process" (UU World, Fall 2014). The MFC submitted two changes to its Rules for consideration at the October 2014 board meeting to address these concerns, and, with minor changes, these will be voted on at the January 2015 meeting. The Board has also charged a working group to work with the MFC to create policies and procedures that reflect "best practices in the complaint process-for those bringing complaints and for defendants." The report on best practices is expected to be completed in 2015.

The 2010 Report recommended that the President issue a broad-based statement and apology to victims of misconduct at GA 2010 and announce new procedures or a task force to develop them. This was not done. In 2014, Moderator Key did issue such an apology to survivors at the opening of the 2014 General Assembly in Providence, Rhode Island, and outlined the steps the Board was taking. Key stated:

On behalf of the UUA Board of Trustees, I want to express my deepest apologies to those of you who have been victims of UU clergy sexual misconduct, whether you have come forward or not. I want you to know we are sorry for the suffering caused by one of our Unitarian Universalist ministers. The Board and I grieve with you over this breach of sacred trust and professional ethics. It is unacceptable that a minister has taken advantage of you sexually and emotionally. It was not your fault. Exacerbating your pain, some people in your own communities added to your trauma by challenging your need to come forward with your complaint.

Some of you have heard this apology from this stage before and might justifiably ask what is different now, and why should you have any confidence that this time there is an institutional will to make the process of filing a complaint more transparent, but most of all, more compassionate. I pledge as Chief Governance Officer, along with your board, to hold all of us, both individually and institutionally, accountable to the values that are at our core.

The 2010 Report recommended that the Youth Office develop a revised ethics template for adult and youth interactions and a process for establishing sexual behavior guidelines in youth groups. With input from the Religious Institute, there is a new participant covenant for UUA youth events which includes new policies on sexuality and the community and a revised Code of Ethics for Adult Leaders. It also addresses a code of ethics for youth in leadership positions and a specific policy on youth sexual behaviors at General Assembly. This can be found online for congregational adaptation at

https://www.uua.org/documents/yaya/participant_covenant.pdf

The 2010 Report also strongly recommended that the UUA congregational staff, at the national and the district (now regional) level, develop stronger outreach promotion and expectations for safe congregations policies for all congregations. There remains a need for model policies, trainings for congregations and regional staff, a higher visibility of the importance of safer policies and programs, and an expressed commitment to improving these policies by the President and key staff leaders. In February 2012, Debra Haffner led an all-day meeting with key UUA staff about this, and a preliminary plan was created. It was not implemented due to the change of leadership of the Executive Vice President and the demands on the staff, especially related to the headquarters move. The Religious Institute has begun the development of a multifaith safer congregations best practice initiative and will be piloting it with UU congregations in 2015 with support from the UU Funding Program. The Board has invited Rev. Haffner to present the project at the 2015 General Assembly.

2015 ADDITIONAL RECOMMENDATIONS

- The Board should continue to work on assuring a revision of the investigation process to a level of best practices for both ministers and accusers/victims and assure that it is aligned with the UUMA and UUA personnel policy practices. The changes in the process should be widely disseminated, and the process, from allegation through investigation, resolution, and restorative justice, should be prominently placed on the UUA website.
- Although the information of the UUA website on safer congregations and misconduct processes is better than it was in 2010, it can still be streamlined, and it should be easier to find from the home page of the website.
- The Board should assure that the codes of conduct for religious educators, musicians, and administrators are modified to reflect the principle that staff of congregations should not have sexual relationships with people in their congregations, regardless of their marital status, and that people who do identify potential life partners in their congregation remove the professional relationship in a transparent process with their congregation before pursuing such a relationship.
- The Youth Office should encourage congregations to adopt the participant covenant for local youth group use. Our impression is that few congregations know of its existence and most have not adapted it.
- At the end of 2015, The Board should request updates from the staff leadership on the implementation of the Sexually Safer Congregations Initiative, including the number of congregations which have best practices in place.

Commitment to Sexual Justice in the Public Square

The 2010 Report noted that “during the past 40 years, the Unitarian Universalist Association has passed 89 resolutions and statements of witness on sexual justice issues” and that “sexual justice issues have been a focus of public witness for the UUA for the past two Presidential administrations.” In the years immediately preceding the Religious Institute report, the emphasis in both public witness and preaching had been on marriage equality and lesbian and gay issues, and the 2010 report encouraged greater involvement in other sexuality areas, including abortion and sexuality education advocacy.

STATUS OF 2010 RECOMMENDATIONS

Major Accomplishments:

- CSAI on Reproductive Justice
- Ongoing press releases on broader range of sexuality issues;
- Increased coverage of sexually-themed stories in *UU World*,
- Sexual harassment prevention policy developed for General Assembly participant program book

In 2012, delegates at the General Assembly in Phoenix, AZ, selected "Reproductive Justice: Expanding Our Social Justice Calling" to be the 2012-2016 Congregational Study/Action Issue (CSAI). This CSAI extends previous resolutions on family planning, abortion, and sexuality education to a commitment to the broader framework of reproductive justice “with a particular focus on how economic justice, racial justice, and health equity are a central part of this vital work.” Under Witness Ministries Program Associate Jessica Halpern’s leadership, a curriculum congregational resource packet, small group ministry discussion sessions, a dedicated Facebook page, and an advisory group were developed. The Religious Institute recommends that there

be opportunities at the 2015 General Assembly to discuss these issues. The Proposed Statement of Conscience (SOC) “will be subject to discussion, amendment, and final approval at the 2015 General Assembly.” If the SOCI is passed, it can be the basis for even more work on reproductive justice by the UUA in the public square.

The 2010 Report asked that President Peter Morales continue the “past Presidents’ high level of involvement in public witness on broad range of sexual justice issues, including sexuality education, reproductive choice, marriage equality and BGLT full inclusion.” Since 2010, there have been at least 11 press releases on marriage equality, four on other LGT equality issues, and five on reproductive justice, including family planning and abortion. President Morales participated in activities at the Supreme Court in 2014 on the inclusion of contraception in the Affordable Care Act and has signed a number of multifaith statements on sexuality issues coordinated by the Religious Institute.

The 2010 Report also recommended raising the visibility of sexuality issues in the *UU World* which had had surprisingly few sexuality related articles from 2006 to 2009. Coverage of sexuality-related issues has definitely increased since the 2010 Report, and the most recent issue of the *UU World* (in print and online) featured three feature stories on safer congregations efforts and clergy sexual misconduct prevention.

In contrast, General Assembly (GA) has continued to not have a significant amount of programming around sexuality issues. Each year, there has been one workshop offered by Rev. Haffner for the Religious Institute, and there have been a few offered on LGBT issues and the reproductive justice CSAI. As a result of the recommendation in the Religious Institute’s 2010 Report, the GA staff developed a statement on sexual harassment at GA which has been included each year in the participant’s conference book.

2015 ADDITIONAL RECOMMENDATIONS:

- It is hoped that the President’s commitment to a broad range of sexual justice issues will continue as well the higher level of coverage in the *UU World* and other media.
- The Religious Institute supports the recommendations in the Statement of Conscience on Reproductive Justice.

- The UUA is no longer looked to as a leader in sexuality education advocacy as it had been for at least two decades. Because of its identity-based focus, the Standing on the Side of Love campaign has not included sexuality education in its advocacy, and the Reproductive Justice program has not focused on it. Yet the UUA and its congregations could play an important role at both the national and local level. The Religious Institute hopes that either SSL or Reproductive Justice staff will consider how the UUA could regain its leadership and commitment to the many UUA positions on comprehensive sexuality education. Community controversies continue about the content of sexuality education, and the abstinence-only-until-marriage federal funding continues to persist despite such programs having been found to be ineffective. Local congregations with support from Standing on the Side of Love could play a major role advocating for comprehensive sexuality education in public schools.
- The Planning Committee of the General Assembly should be encouraged to have more workshops on a broader array of sexuality topics for congregation leaders including full inclusion of LGBT persons (especially bisexuals and transgender persons), implementing OWL at all levels, building safer congregations, and advocating for reproductive justice.