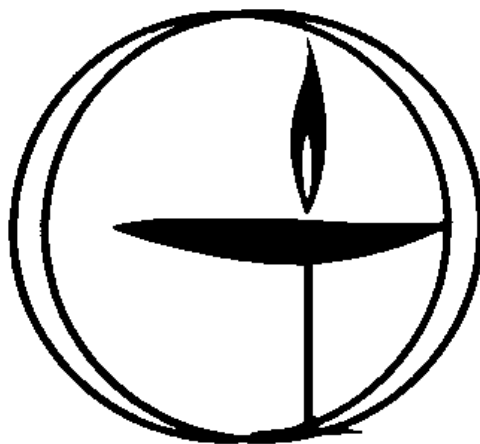


# **Unitarian Universalist Association**

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## **Staff Report June 2005**



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

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## INTRODUCTION

This report outlines for you, by staff group, the work that has been done on your behalf this year by the staff of the Unitarian Universalist Association. It comes with great appreciation for their extraordinary work in a time of many new initiatives in response to the needs of our faith and our congregations.

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

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

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## **ADVOCACY AND WITNESS STAFF GROUP**

The UUA Advocacy and Witness Team is comprised of the UUA staff whose primary responsibility it to take UU values out into the wider world. We insert UU perspectives into key debates of the day through legislative advocacy, strategic media work, and through working in partnerships, domestically and internationally, with other religious and secular organizations that share our values. We also work with local congregations to be effective in this public ministry.

Advocacy and Witness Programs staff are perpetually engaged in strategic thinking about our effectiveness. Many competing demands vie for our attention, and we try to take each one seriously while respecting the limits of our resources and time. Following are updates on the major areas of focus we engaged in this year. Please bear in mind that these ‘categories’ are more like ingredients in a stew than discreet layers on a cake. There is much overlap between issues of race, class and gender!

### **Family Matters (UU Family Values):**

Reproductive Health: We launched a UU Reproductive Health Action Network (<http://www.uua.org/uuawo/new/article.php?list+type&type=31>) and helped to start a new religious advocacy coalition. Staff serve on the board and the membership council of the Religious Coalition for Reproductive Choice.

Comprehensive Sex Education: Working closely with Advocates for Youth, we held an advocacy training for 25 UU youth, young adults and adult allies. The CBS show *60 Minutes* filmed portions of this training and we hope will air them before GA. (<http://www.uua.org/uuawo/new/article.php?list=type&type=27>)

Marriage Equality: We provided support for the California Legislative Ministry’s campaign, provided advice for congregations and ministers across the country, and celebrated the first anniversary of the Massachusetts victory publicly and enthusiastically.

Global HIV/ AIDS: Staff supported the development of a UU network, worked with international partners, and engaged in shareholder advocacy in addressing this crisis. (<http://www.uua.org/uuawo/new/article.php?list=type&type=39>)

### **The Role of Religion in Society:**

Church/ state separation: The UUA President appeared on the WGBH-TV show *Basic Black* on the issue of government funding for religious social services. Washington staff worked diligently in a 70 member coalition of religious, civil rights and social service providers to end religious discrimination and uphold the First Amendment.

(<http://www.uua.org/uuawo/new/article.php?list=type&type=23>) Staff took a lead role in the Faithful Democracy coalition, a group of 16 religious organizations working to promote religious values, civic participation, and community partnerships and supported the forty-some Unitarian Universalists at the Parliament of World’s Religions in Spain, taking leadership roles in many presentations. Staff serve on the board of Americans United for Separation of Church and State, the Resource Center for Religion in Public Life, and The Interfaith Alliance.

### **Racial Justice:**

Reparations: Staff worked with All Souls Church in Tulsa and key national civil rights leaders to bring attention to the need for reparations after the riots in 1921 in Tulsa, Oklahoma.

The Sudan: Staff worked with the Save Darfur Coalition to promote a Save Darfur Sunday in April and, with the UU-UNO office, publicized the need to demand intervention (<http://www.uu-uno.org>). The UUA President, in an act of civil disobedience, was arrested at the Sudanese Embassy in August.

Racial profiling: Staff members are working in a broad-based coalition of civil liberties, immigration, religious and other groups on issues of immigration policy, racial/ethnic/religious profiling, and due process. They are planning a multi-year campaign promoting fair treatment for all.

Anti-slavery work: UU Holdeen India Program partners continue to focus on anti-slavery work, developing schools for former bonded children and migrant workers.

### **Economic Justice:**

Socially Responsible Investing: See the website on congregational socially responsible investing (<http://www.uua.org/finance/sri>).

Congregationally based Community Organizing: Over 100 congregations have joined interfaith and community coalitions to work on local issues of justice. (See [www.uua.org/justice/programs/cbco](http://www.uua.org/justice/programs/cbco) for more information.)

Legislative advocacy has centered on fighting cuts in Medicaid and calling for reauthorization of Temporary Assistance to Needy Families (TANF), as well as working with coalitions to advocate a federal budget that reflects values of compassion and human dignity. (See <http://www.uua.org/uuawo/new/article.php?list=type&type=87>).

International staff work for economic independence for a number of groups, both through the Holdeen India Program ([www.uua.org/international/holdeen/](http://www.uua.org/international/holdeen/)) and through relationships with indigenous groups of UUs in the Phillipines and India. The Jowai Unitarian Youth Cooperative is a micro-lending cooperative to fund new business ventures in India.

Staff serve on the board of Interfaith Worker Justice and the steering committee of Let Justice Roll.

### **New Resources:**

Sharing the Good News: A Public Relations Manual for Congregations (<http://www.uua.org/info/prmanual>)

Press Room—media materials for press and congregations (<http://www.uua.org/pressroom/>)

Virtual Tour of UUA Headquarters <http://www.uua.org/aboutuua.tour/>

Socially Responsible Investment resources for congregations. (See links at <http://www.uua.org/finance/sri>)

Social Justice Handbook from the Washington Office on Advocacy (<http://www.uua.org/uuawo/pdf/sjworkbook.pdf>)

### **How to stay in touch with our efforts:**

Staff from all of our offices lead workshops at virtually every UU conference held nationally or in districts—ask us! <http://www.uua.org/programs/justice/aboutaw.html>

A dozen Social Justice Empowerment Workshops were held in congregations last year and we'd love to hold more next year (<http://www.uua.org/programs/justice/ep/>.)

Our web pages hold vast amounts of information about our work. ([www.uua.org/justice](http://www.uua.org/justice)), ([www.uua.org/international](http://www.uua.org/international)), ([www.uua.org/uuawo](http://www.uua.org/uuawo))

We have a number of email broadcasts which share our work (<http://www.uua.org/programs/justice/forums>)

## **Unitarian Universalist Holdeen India Program**

The Unitarian Universalist Association Holdeen India Program (UUHIP) supports and strengthens the most marginalized and disadvantaged peoples in India in their struggle to address the structural causes of poverty and oppression and to promote economic and social justice.

Since the December 26<sup>th</sup> tsunami disaster, UUHIP has focused on our partners in Tamil Nadu who have been working for years in the now devastated coastal areas to promote the rights of those exploited, excluded even enslaved because of their caste, gender, religion or ethnicity. Unfortunately the systems of power and inequality and discriminatory social practices are so entrenched that even in times of such disasters, women and dalits continue to be largely ignored and left out of government, international and voluntary agency relief efforts.

Thanks to the UUA and UUSC's vision and cooperative efforts and contributions from thousands, UUHIP partners have provided relief, begun to rebuild lives and livelihoods and are demanding the government provide services to those most vulnerable and excluded.

UUHIP continues to strengthen and expand relationships and institutional linkages with the UU community: individuals, congregations and associated organizations. UUHIP and UUSC have discussed opportunities and strategies for collaboration including joint visits to India. The Office of International Relations is working with the Rissho Kosei Kai to visit Holdeen partners with UUHIP and UUSC. The RKK is already supporting one partner: the Self Employed Women's Association.

The 2 *UU World* articles and the "uu&me" insert featuring UUHIP and its partners, especially Vidhayak Sansad's anti slavery work and their schools for former bonded child and migrant labor, broadened UUs engagement with the Holdeen Program. Many UU congregations as well as religious education classes have requested more information as well contributing funds. The Director has spoken at several congregations and has also arranged for several UUs and ministers to visit Holdeen partners on the ground in India, especially after the tsunami. UUHIP and the Partner Church Council are exploring the possibility of UUA congregational partnership with Holdeen supported organizations. And the UU Women's Federation and UUHIP will present a joint workshop at General Assembly 2005 on violence against women featuring Mallika Dutt, the leader of Breakthrough.

Several other partners have also been recognized and honored. Ranjana Gaur and SARC in Uttar Pradesh have won the 2005 Perdita Huston Award for their work against trafficking and violence against women. Paromita Goswami of Elgar has been selected as a 2005 Yale World Fellow. French television is doing a story on our dalit partners and The Washington Post featured Vanangana's work empowering Dalit women. The new Fund for Global Human Rights is co-funding 18 Holdeen partners.

And last, the UUHIP Director has been selected to receive the 2005 Radcliffe Alumnae Recognition Award for UUHIP's work. She has been asked to speak on "Discovering Different Truths: In Search of Common Ground". The UUA's values, vision and support made this possible.

## **CONGREGATIONAL SERVICES STAFF GROUP**

“Committed to anti-oppression and justice, Congregational Services supports the health, growth and transformation of congregations.” This mission guides every aspect of the work and ministry held by the Congregational Services Staff Group. While far from perfect in our knowledge and implementation of anti-racist, anti-oppression, multicultural lenses, we learn from and with one another and support one another as we grow.

### **Anti racism, anti oppression, multiculturalism**

JUUST Change Consultancy was launched in the early spring. Information is on line at <http://www.uua.org/programs/justice/antiracism/consultancy.html> Consultants are ready to help congregations with a developmental process of congregation based anti-racist, anti-oppressive multicultural transformation and social action. By this ministry to congregations and their professional and lay leadership, JUUST Change consultants can help identify internal leaders; facilitate group processes in developing vision and mission, dialogue, problem-solving, team development, developing capacities for building partnership in the larger community, and goal-setting/action planning; Our resources encompass a broad range of voices and experiences, grounded in institutional/power analysis of racism, heterosexism/ homophobia, ableism, gender oppression, and classism, the intersection of oppressions, and wisdom about congregational change and transformation. The UUA is committed to creative partnerships with our congregations as we pursue living in Beloved Community. Our mutual task is to transform ourselves as congregations, so that we are vibrant, spirited, anti-oppressive, pluralistic communities. Our faith is best manifested through relationships that allow deep and honest sharing with one another about what matters most to us, including justice and standing strong against oppression. Such relationships involve active listening, the willingness to acknowledge mistakes, fears, or uncertainty, faith in one another's good intentions, and a desire for transformation that is stronger than the desire for safety and comfort.

Post GA training for newly elected and appointed UUA leaders will include work in systemic understandings of oppression and role/skill focused training that translate those understandings into the work of leadership.

All Regional Subcommittees on Candidacy have completed a basic anti racism, anti oppression, multiculturalism training similar to Beyond Categorical Thinking. The General Assembly Planning Committee devoted a day of their September 2004 meeting to a tailored consultation applying ARAOMC lenses specifically to their work and roles. Ministers of Color/ and Latino/Latina/Hispanic ministers serving UU congregations participated in a mid-April retreat.

The New Congregation and Growth Resources Office completed anti-oppression, anti-racist, multicultural editing processes for Planning for Growth and Vitality Weekend Workshops (for Small and Smaller Mid-size -151 to 350 members – congregations). Both were successfully piloted this spring. Links to information on Planning for Growth workshops and some other congregational resources can be found at <http://www.uua.org/cde/education/index.html>

Jubilee One (introduction to anti racism) and Jubilee Two (power and systems analysis of racism/anti racism) workshops as well as ongoing support for those Districts and congregations that have or are creating Transformation Teams continued during this year.

### **Growing and Sharing Our Faith – regional strategies**

This past September saw the first public worship service of the new Pathways Church. (Go to [www.pathwaysuu.org](http://www.pathwaysuu.org) for more information.) This large church start is part of the regional growth strategy for Dallas Fort Worth. Another strategic goal is support for small and mid size congregation ready to grow and is currently being addressed in two ways. The North Texas Association of UU Societies in the second year of awarding growth grants to DFW area congregation for specific projects related to growth. In anticipation of the marketing planned before, during and after this General Assembly in Fort Worth, DFW area congregations have participated in a workshop and planning process focusing on welcoming and hospitality. Our Fort Worth marketing plan includes building awareness of our faith through bill boards, radio and print and outreach through direct mail and a telemarketing campaign with follow up direct mail during “back to school” time in late July/early August.

The Unitarian Society of New Haven (USNH) and the First Unitarian Church of Worcester, along with three other congregations in the Clara Barton District, are partners in a strategy focused on growth from midsize to large congregations. These congregations share similarities of size and a vision of our liberal faith and its importance in the community. The partnership will help strengthen ties to the UUA and lateral relationships. At the end of this four-year partnership it is expected that USNH will be a large congregation of 600 or more members, capable of robust self-sufficiency at this new size and eager and willing to assist other congregations who share a vision for growth. The partnership includes designing a systematic evaluation program to foster the replicability of blueprints for growth and exploration of which outreach techniques were most successful in attracting visitors, which characteristics distinguish casual visitors from those who become members and which elements of our programs and opportunities were most engaging to new members and most effective in retaining existing members. This process of documentation will include resource-sharing with the midsize cluster of churches in the Clara Barton District. This collaboration in strategies, documentation and evaluation will create a model for growth with the UUA that can be adapted for use with other midsize congregations. Because the five congregations differ from one another in some significant ways, findings that are common among them will very likely be ‘best practices’ for other congregations as well.

The Joseph Priestley District completed two regional plans for growth this spring – for the Philadelphia/Wilmington and Baltimore/Washington areas. Planning committees and task forces representing congregations in each region worked for a year to explore, define and develop the strategies. Congregations in each region were then given the opportunity to affirm the plan they are part of. Information on the plans and the strategies for each region can be found via a link on <http://www.jpduua.org/> Even as the plans were developing, work was beginning on a component of each strategy. In the Baltimore/Washington region, the Davies Memorial congregation developed and began to implement, with District and UUA support, a growth plan focused on outreach to their neighbors in the largely African American community of which Davies is a part. In the Philadelphia/Wilmington region, the district and UUA have been working closely with the Mainline Unitarian Church on first steps in the planting of a large congregation in northern Chester County, PA.



“Imagine a religion” was the theme of the marketing campaign for the eight UU congregations in the greater Houston area. A focus on welcoming and hospitality, including a best practices and planning workshop, preceded the launch of the second generation of The Uncommon Denomination media developed for use in Houston, including bill boards, radio, print ads and direct mail. The campaign ended in mid-April, with a follow up planned for the back to school season. By the time the campaign is finished we will have generated 50 million “impressions” (number of times a message could have been seen or heard). 300 new visitors have attended one of our churches in the months of January and February. The Bay Area congregation is averaging over 100 first-time and returning visitors a month, which represents 15% of their church attendance. Their marketing representative stated, “We had over 211 folks at Easter Sunday- only one other time in the history of our church have we had so many people.” First UU had a high of 120 visitors on a single Sunday (two services) and is growing rapidly with over 540 members. Northwest Community says that over 50% of their visitors are citing the advertising for the reason that they are attending.

As UUA strategies for growth have shifted to a regional and tailored approach, the New Congregation and Extension Ministry Programs have been phasing down. In FY05, six congregations in five districts received subsidies totaling **\$54,278.00** from the grant given to the UUA from the Veatch Program of the Unitarian Universalist Congregation at Shelter Rock. The grant monies were distributed through the Extension Ministry (3 congregations), New Congregation Ministry (3 congregations), and Extension RE Leadership (5 of the 6 congregations in Extension or New Congregation Ministry).

### **The Uncommon Denomination**

Congregational Services continues to receive an average of two inquiries per week regarding the Uncommon Denomination from throughout the U.S. (and as far away as Brisbane, Australia!) with the preponderance from small and midsize congregations. A total of 40 congregations have covenanted with the UUA for the use of these resources. 25 others who are researching use of or using some of the Uncommon Denomination Materials, including those that are issue-focused. “*Civil Marriage is a Civil Right*” banners and ad messages, have garnered the most interest of the issue-focused materials over the last six months. We’ve received positive feedback on the beginning tools such as the online form “*Before You Begin*”. These tools help congregations to identify their strengths and weaknesses and guide them through the self-evaluation process. For those congregations looking for ways to reach out to their communities or to add to their membership numbers, the Uncommon Denomination provides resources that start congregations on their way to identifying and promoting their own identity within the larger context of Unitarian Universalism.

### **New web resources**

The *New Congregation Development Resource* will guide congregations and districts in supporting grass roots new starts.

A new *Vision, Mission and Covenant Resource* provides several models to implement these important planning and identity defining efforts.

In partnership with the Small Group Ministry Network, a *small group ministry web site* was added to [uua.org](http://www.uua.org) earlier this year. New resources and links are being added periodically including some small group ministry session plans. Go to <http://www.uua.org/cde/sgm/>

*Balancing Acts*, a new resource focusing on safety issues in our congregations, became available this past January. Written by the Rev. Debra Haffner, it is grounded in our responsibility and commitment to keep our children and youth safe. Policies and practices that we can implement in our congregations to assure that the possibility of sexual abuse is greatly reduced are outlined and basic background information on the issues is presented. To access *Balancing Acts*, go to <http://www.uua.org/cde/ethics/balancing/>

## **Young Adult and Campus Ministry**

The Office of Young Adult and Campus Ministry remains committed to the transformation and growth of Unitarian Universalism and improving service to our member congregations. New resources and programs developed this year reflect these priorities and the philosophy that ministry to and with young adults is vital to the present and the future of our faith.

Two new resources are of special note this year. First among them is the Code of Ethics for Peer Leaders. This Code provides a framework for discussing the responsibilities of young adult leaders to themselves, their groups, our faith and our world. It was developed through an extensive consultation and accountability process with young adult leaders, ethics experts and communities with marginalized identities. Accompanying the Code are educational materials that help young adults discuss and implement it in their groups. The Code of Ethics has already been formally adopted by the Continental UU Young Adult Network (C\*UUYAN) for use in their work. The Code and educational materials are available on-line at [www.uua.org/ya-cm/youngadults/Ethics.html](http://www.uua.org/ya-cm/youngadults/Ethics.html).

Also of note is a brand-new video to be unveiled at General Assembly and for sale at the Bookstore booth. Designed for use as an outreach tool to young adults 18-25, the video was a joint project of the UUA and C\*UUYAN. Young adult filmmakers Ben Ernst and Sukhi Sanghera traveled around the US and Canada seeking young adults living their faith through worship, community-building and social justice. The result is a spectacular short film suitable for use before major programs and at outreach events.

A new consulting program will provide better and more long-term services to congregations. Nine new consultants were trained in May to join the team of trainer-consultants available to assist congregations in beginning, sustaining and growing their young adult and campus ministry programs. Consulting assistance will now be available to congregations for a small fee (Fair Share contributors to the Annual Program Fund will receive a large discount and will be eligible for grants covering up to 100% of the cost); these services will provide uniquely-tailored assistance to congregations over a period of three to four months, and will include an on-site visit and training.

Two new projects involve collaboration with the Youth Programs Office. This spring, over 200 youth and young adults attended three regional anti-racism conferences, held in Portland, OR, Bloomington, IN and Cambridge, MA. These conferences were led by members of the youth and young adult anti-racism trainer-organizer program. In addition, a joint advocacy project for youth and young adults has been launched with the Washington Office for Advocacy and the

Office of Congregational Advocacy and Witness. Focusing on sexuality education, reproductive rights and gender equality, the project has already sponsored an advocacy training and lobby day in Washington, DC. More information on this advocacy project can be found on-line at [www.uua.org/ya-cm/youngadults/advocacy.html](http://www.uua.org/ya-cm/youngadults/advocacy.html).

Campus Ministry remains an important focus for energy, vision and resources. In conjunction with the UU Campus Ministry Advisory Committee, the Office of Young Adult and Campus Ministry is developing advanced-level training for congregations to supplement our basic workshop offerings. Foremost in this program is the new Campus Ministry Seminar, a six-week course for campus ministry staff people and dedicated volunteers. The seminar will allow participants to explore issues facing campus ministry groups in significant depth, and will be offered for the first time in the fall of 2005.

Finally, at General Assembly 2004, nine congregations were recognized as Anchor Congregations for their leadership in providing ministry for and with young adults and college students. The Anchor Congregation designation is a five-year certification that requires congregations to address institutional support for young adult and/or campus programs, outreach to new young adults and the creation of a regular, balanced program. Information on the Anchor Congregations and their programs (as well as an application for the program) is available on-line at [www.uua.org/ya-cm/congregations/AnchorCongregations.html](http://www.uua.org/ya-cm/congregations/AnchorCongregations.html).

### **Congregational Fundraising Services**

The mission of the Office of Congregational Fundraising Services is to provide consulting services to congregations in the areas of annual stewardship drives, capital campaigns, strategic planning, and endowment program development. In addition, the director of the office works with the Congregational Properties and Loan Commission to manage the UUA loan portfolio.

During the 2004-2005 fiscal year, the 11 fundraising consultants made a total of 188 visits to 95 different congregations. The consultants made 30 initial assessment visits. They guided 19 congregations through successful capital campaigns, helping these congregations to raise \$7.6 million for building projects. The consultants also helped 16 congregations to develop long-range strategic plans and they guided 10 congregations through successful annual stewardship drives.

In addition, three congregations received building loans, two congregations received loan guarantees, and six congregations were given grants to help finance their first spiritual home. Information on Congregational Fundraising Services may be found at <http://www.uua.org/cde/fundraising/>

### **Services to Large Congregations**

Established six years ago to better serve the UUA's largest congregations (those with 550 or more adult members), the mission of this office is to identify appropriate resources and develop strategies to deliver them to large congregations in partnership with the Association and its districts. There are presently forty-five large congregations served by this program, as well as several congregations that are edging towards 550 members, which receive services aimed at helping them manage the size transition.

Approximately 300 participants attended the sixth triennial UUA Conference for Large Congregations, which addressed the theme, "Congregations in Good Company." Thirty of the UUA's forty-five largest congregations were represented, including CLF. Included in the overall number were 41 participants from 13 "larger midsize" congregations, each of which had been identified as having the potential to join the list of large churches in the not-too-distant future. At least half of these midsize congregations are likely to cross the threshold before the next large church conference.

During the past year, services have been provided on-site with the staff and leaders of nineteen congregations in a variety of ways, including leadership development workshops, board retreats, staff consultations, and overall reviews of congregational systems. In a typical month, the office receives 113 requests for information and advice by telephone and email. The office provided support to two regionally-based large church training events.

The Large Congregations Staff Team is inter-departmental and meets on a regular basis to examine the needs of large churches, review the UUA's efforts to serve them, and establish priorities for our ongoing work in this area. The UUA was represented at "Exploring the Large Church," the first of four gatherings being convened by the Alban Institute. In addition to generating increased awareness of the challenges facing large churches and strategies for addressing them, this series of gatherings will lead to the establishment of an Alban-sponsored Large Church Network, a cross-denominational initiative based on the assumption that "we learn better from people who are in our same *setting* rather than in our same *system*." The UUA continues to be the only American denomination known to have an office dedicated exclusively to serving large congregations, a fact that did not go unnoticed at the Alban gathering.

## **DISTRICT SERVICES STAFF GROUP**

The mission of the district services staff group is to foster the spiritual and institutional health of Unitarian Universalism by serving as leaders, consultants, advocates, and educators in our community of congregations.

There are twenty districts of the UUA. All have a *District Executive* who serves as the Association's local presence and is the first person to contact about UUA services. Many districts also have *Program Consultants*, who serve the District in particular program areas based on local priorities, most often in the area of lifespan faith development or growth. District staff members provide direct service to Unitarian Universalist congregations, including consultations on a wide variety of congregational issues such as long-range planning, lay leadership development, ministerial transitions, and conflict management.

President Bill Sinkford stated last year that "Everything the Association and our congregations do is, or should be, about spiritual growth and depth." Whether working with individual lay leaders, professional religious leaders, with individual congregations, clusters, districts, or regions, one can see that the majority of district efforts relate directly or indirectly to the training of lay leaders on how to effectively lead mission-based congregations.

For example, this past year, InterConnections Resources ([www.uua.org/layleader](http://www.uua.org/layleader)), the website designed specifically for lay leaders, has been redesigned for easier navigation. As part of that remake, the Events Calendar was improved. The calendar now links layleaders directly to their district online calendar instead. Most district events relate directly or indirectly to the training of lay leaders and, often, the development of professional staff. Additionally, with this new Events Calendar layout, lay leaders have the opportunity to quickly and easily see offerings by other districts simply by clicking on that district's link.

District staff members are promoting the concept of "transformational leadership" in workshops, conferences, and individual consultations. Transformation leadership is defined as a shift from "maintenance to mission". Articulated by Roy Oswald of the Alban Institute and others, it means minimizing the administrative activities devoted to maintaining an organization and maximizing those efforts that lead to congregations fulfilling their vision of ministry. This shift to transformational leadership changes the kinds of workshops and consultations being offered by district staff, and the way in which they spend their time.

This includes more focus on creating "clusters" of congregations and promoting group training opportunities. While clusters have existed for years, these efforts are increasing in every district. In the east, some of these cluster trainings are cross-district, an indication that district boundaries are melting when they interfere with effective service to congregations.

At the most recent annual meeting of district staff a Weekend Leadership School that is being offered in the Pacific Southwest District was described. Modeled after the week-long leadership schools which have been in existence for years, this weekend model involves day-long experiences in the areas of theology, worship, church fundamentals, and advanced leadership. It occurs over a period of eight weeks. It has successfully addressed the challenge many have raised that the cost and time required by traditional leadership schools was prohibitive to too

many people. Other districts are exploring this new model and some have already been replicating it in some form.

The issue of “measurements” has become a hot topic in the districts – How do we know whether our work makes a difference? A task force consisting of four district staff members and two district presidents representing the District Presidents Association has been formed to explore ways of measuring our impact.

Lay leaders have often asked for leadership materials that could be listened to while driving to or from work or church, so a compact disk was created and will be distributed to congregational presidents and others at General Assembly. It consists of twenty-five three-minute essays on various aspects of leadership and vital congregations, many created by district staff members. Designed to be short and punchy, each essay makes one simple point about leading effective congregations. Additional resources for those wanting to go deeper are referenced. It is expected that this will be the first in a series of CDs for lay leaders.

With approximately 70% of our congregations consisting of 150 or fewer members, making resources available to them is crucial. The first annual meeting of small congregations entitled *Small Is Beautiful* was held at Ferry Beach this past year, and more are scheduled to occur in the coming years. While midsize and large congregation conferences have historically been held as national or continental events, the more limited resources of small congregations makes regionalized gatherings more reasonable.

*Small Talk*, a newsletter for leaders of small churches written and edited by one member of the district staff, was introduced this year in online form. Lay leaders, professional leaders, and UUA staff across the nation are welcome to subscribe to this resource at no cost.

Similarly, growth conferences are being held at regional level as well. Last year a “Raising the Roof” conference was successfully held as a cross-district effort of Midsouth, Florida, and Thomas Jefferson district.

A major part of the Growth Strategy is to “lift up” (honor, publicize, provide recognition to) congregations that have broken through some barrier that has held them back from numerical growth. District staff have assisted four “breakthrough congregations” as they prepared to share at General Assembly what inspired them to achieve their successes. These breakthrough congregations were asked to imagine how their story can inform and inspire others towards their vision of a vital, growing congregation. Additionally, district staff have and will continue to encourage these congregations to present their stories at district conferences. Breakthrough congregations have been asked to “partner” with other congregations that are working to address some challenge the breakthrough congregation has successfully addressed. And each of the four are being featured in InterConnections and the UU World.

## IDENTITY-BASED MINISTRIES STAFF GROUP

Identity-Based Ministries seeks to make Unitarian Universalism a more welcoming, inclusive, empowering and just faith community for Unitarian Universalists who identify as bisexual, gay, lesbian and/or transgender; economically oppressed; Latina/o and Hispanic; multiracial families; people of color and people with disabilities. The work of this staff group supports the Unitarian Universalist Association of Congregations' commitment to growth and promoting liberal religious values in the world by advancing diversity in UU ministry and membership. Identity-Based Ministries employs consultation and develops resources to:

- Advocate for the interests and concerns of constituent groups identified above;
- Educate about anti-oppression and justice issues that affect identity-based constituent groups;
- Support identity-based leadership development and community building and
- Help congregations become more welcoming, affirming and inclusive of the gifts of diverse ministries and membership that people from identity groups listed above bring to Unitarian Universalism.

In 2004 – 2005, Identity-Based Ministries refined and clarified its core work, and continuously focused on the question “how does this staff group’s mission and core work advance the mission, goals and strategic priorities of the Unitarian Universalist Association of Congregations?”

Identity-Based Ministries supports the strategic priorities of: 1) growth of Unitarian Universalism and 2) promoting liberal religious values in the larger world by advancing diversity in Unitarian Universalist ministry and membership. Diversity of ministry and membership is necessary to translate Unitarian Universalism to the larger multicultural community and to bring the richness of these cultural and social identities into the context of Unitarian Universalism. The programs of this staff group also accomplish a third strategic priority of the Association, service to congregations, through programs that enhance congregations’ capacity to welcome, affirm and include diversity in ministry and membership.

Highlights of Identity-Based Ministries 2004 – 2005 program year include the following:

**39 Beyond Categorical Thinking (BCT) Workshops** – Beyond Categorical Thinking is a program designed to help Unitarian Universalist congregations welcome ministers who identify as bisexual, gay, lesbian and/or transgender; people of color and/or Latina/o and Hispanic; and people with disabilities. In addition, BCT provides congregations a snapshot of their readiness to welcome and affirm the multicultural diversity such leadership and members bring to the UU community. Thanks to the efforts of interim ministers to encourage congregations in search to go through the BCT process, and despite the availability of fewer volunteer facilitators, Identity-Based Ministries provided 39 BCT Workshops – a number that represents more than half of UU congregations in search -- as of April 1, 2005. Along with these workshops, BCT has worked with several congregations after they have called ministers of color and Latina/o and Hispanic ministers. To keep up with the demand for BCT, Identity-Based Ministries provided training for new BCT facilitators in June 2005. Identity-Based Ministries is examining ways to build on the success of BCT to better serve congregations and ministers in search.

**41 New Welcoming Congregations** – The Welcoming Congregation Program recognizes UU congregations that undergo a process of education, reflection and congregational vote to identify their community as openly welcoming of bisexual, gay, lesbian and/or transgender people. As of April 1, the number of Welcoming Congregations totaled 442 or 43.6% of UU congregations in the United States. In addition, 35 congregations have requested the Living the Welcoming Congregation curriculum, which was launched within the last year. No other religious denomination matches the percentages of Unitarian Universalist congregations in welcoming bisexual, gay, lesbian and transgender people. Simultaneously, more Unitarian Universalist congregations view becoming a Welcoming Congregation as part of a process of continuous learning and growth rather than an end, and the Office of Bisexual, Gay, Lesbian and Transgender Concerns hears significantly fewer expressions of fear among congregations about being identified as “the gay church”.

**Accessibility/Anti-Ableism Online Resources** – This project is aimed at providing Unitarian Universalist congregations with online resources about how to make every aspect of congregational life accessible to all people – including people with disabilities. The website departs from the typical “medical model” to embrace a social model of disability. Most importantly, this resource reflects Unitarian Universalists’ insistence on going beyond information about disability to embracing a theology of wholeness and justice. Three sections (*Disability 101*, *Environment*, and *Worship Resources*), containing 48 separate files, have been completed by Rev. Devorah Greenstein, the Accessibility Program Associate, who worked collaboratively with people with disabilities to design a website that speaks with the voices of people with disabilities while meeting the education and information needs of congregations. When completed, the Accessibility Website will have seven sections, including everything from readings to use in an accessibility worship service to how to order a Braille hymnal to social justice actions that can be undertaken by a congregation to support anti-ableism activism in their communities.

**Retreat and Conference Ministers of Color and Latina/o and Hispanic Ministers in UU Congregations** – Identity-Based Ministries staff collaborated with staff of Ministry and Professional Leadership, Congregational Services, and the Joseph Priestley District to organize a retreat and conference for parish ministers who identify as people of color and/or Latina/o and Hispanic at the Kellogg Conference Hotel/Gallaudet University in Washington, DC on April 14 – 17. Goals of the conference included sharing stories and models of health and wholeness in ministry, providing collegial support and community, developing leadership and identifying ways to support successful cross-cultural settlements and diversity of ministry in congregations. This project was sponsored by the Joseph Priestley District with a generous grant from the UU Funding Panel, and additional financial support provided by Congregational Services, Ministry and Professional Leadership and Identity-Based Ministries staff groups.

**Freedom to Marry** – The reorganization of the UUA has resulted in Identity-Based Ministries staff participating in cross-staff collaborations on a range of projects and programs, the most visible being the Association’s advocacy on marriage equality. Rev. Keith Kron, Director of the Office of Bisexual, Gay, Lesbian and Transgender Concerns in the Identity-Based Ministries staff group, also serves as a member of the UUA’s Public Witness Team. In this latter capacity, Rev. Kron and members of the OBGLTC staff have consulted with congregations in California, Connecticut, Maryland, New Jersey, New York, Oregon and Washington where Unitarian Universalists are often in the forefront of work to



advance marriage equality. OBGLTC has also administered grants from the President's Freedom to Marry Fund to support forums, banner campaigns and public witness opportunities of UU congregations in Colorado, Georgia, Maryland, Massachusetts, Ohio and Pennsylvania.

**Leadership Development Resources** – Identity-Based Ministries engaged consultants to assist with the development of several organizing guides, facilitator manuals, and identity-based organizing events. These include the Anti-Racism for People of Color Facilitators Guide, the Youth of Color Leadership Development Conference Organizing Manual and the Multiracial Families and Families of Color Retreat Organizing Guide. Next steps include identifying volunteers who will be trained in using these resources.

A six member staff group cannot achieve the ambitious goals articulated in this report without the participation of persons from the constituent groups served by Identity-Based Ministries' programs and congregations committed to a common vision and goals. Identity-Based Ministries appreciates the opportunity to collaborate with UUA staff groups, affiliate organizations, continental committees and other volunteer leaders and UU congregations who participate with us in extending the welcome of Unitarian Universalism to all seekers of a liberal and affirming faith.

## **LIFESPAN FAITH DEVELOPMENT STAFF GROUP**

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

This has been a particularly dynamic year in LFD with several developments of long-range significance.

First, the process of evaluating and revitalizing the Association’s **ministry with and for youth** is now underway. An important first consultation was held in February 2005, at the request of the Board of Trustees. President Bill Sinkford and Board member Megan Dowdell were co-conveners of this gathering of thirty youth and adult stakeholders from across the Association (including youth members of the YRUU leadership, youth who do not take part in YRUU activities), parents, youth advisors, ministers, religious educators, and UUA Administration, Staff and Board Members. An eight-member Consultation Planning Team was selected to propose a process for taking us forward. This representative group began its work in April and will share its recommendations with the Board of Trustees, the YRUU structure, and the entire Association.

An overall plan for the **Lifespan Integrated Curriculum, *Tapestry of Faith***, was presented to the BOT at its April meeting. The total budget, including necessary web support, is approximately 1.1 million dollars, of which approximately \$600,000 is designated for the eagerly anticipated children’s core curriculum. [The total budget represents \$7.50 for every signed member of a UU congregation.] About one-third of the total is in hand, and Stewardship and Development is confident that sufficient funding will be forthcoming to begin development of the integrated K-6 children’s curriculum. This is very significant and exciting news for our congregations, for the Lifespan Faith Development staff group, and particularly for its Curriculum Office. We anticipate publishing the curriculum online, free of charge, within three years of the initial author’s meeting, which could take place as early as this summer.

Another important development is the official launch of **Chrysalis**, the training and recognition program for youth and adults involved in youth ministry. Reminiscent of the Renaissance program for religious educators, this program offers a variety of trainings and certificates of recognition to participants in these 15-hour trainings.

### **New Resources Delivered**

- *Welcoming Children With Special Needs: a Guidebook for Faith Communities* by Sally Patton, published in September, 2004.
- *Nurturing Children and Youth: A Developmental Guidebook* by Tracey L. Hurd published in June 2005. This is the first in the Toolkit Series of resources from LFD.
- *Safe Congregations Handbook: Nurturing Healthy Boundaries in Faith Communities* published in June 2005.
- *Building Your Own Theology II: Exploring* by Richard S. Gilbert, a fundamental revision of the original, published in June 2005.
- *UU Faith Works: Promising Practices for Lifespan Learning Communities*, a collection of resources for lifespan religious education programming was published online in August 2004 and February 2005.

- The UU Family Network Clearinghouse 2005 Packet, *Open Book: Family Stories Are Faith Stories*, published online in May 2005.
- Family Matters Task Force (FMTF) booklet series, *Taking It Home: Families and Faith* published online in June 2005. Titles include: *Let's Talk About Respect*, *Let's Talk About Time/Money Balance*, *Let's Talk About Marriage and Committed Relationships*, *Let's Talk About Divorce and Broken Relationships*, *Let's Talk About Families and Loss*, *Let's Talk About Interfaith Families*. CDs with the text of these booklets will be distributed at GA 2005.
- *Worship Web*: In December we began to revitalize the UUA's worship web, identifying a UU liturgical calendar that made sense to our congregations, and collecting, evaluating, organizing, and posting materials for religious professionals and lay worship leaders. A new collection of resources was launched in March for the spring season.
- UU intergenerational worship service to help congregations celebrate the National Observance of Children's Sabbaths (October 2005) was published in Children's Defense Fund's *Children's Sabbaths Manual 2005*.
- *An Our Whole Lives Grades K-1 / Grades 4-6 Training of Trainers* was held in August 2004 to prepare teacher-trainers throughout our Association to support the quality and growth of this important resource.
- Website resources for congregational to use with children on current topics included images of war; democracy, the election and children (<http://www.uua.org/news/2004/voting/041019children.html>); and the Tsunami crisis ([http://www.uua.org/news/2004/050105\\_hurd.html](http://www.uua.org/news/2004/050105_hurd.html)).
- Teacher Development resources: an on-line needs assessment survey was conducted in the fall of 2004. Preliminary results were published in the February edition of UU Faithworks. A teacher development website, for RE teachers, religious educators, and parents, was launched in May 2005.
- The Youth Office published two issues of *Synapse*, the magazine of the Young Religious Unitarian Universalists. The fall theme was anti-racism. The spring theme was sexuality. *Synapse* is published online at [www.uua.org/YRUU/synapse](http://www.uua.org/YRUU/synapse). It is mailed free to every UUA congregation and also has over 1000 subscribers.
- The *Chrysalis Youth Leadership Program* added a new Advanced Advisor Training to the list of trainings offered. Work has started on bringing the Youth Chaplain training into the *Chrysalis* program The *Chrysalis Training Program Manual* is available as well as in print from the Youth Office.
- *Our Whole Lives Grades 7-9* has been significantly updated by experts in the field and will soon be reprinted.
- Pamphlets: *Faith of a Christian*, a new pamphlet by Stephen Kendrick was published; six others were revised; three other new pamphlets are in publication for summer/fall: *Child Dedication* by Linda Olson Peebles, *Religious Hospitality* by Peter Morales, and *Leap of Faith* by the Youth Office; and four other titles are in development.

### **Resources in Development**

- A revised and updated *Youth Group Handbook*, which includes the game book, *Deep Fun*, will be published in October.
- *Families: A Unitarian Universalist Program for Junior and Senior High Youth* by Helen Bishop, Susan Grider and Tracey L. Hurd was field-tested in twenty congregations and will be revised on the basis of feedback and published on the web in the fall, 2005.
- *Exploring Our Identities Through Poetry*, a program for UU high school youth by Karen Harris, was also field-tested this year for fall online publishing.

- A very substantial *Coming of Age* handbook is almost complete for a fall 2005 field-test. Sarah Gibb is the primary author.
- A new “Couples Enrichment” adult program appropriate for all couples in committed relationships is being written by a UU team of authors from the UU Congregation of Somerset Hills for field-test in early 2006.
- Dan Harper and Matt Hartgering are writing a new youth worship/spirituality resource for youth and their adult allies.
- An Identity Group Manual: a resource for local and district/regional youth groups seeking to incorporate racial identity caucusing into their Anti-Racism/Anti-Oppression work is being written by Jennifer Dunmore and Megan Selby.
- A series of print resources for BGLQQT youth will be presented at a GA 2005 workshop and then will be available online.

### **Changes**

Just to note the following changes this year:

- The Youth Office had to make the painful decision to discontinue its sponsorship of Continental Conference (Con Con). In recent years attendance had declined, the health of the community had declined, it had incurred annual budget deficits, and it demanded a disproportionate amount of Youth Office staff time and resources. GA Youth Caucus and YRUU Social Justice Conference have proved the more productive and popular continental conferences.
- After 12 years, Rev. Pat Hoertdoerfer is retiring at the end of June as Children’s, Family, and Intergenerational Programs Director. We will miss her energy and her devotion to family ministry, safe congregations, interfaith collaboration, eldering, and peace and social justice, among her many passions.

## **MINISTRY AND PROFESSIONAL LEADERSHIP STAFF GROUP**

The Ministry and Professional Leadership Staff Group (MPL) has continued its essential work of helping to recruit, develop and support highly qualified and trained professional leaders for service in UU congregations and to carry our ministry and message to the larger world. The constituency served is a large one – over 1,000 Unitarian Universalist congregations, their leaders, and the approximately 1,500 Unitarian Universalist ministers serving in congregations and in the community, 475 individuals preparing for UU ministry, 900 religious educators, 600 musicians, and 300 administrators.

Through the past year this office has either begun or maintained its involvement in a number of new or continuing important initiatives including the following.

- We have continued our ongoing efforts to better understand and to educate ourselves and those we serve about the challenges we face relating to the racism, oppression and lack of understanding that complicate and frustrate our efforts to build more inclusive and welcoming Unitarian Universalist faith communities and more diverse leadership for them.
- We have paid real attention and put much effort into providing better resources and guidance to congregations about building congregations that are as safe as we can make them and establishing hiring and screening systems that make sure we truly know those we empower to serve in our name.
- We have been working diligently and constructively to build stronger bridges of understanding and mutual support between the ministers, religious educators, musicians and administrators who serve our movement in different ways but with a common commitment to Unitarian Universalist religious values and understandings.
- We have been fully engaged in finding ways to build stronger support for and understanding of Unitarian Universalist community ministry and of the important gifts and opportunities it brings to our movement.
- We have been working to assure that those serving Unitarian Universalist congregations and institutions are compensated fairly and that all who qualify are participants in our health, life, and disability insurance programs and the Unitarian Universalist Retirement Plan.
- We have actively supported the ongoing development of the Religious Education Credentialing Program, the constant refinement of the credentialing process followed by the Ministerial Fellowship Committee and the new certification programs of the Unitarian Universalist Musicians Network and the Association of Unitarian Universalist Administrators.

The staff of Ministry and Professional Leadership are grateful for the progress made this year, and for the creativity, vision, commitment and faith of those lay and professional leaders for whom and with whom they work.

## **Ministerial Credentialing**

The Ministerial Credentialing Office continues to consider as its high priority the charge to create and support a ministerial credentialing process that at its core is anti-racist, anti-oppressive and multicultural. This past year, the Regional Sub-Committees on Candidacy have been receiving anti-racist and anti-oppression training. The credentialing process overall was audited for anti-racism and anti-oppression concerns by the Transformation Committee for Wholeness and Justice, and their important feedback and suggestions are in the process of being fully integrated. The Regional Sub-Committees continue to provide important support and discernment for aspirants and candidates who are seeking ministerial fellowship. Now five years in existence, the Regional Sub-Committees on Candidacy have met with 375 persons preparing for the ministry.

In response to work being done by the Diversity of Ministry Team, the Internship Clearinghouse Coordinator made contact with all interns whom the Ministerial Credentialing Office had reason to believe might identify as persons of color, ethnic minorities, or as being from traditionally marginalized communities to support them in their internships in whatever way possible. The Internship Clearinghouse continues to be an increasingly comprehensive web resource and the Coordinator is available to address any internship related concerns. Two popular workshop opportunities focused on becoming a teaching congregation will be offered again at General Assembly this year, as well as a workshop during Professional Days on the learnings from interns of color and those from traditionally marginalized communities. The Internship Stipend Grant Program received a record number of applications and six congregations and two renewal awards were determined, totaling \$33,700. This summer, the Ministerial Credentialing Office will be re-evaluating this program and its goals toward a possible re-design.

At the present time, the Ministerial Credentialing Office has files on 475 persons who are actively preparing for ministerial fellowship. Women now comprise two thirds of all individuals preparing for the ministry. There continues to be a growing number of persons who plan to serve Unitarian Universalism as community ministers. There are many fine future leaders coming along!

## **Religious Education Credentialing**

Nine religious educators were awarded credentials this year. There are currently 45 participants in the Religious Education Credentialing program: twenty-one are seeking the Credentialed Religious Educator level; twenty are seeking the Credentialed Religious Educator Masters level; and four are seeking the Credentialed Religious Educator Associate level.

Increased clarity in structure and format of requirements was given to the Religious Education Credentialing portfolio and program equivalencies. The reading lists were fully annotated. In continuing its effort to increase committee transparency of process, the RECC initiated alternating an open meeting day and a time for public comments at its meetings. In addition, a précis of the meeting minutes and the report of the credentialed observer of the meeting have been published on the UUA website.

Scholarships totaling over \$8,000 were awarded to religious educators this year. Applications were accepted for the first scholarship from the Veridan Fund for Religious Education

Excellence. The VFREE scholarship was established through the generous contributions of family, friends and colleagues of the late Rev. Norma Veridan to honor Norma's life and ministry in religious education. The scholarship is a \$3,000 award to a participant in the Religious Education Credentialing program to be used to undertake a significant professional development experience in order to strengthen religious education in Unitarian Universalist congregations.

A project to envision the role of and necessary training for a professional interim religious educator was initiated. This year the project resulted in a pilot training program for professional interim religious educators to be conducted before GA 2005 in conjunction with the Orientation to Interim Ministry program.

The Renaissance program of modular training in religious education leadership was returned to its original home at the UUA for administration and content development. In partnership with the Lifespan Faith Development staff group, and in consultation with a Renaissance Program Advisory Committee, commitments were made to improvement in module delivery, targeted revisions to module content, and conception of new training modules. Twenty-four Renaissance module trainings were conducted this year in 14 UUA districts and Canada.

## **Settlement**

The Settlement Office serves congregations and ministers at times of ministerial transition and ministerial succession planning. As of April 10, 31 ministerial search committees have selected their candidate for full-time ministry, a decrease of 14 from 2004, itself a decline of 14 from 2003. Even allowing for some late selections, the final number will continue the three-year decline in settlement activity in recent years among ministers in UU congregations. Virtually all candidating weeks should be completed by General Assembly.

Among the most noticeable factors accounting for this shortfall has been the stability of especially senior ministries in our larger congregations. This trend, welcome in itself, creates a condition of "market illiquidity" for mid-career ministers who feel prepared for a new challenge. A second factor to note is what appears to be a greater reluctance among newer ministers to serve in geographical situations other than those they favor. The relationship, if any, between this greater "choosiness" and the ever-advancing average age of ministers entering our fellowship is one to watch.

The Settlement Office could not do its work without its District-related Ministerial Settlement Representatives. Nominated jointly by the District and the UUMA chapter, the MSR's educate, counsel, and guide congregations' boards and ministerial search committees in carrying out the most thoughtful, wide-ranging, and non-discriminatory search possible.

The Settlement Office is committed to an anti-racist, anti-oppressive, multicultural ministry. The Settlement Director serves on the Diversity of Ministry Team (DOMT) and maintains statistics on African American, Latina/o, Asian, Pacific Islander, and Native American ministers. Ministerial longevity among parish ministers served by DOMT continued its recent increase this year, suggesting that congregations' efforts to create conditions that nurture such longevity may be paying off.

Interim ministry plays a significant role in times of ministerial transition and succession. The 44 active AIMs (Accredited Interim Ministers) and AIMITs (AIMs in Training) take extensive advantage of programs offered by the Interim Ministry Network, and convene annually to reflect on their work and hone their special skills. In the year now closing they have served close to two-thirds of the interim ministries conducted, and appear likely to do so again in the year to come.

More congregations every year, due to their numerical growth and to their greater appreciation of their potential to effect transformation in the lives of their stakeholders, are looking to add an assistant or associate minister or MRE. As a result, there is also an ever-greater demand for interim ministers to serve on those capacities, and a related demand for interim senior ministers able to lead a more complex staff. The annual AIM Seminar seeks to address the latter need. “Orientation to Interim Ministry,” the annual training program for first-time interim ministers, seeks to address the former. At the same time, many other congregations are experiencing a need for interim Directors of Religious Education. In 2005 for the first time, the “Orientation” program will include breakout groups for interim second (or third) ministers and for prospective interim DREs.

In 2004-05 the Settlement Director collaborated with the Director of District Services in producing *Responsible Staffing: Guidelines on Screening Practices for Use by Unitarian Universalist Association Organizations When Adding Clergy, Professional Leaders, Staff, and Volunteers*. These comprehensive guidelines arrived at after consultations with a wide variety of UU stakeholders, meet a crucial need among our congregations, the UUA, and other UUA-related institutions. Now that they exist, the Settlement Office, the Ministerial Settlement Representatives, and the Field Staff will seek out the education and training necessary to provide adequate and sensitive counsel to search and personnel committees that find themselves facing difficult issues.

### **Professional Development**

This year \$50,000 was budgeted and spent to assist ministers and teams of religious professionals engage in Continuing Education opportunities. Such opportunities included aid for earned sabbatical taking, Doctor of Ministry degree programs, workshops on conflict resolution, Applied Suicide Intervention Skills training, retired ministers’ annual retreats, healing courses for hospice workers, the College of Preachers, and so much more. Each minister is eligible to request 1/3 of the cost of a continuing education opportunity, up to \$500 a church year – providing the finances are available.

Helping ministers to think about their professional development needs and plans, and providing resources for them, is a great joy of this work. Talking with ministers as they make decisions that impact their ministries and the lives of their loved ones is also important.

For the past year, the Settlement Working Group, on which the Professional Development Director serves, has met one day in advance of the scheduled MFC meeting to continue its work on the redesign of the Preliminary Fellowship process. Based on feedback from stake owners, the draft proposal was again redesigned and made simpler.

Ministerial candidates also included, for the first time, an anti-racism/oppression and multicultural essay as part of their packet of information. The inclusion of this essay at the December 2004 MFC meeting was a huge move to more fully incorporate anti-racism,



oppression, and multiculturalism into the theology, worldview, and praxis of our ministers, and therefore congregants.

The Professional Development office, along with the Office of Identity-Based Ministries, Congregational Services, and the Joseph Priestley District, created opportunity and space for sixteen parish ministers of color to come together for a time of continuing education, renewal, and support at the Parish Ministers of Color/Latino/a Conference and Retreat in April 2005. Participants consisted of several newly settled ministers (apprentices), several in early to mid-career, and a few ministers in their late careers. The retreat and conference focused on the development of the knowledge, skills and multicultural competencies necessary to create more inclusive, multicultural, and welcoming UU congregations, and support for the ministers who do this important work.

The Professional Leadership Coordinating Council was convened this year, with members representing all major groups of religious professionals served by the Ministry and Professional Leadership Staff Group (Ministers, Religious Educators, Musicians, Church Administrators, and Community Ministers). There are many areas in common among the groups, and as the members come together to share information and plan continuing education opportunities and programs with one another, the UUA as a *religious movement* will be more knowledgeable, more dynamic, and certainly more effective in UU congregations and the world.

### **Church Staff Finances**

The Office of Church Staff Finances has been very busy during this fiscal year with several major projects in addition to usual daily tasks.

The most groundbreaking work has been a feasibility study to determine whether the UUA should sponsor a *self-funded health insurance program* for the staff of local congregations. This appears to be the only route by which we could obtain any national plan for all our churches. The study of financial exposure and competitive market rates has been thorough and highly educational. The Church Staff Finances Office expects to announce the current status of this study at this General Assembly.

Under the direction of the UUA Compensation, Benefits, and Pension Committee, the office has undertaken an extensive study of compensation information of UU congregations; churches and synagogues in other religious bodies; salaries paid by secular not-for-profit organizations; and wage rates in various geographic areas of the US.

The Committee has proposed a new set of *salary range recommendations* that will be offered to UU congregations for use in 2006. The ranges will be available at this General Assembly at the table sponsored by the Council on Church Staff Finances in the display area. Also, see the UUA website at [www.uua.org/programs/ministry/finances](http://www.uua.org/programs/ministry/finances). Click on Compensation for details.

The District Compensation Consultant Program, jointly funded by the UUA and the UU Ministers Association, has functioned very well this year. A joint training event was held in March for Compensation Consultants and Ministerial Settlement Representatives. Dr. Barbara Brown has made a great contribution to the Program as Volunteer Coordinator.

Congregations are increasingly utilizing our group dental, term life, and long-term disability insurance offerings through MetLife. The disability insurance has been a financial lifesaver for the ministers and other church staff who have been medically unable to work for longer than 90 days. This insurance provides great comfort for congregations that might otherwise feel compelled to continue salaries to loyal staff who are medically disabled for an extended period.

The *UU Organizations Retirement Plan* managed by Fidelity Investments continues to grow in size and popularity in spite of stock market fluctuations. This is a 401(k) type plan and is not a pension program that pays a defined benefit after a certain number of years of service.

Gross contributions were \$9,104,592 during 2004 as compared with \$8,076,135 in 2003. This increase of more than \$1 million in new money shows confidence in Fidelity as the Plan manager and a positive response to the educational materials Fidelity has created for our participants. We receive excellent service from the Fidelity telephone representatives, the Fidelity staff with whom we interact daily, and the [www.Fidelity.com](http://www.Fidelity.com) website.

As of March 2005 the Plan had 2,425 participants employed by or serving 593 employer-congregations, and the individual accounts of these persons totaled \$135,086,005. Three hundred ten ministers or employees were making pre-tax voluntary contributions over and above the amounts contributed by their employers.

Depending on the number of years of participation in our Plan, and the level of contributions made by employers and employees during those years, there is an extreme variation in the size of participant accounts. A small number of accounts are generously funded, and these individuals can expect a satisfactory level of income during their latter years.

Others who joined the Plan in midlife, or for whom very small contributions were made, or who invested in an overly conservative manner and thus “missed the market,” will not be so fortunate in the amount available from this source.

We are extremely worried about the inadequate balances in the retirement accounts of many participants who are still working, especially those who plan to retire in ten to 20 years. In March 2005, the average account balances for selected participants was as follows:

| <b>Participants</b>     | <b>Mean Average Account Balance</b> | <b>Median Average Account Balance</b> |
|-------------------------|-------------------------------------|---------------------------------------|
| Retirees age 60-69      | \$88,183                            | \$44,185                              |
| Still working age 60-69 | \$89,395                            | \$39,077                              |
| All participants 50-59  | \$55,433                            | \$26,120                              |

In the future, the Association anticipates a growing number of requests for financial aid from retired ministers and other retired church staff members who find themselves in circumstances of financial hardship, especially if there is any reduction in Social Security Retirement Benefits.

## **COMMUNICATIONS STAFF GROUP**

The UUA's Communications Staff Group publishes *UU World* as a benefit for UU congregations to provide for their members; the *InterConnections* newsletter and Web resource library for congregational leaders; Skinner House Books, whose titles for Unitarians Universalists include spirituality enrichment, meditations, guidance to congregational leaders, theology, religious history, and children's resources; and the UUA Bookstore, which sells UUA-published titles as well as titles by other publishers that appeal to UUs. Communications staffers also take part in the UUA's Interdepartmental Public Witness Team.

Sales of Skinner House titles have grown since the last General Assembly, with sales to bookstores expanding significantly. And an independent research house's new survey of a random sample of *UU World* readers found that the readers view it very favorably, with the average reader spending almost an hour with each issue. The big news from the Periodicals Office is still unfolding: *UU World* is about to get less frequent and more frequent, simultaneously.

### **Periodicals Office**

The May/June issue was *UU World*'s last as a bimonthly, and starting with the next issue, in September, the magazine will appear quarterly, with new issues timed to the changes of seasons. At the same time, a new *UU World* Web magazine will be unveiled, offering fresh content every week.

The print magazine will change only modestly. But the new Web magazine will be a vast change from the current *UU World* Web site, which is essentially an archive to which new material has been added whenever a new issue is mailed. The electronic magazine will publish fresh issues every week, and urgent news may sometimes be added even more often. Each week's issue will offer fresh inspirational material, timely news of UUs and their congregations and institutions, and helpful information for church leaders. Each issue will also feature either an exclusive web-only article or an article from the print magazine. There will be a frequently updated feature for UU activists, helping them keep up on what they can do to make a difference. And the Web magazine's front page will offer an easy way to sign up for weekly e-mails of fresh UU news and other material.

The quarterly print *UU World* and the dynamic new Web magazine together will cost the UUA substantially less than publishing six print issues a year. In this time of tight budgets, the Association's need to cut spending is reducing the magazine's frequency, but some of the resources freed by printing and mailing fewer issues are being directed to serving up quality UU journalism to audiences that not served by the print magazine, which circulates almost entirely to people who are voting members of UU congregations.

The big advantage of the Web magazine will be its outreach beyond the membership. The new Web magazine is expected to attract UU young adults on campus or not yet affiliated with

congregations, UUs who are active in our congregations but have yet to join, and, especially, seekers looking for a religion that fits them just right.

The *InterConnections* newsletter also has a new four-times-a-year publication schedule, as it too moves to enrich the resources that it offers on the Web.

## **Publications Office**

Skinner House Books published 16 new titles this year, and the Skinner House backlist includes some 70 active titles. Aimed primarily at Unitarian Universalists, Skinner House books are read by a broad audience. This is the fourth year that Skinner House has distributed selected titles to the trade—independent and chain bookstores, libraries and other non-UU markets. As of this spring, 43 Skinner titles are distributed to the trade. Revenue from trade sales has increased eight-fold from the previous year.

### 2004-2005 Skinner House titles:

*Admire the Moon: Meditations*, Mary Wellemeyer

*Aisha's Moonlit Walk: Stories and Celebrations for the Pagan Year*, Anika Stafford

*Earth Bound: Daily Meditations for All Seasons*, Brian Nelson

*Everyone a Butterfly: 40 Sermons for Children*, Randy Hammer

*Faith Without Certainty: Liberal Theology in the 21st Century*, Paul Rasor

*For All That Is Our Life: A Meditation Anthology*, edited by Gene and Helen Pickett

*Funding Justice: The Legacy of the UU Veatch Program*, Warren Ross

*In Nature's Honor: Myths and Rituals Celebrating the Earth*, Patricia Montley

*Prairie Soul: Finding Grace in the Earth Beneath My Feet*, Jeffrey Lockwood

*Rejoice Together*, Second Edition, edited by Helen Pickett

*Simply Pray: A Modern Spiritual Practice to Deepen Your Life*, Erik Walker Wikstrom

*The Essential Clarence Skinner: A Brief Introduction to His Life and Writings*, Charles Howe

*This Day in Unitarian Universalist History*, Frank Schulman

*Transforming Liberalism: The Theology of James Luther Adams*, George Kimmich Beach

*We Would Be One: A History of Unitarian Universalist Youth Movements*, Wayne Arneson and Rebecca Scott

*Writing the Sacred Journey: The Art and Practice of Spiritual Memoir*, Elizabeth Andrew

### UUA Publishing:

In addition to Skinner House, the Publications Office produced these new UUA resources:

*Engaging Our Theological Diversity: Report from the 2005 Commission on Appraisal*; 2005

*UUA Directory*; *Singing the Journey, Nurturing Children and Youth: A Developmental*

*Guidebook*, Tracey Hurd; *The Safe Congregations Handbook: Nurturing Healthy Boundaries in Our Faith Communities*, Pat Hoertdoerfer and Fred Muir, eds.; *Youth Group Handbook*, Youth

Office; *Exploring: Building Your Own Theology, Vol. 2, Revised Ed.*, Richard Gilbert;

*Welcoming Children with Special Needs: A Guidebook for Faith Communities*, Sally Patton; *My Seven Principles Stickers*.

## UUA Bookstore

The UUA Bookstore carries Beacon Press, Skinner House, and titles from many other publishers, including a number of self-published Unitarian Universalists. In addition to selling directly to customers by phone, mail, fax, the Internet, and email, the Bookstore welcomes customers to its store located on the first floor of UUA headquarters in Boston. The Bookstore's email newsletter features new books, excerpts from titles of interest, discounts and announcements. Customers can reach the Bookstore online at [www.uua.org/bookstore](http://www.uua.org/bookstore).

## BEACON PRESS

Beacon Press is the independent publishing company of the Unitarian Universalist Association. Founded to promote issues of social justice in the wider world, Beacon Press publishes general interest books that illuminate UU values to a broad constituency across the country and around the world. It continues to be the most highly regarded and distinguished denominationally owned publishing house in America.

Beacon Press books have often led the UU community to focus on areas of urgent concern and provide instigation and support for social justice work: in international and domestic human rights and civil liberties, including peace and free speech issues; in gay, lesbian, bisexual and transgender rights; in issues in public education; in economic justice issues; in recognizing truly “religious” values; in understanding peoples and cultures around the world; and in preserving and valuing our natural world.

FY05 was the third and final year of the Beacon Press “three year plan” implemented by the Finance Committee of the UUA Board of Trustees. The Beacon Press staff is delighted to report that the press has met and exceeded what was asked of them. The trustees passed this resolution at their January meeting: “The UUA Board commends the Beacon Press director and the staff of Beacon Press for their continuing dedication and their unwavering attention to *meeting and exceeding the three-year plan for ensuring the Association’s ongoing commitment to Beacon Press*. For maintaining the high quality of the books that Beacon publishes while managing the bottom line, we thank you.”

Due in large part to their timely, issue oriented publishing program, Beacon Press’ authors made several hundred public appearances in support of their books between July 2004 and June 2005. Beacon authors also appeared all over the electronic media in the United States, on diverse shows such as *Air America Radio*, *The Charlie Rose Show*, *Morning Edition*, and *All Things Considered*, *CNN’s Financial Sweep*, *Tony Brown’s Journal*, *The Today Show*, *BBC America*, *Al-Arabiya*, and *60 Minutes*. Specific notable appearances include:

- Author **Lisa Couturier** and her new book *The Hopes of Snakes* have generated an unprecedented amount of attention for a first time nature writer. Ms. Couturier has appeared on *National Public Radio’s The Diane Rehm Show*, as well as being featured in *People Magazine’s* “Picks and Pans,” *Nature Conservancy Magazine*, *USA Today*, *Washingtonian Magazine*, *Body and Soul Magazine*, and the *Audubon Naturalist News*. Her writing about nature in urban settings has been lavishly praised by reviewers nationwide.
- Late last summer, Beacon received significant coverage on radio and television for *Welcome to the Lizard Motel: Children, Stories, and the Mystery of Making Things Up* by **Barbara Feinberg**, a book that challenges the way schools assign reading and teach writing. In late July, Feinberg had the featured Op-Ed in the *Sunday New York Times* and the book was the subject of full-page essay by Laura Miller in the *New York Times Book Review* a month later. Her book has also been the focus of reviews and columns in *Salon.com*, *Weekend All Things Considered*, *People Magazine*, *Los Angeles Times*,

*Christian Science Monitor, USA Today, Christian Science Monitor, Boston Globe, and The New Criterion.*

- Unitarian minister **Stephen Kendrick** and his son **Paul Kendrick**'s book *Sarah's Long Walk: How the Free Blacks of Boston and their Struggle for Equality Changed America* was chosen by C-Span for inclusion in their *Book TV* series. An event with both authors at Old West Church in early February was videotaped and has aired three times already. The *Boston Globe* daily ran a two page feature in the Living/Arts section and the book was also mentioned separately and reviewed in the *Boston Sunday Globe*. Other positive print reviews appeared in the *Christian Science Monitor, Black Issues Book Review, Boston Herald,* and the *Chronicle of Higher Education*.
- Shortly before the presidential election, Beacon Press published **Jane Eisner**'s *Taking Back the Vote: Getting American Youth Involved in Our Democracy* and its timing couldn't have been better. Jane Eisner was everywhere during the election cycle from *Inside Edition* to *The Diane Rehm Show* to *Air America Radio, ABC Radio,* and *Book TV* talking about getting the young involved in the political process. Her print coverage was just as extensive. Jane had essays on youth enfranchisement appear in the *Philadelphia Inquirer, Altnet.org, Roll Call* (the Capitol Hill newspaper), *Washington Post,* and *Forward* magazine with reviews in *The American Prospect, Teacher Magazine* and the *Orlando Sentinel*.
- Professor **Rashid Khalidi**'s book *Resurrecting Empire: Western Footprints and America's Perilous Path in the Middle East* was a huge success for Beacon. Written as aggression against Iraq was beginning, his expert, historical perspective on current events in Iraq and Afghanistan was in high demand by the national (and international) media in the last year. In total (appearances, signings, interviews, reviews, lectures, etc...), Professor Khalidi appeared or was featured over 150 times around the country and the world to promote his book.

The exposure of Beacon Press in the national media (in addition to a focused acquisitions program) has led to a year of 9 books breaking the magic 10,000-copies sold level. The books are:

1. Octavia Butler – *Kindred* (again!)
2. Mary Oliver – *Why I Wake Early* (paperback)  
--*New and Selected Poems, Volume One* (paperback)  
--*Blue Iris*
3. Rashid Khalidi – *Resurrecting Empire*
4. Deborah Meier and George Wood, Eds – *Many Children Left Behind*
5. Thich Nhat Hahn – *The Miracle of Mindfulness*
6. Gandhi – *An Autobiography*
7. Viktor Frankl – *Man's Search for Meaning*

Also, many Beacon Press books have been rewarded for excellence in the last year. These award winners represent some of the best publishing Beacon has done. The recognized books were:

In the 50<sup>th</sup> anniversary issue of *American Heritage* magazine two Beacon Press books were chosen as part of "100 Greatest Books about Our Past" as selected by their editors. *Shut Out: A Story of*

*Race and Baseball in Boston* by **Howard Bryant** and *The Myth of the Negro Past* by **Melville Herskovits** (first published by Beacon in 1941) were chosen as books that “**best describe our shared national past.**”

Three Beacon Press books recently received special recognition in design. *No One Gardens Alone: A Life of Elizabeth Lawrence* by **Emily Herring Wilson** was awarded Best in Category by the 48th Annual New England Book Show Committee and *African Voices of the Atlantic Slave Trade* by **Anne C. Bailey** and *The Hopes of Snakes* won overall excellence awards from the American Association of University Presses.

- “Living Will” from *Incidental Findings* by **Daniel Ofri** has been selected by Susan Orlean for inclusion in the prestigious *Best American Essays* for 2005.
- *Camp All-American, Hanoi Jane, and the High and Tight* by **Carol Burke** received Honorable Mention in the 2004 Gustav Myers Outstanding Book Awards.
- *The Pueblo Imagination: Landscape and Memory in the Photography of Lee Marmon* won the Mountains and Plains Bookseller Association in The Arts category as well as The Independent Publisher Association Photography Book of the Year.
- **Rashid Khalidi**’s *Resurrecting Empire* received Honorable Mention from the Albert Hourani Book Award Committee of the Middle East Studies Association.

Three Beacon Press books have been selected as “representative titles” by other book-related organizations. Independent booksellers have selected *Blue Iris* by **Mary Oliver** as the #1 Book Sense Pick for the Poetry List. This is Mary Oliver’s second selection for this honor and Beacon Press is grateful to the 1,700+ book stores across the country that helped in making this choice, and that have made all three of Mary’s recent volumes independent store best sellers.

**Martin Moran**’s *The Tricky Part: One Boy’s Fall from Trespass into Grace*, scheduled for publication this June, was selected as a featured alternate of the Quality Paperback Book Club and a main selection of the InsightOut Book Club for their Spring books campaign and **Mary Oliver**’s *Blue Iris* was selected by *The Washington Post* editors as one of the “100 books to watch out for” in the fall.

Beacon Press received dozens of enthusiastic reviews in print media around the country in the last year. There was the full-page review for **David Plante**’s spiritual memoir *American Ghost* in the *Sunday New York Times Book Review*. **Rashid Khalidi**’s *Resurrecting Empire* was literally reviewed in every significant publication in the nation including *The New York Times*, *The Washington Post*, *The Los Angeles Times*, *The Nation*, and *Foreign Affairs*, just to name a few. In June (shortly before last year’s GA), the *New York Times Sunday Magazine* did a cover story on **Geoffrey Canada**, author of *Fist, Stick, Knife, Gun* and *Reaching Up for Manhood*, and his organization the Harlem Children’s Zone. *The Nation* had **Anne Bailey**’s *African Voices of the Atlantic Slave Trade* as the feature review in the February 14<sup>th</sup> issue and called “remarkable.” Most recently, **Marie Myung-ok Lee**’s novel *Somebody’s Daughter* received a 3 ½ star review (out of four) in the April 5<sup>th</sup> edition of *People Magazine*.

And finally, a demonstration of how Beacon Press books impact and change society for the better. On February 10, 2005, *The Boston Globe* reported that the Suffolk County district



attorney “offered five juveniles arrested at the New England Patriots' parade an unusual deal: read Michael Patrick MacDonald's *All Souls: A Family Story from Southie* (published by Beacon in September of 1999) and deliver a 2,500-word report on its meaning, and all the charges will be dropped. A spokesman for the district attorney said: “The DA hopes that, if nothing else, this book makes them more aware of the lives of other people, some of whom fight the good fight every day against social and economic problems, and in some cases against their own demons.”

## **STEWARDSHIP AND DEVELOPMENT STAFF GROUP**

Unitarian Universalists and their congregations have been extremely generous to their Association over the past year.

### **Campaigns and Major Gifts**

This year we have been in conversation with many of our constituencies, inviting various UU leaders in congregations, districts, and the Association as a whole to share opinions about the next major fundraising initiative we will undertake. Completed in January 2005, the first phase of our listening and conversation was conducted in focus groups in a 90-minute exercise involving more than 150 people, including members of the Board of Trustees, the President's Council, District Field staff, and a few other groups. The second phase began in April with the first-ever online UUA opinion survey. Invitations to participate in the survey were sent to several thousand households representing a diverse range of UU groups, including professional leaders, congregational presidents and boards, district boards, youth and young adults, and generous individuals who have supported the Association.

Also new this year, UUA President's Roundtables have been held in five metropolitan areas, including Houston, TX; Boston, MA; and four in California: Orange County, the San Francisco Bay Area, and a group north of Los Angeles that will next meet as two separate groups, Channel Islands and Los Angeles Hills. A small group of volunteers works with Stewardship and Development staff to invite people to attend four UUA President's Roundtable meetings over the course of 12 months. In addition to meeting with the Senior Advisors to the UUA President, each Roundtable group meets with the UUA President once a year. Roundtable participants are invited to imagine a project they would like to initiate to strengthen and grow Unitarian Universalism in their respective regions. The Houston group, a model for this year's new Roundtables, has the longest history, and its members were instrumental in funding the January 2005 launch of a UU marketing and welcoming campaign in greater Houston.

We are grateful for the enthusiastic, thoughtful and generous response the UUA President's Roundtables are receiving.

### **Annual Program Fund**

Generous member congregations support the mission, programs and services of our Association. Their contributions benefit and strengthen the congregations themselves as well as districts and Unitarian Universalism as a whole. For example, the Association distributes annual grants to all 20 districts, which helps them provide programs and services to local congregations. Over \$601,000 is being distributed in 2004/05 based on the contributions of congregations to our Association's Annual Program Fund in 2003-2004.

Our Association's elected Board of Trustees determines the minimum requested contribution (also called "Fair Share") that member congregations are asked to give to the Association annually. The requested contribution for 2004-2005 is based on \$50 per member and on \$51 in 2005/06. Congregations with 550 or more members have the option of calculating their contribution on either the per member basis or as 4.2% of their operating budget.

In 2003-2004, contributions totaled over \$5.93 million or approximately 46% of our Association's unrestricted income. Of the 1,039 member congregations, 743 contributed the full amount requested. Giving was increased by 20% or more by 176 congregations.

Working with the Annual Program Fund staff is a 25-member, volunteer committee appointed by our Association's Board of Trustees. The APF Committee helps bring a stewardship message to member congregations, encourages generous financial support of the larger faith community through our Association, and provides information about programs, services and public witness activities. Members currently serving on the Committee are listed on the Association website at [www.uua.org/giving/apf/apfcom.html](http://www.uua.org/giving/apf/apfcom.html).

### **Friends of the UUA**

Friends of the UUA provides funding for the Association from individual donors in response to mail and phonathon appeals throughout the year.

One of the most important roles our UU community must play in 2005 is to reframe the debate on moral values. Because our faith and our UU congregations are driven by our social consciences, we are uniquely suited to do so. Our success in this mission will hinge on the generous support of Friends of the UUA. To date, Friends donors have enthusiastically supported the Association in these efforts, with income for this fiscal year showing an increase of 4% over last fiscal year.

Friends unrestricted income is also instrumental in supporting:

- programs and services that help congregations to grow and thrive;
- youth and young adult programs, providing resources to a new generation of UUs;
- social action and public witness that bring the voice of UU values to our wider society and the issues of our times;
- Beacon Press and its ongoing mission to produce thought-provoking titles that allow progressive voices to be heard.

### **Charitable Gift and Estate Planning**

For the fiscal year 2004-2005, the income goal for unrestricted gifts and bequests was budgeted at \$450,000. As this report goes to print, it is projected that we will fall short of that goal by about \$88,000. Other "matured" planned gifts and bequests, given to the UUA for specific purposes, will total at least \$215,400 by June 30, 2005. Congregations and other UU entities have received \$132,000 from matured gifts once held in trust by the Association. By the end of June, the Charitable Gift and Estate Planning staff expects to have assisted individuals in completing at least 40 new gifts to be held in trust this year, totaling at least one million dollars, with more than half of that amount going to congregations and other UU entities after the donors have died. These wonderfully generous individuals join others who have included a charitable gift to Unitarian Universalism in their estate plans to constitute the UUA Legacy Society. As we go to press with this report, we have learned of 16 new bequest intentions totaling \$826,000 for the Association; by year's end both of those figures will have grown.

Umbrella giving is one the most exciting new features of our Stewardship and Development work. Approved by the UUA Board in January 2004, umbrella giving makes it possible for the Association to offer “one-stop giving” to Unitarian Universalists. For many years now, individuals have been able use the Association’s gift annuity and pooled income gift fund to make significant contributions to their home congregations and other UU entities. Umbrella giving extends this to charitable bequests and trusts – and all the other kinds of “deferred” gifts that involve some planning on the donors’ part. Instead of contacting a congregation, a theological school, the Service Committee, and the Association to arrange a charitable bequest to each one of these groups, now a donor makes one phone call or writes one letter to the Stewardship and Development staff of the Association, and we take on the responsibility of honoring that person’s wishes, notifying the various groups as directed by the donor, and working with the estate to receive charitable bequests and send funds to the UU entities according to the donor’s wishes.

The Charitable Gift and Estate Planning staff offers many free services to congregations and other UU entities, including consultations on planned giving and endowments, workshops at cluster and District meetings, the “uu-planned giving” list serve, print materials, and web pages full of information. Visit [www.uua.org/giving/giftplans](http://www.uua.org/giving/giftplans) and learn all about it.

All in all it was a year of abundant generosity for Unitarian Universalists.

## **FINANCIAL SERVICES STAFF GROUP**

In serving and interacting with all Association staff groups and districts, Financial Services is responsible for developing and maintaining the UUA's financial records and reporting; issuing timely payments to staff, volunteers and vendors; accounting administration and reporting for the general investment and endowment funds; billing, collecting and reporting to the Congregational Properties & Loan Commission on the financial status and results of the building loan program; and the administering of the financial aspects of the UU Retirement Plan.

## **OPERATIONS / FACILITIES STAFF GROUP**

The role of the Operations staff group is to support the UUA staff and the Association's members, directly and indirectly, by providing services for daily operations and maintaining our physical facilities while protecting the Association's assets at the most economical cost.

**Eliot & Pickett House:** The meeting and lodging house offers accommodations for Unitarian Universalists who tour historic Boston, are here on business at our great location and comfortable, affordable accommodations adjacent to the UUA offices and the Massachusetts State House. Ongoing improvements and maintenance to the facility continue, including a handicap access ramp and an additional accessible bedroom, with rooms being regularly re-carpeted and painted on a planned schedule. Boston meeting rooms and lodging are especially available during the mid-summer months and also throughout the year at reasonable prices. The Eliot & Pickett lodging house has space for committee meetings and lodging during tours of historic New England and our Unitarian Universalist roots. Daily room rate for a single is \$70 and for a double is \$100, with an opportunity for seasonal discounts. Contact Morgan Ryan, Manager for information at (617) 948-4679 or by email at [e&p@uua.org](mailto:e&p@uua.org).

**REPORT ON UUA EQUAL EMPLOYMENT OPPORTUNITY  
APRIL 5, 2005**

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

**STATISTICAL SUMMARY**

|   | All Employees |      |        | Grades 1-7 |      |        | Grades 8+ |      |        | Ungraded |      |        |    |   |    |   |
|---|---------------|------|--------|------------|------|--------|-----------|------|--------|----------|------|--------|----|---|----|---|
|   | Total         | Male | Female | Total      | Male | Female | Total     | Male | Female | Total    | Male | Female |    |   |    |   |
| <b>Black</b>                            | 18            | 8    | 10     | 0          | 8    | 6      | 2         | 0    | 9      | 1        | 8    | 0      | 1  | 1 | 0  | 0 |
| <b>Hispanic</b>                         | 3             | 2    | 1      | 0          | 2    | 2      | 0         | 0    | 0      | 0        | 0    | 0      | 1  | 0 | 1  | 0 |
| <b>Asian / Pacific Islander</b>         | 6             | 2    | 4      | 0          | 1    | 0      | 1         | 0    | 2      | 2        | 0    | 0      | 3  | 0 | 3  | 0 |
| <b>American Indian / Alaskan Native</b> | 1             | 1    | 0      | 0          | 0    | 0      | 0         | 0    | 1      | 1        | 0    | 0      | 0  | 0 | 0  | 0 |
| <b>White</b>                            | 162           | 50   | 112    | 0          | 16   | 4      | 12        | 0    | 121    | 40       | 82   | 0      | 26 | 6 | 18 | 0 |
| <b>TOTAL</b>                            | 190           | 63   | 127    | 0          | 27   | 12     | 15        | 0    | 133    | 44       | 90   | 0      | 31 | 7 | 22 | 0 |

|   | All Employees |      |        | Leadership Council |      |        | Officials / Managers |      |        | Professionals |      |        | Technicians |      |        | Sales |      |        | Office & Clerical |      |        | Craft Workers |      |        | Service Workers |      |        |   |   |
|---|---------------|------|--------|--------------------|------|--------|----------------------|------|--------|---------------|------|--------|-------------|------|--------|-------|------|--------|-------------------|------|--------|---------------|------|--------|-----------------|------|--------|---|---|
|   | Total         | Male | Female | Total              | Male | Female | Total                | Male | Female | Total         | Male | Female | Total       | Male | Female | Total | Male | Female | Total             | Male | Female | Total         | Male | Female | Total           | Male | Female |   |   |
| <b>Black</b>                            | 18            | 8    | 10     | 0                  | 2    | 1      | 1                    | 0    | 3      | 1             | 2    | 0      | 2           | 0    | 2      | 0     | 0    | 0      | 0                 | 0    | 0      | 0             | 0    | 0      | 4               | 4    | 0      | 0 |   |
| <b>Hispanic</b>                         | 3             | 2    | 1      | 0                  | 0    | 0      | 0                    | 0    | 0      | 0             | 0    | 0      | 0           | 0    | 0      | 0     | 0    | 0      | 0                 | 0    | 0      | 0             | 0    | 0      | 0               | 0    | 0      | 0 |   |
| <b>Asian / Pacific Islander</b>         | 6             | 2    | 4      | 0                  | 0    | 0      | 0                    | 0    | 0      | 0             | 0    | 0      | 2           | 1    | 1      | 0     | 1    | 0      | 1                 | 0    | 0      | 0             | 0    | 0      | 0               | 0    | 0      | 0 |   |
| <b>American Indian / Alaskan Native</b> | 1             | 0    | 1      | 0                  | 0    | 0      | 0                    | 0    | 0      | 0             | 0    | 0      | 1           | 0    | 1      | 0     | 0    | 0      | 0                 | 0    | 0      | 0             | 0    | 0      | 0               | 0    | 0      | 0 |   |
| <b>White</b>                            | 162           | 50   | 112    | 0                  | 11   | 6      | 5                    | 0    | 50     | 22            | 28   | 0      | 49          | 10   | 39     | 0     | 1    | 1      | 0                 | 0    | 0      | 0             | 0    | 0      | 10              | 40   | 0      | 1 | 0 |
| <b>TOTAL</b>                            | 190           | 62   | 128    | 0                  | 13   | 7      | 6                    | 0    | 53     | 23            | 30   | 0      | 54          | 11   | 43     | 0     | 2    | 2      | 0                 | 0    | 1      | 0             | 1    | 0      | 62              | 14   | 48     | 0 | 5 |

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

**REPORT ON UUA EQUAL EMPLOYMENT OPPORTUNITY  
APRIL 5, 2005**

**PERCENTAGES**

|   | <b>All Employees</b> | <b>Grades 1-7</b> | <b>Grades 8+</b> | <b>Ungraded</b> |
|---|----------------------|-------------------|------------------|-----------------|
| <b>Black</b>                            | 9%                   | 30%               | 1%               | 3%              |
| <b>Hispanic</b>                         | 2%                   | 7%                | 0%               | 3%              |
| <b>Asian / Pacific Islander</b>         | 3%                   | 4%                | 2%               | 10%             |
| <b>American Indian / Alaskan Native</b> | 1%                   | 0%                | 1%               | 0%              |
| <b>Female</b>                           | 67%                  | 56%               | 68%              | 75%             |

**STAFF GROUP ANALYSIS**

| STAFF GROUP                           | All Employees |           |            | Black    |           |          | Hispanic  |          |          | Asian / Pacific Islander |          |          | American Indian / Alaskan Native |          |          | White    |          |          |          |          |
|---------------------------------------|---------------|-----------|------------|----------|-----------|----------|-----------|----------|----------|--------------------------|----------|----------|----------------------------------|----------|----------|----------|----------|----------|----------|----------|
|                                       | Total         | Male      | Female     | Total    | Male      | Female   | Total     | Male     | Female   | Total                    | Male     | Female   | Total                            | Male     | Female   | Total    | Male     | Female   | Other    |          |
| Advocacy & Witness                    | 16            | 3         | 13         | 0        | 1         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Congregational Services               | 10            | 4         | 6          | 0        | 0         | 0        | 0         | 0        | 0        | 1                        | 1        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| District Services / Field Staff       | 37            | 11        | 26         | 0        | 1         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 1        | 0        | 1        | 0        | 0        | 0        | 0        |
| Identity Based Ministries             | 6             | 2         | 4          | 0        | 1         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Lifespan Faith Development            | 8             | 2         | 6          | 0        | 0         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Ministry & Professional Leadership    | 15            | 5         | 10         | 0        | 3         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Communications                        | 19            | 6         | 13         | 0        | 1         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Administration                        | 6             | 2         | 4          | 0        | 1         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Stewardship & Development             | 11            | 2         | 9          | 0        | 0         | 0        | 0         | 0        | 0        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Information Technology Services       | 13            | 5         | 8          | 0        | 1         | 0        | 0         | 0        | 0        | 1                        | 1        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Financial Services / General Assembly | 13            | 4         | 9          | 0        | 2         | 0        | 0         | 0        | 0        | 1                        | 0        | 1        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Operations / P&E                      | 11            | 9         | 2          | 0        | 7         | 6        | 1         | 0        | 1        | 0                        | 0        | 0        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| Beacon Press                          | 25            | 7         | 18         | 0        | 0         | 0        | 0         | 2        | 1        | 1                        | 0        | 3        | 0                                | 0        | 0        | 0        | 0        | 0        | 0        | 0        |
| <b>TOTAL</b>                          | <b>190</b>    | <b>62</b> | <b>128</b> | <b>0</b> | <b>18</b> | <b>8</b> | <b>10</b> | <b>0</b> | <b>3</b> | <b>2</b>                 | <b>1</b> | <b>0</b> | <b>6</b>                         | <b>2</b> | <b>4</b> | <b>0</b> | <b>1</b> | <b>0</b> | <b>1</b> | <b>0</b> |

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