

Unitarian Universalist Association

Annual Report

June 2010



Peter Morales, President

Harlan Limpert, Vice President for Ministries and Congregational Support

Kathleen Montgomery, Executive Vice President

INTRODUCTION

With Peter Morales' election as President, the beginning of a new Administration, and financial challenges, this year has been filled with change. The focus has been on three areas: growth of our movement, prophetic social action, and the creation of a new ministry for a new century.

Toward these ends, some structural changes have been made. Harlan Limpert has been appointed Vice President for Ministries and Congregational Support, with responsibility for the congregational program areas. Kay Montgomery continues as Executive Vice President, with responsibility for the operating areas of the Association's life.

Other changes include the creation of two new staff groups. Beginning July 1, a new staff group, Ministries and Faith Development, will combine the work of Ministry and Professional Leadership and Lifespan Faith Development. Additionally, a new staff group, Multicultural Growth and Witness, will assume many of the responsibilities currently handled by the Identity-Based Ministries and Advocacy and Witness staff groups. And, finally, the Office of Electronic Communications has moved to the Information Technology Services staff group and the International Resources Director now reports directly to President Morales.

This report outlines for you, by staff group, the work that has been done on your behalf during the year by the staff of the Unitarian Universalist Association. It comes with great appreciation for the extraordinary and creative work of the staff at a time of great change and many challenges. If you have questions in response to the information contained here, please feel free to contact Kay Montgomery (kmontgomery@uua.org) or Harlan Limpert (hlimpert@uua.org).

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ADVOCACY AND WITNESS

The Standing on the Side of Love Campaign was launched this year to harness love's power to stop oppression, exclusion, and violence. The campaign has energized the Association.

- Over 100 clergy and other leaders were trained in media skills.
- Over 250 congregations took part in the February 14 “Standing on the Side of Love” day or registered events related to Standing on the Side of Love.
- Over 150 congregations have purchased large banners, and have bought t-shirts, and other visual identifiers of the campaign.
- A new website was created with high traffic and involvement.
- A network of 25,000 email addresses, 15,000 Facebook Fans, and 1,000 Twitter followers was created.
- Print, radio and TV mentioned the campaign over 300 times, most often related to BGLT equality but also regarding immigration reform, health care, civil discourse, and other issues of local relevance. Hundreds of thousands of views of blogs and videos on the internet were logged.
- Over 1,000 photos from events were posted, over 20 videos were produced and distributed over the internet.
- SSL contributed significantly to success for Marriage Equality in DC, getting Lou Dobbs off of CNN, and a host of local issues.

Advocacy and Witness staff provide a public voice for UUA positions on a range of issues, and support congregations in doing the same. This is done through a variety of skill-centered workshops, creation of resources and tools, and communications networks that enable UUs to be part of timely and effective efforts on key legislation and issues of the day.

Unitarian Universalists have become increasingly engaged in immigration reform work, in partnership with immigration work.

- UU volunteers assisted those affected by the Haiti earthquake through Temporary Protected Status (TPS) clinics.
- Many UUs, including the President of the UUA, have visited Congress and other policy-makers to insist on comprehensive immigration reform.
- Over 500 UUs have organized and attended local and national events demanding respect for the worth and dignity of immigrants.

UUs have maintained strong commitment to BGLT equality.

- President Obama signed legislation that makes it a federal crime to assault a person based on sexual orientation or gender identity. The UUA has worked in a coalition towards this end for 14 years.
- The UUA has been central to coalitions demanding passage of the Employment Non-Discrimination Act, and repealing Don't Ask, Don't Tell.
- Hundreds of Unitarian Universalists attended the March for Equality in October 2009.

UUs supported our congregation in Uganda to reject the vicious bill which would inflict the death penalty on glbt people. Early on, UUA staff met with several key individuals in the Obama administration to increase resistance to this bill.

The UUA has significantly increased capacity on environmental issues through active partnership with Ministry for the Earth and state networks. Hundreds of UU congregations took place in earth justice campaigns including Earth Day, speaking out on the Copenhagen gathering on climate change, and engaged in activities with the 40/40/40 campaign around ethical eating.

Reproductive Justice and Sexuality Education remained a high commitment for UUs.

- UUs have maintained very active resistance to abstinence-only funding and support for funding comprehensive sexuality education. Victories were won this year, with significant money going to teen pregnancy prevention.
- The UUA was active in the coalition to stop the Stupak amendment from passing in the final health reform package.

- The national Sex Ed Advocacy Training Conference, founded by the UUA, brought dozens of teens and adults together from a variety of faiths to demand comprehensive sexuality education.

International Resources Office

Holdeen India Program

The IRO has a three-part mission:

Provide resources to congregations for international engagement;

Coordinate with Unitarian, Universalist, or Unitarian Universalist (U/U) organizations involved in international ministry;

Maintain and develop linkages with historic and new Unitarian/Universalist and interfaith judicatories around the world based upon principles of right relationship.

I. Resourcing to congregations:

An introductory mailing and follow up phone calls were made to all newly settled ministers in Fall 2009. The office:

Provided updated elements of online international engagement workshops on uua.org
Completed the production of a DVD about the Holdeen India Program, published it online and as hard copies.

Developed microfinance resource based on the integrated approach of Holdeen Partner: SEWA.

Organized UUA involvement with the “Charter for Compassion” project, including developing an intergenerational Religious Education project for congregational involvement.

Provided information to congregations about U/U congregations around the world, especially newly emerging congregations.

Distributed bi-weekly e-newsletter: i-news. Increased subscriptions to 1000. Facebook fan-base 1100.

II. Coordinating with U/U Organizations:

Offered networking meeting, shared exhibit space at General Assembly 2009 and 2010.

Finalized MOU with UU-UNO, collaborating with UU-UNO on short-term and long-term goals.

Convene UU International Joint Working Group on a regular basis (reps from ICUU, UUPCC and the Director of the IRO). The JWG troubleshoots and plans for collaborative efforts. In 2010 this included implementing a \$20,000 grant to assist emerging U/U congregations in Burundi and Uganda to perform “Community Assessment” and Planning exercises.

Assist collaboration between UUPCC, ICUU, UU-UNO, ICUUW, Holdeen India Program, and Project Harvest Hope.

Beginning discussions with UUSC about a joint UUA/UUSC experiential learning trip to Uganda.

III. Relationships with U/U and Interfaith judicatory partners:

Organized UUA involvement with Ugandan UU and interfaith allies opposition to the “Anti-Gay Bill”.

Supported the DU (German Unitarians) in finding a UUA minister to serve their congregations and growth initiatives. Provide continuing support to that minister.

Initiated the Tsubaki Grand Shrine Scholarship for a seminarian at a non-UU theological school. The first scholar’s experience was excellent for all. The next scholar will be selected in May.

Serve on the ICUU task force on ministerial education which is implementing solutions for leadership training needs of U/U groups around the world.

Attended IARF International Council meeting to fulfill three key goals.

Visited UUA judicatory partners: Transylvania Unitarian Church, German Unitarians, Unitarian Union of NE India, Unitarian Church of Chennai, UU Church of the Philippines.

Provided various diplomatic correspondence with international judicatory partners.

Arranged opportunities for UUA visits by a variety of international partners.

Continue assisting collaboration between All Souls Church (DC) with Rissho Kosei-kai regarding Hiroshima Children’s Art Project.

Re-initiated historic relationship between UUA and Remonstrant Church (Netherlands) for strategic collaboration. Engaged 4 congregations in this relationship.

Planning President Morales’ International visits to Japan, the Philippines, and India in September 2010 and to India in 2011.

The Unitarian Universalist Holdeen India Program (UUHIP) provides humanitarian assistance to organizations in India that serve the poor and disadvantaged. UUHIP also supports initiatives to generate additional funding, recognition and visibility for our partner organizations, work and issues. Holdeen Partners have garnered awards with global esteem, including: The Niwano Peace Foundation has chosen Self-Employed Women's Association founder, Ela Bhatt, as 2010 honoree of the Niwano Peace Prize.

The Indiana University School of Law has enlisted Holdeen's help to place their law students as interns with Holdeen partners in New Delhi. Three to four law students will intern with Holdeen partners this summer.

The Board of Directors of the International Convocation of Unitarian Universalist Women has endorsed a December trip to India which will enable its members to witness women's programs in India. First UU Church in Houston is planning this trip in collaboration with Holdeen.

CONGREGATIONAL LIFE

The Congregational Life staff group includes all co-employed district staff members, Congregational Stewardship Services, Growth Services, and Services to Large Congregations. Their mission is to foster the spiritual and institutional health of Unitarian Universalism by serving as leaders, consultants, advocates, and educators in our community of congregations.

REGIONALIZATION:

The evolution towards the regionalization of services and support of congregations continued in 2009 and 2010 with the increased sharing of district staff members within a region of three or four districts. For the first time ever, the Clara Barton district and the Mass Bay district are sharing their co-employed district staff members for the benefit of congregations in both districts. This enables specialized support to be provided and resources to be used more efficiently in service to congregations. The Central East Region continues to share the expenses of two staff positions that support all congregations in all four districts. Every opportunity to break down the barriers which inhibit support to congregations is being taken.

ENHANCED USE OF TECHNOLOGY:

Support of congregations through the use effective use of technology continues to increase by the month. Virtual meetings, videoconferencing, and web technologies such as Persony enables collaboration and training to occur in constantly evolving ways. The Prairie Star District, part of the MidAmerica region, recently conducted a “Grand Experiment” during their district Annual Conference. They experimented with live streaming of the keynote address using technology that is easily affordable for a typical UU congregation. Until then the ability to live stream was limited to those with more sophisticated and expensive technology, something that is simply out of reach of many UU congregations. In addition to the small group discussions among those physically present at the conference, those participating via live-streaming participated in their own virtual small group discussion and also interacted with each other and with people at the conference via Twitter and Facebook. Each time new and reasonably priced technologies are used at the district level it creates new opportunities to both model their use and to support congregations in new and useful ways.

Webinars continued to expand in frequency and variety of topics with monthly webinars on leadership development, congregational systems, stewardship, risk management faith development, meeting management, and other topics relevant to congregational leaders. They are led by nearly every district most every week, and access to these webinars is often made available to anyone, anywhere.

BREAKTHROUGH CONGREGATIONS:

The Congregational Life staff continues to identify and lift up congregations that are doing certain things particularly well and encourage them to become partners in growth and learning by providing opportunities for them to share what they've learned with others. The most visible expression of this is the lifting up of Breakthrough Congregations, congregations that have grown in significant and sustained ways over time. Below are the breakthrough congregations for 2010. Each will be given an opportunity to present a 12-minute video during the plenary sessions of General Assembly in Minneapolis and each will share their stories during a GA workshop.

The 2010 Breakthrough Congregations include The UU Fellowship of Mankato, Minnesota – current adult membership: 118. It is served by the Rev. Lisa Friedman, minister, Kristi Schuck, DRE, and others. They have experienced a 61% increase in adult membership in the last three years; The UU Area Church at First Parish, Sherborn, Massachusetts – current adult membership: 243. It is served by the Rev. Nathan Detering, minister, Kate Holland, DRE, and others. They have experienced a 42% growth in adult membership in the last five years; The Unitarian Church of Harrisburg, Pennsylvania – current adult membership: 407. It is served by the Rev. Howard Dana, minister, Trish Brandon, DRE, and others. They have grown by 100 adult members in the last five years; The Unitarian Church of Summit, New Jersey – current adult membership: 529. It is served by the Rev. Vanessa Southern, minister, Dr. Tuli Patel, DRE, and others. They have added 100 adult members to the membership rolls in the last seven years.

GROWTH SERVICES:

Growth Services partnered with five districts, supporting a total of forty congregations, in the Planning for Growth and Vitality project. The three-year pilot phase is winding up in June 2010 and the project has begun to include post-pilot congregations. The key objective is for

congregations to learn what it takes to grow and how to build a sustainable infrastructure and capacity to lead healthy change during growth.

GREEN SANCTUARY:

The Green Sanctuary Program provides a path for congregational study and reflection and a call to individual and collective actions in response to environmental challenges.

To date as of this report: 126 Accredited Congregations, 116 Candidates, 1 Re-Accreditation Candidacy. Total congregations participating 243

CONCLUSION:

The focus in 2010 and beyond will be continuing to enhance the support of congregations by partnering ever more closely with the other newly created program staff groups of the UUA – Ministries & Faith Development, Multicultural Growth & Witness, and other staff groups as well

IDENTITY-BASED MINISTRIES

Mission: Identity-Based Ministries seeks to make Unitarian Universalism more welcoming, inclusive and affirming of Unitarian Universalists in terms of ability/disability, gender expression, race/ethnicity, and sexual orientation. Program areas include Accessibility Concerns, Bisexual/Gay/Lesbian/Transgender Concerns, Racial and Ethnic Concerns, and Congregational Justice-Making.

Office of Accessibility Concerns: In conjunction with the United Methodist Church, this Office completed a congregational accessibility manual adapted for use in Unitarian Universalist congregations. Scheduled completion is June 15, 2010. The manual will include links to American Disability Act guidelines for accessibility. The Office of Accessibility Concerns reports that all 19 Unitarian Universalist congregations that have borrowed assistive listening demonstration kits decided to purchase assistive listening equipment for their congregations. The Office of Accessibility Concerns has provided funding to subsidize Sally Patton's workshops on Welcoming Children with Special Needs. The Office, in partnership with Equal Access, the UU affinity group for people with disabilities and allies, has made significant contributions in growing the Association's awareness about the spectrum of accessibility issues including physical, intellectual, and sensory disabilities and mental illness as these relate to congregational life. In addition she has been an advocate and ally for religious professionals and seminarians with disabilities.

Office of Bisexual/Gay/Lesbian/Transgender Concerns: The UUA has recognized 650 Welcoming Congregations in the United States. This means that over 80 percent of Unitarian Universalists belong to Welcoming Congregations. In addition, Welcoming Congregations are located in 49 states. Of the congregations that are not Welcoming Congregations, 20 have 100 members or fewer, and only three have 300 or more members. Approximately 20 congregations became Welcoming Congregations in FY 2010. In addition 35 congregations have accessed the Living the Welcoming Congregation curriculum, which is now available electronically. This brings the total congregations using Living the Welcoming Congregation to 185. The Office of BGLT Concerns received 5 Freedom to Marry grant requests.

Office of Racial and Ethnic Concerns: This Office developed and hosted the largest religious professionals and seminarians of color retreat to date in California. More than 60 people attended the retreat, which is part of the Diversity of Ministry Initiative. The goal of the retreat is to provide collegial support and mentoring and networking opportunities for these religious professionals and seminarians. In addition, *Catalyst* was launched, an electronic publication that communicates information about important developments related to racial and cultural inclusion, leadership development opportunities, conferences, and events relevant to Unitarian Universalists who identify as People of Color, Latina/o/Hispanic, and/or Multiracial. The Multicultural Congregations Learning Community was launched, comprised of ministers who are intentional about diversifying their ministries and membership racially and culturally. The group currently includes 25 to 30 religious professionals, including ministers from the Diversity of Ministry Initiative Congregations. A DVD for the “Soul Work” multicultural congregation track of UU University was released and disseminated to UU congregations.

Office of Congregational Justice-Making: The Office of Congregational Justice-Making supports leaders in Unitarian Universalist congregations, districts, and board-appointed committees in developing multicultural competencies through workshops, customized leadership trainings, and consultation. The Office has provided anti-racism/anti-oppression/multicultural (ARAOMC) resources through a DVD Loan Library with discussion guides, workshops, leadership training, consultancies, and easily accessible, free online resources. In addition to congregation-based consultancies, the JUUST Change Consultancy has focused on furthering ARAOMC at the district level in ten key districts by providing a process to track and assess the work that congregations are doing well, and help them think about next steps. JUUST Change has also played a significant role in the Diversity of Ministry Initiative by providing congregations with a consultation and other congregation-specific resources to prepare and welcome a called minister of color as part of the goal of making Unitarian Universalism more welcoming and inclusive.

In addition, **Building the World We Dream About**, the UUA program for congregations who want to become more racially and culturally welcoming and inclusive in all aspects of congregational life and social action/public witness, was transferred to Lifespan Faith Development for final edits and preparation for the Tapestry of Faith curriculum download. This version will include more Unitarian Universalist voices than the previous version. In the

meantime, Identity-Based Ministries has provided the revised field test version to congregations. Identity-Based Ministries also hosted conference calls for Building the World facilitators to provide coaching and problem-solving for these generous UU congregational volunteers.

LIFESPAN FAITH DEVELOPMENT

GA 2010 marks the close of the first year of the new **Youth and Young Adult Ministries Office** which was created within the Lifespan Faith Development staff group. For the first time in UUA history, services for every age in our congregations are under one umbrella with the opportunity for increased collaboration, innovation and efficacy. Staff in LFD's Resource Development Office have been working with YYAMO staff on such projects as Youth Interfaith Leadership, Our Whole Lives programming, Bridging resources, and Youth and Young Adults of Color Leadership Training, to name a few significant areas of increased service to and with youth and young adults.

This has also been the first year of implementation of **recommendations of the Youth Ministry Task Force**, the culminating report of the Youth Ministry Consultation that ended in 2009. **Staff implications** include the creation of the full-time Associate for Ministry to Youth and Young Adults of Color, a half-time Campus Ministry Associate, a half-time Our Whole Lives Associate, and a half-time Technology Associate to better serve youth and young adults through electronic media, including video production.

These positions directly resource vital services. Below are some of the specific services inaugurated this year for youth and young adults.

Interfaith Leadership Training Program

This exciting program for leadership development, service and UU identity development is funded by a generous \$100,000 grant from the Shelter Rock congregation.

In partnership with the Interfaith Youth Core (IFYC), we successfully held our first Youth Interfaith Leadership Training and Service Event in Atlanta, GA January 15-18. Nineteen teams of youth and adults were trained in interfaith leadership skills, equipped to return and lead interfaith projects in their home communities. As part of our partnership with the Interfaith Youth Core (IFYC), regional interfaith leadership training was held as part of the Ohio Meadville District Annual Assembly. One of the 19 youth-adult teams trained in January used the skills they learned to lead an interfaith community cleanup day in March. At least five other teams are currently planning interfaith events or projects in their local communities.

We also scheduled a number of regional events, workshops at General Assembly, and a second national training (details below). Also as part of this partnership, we are creating an interfaith youth leadership curriculum for congregational use to be available in August.

Upcoming Leadership Development Opportunities

- [Chrysalis Training of Trainers](#), July 10 – 14, 2010
For youth and adult advisors to become Chrysalis trainers. A fully subsidized opportunity.
- [Interfaith Leadership Summer Camp](#), August 1-6, 2010 Highlands, NC
Youth and adult advisors will learn how to lead from an interfaith perspective and return to lead interfaith events in their home communities. Partially subsidized event.
- [LDC for Youth and Young Adults of Color](#), August 13-17, Boston, MA
This Leadership Development Conference for Youth and Young Adults of Color will focus on leadership development for UU youth and young adults of color. Partially subsidized event.

As called for in the [Youth Ministry Working Group Recommendations](#), we established a grant program for local youth-led projects giving Unitarian Universalist high school-aged youth opportunities to grow in faith, deepen in spirit, develop skills, and offer leadership and service to Unitarian Universalist communities. Grants up to \$2,000 will be awarded to youth who pair with an adult advisor in a sponsoring congregation, district, or Unitarian Universalist organization. [Youth Project Grant Program](#).

Annual scholarships are also available for youth and young adults attending General Assembly each year.

Youth Ministry Advisory Committee

The first Youth Ministry Advisory Committee (YMAC) has been formed. These youth and adults were selected by a subcommittee of the Youth Ministry Task Force. The YMAC will serve in an advisory capacity to the UUA President on Associational progress in implementing the recommendations of the Youth Ministry Working Group, the future needs of Unitarian

Universalist youth ministry, and the creation of a truly multigenerational faith.

www.UUA.org/ymac.

OWL

There is much exciting news about our lifespan sexuality education program, *Our Whole Lives*. The junior high level visuals experienced a much needed conversion this year when the slides that accompany Sexuality and Our Faith were transferred to DVD, a resource greeted enthusiastically in our congregations.

In a major development, the Our Whole Lives Staff Team has initiated a process to revise the junior high level and has hired a very knowledgeable consultant to write and pursue grants to fund this significant undertaking.

Finally, Our Whole Lives Grades 7-9 and Our Whole Lives Grades 10-12 are both scheduled to be professionally and independently evaluated for effectiveness in longitudinal studies to begin in the fall of 2010.

[Family Pages in UU World](#)

Beginning with the Fall 2009 issue of *UU World*, the Lifespan Faith Development staff group has provided “Families: Weave a Tapestry of Faith,” a four-page centerfold that draws from the stories, activities, and faith development guidance in Tapestry of Faith programs. These pages offer inspiration and ideas to use at home—activities, reflections, and stories for parents and grandparents to share with children – and material for UUs and seekers of all ages to explore. The first year of Family Pages can be downloaded as pdfs at www.uua.org/families/uuworld. Themes include topics such as “Water, Stewardship, and Justice,” and “Recycle and Regenerate.”

The **Renaissance Program** continues to serve an important role in the professional development of religious educators and others. This year, the Multicultural Module was significantly revised. Other programs are being evaluated for revision next year, and one new module, Adult Faith Development is in development.

Tapestry of Faith

The feedback has been overwhelmingly positive – and enthusiastically so. A sample of the totally unsolicited testimonials we receive (it was hard to choose just a few):

“We've been using the 'Creating Home' and 'Toolbox of Faith' curricula this year and we cannot say enough good things about it. Not only do the curricula have wonderful ideas, but just the on-line format is so useful and flexible for my leaders' hectic lives. Please could you pass on our sincerest thanks to the curricula writers, website developers and anyone who has a hand in the project. It has just been so amazing.”

“I am currently teaching 'Riddle and Mystery' which is the best curriculum I have ever taught. I can't thank you enough for making it available to us. My 6th-8th graders are enjoying every aspect, especially the WUUC broadcasts. It is amazing to compare Session 1 broadcast with session 9. They are so comfortable in front of the camera.”

“I found [What Moves Us] a wonderful tool for deeper theological conversation in our congregation. I have heard a hunger in the congregation and this curriculum supplies much of what they were hungering for.”

“I have just finished browsing through your *Harvest the Power* program. It is wonderful! There is no doubt in my mind that your program will be a very helpful resource for our congregations. Congratulations and thanks. I will be sharing the program with my stewardship consultants so that they can pass it along to the congregations that they are consulting with.”

The Tapestry of Faith curriculum project continues to produce programs that serve our congregations' diverse needs. While serving as core curricula for children, youth, young adult and adults, Tapestry also provides resources for many purposes outside the “traditional RE” uses.

- A cluster group of eight Houston-area congregations is using What Moves Us: Unitarian Universalist Theology as the first offering of the [Houston UU Lay Theological Institute](#), a pilot project funded in part by a grant from funds raised through the Association Sunday campaign.
- LFD staff is piloting the use of adult Tapestry of Faith programs for online religious professional study groups using Tapestry material.

- A UU divinity school student who works with BGLT adolescents at risk has found the Tapestry handbook, *Sharing the Journey: Small Group Ministry with Youth*, extremely valuable.
- Harvest the Power is being used to train lay leaders at the district level.
- Tapestry of Faith stories are being used in Sunday morning worship throughout the Association.
- Tapestry of Faith programs designed specifically for multigenerational use provide opportunities for families to explore their faith together.
- The Taking It Home sections of Tapestry programs offer hundreds of ideas for families to grow together in faith.
- The Faith in Action sections of every session and workshop provide hundreds of ideas for families and congregations to put their faith in action in short- or long-term projects within or outside the congregation.
- The modular design of Tapestry programs lends itself to use in retreat and summer camp and conference settings.

Tapestry of Faith Programs June, 2010

CHILDRENS CURRICULA

Living Faith Series

Grades K-1: Creating Home (Christy Olson, Jessica York)

Grades 2-3: Moral Tales (Alice Anacheka-Naseman, Elisa Pearmain)

Grades 4-5: Toolbox of Faith (Katie (Erslev) Covey)

Seeking Truth Series

Grades K-1: Wonderful Welcome (Aisha Hauser, Susan Lawrence)

Grades 4-5: Windows and Mirrors (Gabrielle Farrell, Natalie Fenimore, Jenice View)

Grades 2-3: Faithful Journeys (Alice Anachecka-Naseman, Lynn Ungar)

Grade 6: Amazing Grace (Richard Kimball)

Beloved Community Series

Grades 4-5: Love Connects Us (Michelle Richards, Lynn Ungar)

Grade 6: Riddle and Mystery (Richard Kimball)

Multi-Generational

Gather the Spirit (Richard Kimball, Christine Rafal)

CHILDREN'S RESOURCES

Spirituality and the Arts in Children's Programming (Nita Penfold)

Making Music Live (Nick Page)

YOUTH CURRICULA

Grades 7-9: Families (Helen Bishop, Susan Grider, Tracey L. Hurd)

Grades 7-9: Coming of Age (Sarah Gibb Millspaugh)

Grades 9-12: Exploring Our Values through Poetry

(Karen Harris)

Grades 9-12: A Place of Wholeness: Theology (Beth Dana, Jesse Jaeger)

Sharing the Journey: Small Group Ministry with Youth (Jessica York, Helen Zidowecki)

ADULT CURRICULA

Spirit in Practice (Erik Walker Wikstrom)

Spirit of Life (Barbara Hamilton-Holway)

Principled Commitment (Melanie J. Davis, Stephanie Haymaker, Craig Hirshberg, Richard Bellingham)

Building the World We Dream About (Mark Hicks)

Harvest the Power (lay leadership), (Matt and Gail Tittle, Gail Forsyth-Vail)

UU Theology (Thandeka)

New UU (Jonalu Johnstone)

Our Whole Lives for Young Adults (Sarah Gibb Millspaugh, Michael J. Tino, Laura Anne Stuart)

Sexuality and Our Faith for Young Adults (Mandy J. Keithan, T. Michael Rock, Lynn Young)

RESOURCES

Toolkit Book: Nurturing Children and Youth (Dr. Tracey L. Hurd)

Toolkit Book: Stories in Faith (Gail Forsyth-Vail)

Toolkit Book: When Youth Lead (Jill M. Schwendeman)

Making Meaning after Disaster: A Workshop for Unitarian Universalist Adults (Rev. Sarah Gibb Millspaugh)

Together in Faith: Finding Home in Times of Trauma or Disaster (Dr. Tracey L. Hurd)

Study Guide to the film, Milk (Mark Belletini)

TO BE PUBLISHED 2010

Grades K-1: Love Surrounds Us (Lynn Kerr, Christy Olson)

Grades 2-3: Love Will Guide Us (Alice Anachecka-Naseman, Cathy Cartwright)

Grades 7-9: Heeding the Call: Social Justice (Nicole Bowmer, Jodi Tharan)

Grades 7-12: Building Bridges (Mary Isaacs)

Grades 9-12: A Place of Wholeness: Theology (Beth Dana, Jesse Jaeger)

Mission Trip Handbook (Anne Principe, Jen McAdoo)

A Chorus of Faiths (Hannah McConnaughay, Renee Zimelis Ruchotzke)

UU History (Jackie Clement, Alison Cornish)

UU Resistance and Transformation (Colin Bossen, Julia Hamilton)

Toolkit Book: UU Heritage Stories (Polly Peterson)

MINISTRY AND PROFESSIONAL LEADERSHIP

Ministry and Professional Leadership Staff Group members are committed to serving Unitarian Universalism through care for the competence, strength, health and well-being of our religious professionals. To that end, MPL continues to interact with other staff groups, professional organization leaders, UUA committees, congregational leaders, and individual ministers, religious educators, musician, and administrators to assess and address needs.

In addition to the activities reported below, Ministry and Professional Leadership staff have participated in the Review of Ministry staff team convened at the direction of our new President. We have supported the Ministerial Fellowship Committee in awarding and granting renewal of fellowship, disciplinary actions, continuing education, process revisions, and the addition of a new competency requirement in sexual health. Our ranks of military chaplains continues to increase and we now have six on active duty, two recently fellowshipped and about to begin chaplaincies, and five in seminary.

Ministerial Development

The Ministerial Development Office (MDO): provides training programs that assist clergy, congregations, and agencies to make plans for ongoing ministerial development; makes available grant funds for continuing education; oversees ministers through their preliminary fellowship requirements; and, supports ministers in crisis.

Twenty-eight First Year Ministers, those beginning their first year in parish, religious education and community ministries, gathered for 4 days that included orientation, spiritual renewal and enrichment. They also participate in an online listserv and will gather at GA. The Addictions Ministry Team: created a website; surveyed congregations; maintains a list of available resources; and, monitors a listserv offering advice and support on issues relating to addiction. MDO organized and co-sponsored 6 professional development workshops serving 88 ministers on topics including adaptive leadership, conflict transformation, public ministry, and worship arts. Staff members worked with the Ministerial Fellowship Committee and with the 300 ministers in Preliminary Fellowship. As of April 15, 2010, 168 continuing education grants totaling \$70,566 were made to ministers and religious educators.

Ministerial Credentialing

The Ministerial Credentialing Office serves applicants, aspirants and candidates who are seeking ministerial fellowship with the Association and helps support future ministers to become change agents through active leadership in anti-racism, anti-oppression, and multiculturalism efforts. The MCO Director works closely with UU and multidenominational theological schools, supports the Diversity of Ministry Team (DOMT), convenes the UUA Scholarship Committee, serves as a liaison between the four Regional Sub-Committees on Candidacy (RSCC) and the MFC (MFC), and serves as the Executive Secretary of the Panel on Theological Education (POTE). With funding from and in ongoing cooperation with the POTE, the support of in-care programs for seminarians in multidenominational seminaries is now in its second year of partnership with four UU districts. Significant changes in FY 2011 include bringing into the Ministries and Faith Development Staff Group the work of the four RSCC administrator positions and the Internship Clearinghouse.

Religious Education & Music Leadership Credentialing:

There are currently 37 participants in the Religious Education Credentialing program. 7 religious educators are expected to be credentialed this year, including 4 at the Master Level, 1 at the Credentialed Level, and 2 at the Associate Level. This will bring the total of all credentialed religious educators to 61. The re-envisioned program has been well received by religious educators in the field. It is more flexible, attainable, and provides a tenure track for long-term religious educators, which recognizes the significance of their vast experience.

There are 10 participants currently active in the Music Leadership Credentialing program, including 2 church musicians who are expected to be credentialed this year. This year's curricula included courses in leadership of congregational singing, elements of multicultural competence for musicians, and a professional development day on the music leader as a pastoral care giver. A criminal background check was added as a requirement for credentialing, and a tenure track to credentialing was developed for long-term music leaders.

Renaissance module trainings were conducted this year in 10 UUA districts and Canada.

Transitions Office

The year now coming to a close has been a difficult one for ministers seeking first or new settlements, and for congregations seeking new professional ministry. Assuming that all candidacies become calls, as of this date only 43 of the 62 congregations in search have called a minister—a more than 30% disappointment rate, topping the 20% rate of the past 2 years. (Previously a 10% rate had held steady.) Likewise, only 45 of the 120 ministers in search (including 2 co-ministry teams) have been called. The annual average number of calls over the past 10 years was 58. The better news is that of the 45 ministers called, 6 are ministers of color, including one member of a co-ministry team and one Diversity of Ministry placement. Over the previous decade, the annual average was 3.2 ministers of color.

In view of the reduced number of ministerial calls, transitional ministry—both interim and consulting—has taken up some of the slack, with largely part-time consulting ministries growing in frequency. Congregations are thus more frequently underserved and ministers underemployed. Given the economic anxiety still common among us and the short staffing endured by many congregations, fully employed ministers and church staff are probably more frequently over-employed, with consequent wear and tear. It is to be expected that as the recession gives way to new economic growth, an unusually high number of ministries will end.

Church Staff Finances

After three years of study, research, analysis and deliberation, the UUA Compensation, Benefits, and Pension Committee (CBPC), staffed by the Office of Church Staff Finances (OCSF), recommended that the UUA Board of Trustees select TIAA-CREF as the new record keeper for the Unitarian Universalist Organizations Retirement Plan. The CBPC believed that the shift from Fidelity Investments to TIAA-CREF was justified for three reasons as TIAA-CREF: 1) will provide a better line-up of mutual funds and lower cost to our plan participants; 2) is an excellent retirement plan partner; 3) is more aligned with our religious values. As of March 31, more than 2,800 individuals had \$175.3 million invested in the UU Organizations Retirement Plan.

In January 2010, the UUA shifted from MetLife to UNUM as the provider of life/long-term disability insurance for employees of the UUA, congregations, districts, and other related organizations. A successful open enrollment opportunity in February 2010 meant 171 employees, including individuals who work at 40 congregations not currently offering group insurance, signed up for coverage. Our enhanced LTD insurance offers a benefit of 66.7% of pre-

disability income (up from 60% under our old policy). In addition, if the employee is participating in the employer's health plan, including the UUA Health Plan, at the time of disability, our new LTD policy includes up to \$600/month paying their health insurance premium (up to 30 months). The Life Insurance benefit is twice salary (salary & housing for ministers), up to \$200,000 (increased from \$150,000 under our old policy). In addition, our new plan allows employees to take their insurance with them if they end their UUA-related employment. Benefit improvements were implemented at no additional cost to participants.

The UUA Health Plan provides comprehensive health insurance benefits, consistent with UU values, to 769 employees, together with another 556 family members, in 310 employing organizations (UUA national staff, congregations, districts, and other related organizations). On December 31, the UUA Health Plan completed its third year of operation with \$2.6 million in reserves. During 2009, the UUA Health Plan, which is self-insured by the UUA, was able to enhance benefits while continuing to keep premium increases low. During its first three years, total premiums increased less than 15.5 percent – significantly lower than market increases.

During 2008-2009, OCSF was able to distribute more than \$550,000 in aid funds and requests remain high. Of particular concern is the rising amount of divinity school debt borne by individuals entering our ministry. Among recipients, average ministerial debt increased from \$33,291 (2003) to \$50,869 (2010) or an increase of 53 percent. Even more disturbingly, the number of recipients carrying student loans exceeding \$50,000 increased from 21 percent (2003) to 54 percent (2010). For the 67 recipients this year, their total student debt is \$3.408 million. Total loan payments this year is estimated at \$300,547. The \$100,000 in OCSF grants equals 2.93% of the total indebtedness of these ministers. In addition, the Unitarian Service Pension Society provided approximately \$476,000 in service gratuities for distribution to ministers with a minimum of 20 years of service who have reached 66 years of age and their survivors. The OCSF also works closely to coordinate aid requests with the Society for Ministerial Relief and the MA Congregational Charitable Society.

Office of Worship and Music Resources

The Office of Worship and Music Resources (WAMR) seeks to discover, develop, and disseminate the resources needed to nurture and deepen the worship life in our congregations. Now completing its second year of existence, the primary avenue of this is through the online WorshipWeb, which has grown from a searchable database of worship elements to a multi-

modular source for resources on music, multigenerational worship, worship theory, worship associates programs, copyright, technology and worship, and much more. New this year is information about musical resources (beyond our hymnals) that are more and more frequently being used for congregational singing -- including works composed by our growing list of working Unitarian Universalist composers (also found on the WorshipWeb).

This year, the Director of WAMR: led sixteen hours of workshops on worship arts for the UUMA meeting in Ottawa, convened a webinar for the Pacific region, and gave keynotes and workshops at events in the JPD and BCD, as well as here at GA.

COMMUNICATIONS

The Communications Staff Group serves the Association of Congregations by publishing and distributing books and periodicals that inform, inspire, and educate their readers; by developing and maintaining a UUA presence in cyberspace via the World Wide Web, email, and social networking; by raising the visibility of Unitarian Universalism in the public arena; and by counseling and supporting our congregations in their various communications efforts.

Communications staff also serve as resources on UU history and as liaison to the Harvard Divinity School library that holds the Association's historical archives.

Office of Information and Public Witness:

The past year was a busy one for the IPW Office, and a time of great change. Staffing changes resulted in IPW's taking on responsibility for editorial oversight of UUA.org and for the receptionist's functions at UUA headquarters.

Social media tools play an increasingly significant role in our communications, and staff have been working hard to maximize these important vehicles. The UUA's Facebook and Twitter audiences have grown dramatically in just twelve months, and resources for congregations have been developed to help churches be more effective in their own social networking efforts.

In the area of media relations, General Assembly, and particularly the presidential election, yielded a high volume of press coverage. This success followed significant media visibility for UU values last spring in coverage of new marriage equality laws and comprehensive sexuality education initiatives such as the new *Our Whole Lives* curriculum for young adults and the Sexuality Education Advocacy Training (SEAT) for teens. Other public witness topics that garnered significant coverage over the past year were environmental justice and immigration reform. These and other news stories about the UUA are catalogued at <http://www.uua.org/news/index.php>.

Recently, staff have been developing materials for the UUA's website: the redesigned homepage of UUA.org now features a section on blog highlights and a video box as well as an additional thumbnail for news stories. The IPW staff is working closely with Information Technology

Services staff to develop new procedures and protocols for managing web content, e-mail communications, and multi-media sharing and to contribute to the next two phases of the re-design of the entire website.

Periodicals

The Periodicals staff group is responsible for producing *UU World*, the magazine for members of UU congregations, and *InterConnections*, the newsletter for congregational leaders. As the only service the UUA provides directly to all members of its congregations, *UU World* connects individual UUs to their larger religious community. *UU World's* website, uuworld.org, introduces UU voices to a broader audience of religious liberals. *InterConnections* serves congregational leaders by sharing tips and resources from other congregational leaders.

InterConnections, which had been a quarterly print newsletter until 2009, shifted to online-only publication this past year. The newsletter is now published as a monthly email newsletter, with articles archived as part of UUA.org's library of resources for congregational leaders.

Subscriptions to the newsletter, which used to be limited to the lay and professional leadership of UU congregations, are now free to all. Sign up at UUA.org/interconnections. A weekly blog, "InterConnections TipSheet," publishes timely announcements of resources for congregations at tipsheet.blogs.uua.org.

UU World has encouraged conversation this year about Unitarian Universalism and multiculturalism with a series of feature articles: "The Gospel of Inclusion" (Fall 2009), "Unitarian Universalism in a Changing Society" (Spring 2010), and "What Is UU Culture?" (Summer 2010). *UU World* also introduced a new section for UU families in the magazine's centerfold, "Families Weave a Tapestry of Faith," with content from the UUA's Lifespan Faith Development staff.

UU World continues to expand the offerings on its weekly website. From February to May, it published a weekly blog on UU parenting by Skinner House Books author Michelle Richards (blogs.uuworld.org/parenting), which was the most-visited feature on the site this spring. The print magazine's "Books by UU Authors" column is being replaced by much more frequent notices online at uuworld.org/uuauthors. And *UU World* will take on the primary responsibility for covering the annual General Assembly this year at uuworld.org/ga. The magazine's online

outreach on Facebook has generated more than 4,600 fans, who receive multiple updates from *UU World* each week ([facebook.com/uuworld](https://www.facebook.com/uuworld)). More than 3,100 people subscribe to the magazine's weekly email newsletter.

Publications Office and the UUA Bookstore

The Publications Office manages the production of congregational resources sponsored and developed by UUA staff groups, giving congregations across the country access to the expertise of professionals at headquarters. The Publications Office also develops, produces and markets titles for the Skinner House Books imprint, which gives authors beyond headquarters the opportunity to publish books that enrich readers' spiritual lives and promote the values of liberal religion. In the past year, the Publications Office has produced 15 new titles.

The UUA Bookstore is the primary retail arm of UUA publishing. Bookstore sales totalled more than \$1,060,000 this year, down about two percent from the previous year. This decrease is roughly in line with the national industry average according to the Association of American Publishers. UUA and Skinner House titles account for about \$800,000 of these sales.

In the past year, Skinner House has focused on expanding the reach of Unitarian Universalism into the world. *The Growing Church: Keys to Congregational Vitality*, edited by Thom Belote, offers insights from the ministers of some of our fastest-growing congregations. Building on the success of *Welcome: A Unitarian Universalist Primer*, which has outstripped the *Unitarian Universalist Pocket Guide* as the most popular introduction for visitors and new members, Skinner House has published a children's version, *Sunday and Every Day: My Little Book of Unitarian Universalism*. Designed to fit into soldiers' pockets, *Bless All Who Serve: Sources of Hope, Courage and Faith for Military Personnel and Their Families* is a collection of prayers, readings, and songs, as well as reflections by UU military chaplains. With the help of generous donors, 25,000 free copies will be distributed to members of the military. It will also be sold through the UUA Bookstore and trade bookstores.

Other Skinner House titles offer exciting new ideas for worship and spiritual practice. *Singing Meditation: Together in Sound and Silence*, by Ruthie Rosauer and Liz Hill, introduces a new form of small group worship that alternates singing and silence. *Story, Song and Spirit: Fun and*

Creative Worship Services for All Ages, by Erika Hewitt, is a collection of multigenerational service scripts. Finally, *Serving with Grace: Lay Leadership as a Spiritual Practice*, by Erik Walker Wikstrom, challenges lay leaders to experience congregational work as an integrated element of a fully rounded spiritual life.

Publications and the Bookstore have expanded their online presence with the successful launch of two Facebook accounts, a new video feature for Bookstore customers, and a twice-monthly email newsletter. The first Skinner House blog, a dialogue with Michelle Richards, author of *Tending the Flame: The Art of Unitarian Universalist Parenting*, was posted on the *UUWorld* online and saw more than 10,000 hits, proving that marketing efforts can also provide content with inherent value.

BEACON PRESS

Beacon Press is the independent publishing company of the Unitarian Universalist Association, founded in 1854 to promote social justice in the wider world. Ever since, the press has fulfilled its role as the denomination's respected public voice for expressing its liberal religious values. Beacon books illuminate UU values to people everywhere, and help motivate UUs and others to work toward social change by engaging them in the issues the books address. These longstanding issues of importance both within Unitarian Universalism and beyond include: anti-racism and anti-oppression work, and immigrants' rights; religious diversity and the role of religion in a progressive society; civil rights and progressive education; environmental and economic justice; social justice activism and grassroots organizing; human rights; and advancing the rights of women and lesbian, gay, bisexual, transgender, and queer people.

In May, 2009, Beacon Press became the exclusive trade publisher of the works of Martin Luther King, Jr., including his writings, sermons, orations, lectures, prayers, and all of his previously published books. This spring, the press launched The King Legacy series by bringing back into print *Stride Toward Freedom: The Montgomery Story*, a personal and historical account of the Montgomery bus boycott, the first successful large-scale demonstration of nonviolent resistance in America, and *Where Do We Go from Here: Chaos or Community?*, Dr. King's last book and blueprint for global economic activism. Beacon will publish Dr. King's work in new editions, stretching into 2017 and perhaps beyond, and present them as vital works that offer insights for building a better society, for working toward the Beloved Community UUs dream of achieving. The press aims to reach established and new audiences, including school, college, library, and faith communities, as well as general readers, with the revitalized message of Dr. King into the decades to come. This fall Beacon will publish *The Trumpet of Conscience*, Dr. King's final speeches on racism, poverty, war, and the civil rights movement, with a new foreword by Marian Wright Edelman and an accompanying original audio recording of King delivering two of his most powerful lectures, "Conscience and the Vietnam War" and "A Christmas Sermon on Peace."

In the past year, Beacon has made significant strides in raising its online profile in the blogging community and in increasing its social networking outreach. Supported by grants from the Fund for Unitarian Universalist Social Responsibility and the Fund for a Just Society, Beacon Broadside has posted almost 400 articles since launching in 2007, which have received over 166,000 page views on Typepad, the website hosting the blog. In addition, posts have been

viewed approximately 74,000 times in RSS feed readers or via email subscriptions. The press has recently begun work on a strategic plan for its digital future, which includes revisions, enhancements, and improvements to the blog and website. Beacon is now increasing the multimedia content of its website with video and audio interviews with authors, and doing more book giveaways on Twitter and Facebook that drive people to www.beacon.org. Social networking outreach includes polls and contests for readers, soliciting reader feedback and book reviews, and setting up primary spaces online for conversation around particular subjects, beginning with feminism and the environment. Additionally, the press has begun creating independent websites for its authors; Sonia Sanchez's can be viewed at <http://soniasanchez.net/>.

This year Beacon mourned the passing of friend and author Forrest Church. Beacon was honored to publish many books by Church, including *Lifecraft: The Art of Meaning in the Everyday*; *Life Lines: Holding On (And Letting Go)*; *A Chosen Faith*; *The Separation of Church and State*; *Love & Death*; and most recently, *The Cathedral of the World: A Universalist Theology*. On Thursday, June 24, from 10:45 a.m. - 12:00 p.m., Rev. Dr. William Schulz, Dr. Joanne M. Braxton, and Rev. Kendyl Gibbons will hold a tribute to Forrest Church—"The Cathedral of the World: Forrest Church's Legacy"—discussing the many ways his theology can strengthen UU congregations.

Rev. Dr. Rebecca Ann Parker and Rev. Dr. John A. Buehrens have a new book with Beacon. Published in May, *A House for Hope: The Promise of Progressive Religion for the Twenty-first Century* provides a theological and spiritual foundation for religious progressives. Both authors will host the GA program "A House for Hope: Our Theological Foundation" on Friday, June 25, from 1:00 p.m – 2:15 p.m, where they will lay out the framework for religious liberalism and discuss how UUism can meet the challenges of the twenty-first century.

This spring Beacon has also published the first memoir by a nonbiological lesbian mother. *She Looks Just Like You: A Memoir of (Nonbiological Lesbian) Motherhood* by Amie Miller explores what it means to be an LGBT parent. Miller will be present at GA on Thursday, June 24, from 9:00 a.m – 10:15 a.m. to deliver a lecture with Laura Smidzik on the political, societal, legal, and personal difficulties facing LGBT families—"She Looks Just Like You: Exploring GLBT Families."

Among the other thirty original titles the press published in 2009 was *Morning Haiku*, the first new book of poetry in over a decade by Sonia Sanchez, one of the leading writers of the Black Arts Movement. Beacon created a poster for *Morning Haiku* which was very popular at the annual meeting of the American Library Association. *The Protest Psychosis: How*

Schizophrenia Became a Black Disease by psychiatrist and cultural historian Jonathan M. Metzler exposes the racialization of a biologically-based disease, starting with the civil rights era and continuing today. 2009 Ware Lecturer Melissa Harris-Lacewell has called the book “insightful, challenging, and singularly compelling.”

Reproductive-health researcher Carol Joffe’s *Dispatches from the Abortion Wars: The Costs of Fanaticism to Doctors, Patients, and the Rest of Us* relays on-the-ground stories of doctors grappling with the obstacles to providing abortion care for their patients, revealing the persistent cultural, political, and economic hurdles to access. With a preface by Amartya Sen and an afterword by His Holiness the Dalai Lama, *To Uphold the World: A Call for a New Global Ethic from Ancient India* by Bruce Rich offers a powerful critique of the current wave of globalization and urgently calls for a new global ethic of religious tolerance, conservation, nonviolence, protection of all species, and human rights. Award-winning educator Linda Nathan’s *The Hardest Questions Aren’t on the Test: Lessons from an Innovative Urban School* shares the philosophies and practices that have worked so well for the Boston Arts Academy, an ethnically and socioeconomically diverse school that sends 95 percent of its graduates to college.

Dispatched by the MacArthur Foundation to a small town in Iowa, authors Patrick J. Carr and Maria J. Kefalas studied the emptying out of small towns, developing strategies for arresting the process and creating sustainable, thriving communities. Their book *Hollowing Out the Middle: The Rural Brain Drain and What It Means for America* was published last fall. *The Death of Josseline: Immigration Stories from the Arizona-Mexico Borderlands*, by journalist Margaret Regan, explores a host of urgent issues: the desperation that compels migrants to come north, the border militarization that threatens the rights of U.S. citizens, the environmental damage wrought by the new border wall, and the human tragedy of the unidentified dead in Arizona’s morgues.

STEWARDSHIP AND DEVELOPMENT

The Stewardship and Development Staff Group 2010

Mission Statement:

- *Vision: A Unitarian Universalist culture of abundance financially nurturing our congregations, our organizations and our Association.*
- *Mission: Helping Unitarian Universalist congregations and individuals make their dreams come true through the UU institutions and Association they love.*

Staff Culture:

Stewardship & Development staff has had the privilege of working with 1,048 congregations and more than 11,000 individual donors this year, each of whom has a shared commitment to Unitarian Universalism, unique reasons for giving and dreams for our future.

There is an intentional understanding among the staff group of being first and foremost “donor advocates”. Whether in person or on the phone or online, the staff’s first priority is to invite the donor into relationship and engagement with the larger movement. Stewardship and Development takes seriously its donor relations role and constantly looks for ways to feed back what it hears from constituents into the UUA system.

Funding Areas:

The Stewardship and Development staff group has been responsible for four major areas of income for the Association. The annual financial goals for these areas are set by the Administration and approved by the Board of Trustees.

- **The Annual Program Fund** (“Fair Share”) raises \$7 million each year made up of contributions by member congregations in support of their Association. The Annual Program Fund is the primary source of funding for the UUA, which supports core services, programs and resources congregations rely upon to fulfill their missions and ministries in their local communities.

- **The Friends of the UUA Program** raises more than \$1.5 million each year through monthly direct mail to 18,500 donors with updates on programs and initiatives. It additionally targets 135,000 non-donor Unitarian Universalist households once per year (split into three mailings of 45,000 households each) for support via these letters. These direct appeals provide Unitarian Universalists with a regular opportunity to have a significant impact on the growth and vitality of Unitarian Universalism and a sense of connection to their Association.
- **The Legacy Giving Program** assists individuals in making bequests by will or trust, charitable gift annuities, pooled income fund gifts and other planned gifts. Over the last five years the program has raised \$30 million in legacy commitments. The Legacy Gifts office also has a variety of legacy resources to help congregations with their planned giving programs.
- **Comprehensive (Capital) Campaigns** have raised over \$20 million in cash gifts over the last five years to support programs and initiatives that are strengthening Unitarian Universalism.

Initiatives:

Though each of the four income areas has their own financial goals, many of our initiatives are meant to support multiple strategies and funding targets.

- **President's Council meetings** – The Council serves to provide the UUA with suggestions and feedback on stewardship of the Association and the movement, with leadership for resource development efforts and with support through advocacy with individuals and congregations.
- **Annual Program Fund (APF) quarterly newsletter** – This is prepared as part of a multi-faceted, ongoing effort on the part of our staff and the APF committee to provide relevant and concrete tools and information to our congregations.
- **Association Sunday** – In 2007, Stewardship and Development implemented a new program to help strengthen the bonds of common purpose among Unitarian Universalist congregations and combine their resources to support Unitarian Universalism. Association Sunday has raised more than \$2 million over the last three years, much of which has gone directly back to congregations and districts in the form of grants.

- Giving and Generosity E-Newsletter – Stewardship and Development began in 2007 an e-newsletter that circulates to approximately 10,000 constituents. This is an avenue for the department to keep in touch with our donors and offer them a regular opportunity to support the UUA with financial gifts. The e-newsletter shares stories of generosity, informs people of the impact of their gifts, and is a part of the department’s strategy to thank donors as often as possible in as many ways as possible.
- Umbrella Giving – A significant source of direct financial support to our congregations, this program enables the Association to offer “one-stop giving” to donors who wish to give to any Unitarian Universalist organization. Donors contact the UUA Stewardship & Development office to arrange gifts of all kinds, including stock gifts, bequests, trusts and other gifts to congregations, theological schools, and other Unitarian Universalist entities. Nearly 30% of the money raised by Stewardship and Development goes directly back to Unitarian Universalist organizations through umbrella giving.
- Online Giving – Stewardship and Development has acquired new technology to expand the UUA’s ability to solicit and accept online donations at www.uua.org/giving.
- Facebook – Stewardship and Development has recently begun promoting generosity to the UUA through fan pages and other publicity mechanisms.

INFORMATION TECHNOLOGY SERVICES

Mission: We manage the technology that supports communication and information sharing among the UUA staff, districts, congregations, and the public. We provide strategic guidance, high-availability computing networks, software tools and systems, consulting services, and technical training and support to UUA and District staff located throughout the United States. We manage the UUA's website, constituent database, blog platform, email lists, video production studio, and videoconference services, and we are responsible for ensuring the UUA's compliance with data privacy laws.

Over the last year (as of April, 2010), we have delivered on a number of initiatives that derive directly from strategic goals. Chief among those are:

Website Redesign – The uua.org website recently received a positive rating for accessibility from an outside rating organization. On February 1, after a cross departmental project spanning more than 4 months, we launched a significantly updated uua.org. Our home page and a new Resources page were designed from the ground up to be more useful, vibrant, and attractive. Video is now available throughout the site, as well as links to social networks, most viewed pages, blogs, and many other sources of information. Much more information is available than before, and it's organized in a way that makes it relatively easy to identify and utilize. Our most popular feature, Find A Congregation, is now available directly on the home page.

Data Security and Privacy – This portfolio of projects will ensure the UUA is meeting our ethical obligation to protect the privacy and identity of our constituents (including youths), and to be in measurable compliance with laws and industry standards governing the safe handling of personally identifiable and sensitive information. The UUA Bookstore is now compliant with a tough new Massachusetts law that recently went into force, as well as with many provisions of PCI credit card industry guidelines. The GA Office is expected to be in compliance by GA.

Video – As an essential element of our nascent communications strategy, we are championing the use of video. Besides making it possible to include video virtually anywhere on the uua.org website, a modest but up-to-date video and audio studio has been built and is in full production.

Training and resources are in development as well, including published standards, a process for submitting media, post-production services, and media management systems and protocols.

Online Meetings – 5,700 people have attended 650 online meetings, trainings, and webcasts using the Persony software hosted by the UUA. This is more than double the numbers of one year ago. Recently, the Board of Trustees had a special meeting online at which over 65 people attended from all over the country. By making more use of the Internet to conduct some of our business, we have greatly reduced our carbon footprint, made participation possible for people who otherwise could not attend, and saved significant sums of time and money.

myUUA.org - Church administrators use this online system to update the contact information for their members and leaders on file at the UUA. Presently 647 congregations are registered to use the system. In addition to making sure everyone gets UU World magazine, information from myUUA.org will make it possible to have a timely online UUA Directory.

FINANCE AND OPERATIONS

The Office of the Treasurer is responsible for the oversight and safekeeping of all of the Association's assets – financial and physical – including endowment investments, trusts, building loans, facilities, and operating funds. In addition, the Office oversees assets held for the benefit of others. These include the investments of congregations in the UU Common Endowment Fund, trusts benefiting congregations and other UU entities, the UU Organizations Retirement Plan, and planned gift vehicles benefiting donors during their lifetimes. We treat this responsibility as a sacred trust with our congregations, their staffs, the employees of the Association, and all those affected by the actions of the UUA.

Financial Services serves all Association staff groups and districts. This staff group is responsible for the UUA's financial records and reporting; issuing timely payments to staff, volunteers and vendors; accounting, administration and reporting for the UU Common Endowment Fund; billing, collecting and reporting to the Congregational Properties and Loan Fund on the financial status and results of the building loan program; and the administering of the financial aspects of the UU Organizations Retirement Plan.

The Operations / Facilities staff group supports the UUA staff, as well as the Association's members, by providing services for the daily operation and overall maintenance of the UUA's properties in Boston. These properties include the Association's offices at 25 Beacon St. and 41 Mt. Vernon St. as well as the guest accommodations and meeting spaces at the Eliot and Pickett House at 6 and 7 Mt. Vernon Place.

Highlights from Fiscal Year 2010

Financial statements. Every year the books and records of the Association are audited by an independent certified accounting firm. In fact, the Association now has two annual audits, one for the UU Organizations Health Plan, which is structured as a separate trust, and one for the Association's operations and assets. KPMG conducted the audit of the Association's fiscal year ending June 30, 2009 and issued a report stating that the UUA's financial statements "present fairly, in all material respects, the financial position of the Association" without qualification. This is what is referred to as a "clean opinion," and this is the desired outcome of an audit.

KPMG was also the auditor of the Health Plan for fiscal year 2008, but that audit process was not completed until April of 2010 due to KPMG's difficulty in confirming the compliance of congregations with the terms of the Plan. The result, while delayed, was again a clean opinion. For fiscal year 2009 of the Health Plan, the UUA chose a new audit firm, Caturano and Associates. They issued their report, also with a clean opinion, immediately following KPMG's report. (An audit firm may not issue a report on a fiscal year until the report on the previous year is completed.)

During this year, the UUA issued a Request for Proposals for the audit of the Association's operations and assets and selected a new firm to replace KPMG. The firm conducting the UUA's audit for fiscal year 2010 will be CBIZ-Tofias. Tofias is based in Cambridge, Massachusetts and is an affiliate of the national firm Mayer Hoffman McCann.

UU Common Endowment Fund. Several significant improvements were made to the management of the Fund to enhance the convenience to congregational investors and to improve the transparency of the Fund. Early in 2009 the UUA engaged NRS Trust Product Administration to take over the investor reporting from State Street Bank. NRS is uniquely equipped to provide this kind of service in a customized and time sensitive manner. As a result of this change, the UUCEF now calculates unit values on a monthly basis. This enables congregations to deposit and withdraw funds monthly (previously it had been quarterly). Statements have been designed to our specifications and are issued monthly and posted online where investing congregations can access them via a secure web interface. In addition, monthly performance reports are now posted on the UUCEF web page.

For investors, 2008 and early 2009 was an extremely challenging period, and the UUCEF was not spared significant losses. However, the decline experienced by the Fund was not as severe as that of the endowments of many other institutions. Then, during 2009, the UUCEF saw a significant recovery, gaining 27% net of fees and expenses for the year ending December 31. Compared to other similar sized endowments, this placed the performance of the UUCEF in the top 8th percentile, and the three- and five- year returns ranked in the top quartile among comparable endowments.

Shareholder advocacy. The UUA uses its share ownership through the UUCEF to witness for our Principles and values. In this past year, the UUA filed or co-filed shareholder resolutions with a dozen corporations and cast thousands of proxy votes. The Association has used its financial assets to witness for UU values on an array of issues including: climate change, sexual

orientation and gender identity/expression non-discrimination, human rights violations in Burma and excessive executive compensation. In four cases the targeted companies agreed to address the concerns raised in our proposals. Alpha Natural Resources has agreed that climate change represents a significant risk to the company and is taking steps to develop strategies that will result in better disclosure and steps to mitigate risks. The UUA will continue to monitor the progress of the company. Bristol-Myers Squibb has agreed to implement an advisory vote on executive compensation at the next annual shareholder meeting, just as we proposed. Finally two companies, Travelers Insurance and Home Depot have added protections for gender identity and expression to their non-discrimination policies. As a result, some 300,000 employees will now benefit from these policies. The other proposals will be voted on by the shareholders.