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**Unitarian Universalist Association**

**Annual Report  
June 2011**



**Peter Morales, President**  
**Harlan Limpert, Vice President for Ministries and Congregational Support**  
**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 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 new initiatives and many changes. 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)) or Harlan Limpert ([hlimpert@uua.org](mailto:hlimpert@uua.org)).

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## **BEACON PRESS**

Beacon Press is the independent publishing arm 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 published *All Labor Has Dignity*, edited by Michael Honey, which collects many of Dr. King's speeches that exemplify his commitment to labor rights. The book included many previously uncollected writings and some speeches which Beacon transcribed from original audio recordings. . We also brought back into print *Why We Can't Wait*, King's account of the civil rights movement in Birmingham during the spring and summer of 1963. This fall Beacon published *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." The next book in the series will be a book of Dr. King's prayers. Our work on this series is supported by a generous grant from the UU Veatch Program at Shelter Rock.

With the growing popularity of ebooks, Beacon has made a strong effort to make more of our books available in digital format. In 2010, 11,980 ebook units were sold, for about \$70,000 of revenue. This year, as of March 31, 2011 Beacon has 400 eBook titles available for sale and 37,413 eBook units have been sold; projected eBook revenues for the fiscal year are \$350,000.

In our efforts to keep up with publishing's digital future, we continue to increase Beacon's online presence with an active website and blog as well as other online and social networking initiatives. Towards that end, Beacon's part-time Blog Editor was recently promoted to a full-time position as the Digital Content Developer and Blog Editor. This new position will help Beacon to work with authors and staff to develop multimedia content, advise and train authors in use of social media, manage author and book web sites developed by Beacon, create strategies for Beacon's use of social networking sites and multimedia projects, and of course, continue to keep the Beacon Broadside blog fresh and relevant. Supported by grants from the Fund for Unitarian Universalist Social Responsibility and the Fund for a Just Society, Beacon Broadside has posted 722 articles since launching in 2007, which have received over 312,000 page views on Typepad, the service hosting the blog. In addition, posts have been viewed 272,000 times in feed readers (a 67% increase in the average page views per day) or via email subscriptions.

Beacon has increased the multimedia content of its website with video and audio interviews with authors and by doing more book giveaways on Twitter and Facebook that drive people to [www.beacon.org](http://www.beacon.org). This year the blog featured several video interviews of Terry Galloway author of the compelling memoir *Mean Little Deaf Queer* as well as a series of videos with the activists featured in Courtney Martin's book *Do It Anyway*. For National Poetry Month, Beacon promoted a giveaway of several signed copies of poet Mary Oliver's most recent collection of poems as well as a giveaway of Sonia Sanchez posters. 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. There have also been 9,035 views of all videos on Beacon's YouTube channel since its inception in February 2009. There has been a clear increase in views since last year. In April of 2010, there were 298 views; this year's total views in April were 1,879. On the social media front, Beacon's Facebook page has 1,675 fans, which is almost double the number we had last year at this time. At 2,813 followers, Beacon's Twitter page is also reaching almost double the number of people since last year. Additionally, in January 2010, we started regularly posting excerpts to the Beacon Press Scribd page in January 2010. In the first 6 months of 2010, there were 6,433 reads of excerpts we posted to the site. Since July 1, 2010, there have been 69,091 reads of excerpts.

Next year Beacon will publish a new book by Eboo Patel, author of *Acts of Faith*. Patel's second book, titled *Sacred Ground*, will explore the history of American religious integration and how, despite the current politically motivated anti-Muslim fervor, America's history of tolerance and eventual integration will prevail with Muslim Americans as well. This Fall, Beacon will publish *Reimagining Equality* by Anita F. Hill, her first book since *Speaking Truth to Power*, which will examine home as the nexus of gender and race in America through the historical and present day perspectives of African American women. Additionally, we will be publishing a book by psychologist and writer Lauren Slater, tentatively titled *Becoming Family*, in which Slater will explore what it means to be family through her own journey from fiercely independent therapist to a wife and mother. We will also publish the long-awaited memoir by gender theorist, performance artist and author of *Gender Outlaw*, Kate Bornstein. In this highly anticipated book, Bornstein will recount her life as a man, her transition, and perhaps most provocatively, her dozen years as a Scientologist. This spring Beacon has published the fourth book in the Queer Ideas series, *Queer (In)justice* by activist-lawyers Joey L. Mogul, Andrea J. Ritchie, and Kay Whitlock, which examines the experience of LGBT people in the criminal legal justice system. Also this spring Beacon published *A Queer History of the United States* by Michael Bronski, editor of Beacon's *Queer Ideas* series. The book explores the history of the United States from the perspective of LGBT and queer people. Among the other thirty original titles the press published in 2010, *Swan*, Mary Oliver's new book of poetry, was reviewed in *Christian Century* and *Ms. Magazine* and was #3 on the *IndieNext 2011 Poetry Top Ten List*. In his second book with Beacon *Food Rebels, Guerilla Gardeners, and Smart Cookin' Mamas*, Mark Winne, who was Executive Director of the Hartford Food System for 25 years, profiled the leaders of the rapidly growing alternative food movement in his new book. *Recovering a Lost River* by Steven Hawley, argues that dam removal is an urgent issue that makes good scientific, economic, and environmental sense. Hawley is an environmental journalist who was the first to write about the historic agreement to tear out the Edwards Dam on the Kennebec in Maine. *Kirkus Reviews* called the book "Both troubling and encouraging, a well-told tale of environmental activism and citizen action."

In two new books about public health, we presented ideas about the problems inherent in our overtaxed health care system. In *Overdiagnosed* by Dr. H. Gilbert Welch, Dr. Lisa M. Schwartz and Dr. Steven Woloshin, the authors argue that the effects of screenings and presumed preventative treatment for disease and "pre-disease" are in fact socially, economically, and even medically harmful. *White Coat, Black Hat*, an investigative look and ethical consideration of medicine and consumerism and its consequences by medical ethics professor Dr. Carl Elliott, looked at the influence of big Pharma on medicine and found much to concern us.

## **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 played a bigger role this year than ever before, 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](http://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*). 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 totaled more than \$1,060,000 this year, down about 2 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.

## 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. The focus of our staff group efforts this year have been in these areas:

- ♦ *Creating Learning Communities within and between congregations: Focusing on congregations as the drivers of growth, these efforts seek to unlock the inherent capacity for change within our congregational leadership by providing partners across congregations.*
- ♦ *Developing agile staff and support structures to be relevant to current congregational needs. New economic and cultural realities require us to provide more specialized and specific resources for congregations grappling with a changing world. New technologies allow us to provide innovative programs and services that are more accessible to congregational leaders.*
- ♦ *Bringing a holistic vision of congregational life to all we do. By breaking down silos between professionals, departments, areas of ministry, we model of vision of beloved community in which all strive together toward fulfillment of a common mission.*

The following initiatives are outgrowths of this philosophy:

- ♦ **Leap of Faith Initiative:**

In May 2010 President Peter Morales invited the ministers of several congregations with admirable records of numerical growth to join him in considering how best to encourage and support numerical growth in our congregations. Out of this consultation emerged the **Leap of Faith Initiative**. This pilot project has identified 8 vital congregations (called “Aspiring Congregations”) desiring particular support in order to take a big “leap” forward, and matched them with mentoring congregations experienced in particular areas of congregational development. The resultant teams of congregations are:

- First Unitarian Church of Albuquerque, NM and First Unitarian Church in Des Moines, IA
- First Parish in Milton and First Unitarian Church of Richmond, VA
- First UU Congregation in Ann Arbor, MI, Unitarian Church in Summit and First Unitarian Church in Dallas, TX
- UU Church in Bloomington, IN, West Shore Church in Cleveland, OH and First Unitarian Church in Rochester
- Unitarian Church in Harrisburg and First Unitarian Society of Denver, CO
- Cedar Lane Unitarian Universalist Church in Bethesda, MA and Emerson UU Church in Houston, TX.

These teams of aspiring and mentoring congregations spent several days together in October to learn how to develop “learning communities” amongst themselves, and to plan for several embedded learning experiences in which congregational teams visit one another’s congregation to gain first-hand, inspirational experience.

We have engaged two outside evaluators from Brandeis University who have been embedded in the program from the beginning, allowing the UUA program team to become a learning community in its own right, learning and adjusting as we go, and establishing rigorous evaluation standards which will help us design future iterations of this program

♦ **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 2011. Each will be given an opportunity to present an 8-minute video during the plenary sessions of General Assembly in Charlotte and each will share their stories during a GA workshop.

- UU Fellowship of Beaufort, South Carolina
- Westside UU Congregation in Seattle, WA
- Unitarian Universalist Church of Peoria, IL
- UU Congregation of Fairfax, VA

♦ **Forward Through the Ages – “FORTH” – a multiyear stewardship development program**

Utilizing a vision of stewardship developed by Wayne Clark in his book *Beyond Fundraising*, the program **FORTH** is a multi-year stewardship development program designed to support a congregation’s mission while deepening its commitment to a clear vision of the future. **FORTH** is designed to raise awareness of the important of spiritual stewardship and provides suggestions to strengthen internal programs and external ministries. **FORTH** enables congregations to identify the relationship between stewardship and ministry. Within this relationship, money is placed within the larger context of congregational mission, becoming the foundation of a congregation’s strategic plan, outlining its programs and ministries. The ultimate goal of **FORTH** is to facilitate growth – not just numerical growth but maturational, organic and incarnational growth.

♦ **New Regional Staff Structures Offering Comprehensive Skills**

District Staff have begun to organize into five regional groupings in order to provide a more comprehensive set of skills and perspectives to congregations. These groupings allow staff to be more creative, sustainable, cooperative and adaptive to changing congregational needs.

The new Regional Groups are:

- CERG: Ohio Meadville, Joseph Priestley, Metro New York & St. Lawrence Districts
- MidAmerica: Central Midwest, Heartland and Prairie Star Districts
- New England: Clara Barton, Ballou Channing, Mass Bay and Northern New England Districts

- Southland: Southeast (formerly Thomas Jefferson), Southwest Conference, Mid-South and Florida Districts
- Pacific Western: Pacific Southwest, Pacific Central, Pacific Northwest and Mountain Desert Districts.

♦ **Green Sanctuary Program**

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: we have 5 congregations in the re-accreditation process, 143 accredited, and 115 in candidacy to become Green Sanctuaries; for a total involvement of 263 UU congregations.

In addition, the Green Sanctuary program has launched a new blog which seeks to highlight the work of Unitarian Universalist congregations that are engaging in the program, and to provide resources and ideas to congregations. Visit the Green Sanctuary blog at

<http://greensanctuary.blogs.uua.org/>

♦ **Launching “Office of Strategic Growth”**

Beginning in summer of 2012, we will create a new Office of Strategic Growth, which will develop a comprehensive set of growth strategies, including models such as congregational size transitions, new congregation starts, satellite congregations, and web communities.

**CONCLUSION:**

We believe in the potential of our congregations and of Unitarian Universalism to have a significant impact on the world around us. We dedicate ourselves in 2011 and beyond to being partners with our congregations to deepen their capacity and to grow beyond their barriers to fulfill that potential.

## **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, operating funds, and our buildings on Beacon Hill in Boston. 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; insuring compliance with laws and regulations; and managing the annual audit process. In addition, approximately 30% of the expenditures in this staff group are devoted to direct services to our congregations. Specifically, Financial Services provides the accounting, administration and reporting for the UU Common Endowment Fund and the billing, collecting and reporting for loans issued by the Congregational Properties and Loan Fund. In addition, the Treasurer serves as the Administrator of the UU Organizations Retirement Plan and the UUA Health 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. Our Board of Trustees, volunteer committees and visitors benefit from the "behind the scenes" efforts of these dedicated employees whenever they attend a meeting or stay at our guest house.

### **Highlights from Fiscal Year 2011**

Financial statements. Every year the books and records of the Association are audited by an independent certified accounting firm to assure the Board, General Assembly, and member congregations of their accuracy. 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. For fiscal year 2010, the Board of Trustees selected a new auditing firm after a rigorous selection process overseen by the Audit Committee. In the end Mayer, Hoffman McCann – Tofias New England Division emerged as the most qualified. Tofias conducted the audit of the Association's fiscal year ending June 30, 2010 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. Because the Health Plan operates as a separate trust, it has its own audit. Last year the Health Plan Board of Trustees selected Caturano and Associates as its auditor. Caturano subsequently merged with McGladrey, so the audit report for fiscal year 2010 was issued under the new firm's name, but the work was done by the same team. This report also came with a clean opinion.

**UU Common Endowment Fund (UUCEF).** The UUCEF is being selected by more congregations as their option of choice for investing their long-term endowment funds. During the calendar year 2010, 16 new congregations joined the UUCEF while only 3 withdrew. Furthermore, the Fund continues to show strong performance. For the twelve months ending March 31, 2011, the UUCEF returned 14.2% net of fees and expenses. Compared to other similar sized endowments, the performance of the UUCEF ranked in the top 15% for one-three- and five- year periods.

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 eleven 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, and corporate political spending. In two cases the targeted companies agreed to address the concerns raised in our proposals: Dr Pepper Snapple Group and Lowes Corporation have added protections for gender identity and expression to their non-discrimination policies.

## **INFORMATION TECHNOLOGY SERVICES (ITS)**

Mission: We manage the technology that supports connections and information sharing among the UUA staff, congregations, and the general public. We provide strategic leadership, a robust and secure computing infrastructure, software tools and systems, and consulting, software development, and technical support services to UUA and District staff located throughout the United States. We directly manage and safeguard the constituent data and online presence of the Association.

Over the last year (as of April, 2011), we have delivered on a number of initiatives that derive from strategic goals. Chief among those are:

myUUA.org - Church administrators use this online system to update the contact information for their members and lay leaders on file at the UUA. Presently 862 congregations are registered to use the system. In addition to making sure their members get UU World magazine, continuously updated information from myUUA.org appears in the new online UUA Directory.

Online UUA Directory – Available to all on the uua.org website, this new edition of the venerable Annual UUA Directory makes it easy to find key contact and statistical information about our congregations, and lay and professional leaders. It also provides a way for anyone to suggest corrections to the data.

Improved Access to General Assembly – Two initiatives are making General Assembly more open, transparent, and accessible to people not in attendance at GA. First, the UUA has expanded the scope and scale of the live video streaming of plenary hall events. Second, with the assistance of a staff committee of volunteers, systems are being deployed at this year's GA in Charlotte to allow delegates who are offsite to participate in the governance process. For the former, equipment and software have been significantly improved to make streaming video far more reliable than in the past. And to allow up to 1,000 people to watch and listen to plenary events in near real time on a compute or mobile device on the uua.org website. For the latter, delegates not physically present at GA can listen, speak and vote during plenary business agenda items, and listen to mini-assemblies as well. Thus, delegates who might not be able to attend GA due to cost, time, accessibility or other constraints have a way to fully engage in the business of the Association, potentially in the context of a shared congregational setting.

Website Reorganization – For several months we've been conducting research into how to make it easier for people who visit the uua.org website to find what they are looking for. As a result, we are reorganizing the content on the site according to topic, rather than by the department responsible for the content or by the user's cohort (i.e. Visitor, Member, Leader). After studying thousands of feedback messages and using a variety of formal testing tools with website users, we've developed categories that make the most sense to the most people. After careful review and feedback by the appropriate UUA departments who now must share responsibility for some topics, we are moving content into the new categories. We plan to launch a new navigation system using those categories later this year.

Webinars – Over 10,000 people have attended over 2,000 online training webinars conducted largely by Districts on behalf of congregations in the last three years.

UUA Blogs – We commenced hosting several blogs on behalf of staff groups, the Board of Trustees, and other stakeholders.

## **THE INTERNATIONAL OFFICE**

The International Office of the UUA, including the **International Resources Office** and the **Holdeen India Program** are guided by the UUA's *International Vision Statement* priorities:

*(1) Model friendship and right relations, economic fairness and responsible stewardship of resources among partners; (2) Promote religious freedom, international peace, and justice; and (3) Increase the visibility of Unitarian Universalism, Unitarianism and Universalism as an active positive religious presence in the world.*

### **The International Resource Office's Mission is:**

- 1. To provide international engagement resources to UUA congregations,*
- 2. To manage the UUA's new and historic relationships with Unitarian, UU and Interfaith partners around the world,*
- 3. To promote collaboration between independent U/U groups that share international foci.*

**Mission Focus 1:** Program areas include *Faith Without Borders* program material, the *International Engagement Workshop*, development of a DVD introduction to international engagement for UU New Member classes, microfinance consultation and best practices, General Assembly programs and workshops. Communications tools include *i-news* (a bi-weekly e-newsletter), blog posts, social media outreach (Facebook – 2000 subscribers, Twitter – 500 followers). Service/Learning developments include: completion of comprehensive joint task-force work with the UUSC leading to a proposed “Experiential Learning Plan;” development of an international service/learning concept for UU seminarians with completed components operating with U/U partners in India and Uganda, interfaith partners in Japan, UUSC partners in Haiti, and further programs in development; a catalog and best practices for UU clergy and laity traveling overseas that would like to connect with U/Us in various capacities; the development of a vision of international service/learning opportunities with the UU Holdeen India Program.

**Mission Focus 2:** Ongoing communication and face-to-face institutional visits are key aspects of our important international relationships. When visits are held either in the US or abroad the office provides visibility and context about our partners through the internet to UUs and UU congregations. The extended visits of Rev. Mark Kiyimba (Uganda), Rev. Fulgence Ndagijamana (Burundi), and Rev. Derrick Pariat (India) provided multiple UU congregations, lay-leaders and clergy with opportunities to further develop international relationships and discover diverse U/U contexts around the world. The office represented the UUA at the ICUU's International Minister's gathering and Theological Symposium in the Netherlands in July, 2010, followed by a visit to Transylvania to celebrate the 15<sup>th</sup> anniversary of the Partner church movement. In August/September the office organized Rev. Morales' visit to Interfaith partners in Japan, to the UU Church of the Philippines, and to the IARF's World Congress in Kochi, India. In February the International Office represented the UUA at the Standing on the Side of Love event in Kampala, hosted by our UU partners in Uganda. In March the office organized a visit from Rev. Morales to UU Holdeen India Program partners and the Unitarian Union of North East India. And, in April 2011 the IRO represented the UUA during visits with Japanese interfaith partners (Tsubaki, Konkokyo, RKK, Dojin) in the aftermath of the Earthquake/Tsunami there. Upcoming visits are scheduled to Toronto for the Canadian Unitarian



Council's ACM and to Haiti for a seminarian service learning trip. Special relief funds were developed with UU and interfaith partners in response to the need for LGBT Human Rights work in Uganda (with UU-UNO), and to relief efforts in Japan (with UUSC). UUA Ambassadors provide ongoing linkages between the UUA and partners in India, Transylvania and the Philippines.

**Mission Focus 3:** Rev. Morales proposed the re-integration of the UU United Nations Office with the UUA in the Summer of 2010, and work to achieve that agreement has been ongoing and is nearly complete, including an agreement between the UUA and CUC which will guide collaborative efforts and serve as a guide for further collaborations with U/U groups around the world at the UN. The joint task-force work with the UUSC, as noted above, resulted in a visionary and practical plan to provide international experiential learning opportunities for youth, young-adults, seminarians, and UUs in general. Together we planned and completed the first joint JustJourney – to Uganda – which included service/learning experiences for 14 people, including two UU seminarians, with UUSC partners and UUA partners. The International Joint Working Group (UUPCC, ICUU, UUA) continues to operate as a consultative body for shared commitments and efforts, including organizing programmed events together at General Assembly. Also at General Assembly in Charlotte, for the third year, seven organizations with various international areas of focus will share a large exhibit area together. This provides these organizations with quality-time together as well as a simplified presentation of the otherwise complex system of international organizations for UU congregations who attend General Assembly. Finally, the UU Holdeen India Program transition is well underway as we have selected the new Director and established visionary goals related to congregational engagement and service/learning opportunities. At this General Assembly we will celebrate the remarkable work of Kathy Sreedhar, the first Director of UUHIP for 28 years.

**The UU Holdeen India Program's** mission is to provide humanitarian assistance to organizations in India that serve the poor and disadvantaged.

### **President Morales's Visit to India**

UUA President Rev. Peter Morales visited with UUHIP partners in February 2011.

### **Partner Highlights**

Ela Bhatt was honored with the Global Fairness Award in November 2010; Secretary of State Hilary Clinton presented the award at the Kennedy Center Opera House. Ms. Bhatt will also receive the Radcliffe medal this year, the highest distinction awarded by the Radcliffe Institute of Advanced Study at Harvard University. Ela was also recently one of twelve to receive the \$100,000 Ford Foundation Visionary Award.

In November 2010, Reema Nanavaty, Director of Economic and Rural Development of SEWA (Self-Employed Women's Association) met with President Obama, Secretary of USDA Tom

Vilsack, Senior Advisor Valerie Jarrett, and USAID Administrator Dr. Rajeev Shah; they were very supportive of SEWA's work on Agriculture and Food Security.

The Association for Strong Women Alone, working with SUTRA in Himachal Pradesh, has won the Omidyar Network and Ashoka Changemaker Award of \$50,000 for their work supporting single women.

## **MULTICULTURAL GROWTH & WITNESS**

### **Mission:**

The Multicultural Growth & Witness (MG&W) mission is to empower Unitarian Universalist congregations and community leaders to minister effectively in a multicultural world. In support of the UUA's missions of growth, new ministry for a new age, and effective public witness and social justice, MG&W worked in partnership with congregations and districts, UUA staff, interfaith partnerships, and national and grassroots coalitions. In FY 2011 MG&W focused on three goals:

1. increased use of electronic communication and social media to strengthen the public witness and advocacy of Unitarian Universalist congregations and leaders
2. coordinating a Multicultural Growth Consultation with Unitarian Universalist congregations committed to diversifying their ministry and membership
3. developing a Multicultural Leadership Development Institute to provide tools and resources for Unitarian Universalists to increase their cross-cultural capacities to welcome, include, and minister to people of diverse identities.

FY 2011 highlights include the following:

### **Multicultural Growth**

**Multicultural Growth Consultation** – 8 UU congregations doing intentional multiracial/multicultural ministry partnered with MG&W to identify and co-design strategies for growing a multicultural Unitarian Universalism. An appreciative inquiry process was used and involved congregations partnering one-to-one to identify what gives life to their ministries. In consultation with MG&W and UUA staff from Congregational Life and Office of Communications, ministers of those 8 congregations identified (4) foundational areas for multicultural ministry: Worship, Justice Ministries, Ministerial Leadership, and Community Life.

Other outcomes from the Consultation included feedback from participating ministers on the value they receive from collaborative initiatives with the UUA in growing anti-racist/multicultural ministries. Emerging projects from the Consultation included: (1) UUA partnership with All Souls Church, Unitarian in Washington, DC for a weekend experiential learning conference in February 2012, (2) week-long intensive learning experiences for ministerial leaders and other religious professionals, and (3) a multicultural ministry lectionary.

In addition, Skinner House is developing a publication in conjunction with the Multicultural Growth Consultation project so that learning can be shared with other Unitarian Universalist congregations who aspire to be more diverse in ministry and membership. Finally, Consultation products and emerging projects will be incorporated in the development of tools and resources for the Multicultural Leadership Development Institute. These resources will also reflect collaboration and partnership with UU congregations and leaders.

**Diversity of Ministry Initiative:** The Diversity of Ministry (DOMT) Initiative is a UUA program to support sustainable ministries for clergy who identify as People of Color, Latina/o/Hispanic, and/or Multiracial. In FY 2011 this initiative saw the call of Rev. Lilia

Cuervo to First Parish Cambridge MA. At the UU Church of Annapolis, MD, the Rev. John Crestwell has initiated a multicultural outreach ministry. DOMT Initiative ministers are infusing congregations with innovative worship, connecting with newcomers of diverse races and cultures, and providing leadership with their congregations in community and interfaith justice ministries. In 2010 – 2011 the Diversity of Ministry Initiative partnered with Congregational Life staff to provide consultative support to congregations participating in the initiative, and to provide customized start-ups for congregations who settled their first minister of color.

**Finding Our Way Home:** The annual retreat for religious professionals and seminarians of color, Latina/o/Hispanic, and those who are multiracial continues to grow in attendance and maturity with more than 60 registrants for the 2011 retreat. Emerging themes from 2011 included spiritual resources for Unitarian Universalists who identify as people of color, Latina/o/Hispanic, and multiracial. Finding Our Way Home is a project of the UUA's Diversity of Ministry Initiative, which focuses on supporting sustainable ministries for ministers who identify as People of Color, Latina/o/Hispanic, and Multiracial.

**Building the World We Dream About:** The Building the World We Dream About program is a tool and resource for Unitarian Universalist congregations to develop their capacities to cross borders of race and community. To facilitate and encourage the use of this UUA program on race and ethnicity, Multicultural Growth staff sponsored and led workshops for congregations and districts seeking ways to develop their multicultural skills and deepen their anti-racist/multicultural justice work. The workshops stimulated congregation-based anti-racism/anti-oppression/multicultural programs. Examples include UU Fellowship of Charlotte County's Building the World We Dream About blog and a partnership that was formed between the UU Fellowship of Charlotte County and the UU Congregation of Fort Lauderdale.

Workshops were presented at the UU Church of Monterey Peninsula in Carmel, CA, the UU Fellowship of Poughkeepsie, NY, the Joseph Priestley District 2011 Worship Arts Festival, Florida District Racial Justice Conference, and the Metro New York Committee on Anti-Racism and Diversity. Building the World We Dream About workshops will be offered this summer at Star Island and Ferry Beach.

#### Witness and Advocacy

**Standing on the Side of Love Campaign (SSL)** – The SSL Campaign seeks to harness love's power to stop identity-based violence, exclusion and oppression. Current campaign activities are related to the UUA's public witness priorities: immigration justice and LGBT equality. In FY 2011 SSL used social media to inspire, motivate, and organize congregations and individuals to stand on the side of love with:

1. Muslim Americans to support an Islamic cultural center in Manhattan, and to oppose Qur'an burnings and other anti-Muslim actions around September 11. More than 100 congregations participated in actions to express solidarity with the Muslim American community. In addition the UUA joined a multi-religious campaign called "Shoulder to Shoulder" act in solidarity with Muslim Americans to oppose Islamophobia and the targeting of the Muslim community by local and national legislators.
2. "Dreamers" – children of undocumented immigrants -- seeking passage of the Dream Act to immigrant children to attend college/university and serve in the military.

3. Service Members Legal Defense Network to overturn Don't Ask/Don't Tell legislation that barred openly LGBT people from serving in the military
4. LGBT couples and advocacy groups seeking passage of Marriage Equality Laws in Maryland

### **Environmental Justice:**

Sacred Waters was the theme of Earth Day 2011, a UUA partnership with the UU Ministry for Earth to provide congregations online resources to participate in congregational and personal pledges related to advocating for the right to safe and potable water for all people.

Nearly 100 UU congregations participated in 350.org's 10/10/10 International Climate Work Parties. In addition a new UU Climate Coalition was established with leaders from the UUA, UUMFE, UU State Advocacy Networks, UU-UNO, and the UU Service Committee.

The UUA and UUMFE marked the 5<sup>th</sup> anniversary of Katrina and the 6-month anniversary of the BP oil disaster by providing congregational resources to commemorate and advocate on behalf of those communities most harmed by these catastrophes.

### **Immigration Justice:**

The UUA, in partnership with the Interfaith Immigration Coalition (IIC), National Day Laborers Organizing Network (NDLON), Interfaith Worker Justice (and others), organized clergy participation at Department of Homeland Security public engagement meetings to tell the stories of how ICE ACCESS and S(ecure)-Communities policies are negatively affecting immigrant communities, including separating families, criminalizing immigrant communities, and making communities less safe because people are reluctant to report domestic abuse and crime for fear of deportation.

In December 2010, the UUA's Witness Ministries Program Coordinator initiated IIC's involvement of "Dreamers" in advocacy and witness on behalf of the Dream Act. Dreamers accompanied clergy to visits with Congressional representatives and prayed together as witness on Capitol Hill to draw support for the legislation. Though the Dream Act did not pass the UUA continues to support interfaith efforts on behalf of the "Dreamers" in states seeking to institute Dream Act policies.

Congregational Advocacy and Witness staff of MG&W conducted a SSL webinar on Congregational Immigrant Justice Ministries. Participants included NDLON and UU ministers and lay leaders from the UU Church of Arlington, VA and the First Universalist Church of Denver, CO. Participants shared best practices, provided an overview of national and state campaigns, and connected congregations with resources and partners.

Day of Non-Compliance in Phoenix, AZ (July 29, 2010) was a UUA cross-staff effort to support over 200 Unitarian Universalists who came to Phoenix AZ in solidarity with local grassroots, human rights and interfaith groups to protest the implementation of anti-immigrant law SB-1070. Results included deepening partnership with immigration reform and immigrant rights groups.

### **LGBT Equality**

Standing on the Side of Love (SSL) and the UUA's LGBT Ministries staff partnered to support national and state advocacy on behalf of LGBT equality. SSL's Campaign Manager spent 5-1/2 weeks working with the UU Maryland State Advocacy Network, Equality Maryland and state legislators advocating on behalf of marriage equality in Maryland. In addition the LGBT Ministries Programs Coordinator testified on behalf of transgender rights legislation in Maryland.

SSL and LGBT Ministries also worked with LGBT coalitions to support the repeal of Don't Ask/Don't Tell (DADT). DADT was overturned during the 2010 "lame duck" session by the U.S. Congress, allowing out gay and lesbian persons to serve in the military.

The UUA's LGBT Ministries Program Coordinator partnered with civil and human rights groups to secure and protect the rights of lesbian, gay, bisexual, and transgender people. Coalition work included support for the Employee Non-Discrimination Act (ENDA), Student Non-Discrimination Act (SNDA), the Safe Schools Improvement Act, and the Uniting American Families Act (UAFA). In addition, LGBT Ministries has supported direct actions around the repeal of the Defense of Marriage Act (DOMA) on the national front

At the state and local level, LGBT Ministries joined local, grassroots coalitions to support legislative efforts that affirm LGBT people such as Bully Free DC and the Transgender Equality Rights Coalition of Massachusetts. Recognizing the intersections of justice movements with LGBT identities, LGBT Ministries has joined coalitions that support legislative advocacy efforts on reproductive justice such as protecting an individual's right to choose, safeguarding women's health, and endorsing comprehensive sexuality education.

## **MINISTRIES AND FAITH DEVELOPMENT**

Ministries and Faith Development (MFD) serves Unitarian Universalism by creating healthy, transformative, multigenerational and diverse ministries and religious education. There are five core areas within this staff group:

### **1) Resource Development Office**

Tapestry of Faith online curricula this year included children's programs Love Surrounds Us: Grades K/1, Love Will Guide Us: Grades 2/3, and Love Connects Us: Grades 4/5.

For youth, programs included A Place of Wholeness: UU ID for High School: Heeding the Call: Qualities of a Justicemaker for Grades 7-9; and A Chorus of Faiths: Unitarian Universalists as Interfaith Leaders (High School). Adult programs included Building the World We Dream About (with Multicultural Growth and Witness); Faith Like a River: Themes from UU History, and Resistance and Transformation: UU Social Justice History; and a discussion guide and online Facebook community for an Association-wide Common Read of the Beacon Press book *The Death of Josseline: Immigration Stories from the Arizona-Mexico Borderlands*. Family resources included four themed issues of Families: Weave a Tapestry of Faith, full-color inserts in every issue of the *UU World* and online. Tapestry print resources included two Toolkit Books, *Stirring the Nation's Heart: Eighteen Stories of Prophetic Unitarian and Universalists of the Nineteenth Century* and *Journeys of the Spirit: Planning and Leading Mission Trips with Youth*.

*Our Whole Lives: Sexuality Education for Grades 7-9* is undergoing its first significant revision. OWL Grades 7-9 is also being independently evaluated in a three-year longitudinal study. New Renaissance religious education leadership programs include a substantially revised Multicultural Religious Education module and a new Youth Ministry module. Sixteen trainings were offered this year. The second Interfaith Leadership Training for youth/adult teams, co-led by youth and adults, prepared youth to lead local interfaith projects and train others to do so. RDO staff offered numerous webinars and led study groups with religious professionals and lay leaders on Tapestry of Faith programs.

### **2) Office of Youth and Young Adult Ministries**

This has been a year of interim, collaboration, and capacity building. The Youth and Young Adult Ministries Office is shifting from being "all things youth and young adult" to a force of advocating, equipping, and coaching congregations and other Association departments as they integrate youth and young adults safely and effectively into the whole. Using technology creatively we have been able to keep leaders informed and connected through e-newsletters, Facebook, video conferences, and web-based seminars, including an "It Gets Better/Make It Better" video addressing bullying. Young Adult Spirituality and Service is a new effort connecting young adults to service learning opportunities and tools to deepen their Unitarian

Universalist identity and form their evolving faith. Youth and Young Adult program grants as well as the Katie Tyson Fund supported innovation and leadership development in our regions and congregations. We will be learning from and reporting on these efforts our e-newsletters. The Chrysalis Youth Ministry Training Program is no longer administered by the central office, but rather by districts or congregations, allowing for wider access and geographically cultural diversity. The Youth Interfaith Training and the Multicultural Leadership School are still national events brought to you by Ministries and Faith Development.

## **2) Transitions Office**

Fifty-four congregations entered this year seeking a minister. Forty-five were for senior/solo positions. Nine were for second ministry positions. Thirty-six congregations have called a candidate. Nine congregations search for second ministers, seven of which were new or new to full-time. Seven have selected candidates and for two others the search is ongoing. Of the candidates, seven ministers going to new congregations are ministers of color. Additionally, the Transitions Office is recommending that the standard length for an interim ministry be 18 months, moving us to a twice a year settlement system. Congregations also now have the option of having an interim appointed, provided the fill out a longer more detailed application.

## **3) Ministerial Credentialing & Professional Development**

The Ministerial Credentialing Office (MCO) serves more than 500 UU aspirants and candidates who are seeking ministerial fellowship with the Association. The MCO Director works closely with our two UU identity schools and the many multid denominational theological schools attended by UU seminarians, 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 Ministerial Fellowship Committee (MFC), and serves as the Executive Secretary of the Panel on Theological Education (POTE).

The Professional Development Office (PDO – formerly Ministerial Development Office): provides training programs that assist religious professionals, congregations, and agencies to make plans for ongoing professional development; makes available grant funds for continuing education; oversees religious educators and musicians through their credentialing requirements and ministers through their preliminary fellowship requirements; and, supports religious professionals in crisis. PDO organized and sponsored 8 professional development workshops and webinars serving over 100 ministers on topics including leadership, staffing, religious education, stewardship, church finances, and worship arts. Staff members worked with the Ministerial Fellowship Committee, Music Credentialing Committee and Religious Education Credentialing Committee and with the 270 ministers in Preliminary Fellowship. As of May 1, 2010, 133 continuing education grants totaling \$63,482 were made to ministers and religious educators.

## **Church Staff Finances**

In November 2010, the UUA shifted recordkeeping of the UU Organizations Retirement Plan from Fidelity Investments to TIAA-CREF. 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 February 28,



approximately 2,800 individuals in more 600 participating congregations had approximately \$200 million invested in the UU Organizations Retirement Plan.

The UUA Health Plan provides comprehensive health insurance benefits, consistent with UU values, to more than 800 employees. Since the plan's inception in 2007, the number of congregationally-based participants has increased by 50 percent. On December 31, the UUA Health Plan completed its fourth year of operation with \$4.0 million in reserves – reaching the plan's goal of having six months of premium payments in reserve. During 2010, the UUA Health Plan, which is self-insured by the UUA, was able to enhance benefits while continuing to keep premium increases low. 2011 benefit enhancements include: 1) up to \$2,500 annually to pay for traditionally uncovered expenses related to childhood learning disabilities; and 2) a \$2,000 hearing aid benefit every two years. Additionally, the Health Plan distributed 200 copies of the Beacon Press book, "Overdiagnosed: Making People Sick in the Pursuit of Health," to plan participants. More than 1,150 employees in over 500 congregations and organizations are covered by our long-term disability plan which provides 66.6 percent of pre-disability income and other benefits for an affordable premium. Another 860 employees are covered by life insurance (twice the enrollee's annual salary) while close to 600 are enrolled in our dental insurance plan. During the past year, the invoices for our health, dental, and group insurance plans were consolidated into a unified monthly bill.

During 2009-2010, the Office of Church Staff Finance (OCSF) was able to distribute more than \$580,000 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 \$52,852 (2011) or an increase of 59 percent in just nine years. In addition, the Unitarian Service Pension Society provided approximately \$490,000 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.

Finally, the Office of Church Staff Finances worked closely with each of the professional organizations and the aid societies to re-envision the Council of Church Staff Finances. The Council helps identify compensation-related issues affecting religious professionals and congregations and works to educate religious professionals about the importance of financial literacy.

## **STEWARDSHIP AND DEVELOPMENT**

### **Mission Statement:**

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

### **Staff Culture:**

Stewardship and Development staff has had the privilege of working with 1,048 congregations and more than 14,000 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, 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.

Stewardship and Development proudly complies with the Association of Fundraising Professionals’ Donor Bill of Rights, which ensures that donors can be confident that their gifts are processed and stewarded with integrity and accountability.

### **Funding Areas:**

The Stewardship and Development staff group is responsible for six 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 nearly \$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 \$1 million in unrestricted funds annually through direct mail, online fundraising, and monthly automatic gift deduction. Friends of the UUA has a population of 18,500 direct mail donors, 500 monthly sustainers, and reaches out to 135,000 non-donor Unitarian Universalist households once per year for support. 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. The Legacy Gifts office brings in \$1 million each year and offers a variety of resources to help congregations with their planned giving programs.
- ♦ **Major Gifts** raises more than \$1 million each year in generous cash gifts from individual donors to support programs and initiatives that are strengthening Unitarian Universalism.

In addition, Major Gifts secures multiyear gift pledges to ensure the financial health of the Association for years to come.

- ♦ **Association Sunday** works with congregations to hold a special service and collection each year to celebrate the common bonds that connect us and to grow our faith. This year, nearly 600 congregations signed up to participate raising over \$250,000.
- ♦ **Grant Writing** has raised nearly \$1 million this year for the Association.

In addition to these planned sources of income, the UUA is dedicated to raising emergency funds in response to unforeseen events. This year, Stewardship and Development raised \$35,000 to help the UU Church in Uganda respond to increasing violence and oppression of LGBT individuals in that country and over \$300,000 to support the work of our Japanese partners in earthquake recovery efforts.

### **Initiatives:**

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

- ♦ **Giving and Generosity E-Newsletter** – Stewardship and Development began in 2007 an e-newsletter that circulates to approximately 12,000 constituents, also available on the UUA website at <http://www.uua.org/giving/news/index.shtml>. 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 donors 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.
- ♦ **Online Giving** – Stewardship and Development has utilized new technology to expand the UUA’s ability to solicit and accept online donations at [www.uua.org/giving](http://www.uua.org/giving). This year, the UUA processed nearly 3,000 gifts through its website totaling close to \$270,000.
- ♦ **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. This year, the Council offered a matching gift challenge to Friends of the UUA that inspired new levels of generosity through the direct mail program.
- ♦ **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 UU 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 UU entities. The UUA raises an average of \$600,000 each year to go directly back to other UU organizations.

Facebook – Stewardship and Development promotes generosity to the UUA through fan pages and other publicity mechanisms, such as the Association Sunday group at <http://www.facebook.com/home.php#!/group.php?gid=114858345197323>