



MEMORANDUM

To: UUA Board of Trustees

From: President Susan Frederick-Gray, Executive Vice President Carey McDonald

Subject: President's Report and Staff Update

Date: January 21, 2020

In anticipation of our January meeting with the Board of Trustees, we wanted to send a brief advance update of some of the priorities and mission-based work of the UUA staff, as well as share preliminary thoughts on the FY2021 UUA budget.

UU the Vote

We are thrilled about the positive early response to the UUA's [UU the Vote](#) initiative to mobilize UU's for the 2020 election cycle to bring their passion to the polls. UUtV is a multi-strategy, multi-level initiative to create onramps for every Unitarian Universalist to bring their passion to the polls to #VoteLove and #DefeatHate. UUtV encourages UUs to connect with local partners for voter engagement and combating voter suppression in their community and to advance all of our intersectional priorities through an electoral justice lens. Partners within Unitarian Universalism and in wider circles of movement organizing have been glad to hear about the work we are doing and are excited to work with us. The January 12 kickoff webinar was attended by over 1000 UUs, including over 100 congregational watch parties, perhaps the largest ever online UU gathering. Fundraising for UU the Vote has been successful to date, with nearly \$600,000 raised toward our goal of over \$1 million just two months into our appeal (note the UU the Vote budget adjustment is detailed in a separate document).

In the coming months, UUtV will continue its forward momentum. Wisconsin has been selected as our first Tier 1 state, and we are currently hiring for a full-time organizer on the ground. We are also hiring a national organizer to work with congregational teams, schedule trainings and webinars, and build up our partnerships. There will be a major UUtV presence at General Assembly, including tracks of workshops and a Wednesday afternoon training for congregational teams. Unitarian Universalists have the strength and the drive to be a major force for our values up and down the ballot in 2020, and we are committed to leveraging our faith communities to be "all in" for this critical election.

Institutional inclusion, equity and change

Culture and organizational change within the UUA is a high priority. The cross-staff Justice, Equity, Diversity and Inclusion (JEDI) Team has continued to lead monthly learning community opportunities, is beginning conversations about a staff-wide covenant, and has completed its culture assessment of UUA staff. Through the assessment, designed as an annual monitoring tool, we identified areas where the UUA is doing well (valuing learning and curiosity, commitments to dismantling oppression, communicating mission) and where we have room to grow (skills for navigating difference, appreciation and staff support, cross-staff collaboration).

The UUA has continued a steady pace of new hiring, and we foresee this continuing in the spring. Last fall, we met the hiring guidelines set forth by the Interim Co-Presidents in 2017 (30% of staff and 40% of leadership identify as people of color). In the next UU World magazine, there will be a story about how we have changed our hiring process to increase diversity on a number of levels, including gender, ability, and professional credentials. Additionally, as we have brought on a record number of new staff members, we have instituted a new staff orientation as well as expectations for new managers to receive supervision training from The Management Center. Recent hires include Rev. Patrice Curtis in the new role of Associate Director of Interim Ministries, adding to our Transitions Office staff to focus support for interim ministries and transitions for ministers with historically marginalized identities, and Anna Bethea as Director of Lifespan Faith Engagement, overseeing faith development, curricula, family engagement and youth and young adult ministry.

Improving our core mission work

In addition to our organization-wide focus on UU the Vote and culture change, we continue to make major investments in specific areas of the core mission-work of the UUA. Here are a selected few we want to share:

Youth Engagement Process - The Youth Ministry Roundtable, our cross-staff team holding leadership for youth ministry across the UUA, has begun planning for a UUA-wide youth engagement process to holistically understand the realities of the youth ministry ecosystem today. They are designing an open-ended engagement process for youth at all levels to see what needs and strengths emerge in youth ministry today and where the UUA can best focus its work to tend to the youth ministry ecosystem as a whole. We will update the Board on this process in the coming months as it moves forward.

Supporting religious professionals with marginalized identities - The UUA continues focused investment in the ministries of religious professionals of color, trans religious professionals, those who are disabled and/or who hold other marginalized identities. Our work includes investing in healthy ministry practices, “start-up” workshops for professionals in new roles, and making ongoing support available throughout their first year. Interest in the annual Finding Our Way Home retreat for religious professionals of color grows each year, and we have also sustained support for the Transgender UU Religious Professionals Together (TRUUSt) retreat.

Mindful that in the past two years the UUA was supporting a record high number of congregational conflicts involving religious professionals of color, we note that the current number of conflict situations is roughly half of its high water mark. Each situation receives careful, collaborative attention, and we are currently exploring plans to create a specialized Conflict Engagement Team to bring the best support to these and other high-conflict congregational situations.

Conversations on Liberation - Begun last fall to carry big picture conversations about the faith from GA into each congregation, the [Conversations for Liberation](#) project has continued as a key collaboration for the UUA. Congregations can download the discussion guide, access the tools and resources for discussion leaders, and add their conversations to the map. The UUA will be hosting a virtual gathering for conversation leaders in February. In addition to the resources themselves, one valuable outcome of the project has been better communication between UU identity and professional groups within the UUA since the project itself was born from roundtable conversations with these groups.

Stewardship and Development team building - With Rev. Lauren Smith in place as the new Director of Stewardship and Development (StewDev), the StewDev staff team has been focused on key process improvements to the UUA's donor pipeline and its annual cycle of relationship with congregations through the Annual Program Fund. This has included centralizing the donor pipeline with Jay Pacitti in the new role of Director of Donor Relations, building a model for area gatherings of congregational leaders to talk about congregational giving, and cleaning up internal finance processes for receiving and regionally disbursing congregational contributions.

Budget hopes for FY21

As we move into the season of preparation for the FY21 UUA operating budget, to be presented at the April Board meeting, we are mindful that this year's budget decisions will likely be just as difficult as last year's. The trends of flat income with increasing needs and costs continue, and the work of building income streams through congregational relationships and donor cultivation can take years to bear fruit. Despite income challenges, we are committed to investing in our mission priorities, and understand that the UUA's overall financial position remains strong.

We would like to share with you some of our hopes for items to include in next year's budget, so that you can understand where we hope to make investments in our own capacity for impact:

- *Increase in professional development support for staff* - Our JEDI Team's culture assessment has identified the need for more consistent and equitable professional development funds; currently, there are limited funds through HR and most professional development comes from individual office budgets, which vary widely; transparent and predictable support for professional development is an equity issue for our staff.

- Regional Congregational Gift Officer - As the UUA's single largest income stream and source for donor prospects, we need to continue to invest in improving congregational giving and relationships through the Annual Program Fund. Adding a regional gift officer will increase our ability to engage congregations in conversations about their giving, while also identifying individual donor leads to enter into the donor development pipeline.
- Project Manager for the Office of the President - The time of the President and Executive Vice President is a precious organizational resource. In addition to calendars, travel, correspondence, communications and fundraising for the President and EVP, the four-person team in the Office of the President also manages all staff engagement, oversees core mission priorities and supports a vast array of relationships with the Board, UUA committees and related UU organizations. A project manager will create capacity to advance key priority projects that currently lack staff time, and to allow the President and EVP to focus on the most critical areas for attention.
- National Right Relations Team - We see the urgency of creating better support systems for volunteer leadership within the UUA, given the high demands we place on our volunteer leaders. One of the best ways would be to support an ongoing UUA Right Relations Team, which could mirror the functions of the General Assembly Right Relationship Team and Chaplains to help address conflicts and support leadership that aligns our values. This would likely require travel costs for RRT/Chaplain members, as well as a paid coordinator who could support RRT/Chaplain volunteers.
- Budgeting for sabbatical/leave support - The UUA's generous leave and sabbatical policies are one of the primary benefits we have to attract and retain staff, and to create an equitable workplace. However, given that UUA staff are spread into dozens of small teams, when one person is out it can be a major burden on the rest of the team. Creating a shared pool of funding to support sabbatical and leave costs (e.g. hiring administrative support, contractors, temporary staff, etc.) would greatly reduce a pressure point for the sustainability of our staff.

We fully recognize that all of these priority areas are unlikely to be met in the FY21 budget. At the same time, we understand them to be strong priorities for continuing to meet the demands of the mission, vision and culture change work needed at the UUA. We share them with you to provide insight into the places where we wish to invest and where we feel pressing needs and the limits of our capacity to do our work well.