



Annual Report | 2016-2017



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Faithful.

Staying true.

Saying yes.

Being willing to be uncomfortable.

Saying yes

to growing

to challenging old ways,

to admitting failure,

to doing better.

Faithful.

In the last year our Unitarian Universalist Association (UUA) saw the unexpected resignation of our President, the Rev. Peter Morales, after calls for more honest examination of the ways our culture, practices, and structure center whiteness and isolate and silence Unitarian Universalists of color.

The UUA Board of Trustees appointed three leaders to step into the role of president until a new president could be elected at General Assembly in New Orleans. The Rev. Bill Sinkford, the Rev. Sofía Betancourt, and Dr. Leon Spencer served in this capacity for twelve weeks.

Within the UUA staff, board, and in our congregations, the end of this church year brought a mixture of pain, examination, challenge, anger, reckoning, commitment, fear, and hope.

In the midst of all of this, what many have reflected seeing is **faithfulness**.

Perhaps most often faithfulness has been used to describe our interim co-presidents,

Sofía, Bill, and Leon. Despite all of the reasons they might not have answered the call to hold us and lead us, they said yes.

At so many moments in the last year Unitarian Universalists have said **yes**.

The UUA Board of Trustees said yes: Yes we will have the difficult conversations, yes we will commit our treasure in line with our values, and yes we will find a new way.

UUA staff said yes: Yes we will face the ways we have failed, yes we will keep showing up for the work we care so deeply about, yes we will do better.

Leaders of color said yes: Yes we are here, yes we are leading, yes we are calling out and we are calling in.

Religious professionals said yes: Yes we will answer the call, yes we will challenge ourselves, and yes we will look to the future together.

And you said yes. Yes we will hold our faith—and ourselves—accountable, and yes we will remain faithful with our contributions, large and small.

Together we have said yes.

We hope you are inspired by this brief look at where we are in the story of Unitarian Universalism. A testimony to faithfulness. An expression of love.

Rev. Mary Katherine Morn
Director of Stewardship and Development

FAITHFUL

to Our Future

UUA President Susan Frederick-Gray recently sat down to reflect on her first months in office with Rev. Terry Davis, the called minister at Northwest Unitarian Universalist Congregation in Atlanta, and a member of the UUA President's Council.

This has been a tough year, both inside and outside the UUA. What do our priorities need to be moving forward?

Susan: This is a time of enormous challenge for our world and our congregations. It is also an opportunity, and a priority, for our faith to make a real and measurable difference in this time.

It's critically important to focus on re-establishing strong relationships and trust between our congregations and the Association, as well as between the UUA president and the board of trustees. We're not going to do that if we aren't building trust in one another, and if we're not committed to a broader vision and mission for our faith. We all have a role to play in making this happen.

What strengths will help us reach these goals?

Susan: Our commitment to understanding ourselves as an interdependent community is a strength. In this time of national and climate disasters, in this time of growing nationalism

around the globe, our theology grounded in love, justice, and interdependence is a strength. Our theology is already progressive, already pursuing justice, and already grounded in a sense of covenant rather than creed — emphasizing our responsibilities to one another.

What are some of our greatest challenges?

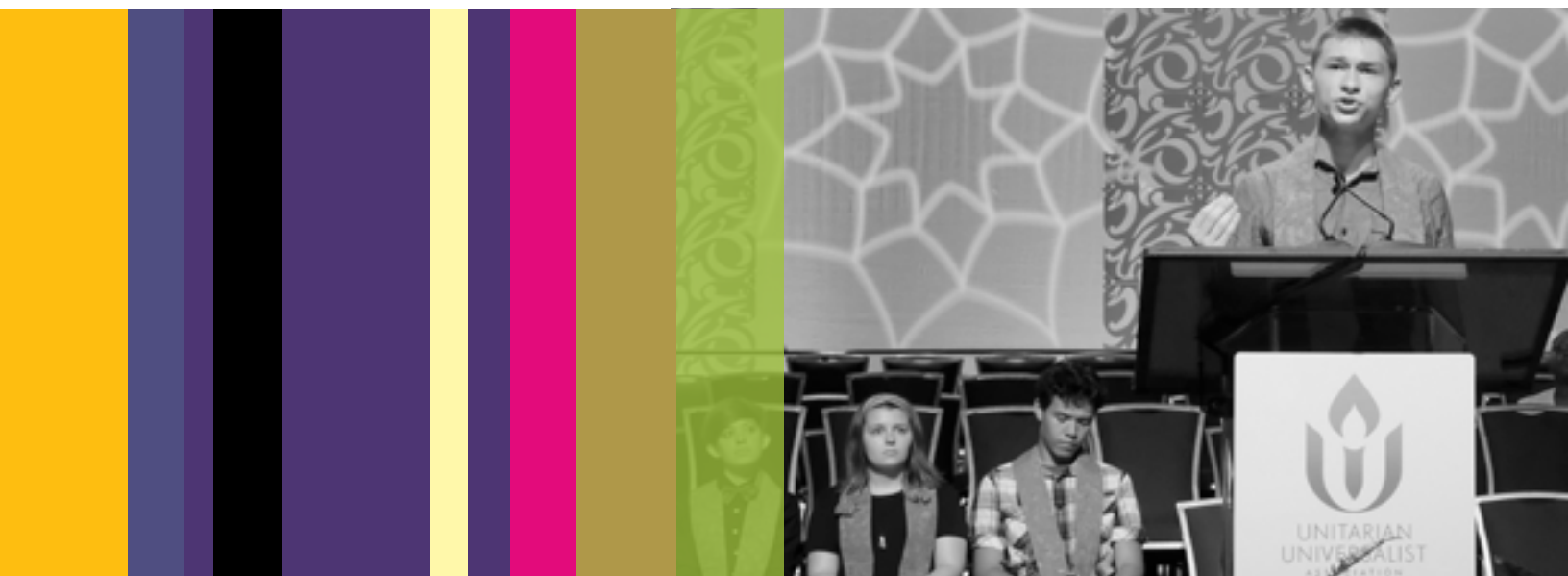
Susan: We're in a change mode, and that's never easy. We need the spiritual resources to embrace and navigate change. We also need to articulate clearly how our faith is being called because we don't want to embrace change for change's sake. We need our mission to drive the change so we can have a greater impact.

For instance, we're living in a period where a lot of shocking things are happening in our daily lives. It puts tremendous stress on people and on our institutions. How do we nurture spiritual communities that prepare us for resiliency, compassion and collective strength? This is a question we need to answer.



"We need spiritual resources to embrace and navigate change...We need our mission to drive the change so we can have a greater impact."

— UUA President Susan Frederick-Gray



Additionally, our congregations' economic realities are changing. This means we have to be better at understanding where our ministry and resources are having the greatest impact for our children, our families, our members and the wider community. This focus on impact can help us understand that we may need to double our resources in some key areas and let go of some things we've always done.

What will you recognize as signs that our UUA is growing healthier and stronger?

Susan: Seeing increasing numbers of children and young people and families engaged in our religious education and family ministry programs will be a huge indicator of the vitality and future of our faith.

Having the UUA and our faith as a whole on a stronger financial foundation is also important. However, it would be wrong to think we'll ever have all the resources that

we need. If we think we do, then we're not dreaming big enough.

What will be personally challenging for you in your new role?

Susan: I want to make sure that I regularly find the time and space to articulate our theological call. In a time when we're seeing civil rights, human rights and climate justice efforts rolled back every day, it's hard not to feel devastated. I want to make sure that I'm sending a pastoral and prophetic message of resiliency, courage and hope.

At the end of your first year, what do you hope you can say about the difference you made?

Susan: I hope that I can say that people feel more connected to the larger Association and our shared mission. I think that people really do feel optimistic about our faith. I hope we are able to live into this moment and keep feeling it calling us forward.



“Seeing increasing numbers of children, young people and families engaged... will be a huge indicator of the vitality and future of our faith.”



“We have to be better at understanding where our ministry and resources are having the greatest impact for our children, our families, our members and the wider community.”

Rev. Susan Frederick-Gray is a lifelong UU who grew up outside of St. Louis, MO. For the last nine years, she served as the Lead Minister of the UU Congregation of Phoenix, AZ, where she has been a national UU voice for immigrant rights, including working to thwart, and later defeat, Maricopa County Sheriff Joe Arpaio.

Susan’s first settled ministry was at the First Unitarian Universalist Church of Youngstown, OH. She also served as a Student Minister of Religious Education at Winchester Unitarian Society, outside of Boston, for two years and as Intern Minister and Sabbatical Minister at the First UU Church of Nashville, TN. Susan is a graduate of Harvard Divinity School and has a B.S. in Molecular Biology from the University of Wisconsin, Madison.

Susan’s husband, Brian Frederick-Gray, is also a minister with dual fellowship with the United Church of Christ (UCC) and the Christian Church Disciples of Christ (DOC). They have an 11-year-old son, Henry.

FAITHFUL to the Struggle

By Kenny Wiley

Living in the Middle

How do we tell the story of Black Lives of UU, or the story of the movement to combat white supremacy culture as it lives inside our Unitarian Universalist faith?

Quite simply, by the facts: The Black Lives UU convening in New Orleans, with more than 100 Black UU attendees, that took place March 9 - 12, 2017. Eleven middle and high school youth participated alongside elders, many of whom felt “called back into the faith by these new leaders,” as former Black Unitarian Universalist Caucus president Dr. Mtangulizi Sanyika put it. Sanyika called BLUU the “heir” of the work of Black UUs in the 1960s.


The moments that take us to deepest truth: Black UUs taking “elevator selfies” and posting them on social media, and an ever-escalating contest to get the most people into one photo. Blurry shots of uproarious laughter telling stories of the Arizonian Black UU thinking, “I didn’t know Unitarian Universalism could really feel like this.”

Unitarian Universalist worship, led by Black women Amanda Weatherspoon and the Rev. Kimberly R. Hampton, with sounds full of say-that’s and you-preachin’-nows, of youth swaying and holding hands, of elders wiping away tears, of others shifting side to side,

silently, almost imperceptibly, hearts content, feeling home.

The UU White Supremacy Teach-In movement, led foremost by two women of color, supported by more than a dozen religious educators and musicians. Organized this past spring, 682 of the 1,038 UU congregations answered Aisha Hauser and Christina Rivera’s call. Rivera told *UU World* that most participants found the work “challenging, hard, uncomfortable,” adding, “People were totally willing to stay in that [uncomfortable] place.” Unitarian Universalists of color felt empowered to step into the pulpit and preach their truth—or to stay home and “let white UUs take the lead on this, for once,” as one Latinx UU said of her experience.

There’s the uncomfortable silence, then the nervous, affected applause, as a Korean-American UU in her early thirties reminded her congregation, “I grew up in this faith. Stop marching up to me like I’ve never been here and launching into explanations of the Seven Principles every Sunday.”



*“Most participants found the work
challenging, hard, uncomfortable...
People were totally willing to stay in that
[uncomfortable] place.”*

— Christina Rivera



At the 2017 General Assembly (GA), with 4,000 UUs crammed into the New Orleans Convention Center. By then, our faith had seen its president as well as two top staff leaders resign; its moderator, Jim Key, die during cancer treatments; and tense debates over “white supremacy culture” take over UU Facebook threads, Twitter feeds, and fervent email exchanges. Nobody knew what to expect at GA, except that things would be different.

The changes were immediate: Afro-Latinx the Rev. Sofía Betancourt, and African-Americans the Rev. Bill Sinkford and Dr. Leon Spencer served as interim co-Presidents; Gregory Boyd, Kathy Burek and Elandria Williams served as tri-Moderators, with Denise Rimes in the role of Acting Moderator during General Assembly; and three women, the Revs. Susan Frederick-Gray, Alison Miller, and Jeanne Pupke running for UUA president.



A year of moments, of new leadership emerging, of spirit-filling convention rooms, of challenge and growth and redemption.

Then there was the moment during the Sunday morning worship when Rev. Betancourt, just hours after newly elected president Frederick-Gray acknowledged



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her as the first woman to serve as a UUA president (to thunderous applause), ended her pastoral prayer with a stunning, “insta-chills” a cappella rendition of Mimi Bornstein’s hymn “Comfort Me.” A Black UU sitting in the back of the hall loudly whispered, “All right, now!”

How do we measure a movement and this past year for Unitarian Universalism? With facts, yes, and with moments of new leadership emerging, of spirit-filling convention rooms, of challenge and growth and redemption.

Elliot Ferrell-Carretey, a Black high school student from Denver and Thrive coordinator for youth of color at GA, along with several other speakers at the Synergy bridging service—in which youth ritually move on to young adulthood—told the crowd, “I am in the middle: no longer a child, exactly, but not yet an adult. Being in the middle is hard sometimes.” Other youth and young adults suggested that our faith, too, is “in the middle.”

Marissa A. Gutiérrez-Vicario, executive director of Art and Resistance Through Education and one of the young adult speakers, said, “While the results of the [national] election were devastating for me, they were not the end of the world, nor the beginning of a resistance movement. We are actually in the middle of a resistance movement: one that undocumented immigrants, trans folks, women of color, and incarcerated folks have been in the middle of for a long time.”

“The middle” of a long struggle, say leaders of color, may be where Unitarian Universalists find ourselves. Thrive young adult coordinator Vanessa Birchell said of the present challenges faced by our faith around white supremacy, “Now that we have identified the problem, what are we going to do about it? I believe that our faith can do this.”

Kenny Wiley is program director for the Interfaith Alliance of Colorado and a UU World senior editor.

FAITHFUL to Justice & Compassion

By Rev. Kathleen McTigue

Love Resists

In July 2017, a group of young migrants departed Mexico City headed for the U.S.-Mexico border to request political asylum.

Calling themselves the Trans-Gay Migrant Caravan, these Central American teenagers and young adults had fled identity persecution and violence in their home countries.

Knowing of the added danger for being trans and gay, they banded together, publicized their caravan, and built support among allies in the United States. A key part of that support has come from Love Resists.

Love Resists is a collaborative response of the UUA and the Unitarian Universalist Service Committee (UUSC) to the new levels of threat posed to already targeted communities in the new administration. In this political moment it has become clear that the central calling of our faith is to respond with bold, powerful action to the escalating criminalization of entire communities. As immigrants, Muslims, Black Lives Matter activists, LGBTQ folks, and people of color are targeted in multiple ways, the call of justice—the call of love—is to resist.

As the migrants departed Mexico City, they issued this plea, “All of us are escaping from death threats, forced sexual labor, sexual assault, and discrimination. We’ve been assaulted and robbed and denied refugee status. Traveling

north, we are searching for a safe and stable place to live.” Volunteers from the Tucson group Mariposas Sin Fronteras (Butterflies Without Borders) were among the first to respond by helping with asylum applications.

As the caravan prepared to cross the border, Mariposas put out a call for sponsors in destination cities, who could offer the migrants places to live once released. Sponsors must provide documentation to Immigration and Customs Enforcement (ICE) declaring themselves legally responsible for an individual, and provide housing and financial support for up to six months while asylum claims are processed.

Over the past six years, many UUs have traveled to the Arizona/Mexico border with the UU College of Social Justice, and met with Mariposas Sin Fronteras.

The response to the call for assistance was immediate: the Queer Detainee Empowerment Project, a UUSC-funded partner, traveled to the border. In New York City, a UU family in Staten Island agreed to sponsor caravan members. When one more sponsor was urgently needed, we reached out to UU clergy in Washington, DC. In less than 24 hours, two



families from the Washington Ethical Society and Cedar Lane UU Church had volunteered as sponsors.

As they crossed into the United States, the caravan members were arrested and taken to overcrowded detention centers. Asylum seekers in the Trump presidency era are far less likely to be released than previously; ICE detention centers are increasingly overcrowded and for trauma survivors their trauma is magnified by the detention.

Since crossing the border, the transgender women of the caravan have been held at a male detention facility and separated from their gay male companions. They have faced harassment, discrimination, and taunting both by guards and other detainees.

As they await asylum decisions that may quite literally mean the difference between life and death, their UU allies have made clear our commitment to do all we can to see that justice, and love, prevails. Sadly, a few of the men asked to be self-deported, finding the conditions of their detention too debilitating to remain any longer.

The courageous choices made by members of the Trans-Gay Migrant Caravan, the

immediate solidarity by grassroots groups, and the willingness by congregations and individuals to show up as effective allies, together tell the story of resistance.

Human rights and dignity are under assault on many fronts: new laws to legalize discrimination of LGBTQ people, draconian restrictions on Muslim immigrants, surveillance and harassment of U.S. Muslims, new legitimacy offered to white supremacy, and the ongoing criminalization of black and brown communities.

Love Resists is a way to build a consistently powerful response to increasing injustice demands. By combining the staff resources of the UUA, the UUSC, and the College of Social Justice, and linked to UU State Action Networks, UUA field staff, and local congregations, we are building resources for spiritually grounded action. We are rising to the challenges of a fraught and often chaotic political moment, activating people of faith and conscience to resist the harm inflicted by criminalization.

Rev. Kathleen McTigue is the director of the UU College of Social Justice (UUCSJ); she previously served for 25 years as a UU parish minister.

FAITHFUL to Our Weekly Labors

By Rev. Sharon Dittmar

Building Bridges

Many UU congregations saw attendance spike after last year's presidential election. For some congregations, it was the first time in quite a while that they had experienced a surge in attendance by families with small children.

If you're a minister in a smaller congregation, with a part-time religious education director, the excitement of seeing so many new faces every Sunday may be tempered by the sudden need for a childcare worker, and ensuring that staff and volunteers have the training necessary to provide a safe environment.

It's in situations like this where Congregational Life (CL) staff is often called upon to connect congregations with resources, tools, and trainings that draw upon best practices. Our work is often in the weeds. It is not sparkly, and yet, it is as essential as filling potholes so everyone can get where they are going.

I, along with my CL colleagues in the five regions—Central East, MidAmerica, New England, Pacific Western, and Southern—have the privilege of supporting staff and lay leaders as they strive to live our faith and extend the reach of our values in our congregations.

I like to think of myself as a bridge builder, lifting up the week-to-week labors of our congregations and plugging them into the array of resources available whether it's from our headquarters in Boston, or from one of the other 185 congregations in the MidAmerica region that I serve. We can all learn from one another.

This past spring the MidAmerica Regional Assembly fell on the same weekend as the proposed White Supremacy Teach-In. What to do? Well, adapt of course.

MidAmerica staff researched and drew upon the available tools from Black Lives of UU (BLUU) developed by religious educators and clergy. We considered our venue and audience and created a quality White Supremacy Teach-In. Almost 300 lay members and religious professionals alike considered what they could replicate to offer in their congregations.

Due to our work, MidAmerica congregations—including those with and without religious professionals on staff—had widespread support on how to facilitate a White Supremacy Teach-In. Lay members, staff, clergy, and congregations of various sizes and locations considered questions of white supremacy and how to make different choices. It proved particularly helpful to those members who were anxious and conflicted on how to proceed. We posted the teach-in resources on our regional website, which congregations continue to access and utilize.

This summer I learned how pivotal the Regional Midwest Leadership School (MWLS) can be for the youth and adults who participate in it. I, along with our Regional Lead, Rev. Ian Evison, and two of our clergy served as leadership school faculty; Ian and I presented coursework on congregational systems theory, conflict, and change.

Afterward, several of the adult participants approached us to discuss congregational situations of conflict and/or change. One, a board president, conveyed a concern about a conflict brewing in his congregation. As the week progressed, he shared new insights about the conflict, and his role in it. By the time he left the MWLS he had changed his mind about his role and approach.

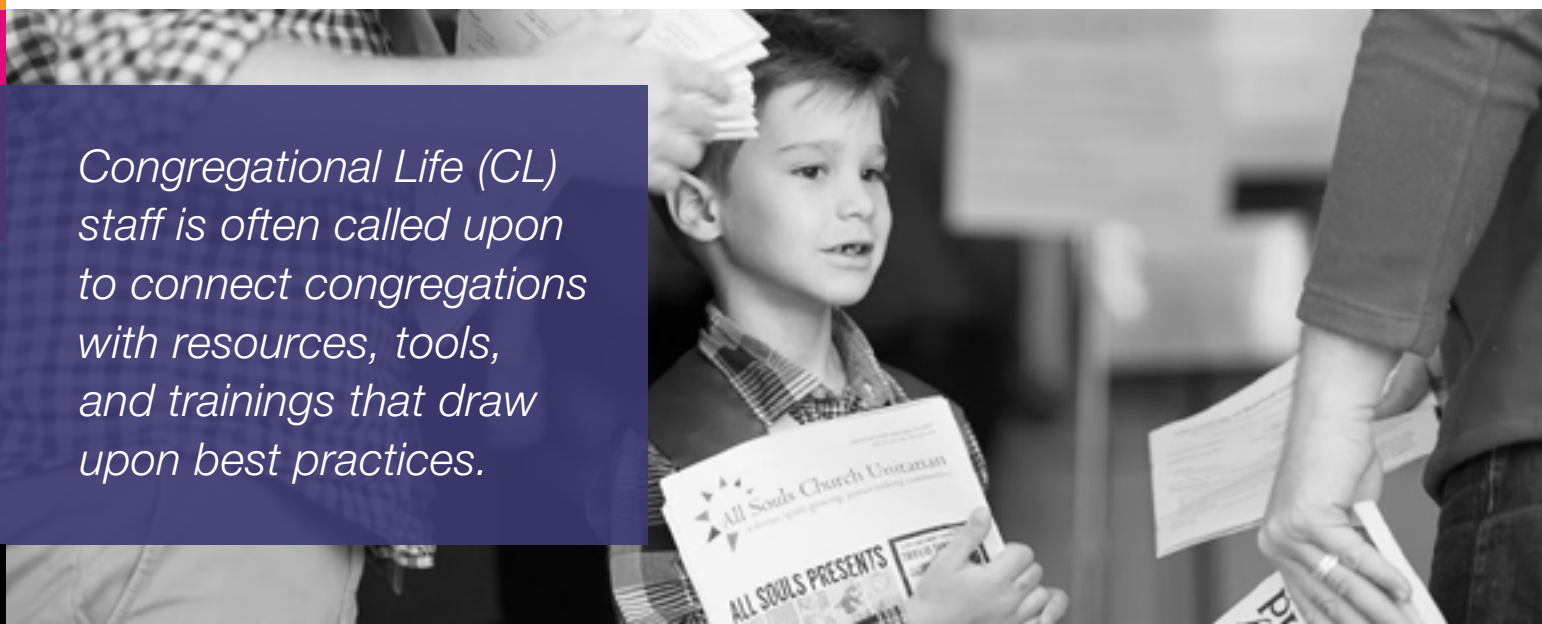
Later in the summer, as the conflict was deepening, the board president reached out for more conversation, after which I sought (and received) permission to speak with the minister. The minister shared how prior to attending the MWLS, the board president had inadvertently fanned the conflict, but with his new insight was now responding in ways that helped the minister and congregation hold the conflict in productive ways.

In both of these situations, bridges were built (or reinforced) between regional staff, congregations, and lay members. Building these relationships will boost the health and vitality of Unitarian Universalism in ever-expanding circles.

Such transformation is possible in all of our congregations thanks to the contributions that congregations make to the Annual Program Fund (GIFT in the Southern Region). In the MidAmerica region, we know that the resources that are made possible through APF make it possible to provide the education, innovation, interconnections, best practices, support, coaching, and experiences in what is currently known, and ever evolving, in our faith and the world.

Rev. Sharon Dittmar joined MidAmerica Region's Congregational Life Field Staff in 2016. Previously, she served as Minister at First Unitarian Church of Cincinnati for eighteen years, and before that as Interim Minister at the Gathering at Northern Hills in Cincinnati.

Congregational Life (CL) staff is often called upon to connect congregations with resources, tools, and trainings that draw upon best practices.



FAITHFUL

Service

By Denise Rimes

Love as He Loved

For anyone who ever heard Jim Key speak more than once, you heard him tell his story of how Unitarian Universalism saved his life when he was diagnosed with cancer in the late 1990s.

The story was not about Jim; it was about the life-saving message of Unitarian Universalism. He took his lessons from that time and many other experiences to live fully into his faith. Jim's legacy is one of generosity of spirit, talents and resources that stand as a tribute and example of how we might embody Unitarian Universalism.

After serving in many roles within his congregation in Beaufort, South Carolina, as well as at the district, regional and national level of the Association, several people encouraged him to consider running for Moderator—the highest volunteer position and the chief governance officer for the Association.

“What can I bring that can move us forward in our faith journey?” he would ask.

As he moved into the role of Moderator, he brought all his unique gifts. The gift of good governance was a spiritual practice for Jim that offered structure and made space for faith development, social justice, and ministry.

His extraordinary talent for collaborating with diverse groups opened doors that hadn't been open for forty years. His deep concern for stronger processes around ministerial misconduct began to pave the way for telling difficult stories that could begin the healing process. And he gifted us with listening—to our stories, our joys and our sorrows.

As we celebrate Jim's gifts to us and mourn his loss, let us love as he loved. His legacy of generosity, which was manifested in so many ways, serves as a reminder of what it means to be part of a life-saving faith.

Godspeed, Jim Key. We give thanks for your gifts.

James Key served as UUA Moderator from 2013 until shortly before he died in June 2017.

Denise Rimes serves as Vice Moderator of the UUA Board of Trustees and is a member of First Unitarian Universalist Church of Richmond, Virginia.



By Denise Rimes



Year in Review

To be faithful is to be wholly committed, through times of success and times of difficulty.

This past year was one that reflected this understanding, as we experienced courage, pain, joy, compassion, and hope.

Guided by the **leadership** of our Board of Trustees, grounded in the **steadfastness** of our staff, and buoyed by **support** of our contributors,

your UUA met challenges as they arrived as we continued our work of supporting Unitarian Universalist congregations in their mission to serve the needs of their members and communities and our shared world.

FAITHFUL to Our Aspirations

At the end of their twelve-week interim co-presidency, Rev. Sofia Betancourt, Rev. William Sinkford, and Dr. Leon Spencer sat down with the gathered community at General Assembly in New Orleans for a conversation. They spoke about their time as co-presidents, the challenges Unitarian Universalism now faces, and their hopes for the future.

Rev. Sinkford: We were asked to answer the call to hold up our faith.

Dr. Spencer: We answered that call because we felt needed, to not only set the table for all members of our faith, but to create a new table where the values of our faith were both promised and practiced without reservation.


Rev. Sinkford: We saw this as an opportunity to come home. It is critical we understand this time in the life of Unitarian Universalism not just as a time of problems, but as a time of opportunity where we can chart a different, more inclusive, more grounded, course forward.

We use the language of opportunity, yet we recognize there are problems. It is important we shift our focus not on the persons, but on the patterns, so we can begin inspecting how it is we embody this fabulous faith and make some changes so we can live into a hopeful future.

Dr. Spencer: The opportunity I see is that we have such a history of pain, and a history of success. We can grow from our pain, but we run from success. We have the opportunity to look at who owns the table we're inviting people to, to know how we come together. This is the opportunity in our pain and in our healing.

Rev. Betancourt: This spring some 700 congregations participated in the White Supremacy Teach-In, and countless people took this invitation to learn, participate, and grow. This kind of grassroots response and profound leadership feeds a moment of opportunity.

Rev. Sinkford: We hope that Unitarian Universalists can listen and take in the truth that Unitarian Universalism as it has been lived has been a struggle for some of us to commit to, not because of the promise of Unitarianism and Universalism, but because



*"...we all become
more whole when
we lean into the
full humanity of all
people..."*

— Rev. Sofia Betancourt



of the practice of our faith. Because it is about the practice of our faith we have the chance to change it.

We remember the core of our faith. We remember that there's nothing in Universalism that insists on sameness. The highpoints in our history have dealt with honoring individual identities, such as our work for marriage equality, which fueled our faith and work for decades. We have theological strength when we remember that how we practice faith defines who can take part in it.

Rev. Betancourt: There are questions of scarcity, fears that there's only so much energy to invest in the work of justice and if we will be whole at the supposed end of this work. Instead, we believe we all become more whole when we lean into the full humanity of all people while remembering that anti-black racism, and oppression against our indigenous family, is the foundation of white supremacy.



We have to do more than sing *I'm Gonna Sit at the Welcome Table*— we have to restructure the table.

But white supremacy extends and spreads to a culture of domination that impacts everyone—it is the many ways we're made insignificant so a group of people



“As our time as co-presidents comes to a close, we ask you to take this invitation home with you to do the work.”

— Rev. Sofia Betancourt

can advance above everyone else. Is it all about black people? No. But will it ever be addressed if we don't dig into the foundations of anti-black racism and intentional attempts at genocide for our native kin? No. We have an intersectional approach, and this is how we become more whole.

Dr. Spencer: We have to do more than sing *I'm Gonna Sit at the Welcome Table*— we have to restructure the table. We need to carry our leadership back to the pews. We need to name it and claim it. We've never seen so many congregations ready to tackle such a problem. It is an inside job, one of contemplation and self-questioning, in our fellowships and congregations. And it is rich when you do the inside work.

Rev. Sinkford: We've focused our time in working with the UUA, providing pastoral care and working on making the changes that need to occur there. But the real task needs to happen in our congregational settings.

Rev. Betancourt: It's time to be on the forward-moving edge of racial justice again. This moment is an invitation to ourselves and our broader communities to do this long-needed work of justice and redemption driven by our values and supported by our faith. As our time as co-Presidents comes to a close, we ask you to take this invitation home with you to do the work.

As there are more and more invitations as to how to do this work, to remember that it allows us to do this work together, we are a community of faith and we're going to do this together. When you get an invitation say yes, show up, participate, be faithful.

Hold our faith. We believe in you.

These excerpts from a longer conversation between the co-presidents were compiled by Mason Bolton, a staff member in the Stewardship and Development office. His work has been published in Epiphany Magazine, Kelsey Review, The Black Napkin, and is forthcoming in the Lambda Literary Poetry Spotlight.



Leadership

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Development and Special Advisor
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Mark Steinwinter
*Director of Information
Technology Services*

Jessica York
*Co-Director of Ministries and
Faith Development*

*The Leadership Council is
comprised of the Association's
senior staff and advises the UUA
president on key issues and
operations of the Association.*

Support

*“Stand by this faith. Work for it and sacrifice for it. There is nothing in all the world so important as to **be loyal to this faith** which has placed before us the loftiest ideals.”*

Universalist minister Rev. Olympia Brown’s timeless words are an invitation to us today, one that has been embraced by so many Unitarian Universalists. Our loyal contributors are foundational to our vision of supporting and strengthening UU faith communities who, in turn, act on our cherished values with the hope of protecting our precious planet and achieving the Beloved Community we dream about.

To our donors: thank you
for standing by this faith.

FAITHFUL

Contributors

Congregational Honor Roll



Thank you to all of our UU congregations for your generous contributions to the Annual Program Fund (APF) and the Generously Investing for Tomorrow (GIFT) program in the Southern Region, which embodies the covenant between us and fulfills our promise of mutual support.

Leadership Congregations

We thank the fifty most generous congregations that contributed the full requested amount to APF or GIFT in fiscal year 2017.

Valley UU Church
Chandler, Arizona

UU Congregation of Phoenix
Paradise Valley, Arizona

UU Church of Berkeley
Kensington, California

UU Society of Sacramento
Sacramento, California

First UU Church of San Diego
San Diego, California

First Unitarian Universalist
Society of San Francisco
San Francisco, California

Mt. Diablo UU Church
Walnut Creek, California

First Unitarian Society
of Denver
Denver, Colorado

First Universalist Church
of Denver
Denver, Colorado

Foothills Unitarian Church
Fort Collins, Colorado

Unitarian Society of New Haven
Hamden, Connecticut

First Unitarian Church
of Wilmington Del.
Wilmington, Delaware

First Unitarian Church
of Orlando
Orlando, Florida

UU Church of Sarasota Inc.
Sarasota, Florida

UU Church of Bloomington Inc.
Bloomington, Indiana

First Unitarian Church of Des
Moines Iowa
Des Moines, Iowa

Unitarian Church
of Baton Rouge
Baton Rouge, Louisiana

UU Church of Annapolis
Annapolis, Maryland

Cedar Lane UU Church
Bethesda, Maryland

River Road UU Congregation
Bethesda, Maryland

UU Congregation of Columbia
Columbia, Maryland

First Parish UU
of Arlington, Massachusetts
Arlington, Massachusetts

First Parish in Bedford
Bedford, Massachusetts

Church of the Larger Fellowship
Boston, Massachusetts

First Religious Society
in Newburyport
Newburyport, Massachusetts

First Unitarian Society
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Newton, Massachusetts

The North Parish
of North Andover
North Andover, Massachusetts

UU Church in Cherry Hill
Cherry Hill, New Jersey

UU Congregation
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Lincroft, New Jersey

The UU Congregation
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Montclair, New Jersey

Morristown Unitarian Fellowship
Morristown, New Jersey

UU Congregation of Princeton
Princeton, New Jersey

First UU Society of Albany
Albany, New York

UU Church of Buffalo
Buffalo, New York

UU Congregation
at Shelter Rock
Manhasset, New York

First Unitarian Church
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UU Society of Schenectady
Schenectady, New York

UU Congregation of Asheville
Asheville, North Carolina

UU Church of Charlotte
Charlotte, North Carolina

West Shore UU Church
Cleveland, Ohio

All Souls Unitarian Church
Tulsa, Oklahoma

UU Fellowship of Corvallis
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Main Line Unitarian Church
Devon, Pennsylvania

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Horizon UU Church
Carrollton, Texas

Mt Vernon Unitarian Church
Alexandria, Virginia

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Oakton, Virginia

First UU Church
of Richmond VA
Richmond, Virginia

Quimper UU Fellowship
Port Townsend, Washington

UUC of Spokane
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We thank these
congregations that have
contributed the full
requested APF or GIFT
amount in fiscal year 2017.

■ Indicates congregations that
have contributed the full
requested amount for 25 or more
consecutive years.

▲ Indicates congregations that
have contributed the full
requested amount for 10 - 24
consecutive years.

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Camp Hill, Alabama

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Florence, Alabama ■

UU Fellowship of Mobile

Mobile, Alabama ▲

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Tuscaloosa, Alabama ▲

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Fairbanks, Alaska ■

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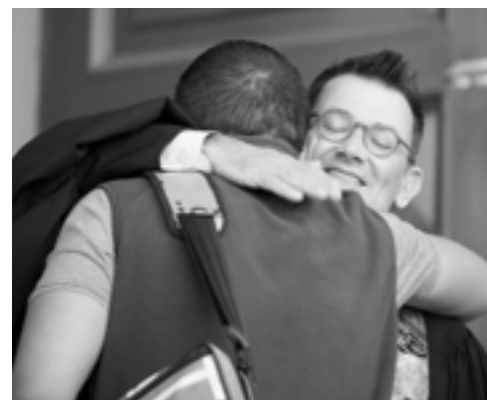
Eureka UU Fellowship
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Salina, Kansas ▲

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Wichita, Kansas ▲

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Bowling Green, Kentucky

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Unitarian Church
Louisville, Kentucky

Thomas Jefferson
Unitarian Church
Louisville, Kentucky ■

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Richmond, Kentucky ▲

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Baton Rouge, Louisiana ■

UU Fellowship
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Lafayette, Louisiana ▲

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UU Congregation of Castine
Castine, Maine ■

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Pittsfield, Maine ▲

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Rockland, Maine

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Yarmouth, Maine ■

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Annapolis, Maryland ■

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Baltimore, Maryland ▲

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Murray UU Church
Attleboro, Massachusetts

First Parish in Bedford
Bedford, Massachusetts ■

The First Parish of Bolton
Bolton, Massachusetts

Church of the Larger Fellowship
Boston, Massachusetts ■

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The Community Church
of Boston
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Brookline, Massachusetts ▲

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Canton, Massachusetts

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The First Church of Deerfield
Deerfield, Massachusetts ▲

First Parish Church
in Dorchester
Dorchester, Massachusetts

The Dover Church
Dover, Massachusetts ■

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East Falmouth, Massachusetts ■

The Federated Church
of Orleans
East Orleans, Massachusetts ▲

UU Society of Fairhaven
Fairhaven, Massachusetts

UU Society of Grafton & Upton
Grafton, Massachusetts ▲

First Parish Church
of Groton UU
Groton, Massachusetts ▲

First Congregational Unitarian
Church of Harvard
Harvard, Massachusetts ▲

Second Parish in Hingham
Hingham, Massachusetts ▲

Hopedale Unitarian Parish
Hopedale, Massachusetts

UU Meeting of South Berkshire
Housatonic, Massachusetts

First Parish Unit Church
of Hubbardston
Hubbardston, Massachusetts ▲

Unitarian Church of
Marlborough & Hudson
Hudson, Massachusetts

First Church
in Jamaica Plain UU
Jamaica Plain, Massachusetts

First Parish in Kingston
Kingston, Massachusetts

Leicester Unitarian Church
Leicester, Massachusetts

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Leominster, Massachusetts

Follen Church
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Melrose UU Church
Melrose, Massachusetts ▲

First UU Society of Middleboro
Middleboro, Massachusetts ■

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Milton, Massachusetts

Second Congregational Meeting
House Society UU
Nantucket, Massachusetts

First Parish in Needham UU
Needham, Massachusetts ▲

First Religious Society
in Newburyport
Newburyport, Massachusetts ■

First Unitarian Society
in Newton
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The North Parish
of North Andover
North Andover, Massachusetts ■

Unity Church of North Easton
North Easton, Massachusetts

First Parish Church UU
Northborough, Massachusetts

First Parish of Norwell
Norwell, Massachusetts

St Paul's Church of Palmer, MA
Palmer, Massachusetts ▲

UU Meeting House
of Provincetown
Provincetown, Massachusetts

United First Parish Church
Quincy, Massachusetts ▲

Unitarian Church of Sharon
Sharon, Massachusetts ▲

UU Area Church at First Parish
in Sherborn MA
Sherborn, Massachusetts ▲

The First Church in Sterling
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UU Church of Greater Lynn
Swampscott, Massachusetts ■

UU Society
of Martha's Vineyard
Vineyard Haven, Massachusetts ■

The First Parish in Wayland
Wayland, Massachusetts

UU Society of Wellesley Hills
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Winchester Unitarian Society
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Community Unitarian
Universalists in Brighton
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Universalist Unitarian Church
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UU Congregation of Flint
Flint, Michigan

Grosse Pointe Unitarian Church
Grosse Pointe, Michigan ■

UU Church of Greater Lansing
Lansing, Michigan ▲

The Marquette Unitarian
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Marquette, Michigan

UU Fellowship of Midland
Midland, Michigan ■

UU Fellowship
of Central Michigan
Mt Pleasant, Michigan ▲

Harbor UU Congregation
Muskegon, Michigan ■

New Hope, A UU Congregation
New Hudson, Michigan

UU Congregation of Petoskey
Petoskey, Michigan

UU Community Church
of SW MI
Portage, Michigan ▲

Berrien UU Fellowship
Saint Joseph, Michigan ▲

Northwest UU Church
Southfield, Michigan ■

Beacon UU Congregation
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Dakota UU Church
Burnsville, Minnesota

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Nora Church UU
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UU Fellowship of Northfield
Northfield, Minnesota ▲

First UU Church
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St Cloud UU Fellowship
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UU Congregation of Tupelo
Tupelo, Mississippi ▲

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UU Fellowship
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Wooster, Ohio ▲

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Yellow Springs, Ohio ▲

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All Souls Unitarian Church
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Pacific UU Fellowship
Astoria, Oregon ▲

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Bend, Oregon ▲

South Coast UU Fellowship
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In Memoriam 2016 – 2017

Legacy Society

We are deeply grateful to our Legacy Society members, whose visionary generosity will nourish and strengthen Unitarian Universalism for generations. We are honored to remember the generous Unitarian Universalists who have passed away this year. Their gifts of time, talent, and treasure have profoundly transformed their congregations and our movement.

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Financial Performance



Tim Brennan, Treasurer and Chief Financial Officer

The UUA remains on solid financial ground with a strong balance sheet and a positive bottom line for the year.

Fiscal year 2017 operating income increased primarily due to the inclusion of the finances of two formerly separate regions into the UUA. In addition, Beacon Press had an outstanding year generating more than \$7 million in sales for the first time. Regular operating income from core activities was flat.

The leadership turmoil and attention on white supremacy culture in the Association slowed support from congregations and individual contributions. Nevertheless, core operations did slightly better than breakeven and overall the Association's operating results were just below breakeven. For fiscal year 2017, expenses exceeded income by an immaterial \$33,000 on total revenues of \$38.8 million. The Annual Program Fund is off to a strong start in fiscal year 2018.

The UUA's invested assets, primarily the UU Common Endowment Fund (UUCEF), performed very well, generating overall returns of \$17.4 million after distributions for operating expenses. The UUCEF reported a

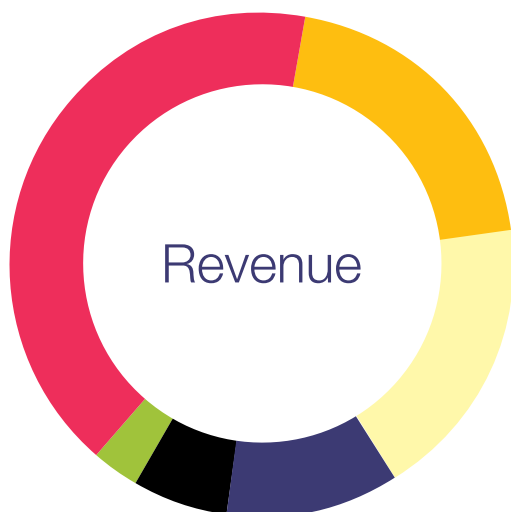
return of 14.9% (13.8% net of all expenses) that placed the fund in the upper 15% when compared to like-sized endowments. This is a welcome reversal of last year's relatively poor performance. Five, seven and ten-year returns were also strong and in excess of benchmarks.

The UUA Investment Committee remains committed to active management, global markets, and diversification, which have delivered benefits this year. And these results were achieved along with a strong commitment to Socially Responsible Investing.

The audited financial statements of the UUA (highlights follow) have been reviewed by the board-appointed Audit Committee. The Association's auditors, Mayer, Hoffman McCann – Tofias New England Division, issued a clean opinion. That is, they certified that the statements, which were prepared by the UUA staff, fairly present the financial condition of the Association in all material respects.

Income (\$ in thousands)

	FY 2017	FY 2016
Total revenue	40,618	36,581
Total expense	38,832	36,507
Net from operations	1,786	74



Charitable Gifts	41%
Net Sales from Publishing Activities	20%
Rent and Other Income	18%
Endowment Income	11%
Sales and Administrative Services	6%
Holdeen Trusts	3%

Annual Program Fund (Net to UUA)	54%
Realized Bequests	12%
Unrestricted Gifts	11%
Restricted Gifts (Campaign)	10%
Grants	9%
International Programs	2%
Living Tradition Fund	1%
Endowment Gifts	1%



Programs	75%
General and Administrative	18%
Stewardship and Development	5%
Rental Expense	2%

Socially Responsible Investing

The UUA brings our values to bear in every decision related to the investment of our assets. For example:

- The UUA incorporates environmental, social, and governance (ESG) factors into stock and manager selection. Currently fully 80% of the investment strategies in the fund incorporate ESG. Our portfolio favors companies with strong ESG performance and avoids those that do not meet our criteria. When choosing managers of mutual funds, we look for those with strong ESG practices.
- The UUA is an active owner, using our shareholder rights to press companies for better performance on ESG issues. We vote all of our proxies, file shareholder resolutions, and engage in dialogue with corporations around issues of concern, such as climate change, executive compensation, political lobbying, GLBTQ and gender discrimination, fair chance employment, and the Dakota Access Pipeline.
- The UUA devotes significant assets to impact investing, which offers a “double bottom line” through private equity investments that offer both competitive market returns and measurable positive social and environmental impact.

UU Common Endowment Fund

The UU Common Endowment Fund, LLC, (UUCEF) is a professionally managed, diversified investment fund available to UU congregations, regions, and other related organizations. These organizations pool their assets with the UUA's to take advantage of economies of scale as well as professional management and oversight.

The Fund is overseen by the UUA's Investment Committee, made up of individuals with professional institutional management experience. The committee is advised by New England Pension Consultants, a leading institutional investment advisory firm focused on endowments, foundations, and pension funds.

The Fund invests with a long-term horizon and makes decisions through the lens of UU values as guided by our principles and the resolutions of General Assembly.

UUCEF currently has \$184 million under management (as of 9/30/17), which includes the assets of the UUA and 360 congregations and related organizations. Congregations hold 52% of the Fund's total assets, with the UUA holding the remaining 48%.

Key characteristics:

- Long-term investment strategy
- Investment portfolio diversified across asset classes, geography, and managers
- Managed by professional investment managers, each specializing in a particular strategy or asset class
- Reflects UU values while achieving financial goals
- Open to congregations, districts, and other UU organizations

Governance:

The UU Common Endowment Fund (UUCEF) is a separate legal entity from the UUA, with separate audit and financial statements. UUCEF is designated as a 501(c)3 charity by the Internal Revenue Service. UUA serves as manager of UUCEF; with the UUA Board of Trustees serving as the ultimate fiduciary.

Performance and Fees:

Annualized % return as of September 30, 2017:

	1 Year	2 Years	3 Years	4 Years
Gross return	14.0	5.7	7.1	7.3
Return net of fees	13.0	4.7	6.0	6.3
Blended benchmark*	12.9	6.1	7.2	6.8

* Benchmarks of each asset class (US equities, international equities, bonds, etc.) weighted according to the relative asset value in each.

Fees are approximately 1% inclusive of all manager fees, consulting, custody, audit, and 0.20% to the UUA for administrative services.

For more information visit uucef.org, or contact the fund at responsibleinvesting@uua.org or (617) 948-4306.

Balance Sheet

Consolidated statements of financial position for the fiscal years ending June 30 (in \$ thousands)

Assets	FY 2017	FY 2016
Cash and cash equivalents	11,864	9,554
Accounts receivable, net	1,685	2,584
Pledges receivable, net	981	582
Agency receivable	496	—
Inventories, net	1,382	1,294
Other assets	1,167	1,582
Investments	87,894	81,818
Investment funds managed for others	94,754	88,750
Funds held in trust by others	44,854	42,075
Funds held in support of split-interest agreements	9,419	9,130
Loans to member congregations, net	4,391	5,303
Property and equipment, net	35,340	36,026
Total assets	294,227	278,698
Liabilities and Net Assets		
Liabilities:		
Accounts payable and accrued expenses	5,824	6,287
Agency liability	496	—
Annuity liabilities	2,001	2,073
Bank debt	8,388	10,310
Obligations under split-interest agreements	5,491	5,218
Accumulated postretirement benefit obligation	1,761	1,937
Total liabilities	23,961	25,825
Minority interest in UUCEF	94,754	88,750
Net assets:		
Unrestricted	57,430	53,876
Temporarily restricted	59,732	52,541
Permanently restricted	58,350	57,706
Total net assets	175,512	164,123
Total liabilities and net assets	294,227	278,698

The financial statements of the Unitarian Universalist Association (UUA) as of June 30, 2017, were examined by the independent certified public accounting firm Mayer Hoffman McCann PC, Boston, MA. The above are financial highlights. The complete audited financial statements and report are available at UUA.org. See accompanying notes to consolidated financial statements.

Your UUA

Resources for Congregations

Congregational Justice Programs

uua.org/justice-programs

Justice is at the core of our faith. Our congregations are called to make a positive difference in our wider communities. We work to serve, to raise awareness, and to support and partner with people who face injustice. Learn the 'do's and don'ts' for justice-seeking congregations, how to deepen engagement and connection, and how small group ministry can be organized for social change.

Curricula & Faith Development

uua.org/re

The UUA offers a variety of tools needed for a thriving faith development program in your congregation, including resources for starting or maintaining Adult Faith Development Programs and training and support for Religious Education Volunteers. *Tapestry of Faith* and *Our Whole Lives* are the UUA's foundational curricula series from preschool to older adults.

Finances & Fundraising

uua.org/finance

If your congregation has paid staff, you'll want to check out Congregations as Employers for

information on staffing practices, policies, and development. Download a free copy of the *Benefits Tune-up Workbook*.

Explore *The Wi\$dom Path*, a Tapestry of Faith curriculum that examines our attitudes and behaviors toward money in our everyday, spiritual, and congregational lives arranged around three themes: Money and Self; Money and Society; and Money, Spirit, and Life.

The UUA facilitates the continued growth, in the broadest sense of the term, of member congregations through several affordable loan options such as the Building Loan Program, Loan Guarantee Program, and the Small Projects Loan Program.

The Unitarian Universalist Common Endowment Fund (UUCEF) is available for the investment of endowment funds, trust funds, and other assets of congregations that have a long-term investment perspective (see page 68).



Launched in 2014, FAITHIFY is a crowdfunding site where passionate people inspire, unite and fund Unitarian Universalist ministries.



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Universalist
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Leadership Development

uua.org/leadership

Leadership Development is a kind of faith formation; explore resources for both new and seasoned leaders to develop self-awareness and find ways to cultivate and improve their full, authentic selves in ways that make them better leaders.

Membership, Growth & Outreach

uua.org/growth

Growth in numbers brings many blessings—and also significant challenges. Congregations of different sizes need different approaches. UUA Congregational Life staff is available to offer workshops, education, and leadership to help grow your congregation.



Breakthrough Congregations seeks to celebrate and share innovative ways

congregations are adapting to the challenges that they face in this changing religious landscape. A successful Breakthrough Congregation has demonstrated an innovation or adaptation that is entirely new to the congregation and could be useful to other congregations.

Ministerial Transitions

uua.org/careers/ministers/transitions

The health and vitality of our congregations depends in part on a good fit between a congregation and their minister. The UUA helps to connect ministers searching for a position with congregations who want to find a minister through information and resources for congregants, ministers, ministerial search representatives, compensation consultants, and regional staff throughout the search process for all types of ministers (assistant, contract, developmental, interim, or settled).

Multicultural Ministries

uua.org/offices/staff/mgw/multicultural-ministries

We envision justice-seeking faith communities where all people see their cultural identities reflected and affirmed in every aspect of congregational life. Multicultural Ministries supports and creates programs, initiatives, leadership development opportunities, and educational resources to help Unitarian Universalism become an inclusive and multicultural faith. For Multicultural Ministries, cultural identity includes sexual orientation, gender identity/expression, economic and educational background, physical and mental ability, and age, as well as race, ethnicity, and nationality.

UU World Magazine

uuworld.org



Quarterly print and digital versions of *UU World* magazine are published in March, June, September, and November; uuworld.org publishes news and original online-only content every week. Members of Unitarian Universalist congregations in the U.S.

receive a free print subscription as a benefit of membership, thanks to congregations' generous support of the Annual Program Fund.

UU World's "Seeker" issue is designed specifically as an introduction to Unitarian Universalism. The 32-page publication is an anthology of articles and photographs, organized in four sections: Who We Are, What We Believe, How We Gather, and What We Do. Available in packs of 10 or 25 from inSpirit UU Book and Gift Shop (uua.org/bookstore), the Seeker issue is suitable for use in path to membership classes as well as general outreach to people interested in learning more about Unitarian Universalism.

Worship & Inspiration

uua.org/worship

Whether you're looking to feed your own spirit or for a reading to open a meeting, browse WorshipWeb, a free and extensive online collection of readings, prayers and meditations for all occasions.

BRAVER/WISER
COURAGE AND COMPASSION FOR LIFE AS IT IS

Or sign-up for Braver/Wiser, offering a weekly message of courage and compassion for life as it is. Every Wednesday we email an original written reflection by a contemporary religious leader, and a brief prayer, grounded in Unitarian Universalism.

How do we cross cultural borders, grapple with grief and loss, navigate growth and change, strive for justice and action, or questioning conscience and belief? Unafraid to tackle the thorniest issues, Skinner House (uua.org/books/skinner) brings you insightful writing for every age and stage drawn from the Unitarian Universalist tradition.

From best-selling titles to national print and broadcast reviews, to college curricula and citywide reading programs, Beacon Press (beacon.org) books are known for their values-based, forward-thinking perspectives.

The UU Common Read (uua.org/books/read) invites participants to read and discuss the same book in a given period of time. A Common Read can build community by giving diverse people a shared experience, shared language, and a basis for deep, meaningful conversations. Downloadable discussion guides include plans for both a single session and three more in-depth sessions.

Youth & Young Adults

uua.org/ages

UU religious education seeks to develop respectful, responsible, life-loving kids who know they are valued for all of who they are and are ready to show others the same deep acceptance. The UUA offers comprehensive, adaptable, and searchable children's curricula online, for congregations to use at no charge, including:

- **Tapestry of Faith** nurtures children in ethics, spirit, faith, and Unitarian Universalist identity through stories, activities, and

social justice projects. Taking It Home and Find Out More sections extend learning for children along with their parents, families, and religious educators. Families can go online from home to explore the ideas and activities the children experience in their religious education program.

- **Our Whole Lives** (OWL) offers age-appropriate, self-affirming learning about bodies, reproduction, safety, health, gender, and sexual orientation for grades K-1 and grades 4-6.
- **Coming of Age** helps middle school youth explore what it means to be Unitarian Universalist. Over the course of a year, youth gather for fun workshops, retreats, and justice projects. With mentors and guides, participants explore what they believe, what they find meaningful, and how to build a spiritual “toolkit” to help them as they face the joys, sorrows, wonders, and challenges of being human.



Publications



beacon.org

Beacon Press continues to amplifying UU values by publishing serious non-fiction and presenting viewpoints from diverse authors and and cultures. Sometimes called the “NPR of publishing,” Beacon publications often provide deeper context for current events and headlines. In addition to print and e-books, the press has 34 new audiobooks coming next year. Beacon authors reached the public via more than 750 ‘hits’ across a wide range of media platforms, reaching an audience of millions. Learn about Beacon’s Social Impact at beacon.org/socialimpact.

inSpirit
UU BOOK AND GIFT SHOP

uua.org/bookstore

If you’ve ever attended General Assembly then you’ve probably shopped at inSpirit. Shop online year-round or stop by the store’s retail location at UUA headquarters in Boston.



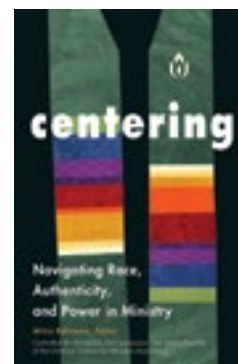
inSpirit carries books from Beacon Press, Skinner House, and other publishers that will help nurture your faith and connect with our history, and offers a wide range of fair trade gifts. Congregations can order a variety of church resources, including UU pamphlets, hymnals, and religious education curricula; discounts on bulk orders are available.



uua.org/skinner

Skinner House publishes titles directly aimed at the spiritual needs of Unitarian Universalists, seekers, and others who share the values of liberal religion.

Publications include worship and church resources, books on theology and religious history, books for children and families, introductions to Unitarian Universalism, pastoral resources, and religious commentary on current issues and social justice concerns.



New titles this year include:

- *Testimony: The Transformative Power of Unitarian Universalism*, edited by Meg Riley
- *To Wake, To Rise: Meditations on Justice and Resilience*, edited by William G. Sinkford
- *Centering: Navigating Race, Authenticity, and Power in Ministry*, edited by Mitra Rahnema



Our Unitarian Universalist Principles

We, the member congregations of the
Unitarian Universalist Association, covenant
to affirm and promote:

The **inherent worth** and **dignity** of every person;

Justice, equity and **compassion** in human relations;

Acceptance of one another and **encouragement** to spiritual growth
in our congregations;

A **free** and **responsible** search for truth and meaning;

The **right of conscience** and the use of the democratic process
within our congregations and in society at large;

The goal of **world community** with peace, liberty, and justice for all;

Respect for the **interdependent web** of all existence of which
we are a part.

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