



UNITARIAN
UNIVERSALIST
ASSOCIATION

Fiscal Year 2017 Report

Table of Contents

- 3 Thank you
- 4 Multicultural Growth and Witness
- 7 Standing on the Side of Love
- 8 Black Lives of Unitarian Universalism
- 9 UU College of Social Justice
- 10 UU United Nations Office
- 12 General Assembly
- 14 Communications & Outreach
- 15 Skinner House Books
- 16 Youth & Young Adult Ministries
- 17 Congregational Life
- 18 Faith Development & Religious Education
- 19 Office of Church Staff Finances
- 20 Ministerial Transitions
- 21 Professional Development
- 21 Credentialing
- 22 Internal Services
- 23 IRS Status
- 24 Financial Information
- 27 Balance Sheet
- 28 Collaborative Campaign Legacy Challenge
- 29 Fundraising
- 30 2016-2017 Board of Trustees
- 31 Our Seven Principles



Multicultural Growth and Witness

A new level of fear is gripping many Americans following the results of our recent national election. There is a real possibility of the targeting of immigrants, Muslims, LGBTQ communities, Movement for Black Lives networks, and other progressive movements. Unitarian Universalists must live into our values and interconnected relationships with a new sense of urgency. We will focus our efforts on sanctuary and solidarity, resistance and resilience.

UUs and our partners will be vigilant of administration actions, policies, and verbal assaults that undermine the principles of our nation or disparage, threaten, or attack innocent people. We will respond by speaking truth to power and mobilizing support for those who are under siege. Around the American Presidential Inauguration, the UUA encouraged people to participate in local and national events advocating for an agenda of justice, including Dr. Martin Luther King, Jr. Day events, #Fast4Power, and the Women's March in Washington, DC. UUs hosted hundreds of justice-focused event around the nation, and shared them on a [Show the Love map](#).

In response to the very real threat of human rights violations, the UUA and the UU Service Committee (UUSC) are joining together as never before to encourage UUs and congregations to sign onto a [Declaration of Conscience](#) (p. 5). This is the first step in building capacity and a national network of responders to acts of injustice. We must protect our values and the vulnerable among us. Rev. Morales and UUSC President Hon. Tom Andrews jointly write "...This is not about partisan politics. It is a principled response to the potential targeting of people not for what they have done, but for who they are. It is a commitment to speak out and to act in support of basic human rights..."

In the coming year and beyond: This moment takes our faith communities and ministries beyond the usual ways we categorize and resource our work. The practices permeate every aspect of our religious and spiritual life, and the Association has to be able to align and support both our UU communities and the movement partners with pastoral, prophetic, and strategic leadership, and resources.



Events around the nation "Show the Love"

UUA - UUSC Declaration of Conscience

At this extraordinary time in our nation's history, we are called to affirm our profound commitment to the fundamental principles of justice, equity and compassion, to truth and core values of American society.

In the face of looming threats to immigrants, Muslims, people of color, and the LGBTQ community and the rise of hate speech, harassment and hate crimes, we affirm our belief in the inherent worth and dignity of every person.

In opposition to any steps to undermine the right of every citizen to vote or to turn back advances in access to health care and reproductive rights, we affirm our commitment to justice and compassion in human relations.

And against actions to weaken or eliminate initiatives to address the threat of climate change – actions that would threaten not only our country but the entire planet – we affirm our unyielding commitment to protect the interdependent web of all existence.

We will oppose any and all unjust government actions to deport, register, discriminate, or despoil.

As people of conscience, we declare our commitment to translate our values into action as we stand on the side of love with the most vulnerable among us.

We welcome and invite all to join in this commitment for justice.

The time is now.



© Dea Brayden/UUA

President Morales and other clergy at a Standing Rock #NoDAPL protest



© Dea Brayden/UUA

Young people protesting Arizona Senator Joe Arpiao's anti-immigrant and racist policies

Congregational Advocacy and Witness

The work of the UUA's Congregational Advocacy & Witness Office builds on multi-faith relationships and coalition work and links Unitarian Universalist communities to larger campaigns for racial, economic, and environmental justice.

In the coming year and beyond: As the actions of the new US administration become clear, we anticipate greater coordination among UU entities to support effective advocacy and organizing. This will grow congregational capacity to be a moral voice and force and to project a constant vision of a more just and compassionate society. We will build on our strong existing relationships with Rev. Dr. William J. Barber II, leader of the Moral Movement; Interfaith Worker Justice; the Interfaith Organizing Initiative; and the We Say Enough Campaign.

Mosaic Makers

Mosaic Makers: Leading Vital Multicultural Congregations is a dynamic gathering for teams from congregations engaged in the work of building intentional multicultural community.

In the coming year and beyond: In October 2017, the First Unitarian Universalist Church of San Diego will host the conference with the guiding themes of "Sanctuary and Solidarity." This congregation has a bilingual second campus served by a Latina seminarian, and has been substantively engaged in supporting the movement for immigrant rights with advocacy, detention visitation, and US-Mexico border trips. As host, their setting will provide excellent context for learning and discussion of multicultural ministry.

Standing on the Side of Love



Standing on the Side of Love (SSL) is a UUA public advocacy campaign that seeks to harness love's power to end oppression. SSL's #ReviveLove Tour, launched in September 2016, visited local activists in five communities throughout the south: Knoxville, Tennessee; Nashville, Tennessee; Atlanta, Georgia; St. Louis, Missouri; and New Orleans, Louisiana. "Workshop," an event combining elements of a workshop and a worship service, and the music of Rev. Sekou and the Holy Ghost rejuvenated and motivated local activists. In cooperation with Black Lives of Unitarian Universalism, the tour served to heal, support, and connect leaders who work for justice for Black, LGBTQ, immigrant, and other oppressed people.

SSL also launched [Fortification](#), a new podcast series focusing on the spiritual lives of movement leaders and activists.

In the coming year and beyond: Standing on the Side of Love will focus on building membership bases that can be mobilized efficiently, and on learning from those organizers who have already achieved victories, particularly in "red states."

SSL staff will expand recent successful projects such as the Fortification podcast, webinars, partnership with the UU College of Social Justice's GROW Racial Justice Program, and the #ReviveLove Tour. SSL will also help activists and lay leaders build skills for "Organizing on the Side of Love," offering tools for community organizing.

These ideas will be shared via the 30 Days of Love campaign; at General Assembly workshops; and by working with regionally based organizers as part of a collaboration between UUA, UUSC, UU College of Social Justice, UU Rise, State Action Networks, and UUs for Social Justice.

"The grace of the work does not live in perfection. It lives in the ability of deeply imperfect leaders, organizations, and alliances to do life-giving, transformative work that wins."

—Caitlin Breedlove, SSL Campaign Director



Rev. Sekou and the Holy Ghost at #ReviveLove

Black Lives of Unitarian Universalism

Since 2014, Unitarian Universalists have stood with the Black Lives Matter movement by providing gathering space and logistical support, showing up at demonstrations, hosting activists, and educating our congregations and communities on racial justice issues.

Within Unitarian Universalism, the Black Lives of Unitarian Universalism (BLUU) Collective, founded in 2015, is bringing together Black UUs to organize and connect with one another and the larger UU community. An active [social media presence](#) provides space to share stories, successes, and pain. Efforts to create a lay ministry for Black UU youth are underway. In March 2017, BLUU will host a convening for Black UUs in New Orleans, Louisiana.

In October 2016, the UUA Board of Trustees voted to expand their support of BLUU with an immediate commitment of \$300,000 for BLUU's current organizing work, and a long-term commitment of \$5 million for a new ministry for black identified UUs.

In the coming year and beyond: The Board's commitment to this work demonstrates a bold step toward transforming our faith and a commitment to doing what it takes to live our values of equity and inclusion.



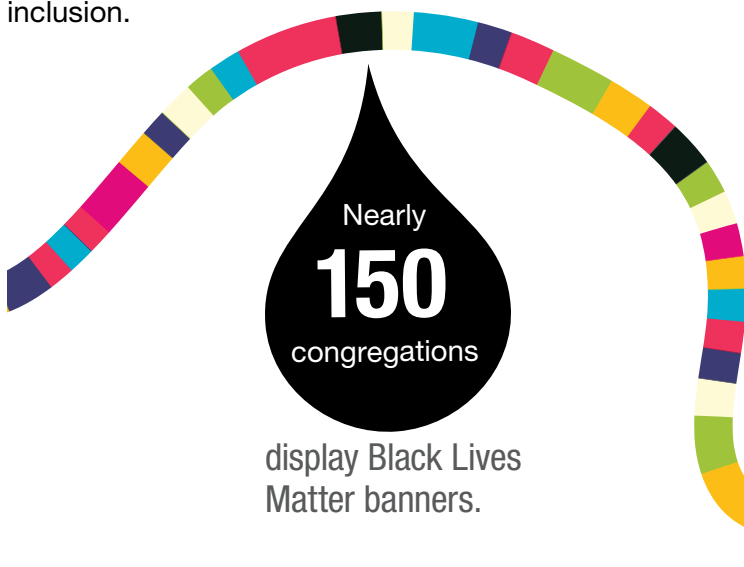
© SSL/UUA



© SSL/UUA



© SSL/UUA



UU College of Social Justice

The UU College of Social Justice (UUCSJ) offers UUs of all ages the chance to cross borders, exploring the intersection of spirituality and social justice. The UUCSJ is a joint program of the UUA and the UU Service Committee, founded in 2012 to inspire and sustain effective and spiritually grounded activism for justice.

Over the last year, groups from congregations visited Haiti to learn about the connections between climate justice and food security. They also stood with the Lummi Nation in Bellingham, Washington, supporting efforts to protect native lands. In Nicaragua, they explored climate justice and fair trade. On other trips, ministers and seminarians traveled to learn about the reality of immigration justice on the Arizona-Mexico border and carried that knowledge back to their congregations.

Activate!, the UUCSJ's justice training for high schoolers, taught young people about immigration justice in Tucson, Arizona, and racial and economic justice in New Orleans, Louisiana.

Youth groups worked to repair damage from Hurricane Sandy in New York. In addition, a dozen young adults worked at summer-long internships with justice organizations in the US and India. Others participated in GROW Climate Justice, a new intensive five-day workshop on spiritually grounded climate justice activism.

In the coming year and beyond: Programs in the next year include six [US-Mexico border trips](#) with new elements for Sanctuary training and direct links to UUA and UUSC immigrant justice work. A new immersion program focuses on indigenous rights and our involvement with the Standing Rock Sioux tribe's efforts to protect their water and sacred lands. Trips to Nicaragua with UUSC partner Equal Exchange will explore economic justice issues.

All UUCSJ programs broaden attendee's ability to apply organizing principles to effective mobilization; expand anti-racism and consciousness of the importance of our own social location; and develop connections between local, national, and international justice activism.



Activate! Youth at an environmental justice march in Boston

UU United Nations Office

The path toward justice winds around the globe. The Unitarian Universalist United Nations Office (UU-UNO) advocates for human rights and UU values on the global stage through advocacy at UN and diplomatic gatherings, and by hosting public events.

For example, as chair of the UN Department of Public Information Non-Governmental Organization Executive Committee, UU-UNO Director Bruce Knotts helped shape the “Education for Global Citizenship: Achieving the Sustainable Development Goals Together” conference in Korea, ensuring that UU principles and values were represented, particularly the inherent worth and dignity of every person. At the conference, he spoke and participated in workshops on climate change, nuclear disarmament, sustainable development and inclusive education.

The UU-UNO advocates for equality for people of all genders and sexual orientations. The UU-UNO led a panel called “Breathing Free: LBT Women and the Sustainable Development Goals” at the annual UN Commission on the Status of Women (CSW) forum in March. It was one of only three events at CSW that specifically addressed the rights of lesbian, bisexual, and transgender women.

Outside of the diplomatic arena, the UU-UNO participated in several public events to expand the conversation on racial justice, focusing especially on justice for people of African descent. In September, in partnership with All Souls Church NYC and the Heart and Soul Foundation, the UU-UNO helped organize the Forrest Church Award for Humanitarian Service ceremony, honoring the founders of #BlackLivesMatter.

Speakers at the event called for us not to be content with honoring the founders of #BLM, but to commit ourselves to constantly struggling toward racial justice.

The annual UU-UNO Intergenerational Spring Seminar in April 2016 focused on the theme of “The Colors of Inequality: Costs and Consequences.” UUs from around the US & Canada explored the intersection of economic inequality and racial discrimination, with a record 160 participants, including 82 youth. During the keynote panel discussion, held at the UN Headquarters, panelists explored how unconscious and overt biases about race, sexual orientation, gender, and criminal record can have an impact on economic inequality. Attendees enjoyed a performance by a theatre group of youth of color who have personal connections to the criminal justice system, who shared their experiences through poetry, rap, and dance.



Conversation and connection at the 2016 Intergenerational Spring Seminar

In the coming year and beyond: The UU-UNO will continue its formal integration with the UUA International Office staff group, and work more closely with other internationally-focused UU entities and organizations.

The UU-UNO will build on its ongoing efforts to increase and improve fundraising efforts with connections and events across the country, and working closely with the Stewardship and Development team.

The 2016 Fall Reception, honoring the Kingdom of Norway for its support of LGBTQ rights was held in Washington, DC, rather than in New York City, as is customary, to attract a new set of supporters. The 2017 fundraiser will likely be held in another area to continue to grow support and engagement

The UU-UNO hosts approximately five interns from Master's programs around New York each semester, each of whom focuses on a different topic such as women's rights, climate change, or racial justice. Interns working at the UU-UNO conduct research, build partnerships within the UN and NGO community, work on communications, and develop resources. In the next year, the Office will strengthen the internship program through service learning opportunities.

Throughout the coming year, the UU-UNO will work to carefully position conversations and programming to protect human and civil rights during the new presidential administration.



UU-UNO Staff and Interns



Kare Aas (center right), Norwegian Ambassador to the US, accepted an award to Norway at the Fall Reception

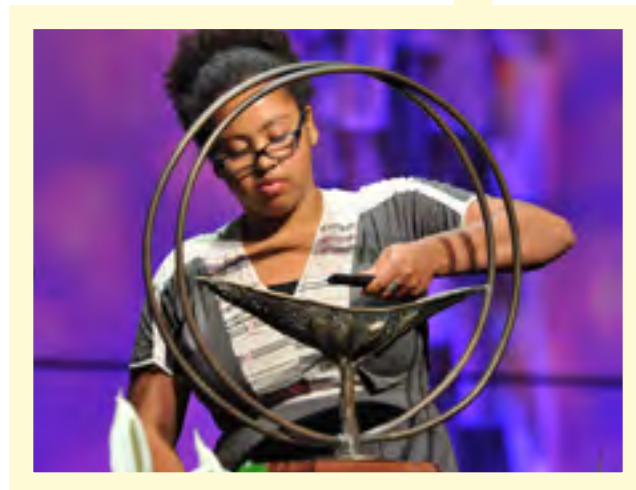
© Isaac Humphrie/UUA

© Isaac Humphrie/UUA

General Assembly

In June 2016, more than 3,500 UUs gathered in Columbus, Ohio, to work, worship, and celebrate. Some highlights:

- BLUU organized a workshop track on racial issues, and young Black UUs spoke about their experiences in mostly-white congregations. A fundraising appeal raised almost \$90,000 from attendees to support the work of BLUU.
- Three Actions of Immediate Witness were passed with overwhelming support, which respectively expressed solidarity with Muslims, advocated for legislative reform to reduce gun violence, and affirmed support for transgender people.
- A business resolution asking delegates to support Palestinian rights by opposing future investment in companies doing business in Israel did not pass.



© Nancy Pierce/UUA



© Nancy Pierce/UUA

UUA presidential candidates Rev. Alison Miller, Rev. Jeanne Pupke, and Rev. Susan Frederick-Gray

delegates from
544
congregations

from
48
states



© Nancy Pierce/UUA

Facing hatred with love at General Assembly

- UUs responded with love to an anti-LGBTQ protest by the Westboro Baptist Church. UUs wore angel wings sent from Orlando, Florida, where the wings had first been used to shield mourners at funerals for victims of the Pulse nightclub shooting.
- In workshops, participants discussed the moral implications of hydrofracking; learned about "The Spirituality of Hip-Hop" and its role in building multicultural communities; and explored the connections between ableism, homophobia and transphobia.

In the coming year and beyond: In June 2017, the UUA's General Assembly will take place in New Orleans, Louisiana. New Orleans is known as a place of rebirth following the devastation of Hurricane Katrina in 2005. Many Unitarian Universalists contributed time and funds in the effort to rebuild the city and the congregations in the area. We will celebrate progress and recommit to the relationships that have been forged with this community.

Programming will include workshop tracks with conversations on climate justice, indigenous rights, legacy and stewardship, singing for social justice, refugees and immigration, as well as tracks that address the concerns of people of color and white people.

"Resistance is what love looks like in the face of hate. Resistance is what love looks like in the face of violence."

—Rev. William G. Sinkford

150
workshops

16
worship
services



Communications & Outreach



The UUA shares our inclusive message of liberal religion through many media, including uua.org, social media, newspapers, magazines, television and other outlets.

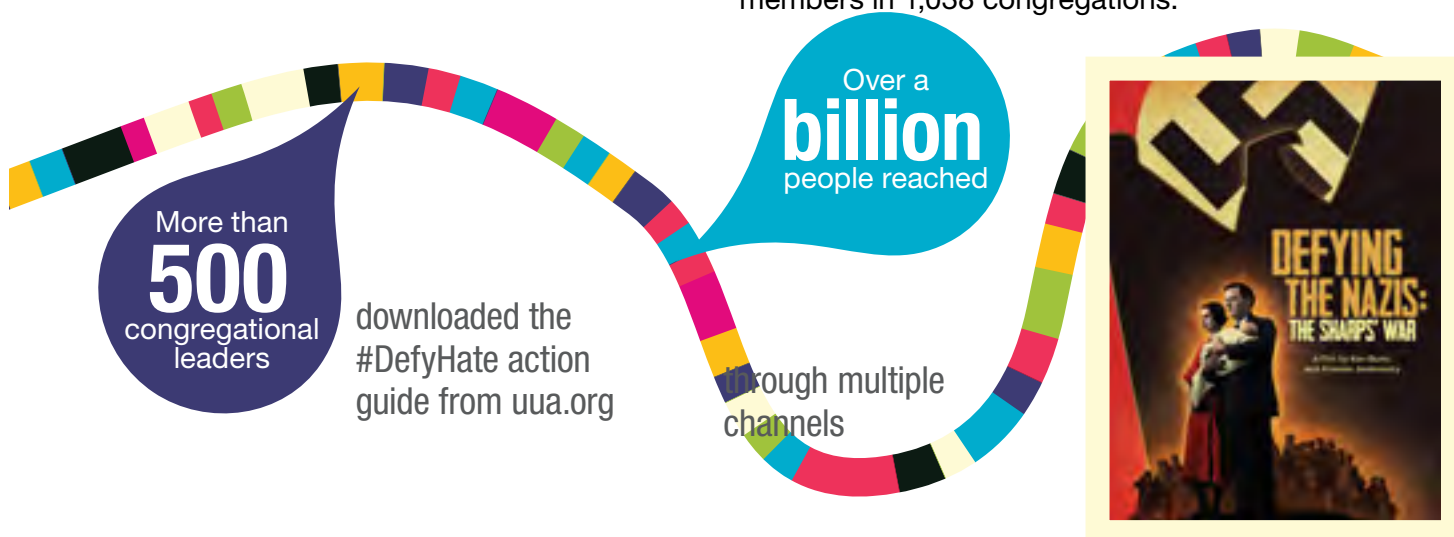
On the [UUA Facebook page](#), 44,000 people saw the UUA speak out against discriminatory “bathroom laws” aimed at transgender people; more than 70,000 discovered the Unitarian roots of Mother’s Day; and over 100,000 were linked to the January “Dear Abby” column advising spiritual seekers to look into Unitarian Universalism.

Defying the Nazis: The Sharps’ War aired on PBS in September and was viewed by millions nationwide. The Ken Burns documentary told the story of a courageous Unitarian couple, Rev. Waitstill and Martha Sharp, who rescued refugees and children from the Nazis. With important help from the UU Congregation at Shelter Rock, more than 50 congregations organized public screenings and projects related to the film, supported by materials created in a partnership between the UUA and the UU Service Committee.

Several projects this year reached out to non-UUs searching for a liberal spiritual home. *UU World* published a special “religious seeker” issue, introducing Unitarian Universalism to congregational visitors and friends. The first print run completely sold out. [We Are Unitarian Universalists](#), a new online video, explains who we are and what we do in three minutes of engaging, colorful animation. Within a month, over 300,000 people had watched the video, and thousands more since, a powerful testament to the hunger for our UU message.

UUA also launched the *Braver/Wiser* email newsletter. Every Wednesday the Outreach office sends an original reflection by a contemporary UU religious leader and a brief prayer grounded in Unitarian Universalism. There are about 3,000 subscribers to the newsletter, with an average email open rate of 45%.

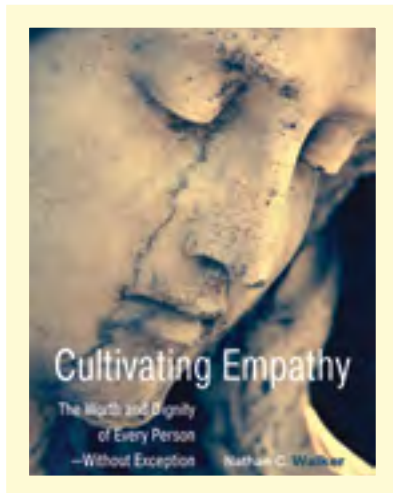
In the coming year and beyond: Staff are exploring ways to syndicate *UU World* material on other websites, to bring public interest content to a wider audience. The need for creative outreach in the 21st century is clear: UUA’s total membership peaked in 2008 with 221,000 members and has declined about 1-2% year since then for a 2016 total of 199,850 members in 1,038 congregations.



Skinner House Books

Skinner House
sold more than

38,000
books



Cover by Kathryn Sky-Peck © UUA



Cover by Kathryn Sky-Peck © UUA

Unitarian Universalists follow many paths to spiritual growth. Skinner House publications help guide UUs with readings for worship, pastoral resources, texts on theology and religious history, books for seekers, children, and families, and religious commentary on current issues and social justice concerns.

In 2016, Skinner House published three new books that are particularly timely and relevant in this era of changing demographics, political divisiveness, and racial tension.

Cultivating Empathy: The Worth and Dignity of Every Person—Without Exceptions, by Nathan C. Walker, introduces a creative approach to empathy, using moral imagination as a spiritual practice.

In *Turning Point: Essays on a New Unitarian Universalism*, edited by Fredric Muir, 20 UU leaders envision potential change and growth in our denomination.

Adam Dyer's poetry volume, *Love Beyond God*, explores the Black Lives Matter movement and the author's experience as a young Black UU in America.

For multigenerational and multicultural religious education, two new story collections bring other faith traditions to life.

Ancient Stories for Modern Times, by Faye Mogensen and Katha Sagar, retells 50 folk tales from around the world, indexed by worship themes and UU Principles.

Ocean of Stories: Hindu Wisdom for Every Age, by Sarah Conover and Abhi Janamanchi, illustrated by Shanthi Chandrasekar, continues a popular series from Sarah Conover that also includes books of Islamic and Buddhist stories.

In the coming year and beyond: Upcoming publications from Skinner House include a history of race relations within the UUA in the 1960s by Rev. Mark Morrison-Reed; a two-volume documentary history of Unitarian Universalism, by Harvard Divinity School professor Dan McKanan.

New books on UU spiritual practice by Erik Wikstrom and Elizabeth Andrew, two of Skinner's best-selling authors, will be marketed broadly, spreading UU values into the wider culture.

Youth & Young Adult Ministries

UUA programs help to guide young UUs and connect them with peers and mentors as they grow.

The annual Summer Seminary program, hosted by Starr King School for the Ministry in 2016, welcomed 23 students who are exploring the path of religious leadership. These youth created worship services, explored their own spirituality, studied faith formation and learned about building covenantal communities, in the company of new friends exploring the same call.

The UUA's new Meaning Makers program was launched with a five-day retreat. Meaning Makers helps young adults, age 18 to 24, explore personal spirituality, identity, and what it means to live life with integrity as a Unitarian Universalist. The retreat was just the start; Meaning Makers continues with mentoring and small group ministries that meet monthly via videoconference.

Multicultural Youth and Young Adult Leadership Schools, now called Thrive, celebrated its fifth year, with three programs serving young people from many backgrounds: African, Caribbean, Native American, Asian and Pacific Islander, Latino/a and Hispanic, Middle Eastern and Arabic, and multiracial. At Thrive Youth East, in Bethesda, Maryland, students performed original spoken word and musical pieces. Thrive Youth West participants in Denver, Colorado, gathered with Black Lives Matter activists in a healing space for people of color. In New Orleans, Louisiana, an opening worship service at Thrive Young Adult was led by Nigerian-American Ruth Idakula, community organizer, and featured drumming and storytelling by New Orleans spiritual leader Mama Jamina.

In the coming year and beyond: The Youth and Young Adult Office will continue to add to curriculum offerings such as Bringing the Web to Life, designed to help youth and adults in youth ministry develop the skills to faithfully lead within and beyond a Unitarian Universalist context. The title is a reference to the Web of Youth Ministry that outlines eight components of a balanced youth ministry: spiritual development, beloved community, justice making, faith exploration, multi-generational relationships, covenantal leadership, and identity.

The 2017 Summer Seminary program will take place at Meadville Lombard Theological School in Chicago and will draw on the wisdom of many of their excellent professors.

For many youth, the state of injustice in our world today can seem so heartbreaking as to instill a sense of hopelessness. This is why youth leadership development in our congregations is a ministry, because it provides skills and tools for youth to have hope in their agency to be changemakers in a hurting world.



©Bart Frost/UUA

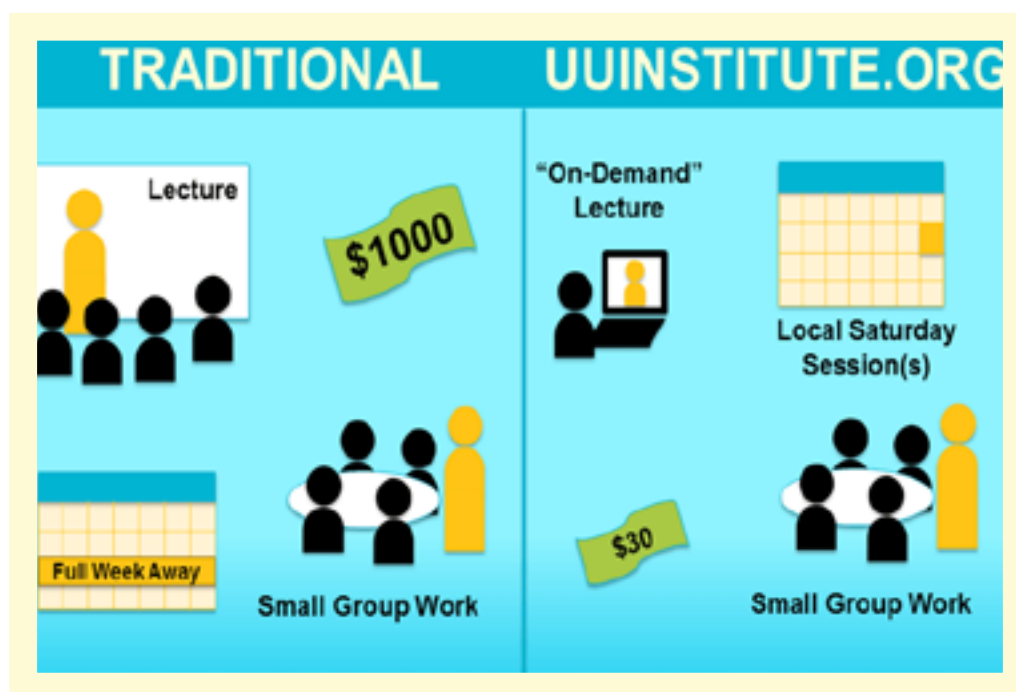
Congregational Life

To support some of our most promising, innovative faith leaders, the Unitarian Universalist Association created the Entrepreneur-in-Residence program. Modeled after “artist-in-residence” programs, entrepreneurs are chosen for a yearlong residency with the UUA. They receive a \$20,000 grant to support their ongoing ministry and to share their inspiring stories with Unitarian Universalists across the country. The program will select entrepreneurs who have started new forms of faith community and are ready to expand their reach.

In the coming year and beyond. Fiscal year 2018 will be the official start of the residency, following a 2017 pilot with Rev. Erik Martinez Resly and The Sanctuaries, Washington, DC. The Sanctuaries is an interfaith artist community that “empowers people to live creative and soulful lives.” Founded as a neighborhood ministry in 2013 by Rev. Erik, The Sanctuaries offers shared meals, artist collaborations and public performances.

The goal for future years is to expand the program to support two entrepreneurial leaders or communities. This program is part of our UUA's efforts to support “beyond” communities, those that operate outside of the traditional congregational model.

The [UU Leadership Institute](#), created by the UUA Central East Regional Group, is a UU “leadership school in your pocket.” Online seminars, on-demand resources, peer learning groups, as well as local in-person communities of practice help people to lead more effectively while building relationships and partnerships with other UUs. In FY18 and FY19, this program will expand in two ways. First, it will grow from a regional program to a national program. Second, the offerings will include online webinars, and online, real-time, peer learning environments. This reflects our UUA's commitment to innovative service-delivery as well as more sustainable program offerings. Upcoming courses include topics such as “The Welcome Table: Creating Inclusive Faith Communities” and “Theological Plurality in Our Congregations 201.”



Faith Development & Religious Education

The journey toward a deeper understanding of our faith happens both face-to-face and online.

The staff of the UUA Faith Development Office (FDO) helps religious educators and ministers support our UU congregations and communities, including using the latest technology to share and enhance programs.

In April 2016, the UUA sponsored the first ever Summit on Innovation in Religious Education. UU ministers and religious educators met to discuss innovative projects.

In a virtual community of UUs of color under the auspices of the FDO, online meetings include worship, mutual support, and personal stories of their experiences within a predominantly white religious community.

The Renaissance training program for religious educators is expanding online to make education on UU history, theology, identity and other topics accessible in more time- and cost-effective ways, including hybrid modules combining in-person meetings with online education.

The Our Whole Lives sexuality education program, which helps participants make informed and responsible decisions about relationships, health, and behavior, includes recently updated age-appropriate curricula for children and youth, and new materials to address the needs of older adults. Recently, Faith Development staff traveled to the UU communities in the Philippines to work with local leaders interested in teaching OWL. Following the training, UUA staff mentored the new facilitators as they led a seven-day retreat that included 40 hours of OWL content for youth ages 14 to 20. OWL's flexibility enabled them to learn in small groups in their own languages.

In the coming year and beyond: Staff will continue to develop and update resources to better serve UUs in this cultural moment, including adding to the curriculum about politics and voting, supporting older adults in congregations, and OWL in the age of technology.



©FDO/UUA

Sexual anatomy model building exemplifies OWL's use of the Experiential Learning Cycle

Office of Church Staff Finances

The UUA Office of Church Staff Finances (OCSF) remains concerned about the complex issue of the economic sustainability of ministries, which is closely intertwined with membership growth and congregational giving. Congregations are increasingly challenged to find sufficient resources to recruit, retain, and adequately compensate their employees, so some smaller congregations are turning to part-time ministry. OCSF recently completed a review of the methodology behind our staff Fair Compensation recommendations with a consultant, as well as focus groups to assess how well the current Fair Compensation Guidelines are working in relation to overall economic sustainability.

In the coming year and beyond: To respond to these concerns, the OCSF is working to develop job description templates for congregational positions and to identify “better” practices regarding employment and staffing issues. The next major component of this program review is reviewing and updating what constitutes Fair Compensation.

- The UUA Health Plan continues to offer stable and comprehensive benefits, consistent with UU values, to 807 congregational employees and 164 UUA national staff.
- The Health Plan’s unrestricted reserves are \$4.1 million.
- Approximately 3,600 retirees, survivors, and staff working in 598 participating congregations have slightly more than \$300 million invested in the UU Organizations Retirement Plan.
- Last year, the OCSF distributed \$565,000 in aid funds to working ministers (60%), other religious professionals and congregational staff (3%), retired ministers (13%), and their survivors/ family members (25%).
- Debt reduction grants to seminarians and recent graduates totaled \$220,000 during 2015-2016.
- In FY16, \$621,343 was distributed to 328 recipients on behalf of the Unitarian Service Pension Society.



© Nancy Pierce/UUA

UU ministers reaching out!

Ministerial Transitions

The call to ministry leads to many different paths. Over the past year, the UUA worked with 70 congregations that were searching for a full- or part-time minister. More than 100 ministers participated in this transition process, each with a different journey and destination.

One such journey connected California to Rhode Island, where the Unitarian Universalist Congregation of South County was founded in 1989. After the retirement of their first minister in 2013, two interim ministers led the congregation while they embarked on a thoughtful search.

Their efforts were rewarded in June 2016 when Rev. David Helfer accepted the call to serve as the congregation's second settled minister. Rev. Helfer attended the Claremont School of Theology in Claremont, California, and was ordained in 2014.

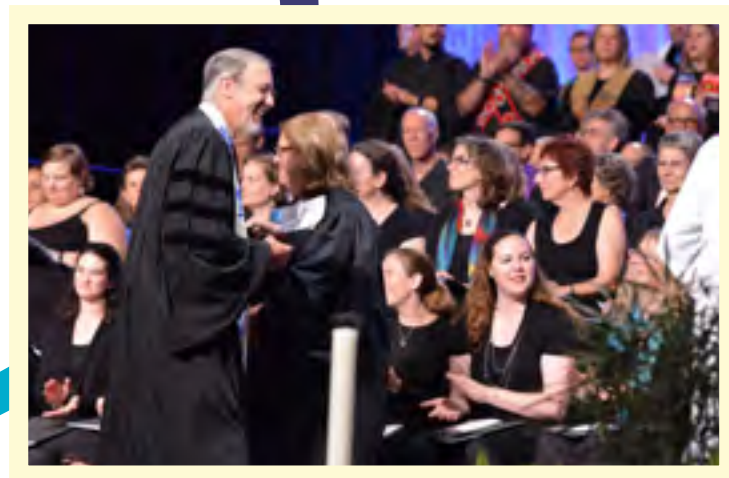


Rev. David Helfer

© Barbara Pagh

Before his call to ministry, he spent two decades in the environmental field and earned degrees in English literature, environmental policy, and business. He is now working on a doctorate from Claremont in faith-based strategic leadership and is thrilled to be making his spiritual home in Rhode Island.

In the coming year and beyond: Ministerial candidates for fellowshiping by the UUA currently submit over 100 pages of detailed forms and other documents to the Credentialing office by email over several months or years. UUA Information Technology Services is developing a new online portal to more easily track the documents to better reflect the value we place on our ministers' formation.



Rev. Harold Babcock celebrating retirement at GA

© Nancy Placed/UUA

Professional Development

The UUA strives to serve its lay, ordained, and professional leaders throughout all stages of their lives and careers. There is often a strong focus on clergy in called parish ministry, but it is equally important to serve other types of ministry. In recent conversations, community ministers in preliminary fellowship expressed a need for deeper connection with peers and mentors engaged in non-traditional ministries.

In the coming year and beyond: The Professional Development staff are planning a 2017 retreat for community ministers to reduce the sense of isolation that some experience, provide time for networking, build mentorships and assist with issues of accountability. This retreat will create structured opportunities for collaboration amongst community ministers and ongoing online mentoring circles.

In collaboration with Central East Region and the UU Ministers Association (UUMA), the UUA will launch a Lifecycle Ministries program, in which 50 ministers from all stages of ministry, from early career to retirement, will connect to help establish a culture of consistent expectations around collegiality and continuing education.

The UUA, UUMA, and the Unitarian Universalist Retired Ministers and Partners Association (UURMaPA) are highly committed to ensuring that mid-to-late career clergy engage in healthy retirement planning. A five-day Retirement Seminar in 2017 will include opportunities for attendees to design their customized map toward retirement, including considering post-retirement ministries and financial readiness. Participation in the program is highly subsidized so that all may attend.

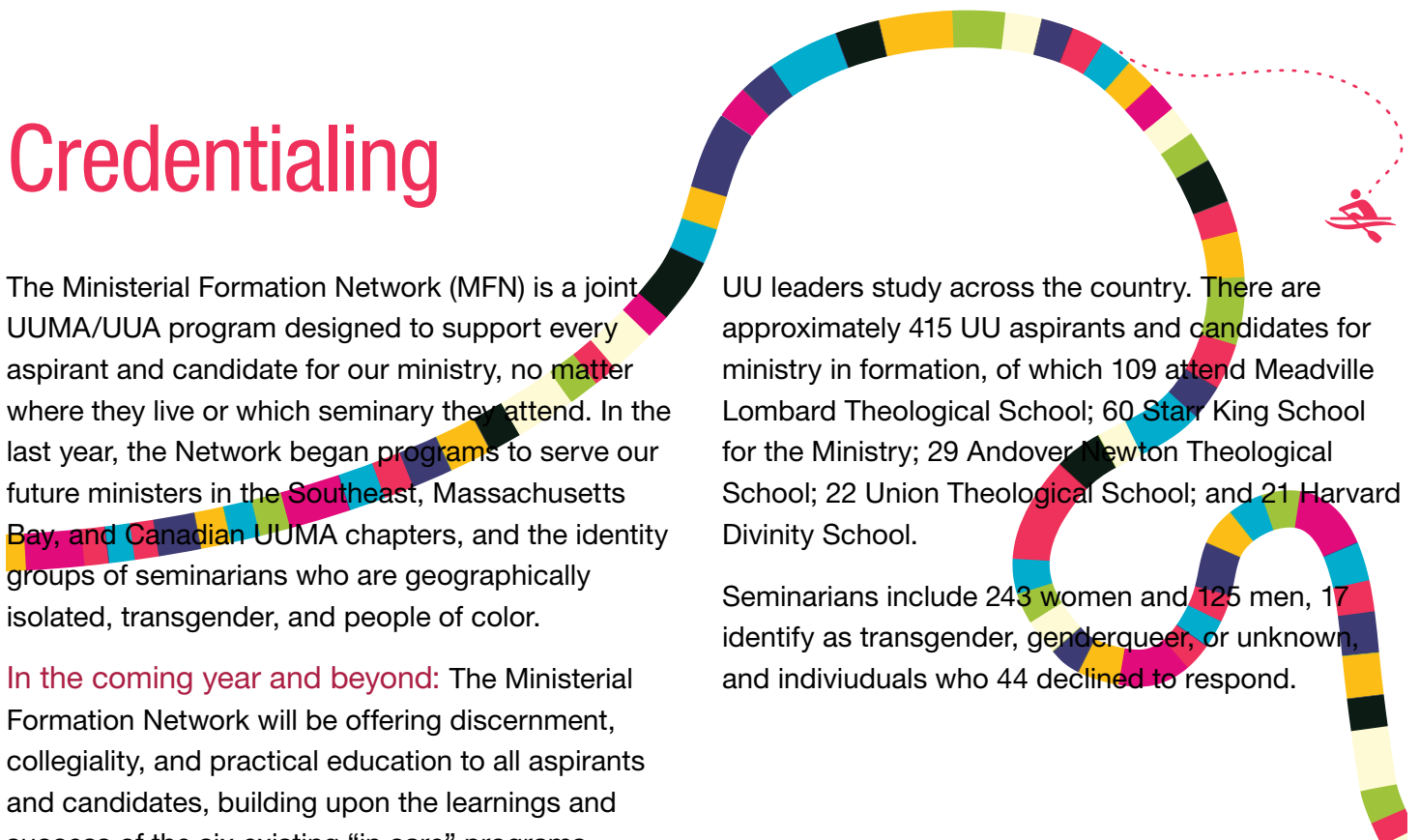
Credentialing

The Ministerial Formation Network (MFN) is a joint UUMA/UUA program designed to support every aspirant and candidate for our ministry, no matter where they live or which seminary they attend. In the last year, the Network began programs to serve our future ministers in the Southeast, Massachusetts Bay, and Canadian UUMA chapters, and the identity groups of seminarians who are geographically isolated, transgender, and people of color.

In the coming year and beyond: The Ministerial Formation Network will be offering discernment, collegiality, and practical education to all aspirants and candidates, building upon the learnings and success of the six existing “in care” programs.

UU leaders study across the country. There are approximately 415 UU aspirants and candidates for ministry in formation, of which 109 attend Meadville Lombard Theological School; 60 Starr King School for the Ministry; 29 Andover Newton Theological School; 22 Union Theological School; and 21 Harvard Divinity School.

Seminarians include 243 women and 125 men, 17 identify as transgender, genderqueer, or unknown, and individuals who 44 declined to respond.



Internal Services

To provide a strong foundation for the UUA staff's outward-facing work, our internal teams, including Human Resources and Information Technology Services (ITS), are updating tools to make the UUA run more efficiently.

UUA Human Resources studies the general well-being of the staff, including the demographic makeup. Women comprise about 67% of the UUA staff, and 20% of staff is non-white.

The Information Technology Services team is constantly making changes and improvements to the functionality of uua.org, including adding tools to design unique webpages and better connect information to social media.

In the coming year and beyond: Human Resources will implement an online performance management system to track annual reviews. This will help employees think about continuous improvement, facilitate conversation between staff and managers, and encourage employees to think about how to work most effectively to serve our mission. HR will also introduce improved job applicant tracking systems and onboarding and training programs for new staff via online modules.

Timely access to correct contact information for congregational leaders is essential, but information is currently scattered across many different software systems. The resulting duplications and omissions reduce efficiency. Therefore, ITS is building a new database to sync with key existing systems, which will expedite and improve our ability to connect with the right people at the right time.



© Dea Brayden/UUA

UUA staff gather in the headquarters at 24 Farnsworth Street

Collaborative Campaign Legacy Challenge



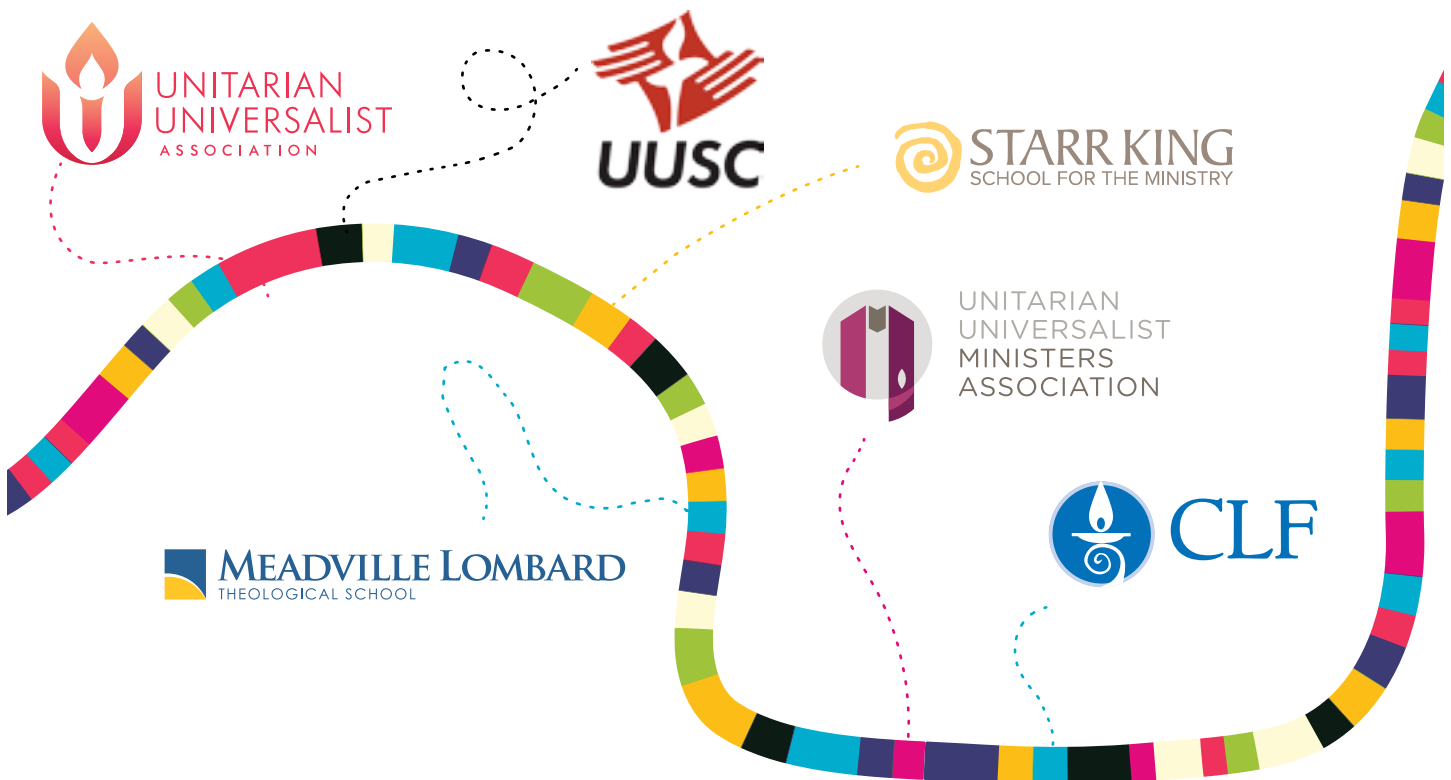
The Unitarian Universalist Congregation at Shelter Rock (UUCSR) is generously partnering with Wake Now Our Vision to launch the Legacy Challenge, a planned giving campaign for Unitarian Universalism with a goal of \$50 million. UUCSR's generous \$5 million gift supports a 10% matching gift for new legacy gifts to any of the six collaborative campaign partner institutions, to congregations, and to other UU organizations.

This Legacy Challenge officially launched on January 1, 2017. It is inspiring conversations among Unitarian Universalists about planned giving, the future of our faith, and the collective power of our individual legacies.

In the coming year and beyond: Campaign leadership will distribute resources to support the campaign including webinars for ministers, how-to packets for congregational leaders, and online resources such as pledge forms, planned gift calculators, and information about creating bequests and annuities.

The Wake Now Our Vision Unitarian Universalist Collaborative Campaign is a joint initiative uniting six of our most essential institutions: the Unitarian Universalist Association; the UU Service Committee; Starr King School for the Ministry; Meadville Lombard Theological School; the Church of the Larger Fellowship; and the UU Ministers Association.

The Collaborative Campaign signals a new era of interdependent Unitarian Universalism, in which we serve our congregations and communities more effectively by sharing our gifts, talents and expertise.



Fundraising

The UUA's Stewardship and Development team has been carefully assessing all fundraising streams to maximize revenue, while providing excellent stewardship of our donors. The Annual Program Fund, which supports our work through gifts from congregations, will move, over the next three to five years, from an annual gift request based on membership size to a request based on expenditures. UUA leadership and volunteers versed in financial modeling are working to design a fair and sustainable program.

Technology is creating easier options for people to be generous. Participants at General Assembly gave thousands of dollars via their cell phones through MobileCause. Online, donors gave nearly \$50,000 on #GivingTuesday, inspired by a generous matching gift.

The UUA is also working to ensure greater stewardship capacity within our congregations through our partnership with the UU consultant group, Stewardship For Us. One of the goals of this partnership is to share models that do not rely on pledge drives alone: they offer support on strategic planning, capital campaigns, legacy giving, and major gifts.

In the coming year and beyond: The UUA Stewardship & Development team and Rev. Dr. John Morehouse are updating the key stewardship text for UU congregations: *Beyond Fundraising: A Complete Guide to Congregational Stewardship*. The new book will include a deeper analysis into the spiritual roots of stewardship, current information about planned giving, and a look at newer models of fundraising such as mobile-giving and crowdsourcing. The updated edition will be published in the Fall of 2017 by Skinner House Books.

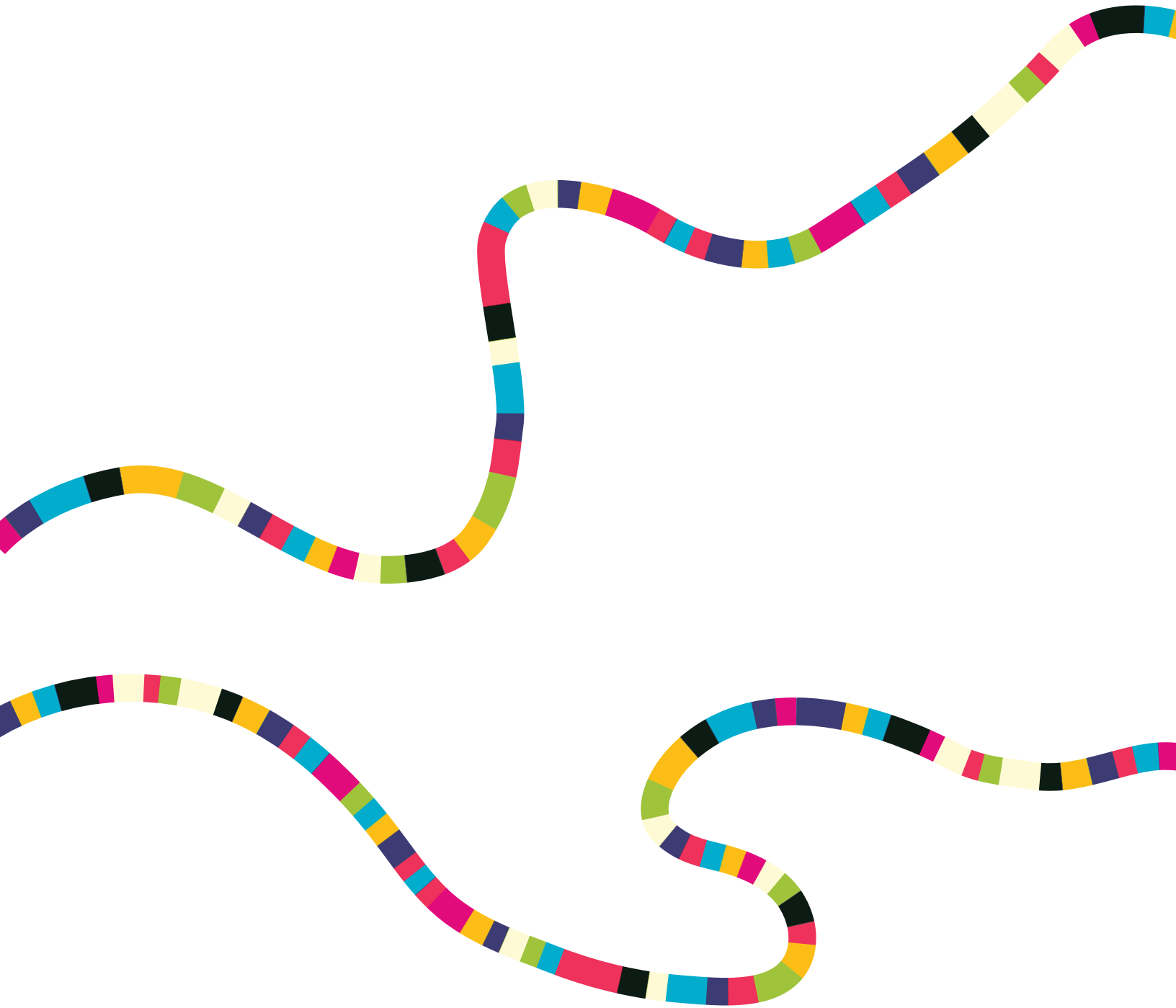


Foundation Funders

Unitarian Universalist Veatch Program at Shelter Rock
 Unitarian Universalist Congregation at Shelter Rock - Grant for Wake Now Our Vision
 The Ford Foundation
 Peierls Foundation, Inc.
 Milner Foundation
 Boston Foundation
 Columbus Foundation
 AmazonSmile Foundation

FY17 FY18 Expected

\$975,000 \$975,000
 \$250,000 \$250,000
 \$115,200
 \$23,400 \$23,500
 \$15,000 \$15,000
 \$10,000 \$10,000
 \$3,000
 \$364



24 Farnsworth Street
Boston, MA 02210
UUA.org

UNITARIAN
UNIVERSALIST
ASSOCIATION