



APRIL  
2012

# UUA President's Report



To  
The UUA Board  
of Trustees

From  
The Rev. Peter Morales  
UUA President

## Table of Contents

<b>INTRODUCTION .....</b>	<b>3</b>
PRIORITY #1: GET RELIGION .....	4
Attendance and Engagement .....	4
Services for Large Congregations .....	6
Breakthrough Congregations Initiative .....	7
Regional Staff Structures .....	8
Leap of Faith Initiative .....	9
Forward Through the Ages .....	10
Financial Sustainability for Congregations .....	11
The Gathered Here Initiative .....	13
PRIORITY #2: GROW LEADERS .....	13
Strategic Review of Professional Ministries .....	14
Association Sunday .....	14
Credentialing and Professional Development Office .....	15
Resource Development Office .....	15
Youth and Young Adult Office .....	17
PRIORITY #3: CROSS BORDERS .....	19
Congregational Advocacy and Witness .....	19
Standing on the Side of Love .....	21
Justice General Assembly .....	24
Office of International Resources .....	24
Socially Responsible Investing .....	28
Beacon Press .....	30
Friends of the UUA Matching Gift Challenge .....	31
<b>LOOKING AHEAD .....</b>	<b>32</b>
CONTINUE EXCELLENT SERVICE TO OUR CONGREGATIONS .....	33
Strategic Review of Professional Ministries .....	34
Resource Development Office .....	35
Youth and Young Adult Office .....	36
CREATE A MOVEMENT BEYOND CONGREGATIONS .....	38
Multicultural Growth and Witness .....	38
Faith Without Borders .....	40
Socially Responsible Investing .....	41
UUA COMMUNICATIONS .....	42
UUA FUNDRAISING .....	44
CONCLUSION .....	45



## Introduction

As the Unitarian Universalist Association (UUA) moves into the future, I'd like to take this opportunity to review the past year, lifting up our accomplishments and looking forward to the year ahead. We acknowledge new challenges, we recognize new possibilities, and we appreciate the growing need for a strong, liberal religion that is inclusive and welcoming to all.

This year we have focused on three priorities:

1. Deepening our spirituality—"Get Religion."
2. Developing exceptional religious leadership—"Grow Leaders."
3. Spreading our values across cultural, class, national, and political lines—"Cross Borders."

I defined these three ideas during the 2011 General Assembly, and further detailed them in an article in the [UU World](#). These priorities center our attention on the practical ways we can grow and affirm our religious movement through programs, projects, and other initiatives.

Using these three important concepts as an outline, this report will describe the background, goals, and outcomes from this past year and explore how to expand our current programs, explore new possibilities, and deepen our engagement beyond traditional congregations.



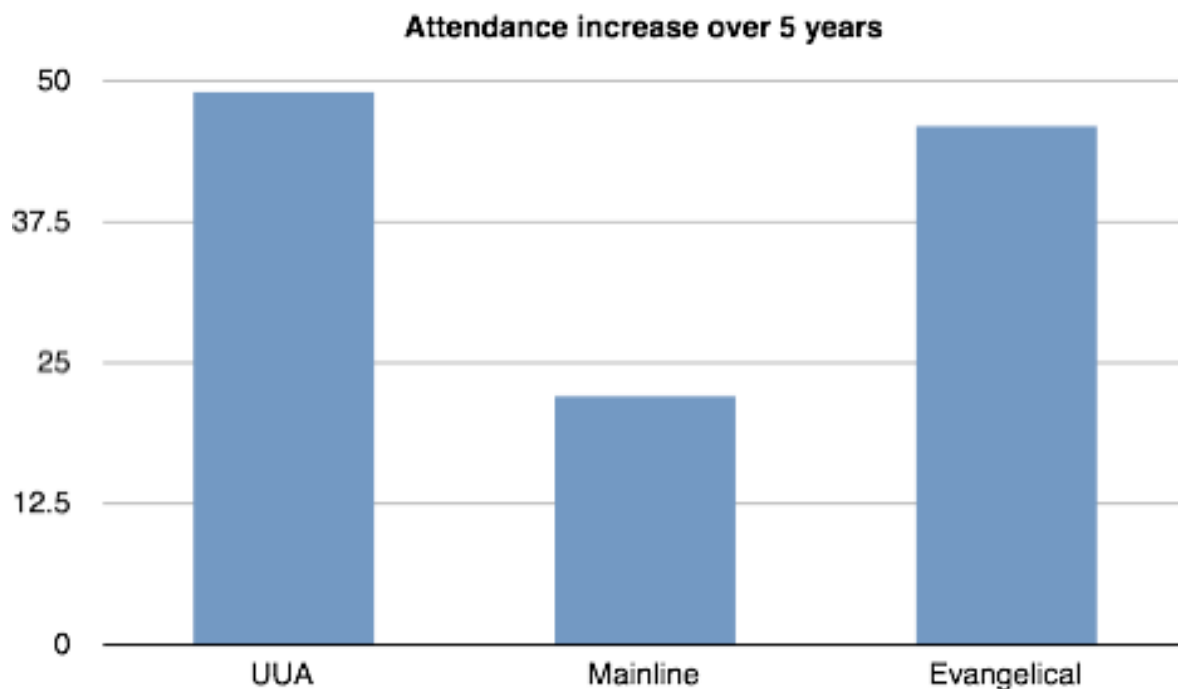
## Priority #1: Get Religion

Our religion is about what we love passionately, about how we aspire to live, about what moves us at the center of our being. Religion's source is our experience of being loved, of loving, of belonging, of feeling awe, and of feeling connected to all creation... It is through the practice of our religion that we create community, that we strengthen the bonds that sustain us, and that we build compassionate connection to the wider world.

### Attendance and Engagement

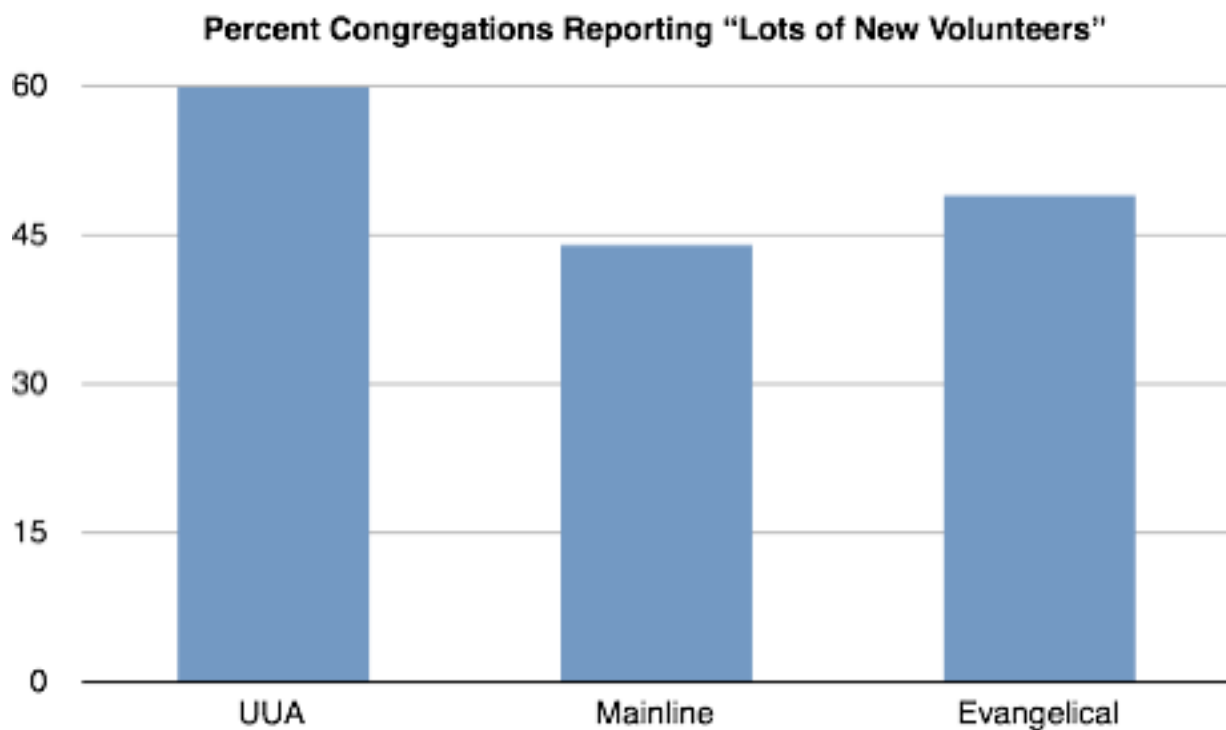
I have just seen [some fascinating research information](#) that compares Unitarian Universalist congregations to “mainline” Protestant and “evangelical” congregations. The data compare attendance (as opposed to membership) over the last decade.

Briefly, the study finds that UU congregations are doing better than evangelical churches and a lot better than mainline churches. The study found that in 2010, 49 percent of UU congregations reported an increase of 10 percent or more in attendance over the previous five years. That compares with only 22 percent of mainline churches and 46 percent of evangelical church. Here's how this looks in a graph:



This is particularly impressive for a couple of reasons. First, this comes during a decade that has been hard on religious institutions. The overall number of people at worship in the U. S. has been in decline and churches are less financially stable than a decade ago. Second, most people consider us more like mainline churches than like evangelical churches. The fact that we are doing so much better than the mainline churches is striking.

There is a second measure in the research that I find equally fascinating. When asked if the volunteers at a congregation are the same people, the same with some new people, or include “lots of new volunteers,” UU congregations show more new volunteers than others. Here is a chart that shows the differences:



This speaks to enthusiasm in our congregations and a sense of shared ministry. This is truly exciting and gratifying.

Of course, these data raise a lot of questions for us as well. If so many of our congregations (half) show an increase of 10 percent or more in attendance, shouldn’t our membership numbers be up as well? The growth numbers from the most recent certification process indicates a modest decline in membership (-0.8%), RE registration (-1.6%) and even



attendance (-2.2%). As it relates to membership, many speculate it is related to congregations updating their membership rolls in tough economic times. That, however, does not explain the decrease in RE registration or attendance.

Perhaps most of all, these data suggest, as I have long felt from direct experience in the parish and from lots of other data, that Unitarian Universalism has lots of potential. In fact, 41% of our congregations reported net membership increases last year and an additional 15% reported their membership remained stable. I also think these data reinforce the conclusion that people want an alternative to what they see as staid, old style religion. Some opt for evangelical religion, and that gets lots and lots of attention in the media. However, evangelical religion is not growing in America and has not been growing for a generation. Lots of other research shows this. These data show that our congregations are more vital than evangelical churches.

Our challenge, as always, is to be the progressive alternative. When we do that well—with passion and energy—people will join us. These data are both signs of hope and a challenge to us all. There is much here to ponder.

### Services for Large Congregations

The overall objective of the Large Congregations Program is to help Unitarian Universalism fulfill its potential and grow in strength by identifying and providing resources that serve the developmental needs of its larger congregations in ways that are innovative, size-appropriate, and faithful to our liberal values.

During the past year, the Rev. Stefan Jonasson, Director for Large Congregations, provided on-site consultation to nine congregations, where he offered leadership training events, governance training, stewardship advice, strategic planning assistance, transitions guidance, and staffing assessment and consultation. He also consulted extensively with twenty-nine congregations through electronic means. He represented the UUA at the annual meetings of the Senior Ministers of Large UU Congregations and LREDA-Large, the professional



Stefan Jonasson,  
Director for Large  
Congregations



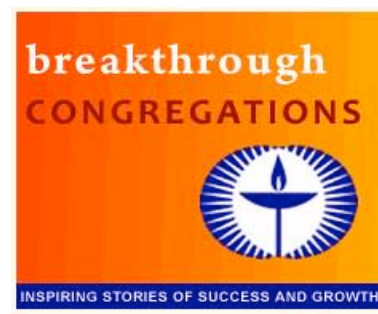
association for religious educators in larger congregations; facilitated an alumni retreat for participants in the “Dreaming Big” program; supported the [Leap of Faith](#) initiative; and offered presentations at General Assembly and other conferences.

In September 2011, the UUA established its new Office of Growth Strategies to encourage the strategic mobilization of resources and partnerships to grow current and future congregations. Incorporating the work of the existing Large Congregation Program, the new office is paying particular attention to developing strategies to help congregations grow through successfully negotiating size transitions, to increase and support emerging congregations, and to exploit technological innovations for growth. The long-term objective of the new office is to promote realistic and effective strategies to help congregations grow in strength, numbers, and influence.

This new office was established thanks to funds from the UU Veatch Program at Shelter Rock, which have also allowed the UUA to collaborate on the creation of more resources for large congregations.

### Breakthrough Congregations Initiative

Breakthrough Congregations are congregations that have experienced significant and sustained numerical growth by overcoming some obstacle that had prevented them from growing in the past—a lack of hospitality, inadequate space, conflict, or a culture of exclusiveness. The concept behind Breakthrough Congregations is that congregational leaders can learn best from the true experts in our Association: those congregations and leaders that have actually achieved growth themselves.



Breakthrough Congregations on  
[UUA.org](http://UUA.org)

Since the creation of the Breakthrough Congregations initiative in 2005, 28 congregations (four each year) have been highlighted during plenary sessions at General Assembly and with articles in *InterConnections*, *UU World*, and countless district newsletters. The four Breakthrough Congregations selected in 2011 were:

1. The UU Fellowship of Beaufort, SC, which experienced five-year growth of 72% (47 to 81);

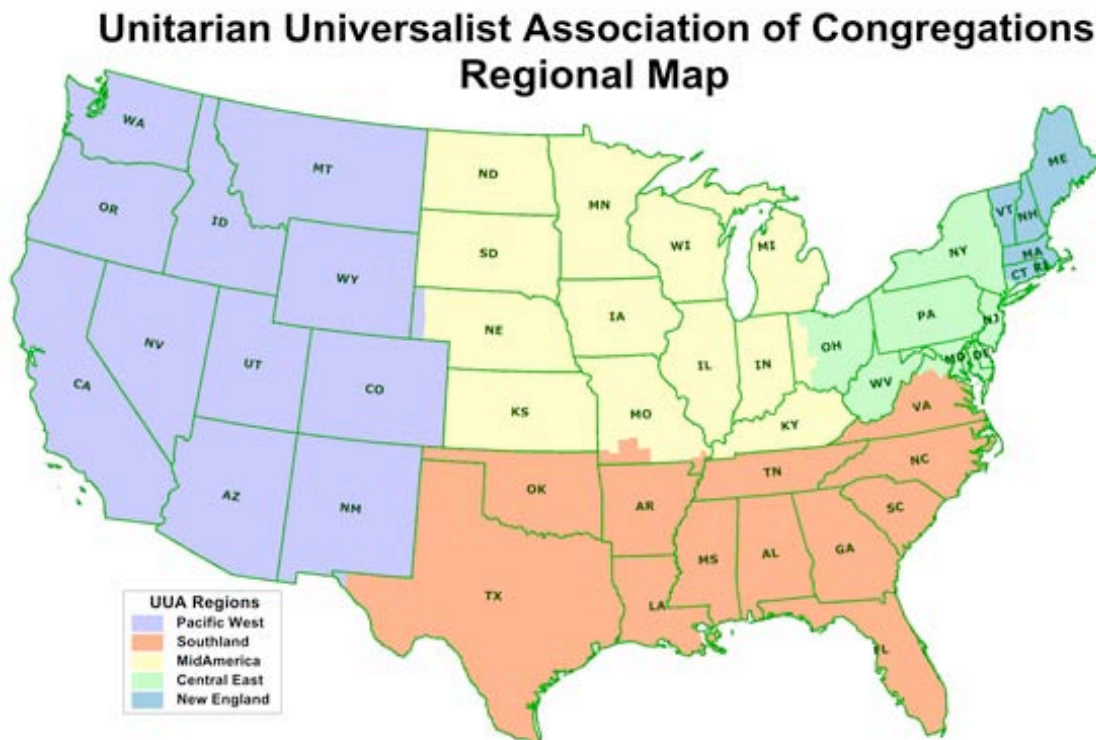


2. Westside UU Congregation in Seattle, WA, which experienced five-year growth of 56% (116 to 181);
3. UU Church of Peoria, IL, which experienced five-year growth of 28% (270 to 346); and
4. UU Congregation of Fairfax, VA, which experienced five-year growth of 24% (574 to 713).

### Regional Staff Structures

Our regional staff structures are growing in depth and breadth. The move toward this structure has allowed us to combine district resources, thereby avoiding duplication of effort and expenses; to respond with a greater breadth of services in different areas of specialties; and to provide greater technologically-based resources.

The five regions are MidAmerica (Central Midwest, Heartland, and Prairie Star Districts), Southern (Southeast, MidSouth, Florida, and Southwestern Districts), Northeast (Clara Barton, Mass Bay, Northern New England, and Ballou Channing Districts), Pacific Western (Pacific Northwest, Pacific Central, Pacific Southwest, and Mountain Desert Districts), and the Central East Regional Group (CERG) (Metro New York, St. Lawrence, Ohio Meadville, and Joseph Priestley Districts).





In 2012, we supported local congregations through workshops, trainings, and webinars. Major accomplishments include:

- “Threshold Congregations” in the CERG – nine growing congregations that were chosen in recognition of their growth potential and assigned to one of the CERG specialists to help them identify new strategies and areas of learning about their congregational dynamics.
- Two highly acclaimed Leadership Schools in different areas of the Southern Region to equip lay leaders with understandings of theology, polity, systems, and covenantal behaviors.
- Web resources, in partnership with CLF, for congregations in the MidAmerica region that are too small for ministers.

### Leap of Faith Initiative

Leap of Faith is a pilot project promoting long-term numerical growth. Based on a consultation with large and growing congregations, [Leap of Faith](#) is more a methodology than a program, inviting congregations into learning communities with larger congregations.

In the first year, 12 aspiring and mentoring congregations worked together in five learning communities. Each aspiring congregation made a weekend learning journey to their mentoring congregation, in addition to regular phone and web contact throughout the year.

[The response to this program](#) has been very positive. One congregation committed to a new building after decades of struggle with a historic building. Another learned how to maximize their sanctuary through appropriate use of technology and is now filling it twice each Sunday. Yet another Leap team led a congregation out into the community where they are now actively and regularly engaged in sharing UU values.



Members of the Leap of Faith initiative visit their mentor congregation.

### ***A story from a lay leader at All Souls in New London, CT:***

“We in All Souls New London have started taking leaps. ...We decided that we should use this opportunity to bring our DRE from 3/4 to full time. After all we have increased RE registrations by 25% this year to a total of 92 and we really understand the need to staff for growth. We set a goal of raising \$10,000 and had only 2 months to do it. Needless to say that there was some concern. The short story is that so far, instead of raising \$10,000 we raised \$14,100 to date! AND



there are still some donations that are yet to come in!!!! Thank you to Rev. Sue Phillips for coming down to help us celebrate, for the gift from Mass Bay, for the wonderful sermon, and for pointing out that we have been a congregation who has taken leaps of faith in the past and for helping us get back to that. My advice: LEAP!!"

***An update from the First Unitarian Church of Des Moines, IA, a 2010-2011 mentee:***

We will certify at 446 members this week, an increase of 37 adult members over last year. From the fall of 2010 to today, we've also increased registrations in our RE program for children and youth by 130 (for a total registered enrollment of +225). We've added 30 hours of support staff for our membership and RE programs, and we're aiming towards adding a Saturday service and a youth coordinator this fall. Thanks Leap of Faith!

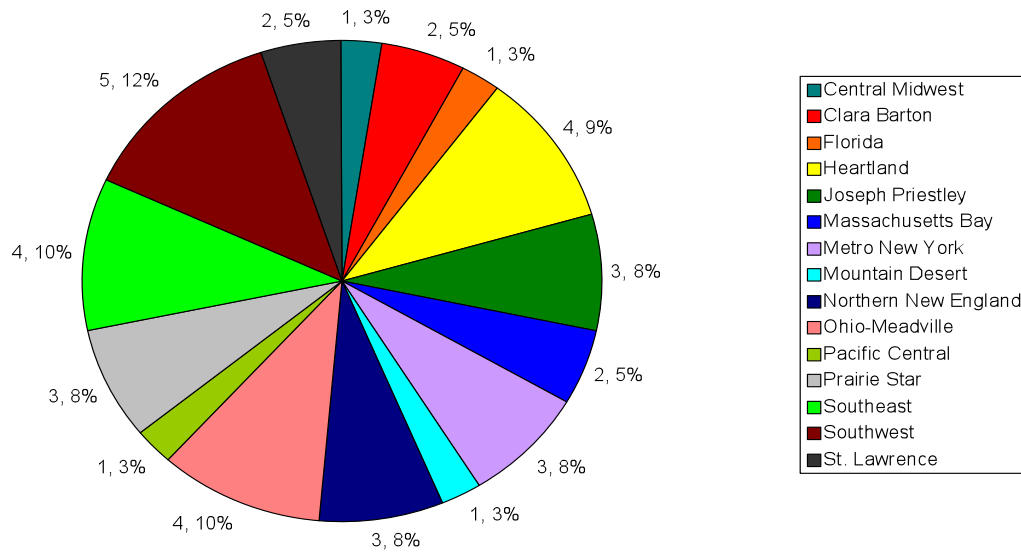
This is the second and final year of the pilot project before the methodology will be implemented at the regional level without UUA funding. We are currently working with nine teams of aspiring and mentoring congregations across the country. Our aspiring congregations range in size from 135 members to 900 members. All will have made their Learning Journeys by the end of March. The New England and Pacific Western Regions are preparing to launch regional expressions of Leap of Faith in 2013.

### **Forward Through the Ages**

[Forward Through the Ages](#) (FORTH) is a multi-year stewardship development program that the UUA launched in July 2011, after four years of input from hundreds of congregational leaders. It is based on the book [\*Beyond Fundraising: A Complete Guide to Congregational Stewardship\*](#), by Wayne Clark, Director of Congregational Stewardship Services. FORTH helps congregations discover the links between growth and financial support, and promote stewardship within the congregation. Since July, over 400 lay leaders have completed a congregational self-assessment and 44 congregations have qualified as FORTH Partners.

This year, 232 lay leaders attended five different workshops and 152 lay leaders attended four webinars. FORTH staff ran 104 *Champions of Change* coaching sessions, signed 90 contracts, and coached 66 congregations in 26 states and 18 districts.





FORTH Partners Distribution by District

### Financial Sustainability for Congregations

Ensuring the long-term financial sustainability for our member congregations is essential to strengthening our religious movement. In working towards this goal, Stewardship and Development staff led more than 60 fundraising consultations and workshops with congregations and organizations. We advised in a variety of fundraising areas including annual canvas, major gift cultivation, capital campaigns, and endowment building. Highlights from these consultations include:

- Harvard Divinity School – Full day stewardship class for 19 religious professionals and seminarians.
- UU Fellowship of Anchorage, AK – Stewardship workshop weekend for 10 members on canvass, legacy, and more.
- First Unitarian Church of Rochester, NY – Two separate stewardship workshop weekends for 20 members each.
- General Assembly 2011 – Breaking Through to Generosity workshop for 200 UUs.
- UU Fellowship of San Luis Obispo—Stewardship workshop weekend for over 40 members.

The consultation process involves conversations with ministers, members, or donors by phone, webinar, or personal visit. Staff travel to congregations, conduct workshops, and even preach during a service. Congregations later follow up with reports of their fundraising success. The



map below represents all of the individuals with whom we have had consulting conversations over the past year.

***Testimonial from Judy Eng, of the UU Fellowship of Anchorage, AK***

“We had our first stewardship dinner to set up a matching challenge fund. We already have two more donors at that 10K level and a \$20,000 challenge fund so far. There was lots of good conversation that was “healing” from past difficulties. One young couple increased their pledge from 5K to 10K! Thanks for your help... we often refer to the weekend with you!”



Each flag represents a donor in the continental United States with whom we've held a conversation in the past year

Stewardship and Development staff also coordinate the UUA's umbrella giving program, which allows donors to make donations to their congregations or other organizations through the UUA. This in turn lets congregations focus on programming instead of on gift administration. The UUA facilitated 155 gifts, totaling \$746,940, for other UU entities this year. We are currently cultivating a \$5 million gift for the UU Fellowship of Central Oregon's capital campaign. We have committed significant staff time, resources, and travel costs to facilitate this gift—all a free service to UU Fellowship of Central Oregon as a part of our ministry of generosity.



## The Gathered Here Initiative



Gathered Here Logo

Gathered Here is our joint initiative of the UUA Board of Trustees and the UUA Administration in which all UUs are invited to discover our common aspirations and unleash the power of our faith.

This is accomplished by people across the country participating in structured interviews during which individuals share positive experiences about their lives as UUs and reflect on how these experiences can enhance our congregations, communities, and faith as a whole. Some of these conversations occur in one-on-one conversations, but many occur during a “Community Conversation,” in which groups of people—20, 30, or more—conduct the two-way interviews. They are run by a facilitator, who records and reports back the findings of the group through an online form.

We have had conversations in over a hundred congregations—capturing meaningful moments, times of growth, and positive developments. The board and staff will reflect on how these positive experiences are relevant to our larger faith and how they might be applied to our collective future. Input will help to shape a collective vision for the UUA and help professional and lay leaders shape the future of Unitarian Universalism.

So far 117 people have volunteered to conduct these Community Conversations in their home congregations or the communities of which they are a part and it is hoped that 200 or more congregations and communities become involved before the initiative is wrapped-up in October of 2012. It is also significant to note that this initiative is not limited to existing brick and mortar congregations. Wherever UUs—and potential UUs—are gathered, attempts are being made to include them in the process.

### Priority #2: Grow Leaders

Growing leaders is about learning to trust and empower one another. Vital, healthy communities identify, nurture, mentor, and empower leaders.



## Strategic Review of Professional Ministries

The Strategic Review of Professional Ministries (SRPM) was accomplished in 2010 to carefully review our ministry and to explore the way the UUA can best direct our resources to further excellent ministry in the future. The follow up report, [Strategic Plan for Professional Ministries](#), presented eight recommendations:

1. Aggressively recruit leaders.
2. Support multicultural immersion learning.
3. Re-imagine and evaluate our credentialing efforts.
4. Expand transition systems.
5. Support advanced learning for all religious professionals.
6. Be more strategic in the use of scholarships and grants.
7. Measure what is truly important.
8. Go deeper: partner with related UU organizations.

The Office of Ministries and Faith Development (MFD) focused on prioritizing and implementing project plans for these eight areas. In 2012, MFD focused mainly on recommendations one and five. To work toward recommendation one, the UUA produced over a [dozen recruiting videos](#) for ministry (parish, community, and military), religious education, and music leadership.



Recruiting Video: "So You Think You Have a Calling..."

To further recommendation five, MFD consulted with the Education Development Corporation to create an assessment framework for UU parish ministers. This 18-month project will gather a small panel of ten, mostly made up of diverse ministers who are excellent and creative practitioners in the field. Together we will create a rubric of the skills, behaviors, and knowledge that enable a minister to perform ministry effectively. The framework will be future-oriented and will lay out four levels of development through the arc of one's ministerial career: Novice, Approaching Proficiency, Proficient, and Excellent.

## Association Sunday

Association Sunday began in 2006 as a way for congregations to take special collections for innovative programs and initiatives of the UUA. Since then we have raised \$2.7 million; almost all of those funds have gone, in turn, to support our member congregations.





This year, the UUA partnered with the Unitarian Universalist Ministers Association (UUMA), the Unitarian Universalist Musicians Network (UUMN), and the Liberal Religious Educators Association (LREDA) to support scholarships, continuing education, and a comprehensive assessment of our ministries and their needs. During 2011, 476 congregations participated in Association Sunday, raising a total of \$288,139.

Association Sunday has allowed congregations to participate in teaching, learning, and growing. We have built the strength of our faith with ministerial education, improved diversity awareness, leadership training, and congregational partnerships. Most importantly, we have highlighted the good works and the purpose of the UUA to thousands of members around the country and united them with a common goal. As Association Sunday completes its five-year series of special services, we remain committed to the ministry of generosity and to asking congregations to support something larger than themselves.

### **Credentialing and Professional Development Office**

The Credentialing and Professional Development Office provides a continuum of support from the first blush of a “call” to ministry through the formation and credentialing process, and on throughout a career. The team also includes the Professional Development Associate for Religious Education and Music Leadership, who provides support for certification programs and advanced learning for UU religious educators and musicians.

In 2012, 53 congregations were in search for a full-time or 3/4 time minister. 47 congregations called a minister in that search cycle. We expect a similar number in the coming cycle. Thus far, 19 ministers have received preliminary fellowship. We anticipate that by June 30, 2012, between 50 and 60 ministers will have received preliminary fellowship.

### **Resource Development Office**

The objectives of the Resource Development Office (RDO) are to foster multicultural, multigenerational congregations; nurture spiritual, ethical, and faith development in UUs of all ages; and broaden and deepen access to and engagement with UUA faith development programs and resources through creative use of technology. We seek to meet these goals by



producing accessible, flexible programs and resources for all ages, including children, youth, young adults, adults, multigenerational groups, and religious professionals and lay leaders.



Tapestry of Faith logo

Major RDO initiatives include Tapestry of Faith programs and resources (now comprising approximately 14,000 pages online and more in print), Our Whole Lives sexuality education programs, Renaissance modules for religious educators seeking professional credentialing, and the UUA's Worship Web.

The RDO created several new programs and resources this year including:

- "Wisdom from Hebrew Scriptures" (multigenerational), by the Rev. Thomas R. Schade and Gail Forsyth-Vail. October 2011. For a multigenerational setting, with eight workshops based on biblical stories. All these stories offer wisdom that can help people of all ages grow in spiritual depth and understanding while building Bible literacy.
- "Ethics" (adult), by the Rev. Amber Beland and the Rev. Manish Mishra-Marzetti. January 2012. Ten workshops invite adults to clarify and expand their ethical understanding, independent of a personal crisis, through an intentional examination of ethical concepts, dilemmas, and questions.
- "Building Bridges" (youth), by Mary K. Isaacs. In field test. New Tapestry of Faith world religions program for youth in Grades 8 and 9 continues the legacy of previous UU world religions programs, with 23 workshops geared to our contemporary, pluralistic communities and world.
- "From the High Hill: Odyssey Writing for Elders" (adult), by the Rev. Anne Odin Heller. September 2011. This program offers two weekend retreats—one for preparation, one for presentations—that frame an individual period of remembering, sorting, reflecting, and writing. Participants are encouraged to use photos, mementos, and music as they mine the stories of a lifetime to create a presentation to share with peers, loved ones, and co-congregants.
- "Adapting Small Group Ministry for Children," by Gail Forsyth-Vail. August 2011. This resource for religious educators and lay leaders describes an alternate model to traditional Sunday religious education classes, based on insights from the small group ministry model offered by many congregations for adult, young adult, and youth groups.
- Identity-based video/discussion workshop series for youth/young adults, produced by the Rev. Dr. Monica L. Cummings. Each animated training video is posted on the [UUA website](#) alongside a leader guide and handouts for planning and leading a one-hour workshop.

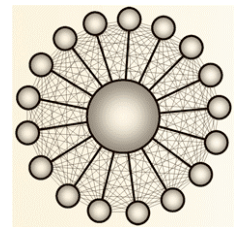


Image created in "From the High Hill"





- “Families: Weave a Tapestry of Faith,” edited by Susan Dana Lawrence. Themed centerfold pages in each quarterly issue of UU World magazine; full-color print and online editions, providing stories, activities, and reflections for faith development in the home and community, drawn from Tapestry of Faith programs and resources.
- *Acts of Faith* Discussion Guide, by Gail Forsyth-Vail. October 2011. This guide supports the 2011-12 UUA Common Read, Eboo Patel’s memoir *Acts of Faith*. Three adaptable, 90-minute sessions for congregational, cluster, or District programming for adults of all ages and life stages, for campus groups or young adult groups, for youth groups, or for cross-generational groups.
- *Bridging: A Handbook for Congregations*, by Gail Forsyth-Vail and Jessica York. For print publication in August 2012. Offers guidance and workshop plans to help congregations implement a program serving youth who are approaching majority and their parents.
- “Cooking Together: Recipes for Immigration Justice Work.” [Crowd-sourced online project](#) offering resource development for congregations. Blog and UUA.org web pages launched October 2011. This expanding collection of resources in support of Justice GA 2012 is organized in four categories: Religious Education, Theological Reflection, Worship, and Faithful Witness and Action; it is refreshed at least weekly.
- Additional Tapestry of Faith Curricula – Three children’s programs and one high school program will be published online this fiscal year.
- Our Whole Lives, Grades 7-9 – Field test of new edition began December 2011.
- New Renaissance Modules – Multicultural Religious Education (March 2011); Ministry with Youth (October 2011); Administration of Religious Education Programs (in development); and Adult Faith Development and Programming (in development).
- UUA Pamphlet – “To the Point: 15 UU Elevator Speeches.” October 2011.
- UUA [Worship Web](#) – New material, new infrastructure and new, enhanced search capabilities.



Worship Web

We monitor “hits” on our Tapestry of Faith resource pages—of more than 6 million hits on the entire UUA web site in FY11, almost 1.2 million were Tapestry of Faith pages, representing more than 16% of the website traffic. Except for the “visitor” button on the index page, Tapestry of Faith was the most clicked link on the lower navigation.

### Youth and Young Adult Office

The Youth and Young Adult Ministries Office (YaYA) completed a strategic plan in October 2011. Roughly half of the work that the YaYA office does is related to institutional development, improvement, and interconnection in the youth and young adult ministry fields; the other half is focused on entrepreneurial-style projects that aim to promote dynamic youth and young adult ministry. Here are a few highlights from the strategic plan:



*Goal: Launch youth and young adult ministry blog*

Status: COMPLETED

[Blue Boat of Youth and Young Adult Ministries](#) has had thousands of visitors since launched last fall, already averaging 100 visitors/day.

*Goal: Publish a young adult fundraising guide*

Status: COMPLETED

One of the latest resources published by the YaYA office to assist young adults with service trips, [this guide](#) (PDF, 21 pages) can also be used by young adults and youth who are interested in other faith-based projects or for raising funds to attend General Assembly.



YA Service Trip Fundraising Manual

*Goal: Develop a youth leadership recognition program*

Status: IN PROCESS

After six focus groups comprised of diverse youth across the country, reactions have been uniformly positive towards our project to develop a national youth recognition program.

*Goal: Publish a comprehensive campus ministry guide*

Status: COMPLETED

Adapted from an older guide, the revised edition of “Being More Visible, Changing More Lives” provides a wide range of strategies and suggestions for campus ministry programs. It is already receiving rave reviews from campus ministry leaders and practitioners in the field.

*Goal: Create the General Assembly (GA) Accessibility Project*

Status: IN PROCESS

Fulfilling the call from all corners of our faith to make it possible for more youth and young adults to attend historic [2012 Justice General Assembly](#) in Phoenix, the YaYA office has partnered with the GA Planning Committee to promote GA and provide resources, grants, and coordination to remove barriers for youth and young adult attendance.

***A story from Erik Mohn, UUA Spirituality and Service Consultant:***

After UUA Spirituality and Service Consultant Erik Mohn went on a UUA-funded trip to Ghana in August 2011, he used UU networks to raise funds to help fix a broken water pipe in the village he visited. By Christmas, Erik had raised over \$2,500 from personal contributions that went to a partner organization (Amizade) which put the funds towards fixing the pipe and improving access to water for the village. He wrote about his experience on the [Blue Boat blog](#) and the [Faith Without Borders blog](#): “From witnessing a multitude of situations and talking with various people, I now have a better understanding of the complexities associated with service work and international development, but I also have a greater understanding of the fulfillment and priceless rewards that come from helping out fellow human beings.”



Erik Mohn in Ghana



Support from the UU Veatch Program at Shelter Rock has allowed the UUA to promote resources and provide opportunities for our youth and young adults.

### **Priority #3: Cross Borders**

Our challenge is to learn to reach beyond the confines of our personal social and cultural experience. This is what I mean by learning to “cross borders.” We particularly need to learn to cross the borders of race, culture, and social class. We need to understand that learning to cross borders is a spiritual practice.

### **Congregational Advocacy and Witness**

In the area of social justice, the goal of the office of Multicultural Growth & Witness (MG&W) is to enable UU congregations and leaders to engage in effective witness, advocacy, and social action in relationship with oppressed and marginalized communities who are also working for social change and transformation in local, state, national, and international spheres. Towards this goal, MG&W staff provides congregations resources, relationships, and support that will enable them to engage in interfaith and community-based partnerships to advance social justice in their localities and beyond.

In the area of multicultural growth and ministry, MG&W’s goal is to develop congregations’ capacity to do effective ministry in a multicultural world. This goal is advanced by the Multicultural Growth staff that identifies, connects, partners with, and provides leadership development and learning opportunities for congregations and leaders committed to diversifying their ministries and congregational communities.

The UUA has worked to support Congregation-Based Community Organizing (CBCO). Witness Ministries staff and UU CBCO Ministers Council Executive Team members represent the UUA in the national Interreligious Organizing Initiative (IOI) coalition of organizing networks, denominational staff, CBCO clergy and lay practitioners, and funders. The IOI helps deepen and broaden congregational engagement with organizing through collegial support and shared strategies.



In November 2011, Susan Leslie, Congregational & Advocacy Witness Director, and the Rev. Craig Roshaven, Witness Ministries Director, participated in the People Improving Communities through Organizing (PICO) Clergy Gathering and IOI meeting. There they met with 15 UU ministers involved in PICO affiliates and identified needs, concerns, and best practices. Out of this meeting a series of webinars for supporting CBCO practitioners was planned.



The UUA's CBCO team

In September 2011, Congregational Advocacy and Witness co-sponsored a New England training with the InterValley Project (IVP), a New England based network, and the UU Church of Nashua, NH, a member of the Granite State Organizing Project, for UU clergy and lay leaders interested in learning about CBCO. Approximately 50 UUs, including social justice district staff, attended from five New England states and received training in one-to-one meetings, storytelling, and the cycle of organizing. Very positive evaluations were received and several new congregations are now working with IVP.

Witness Ministries tracks the work of congregations engaged in CBCO and highlights them through [UUA.org](http://UUA.org), CBCO-News, Just-Act, Standing on the Side of Love blogs, and other UUA communications. The work CBCOs are engaged in for immigrant rights, including stopping detention and deportations, state and national DREAM Act legislation, and support of immigrant communities, is a particular focus given the UUA's advocacy priority for immigration reform.

There are currently 150 UU congregations involved in CBCO. Witness Ministries has a goal of increasing that to 200 by the end of 2013. Congregational Advocacy & Witness conducted a social justice survey with 303 congregations of various sizes. 90% of respondents reported interfaith partnerships with 12% reporting participation in CBCO. 15% of UU congregations overall are engaged in CBCO. This gap corresponds with Witness Ministries' goal of increasing participation to 20%.



Support from the UU Veatch Program at Shelter Rock has enabled MG&W to sustain current staff levels and to promote witness in our member congregations so we can share our principles with the world.

### Standing on the Side of Love

Standing on the Side of Love (SSL) is the UUA's public advocacy campaign, which seeks to harness love's power to stop oppression. It has continued to grow its online advocacy and witness throughout FY12. Some recent statistics are as follows:

- As of April 11, 2012 Standing on the Side of Love's Facebook Page has 28,692 "Likes."
- Interactions for the year of 2011 and the first two weeks of 2012 featured 13,886,034 post views, and 61,506 total "Likes" and Comments on posts.



Dan Furmansky,  
Campaign Manager

SSL Campaign Manager Dan Furmansky provides direct support to UU congregations, state networks, and activists in key states with Lesbian, Gay, Bisexual, and Transgender (LGBT) initiatives, as well as to [allied LGBT organizations](#). Currently, Standing on the Side of Love is providing direct support to Maryland LGBT activists and interfaith leaders to support marriage equality and transgender anti-discrimination laws and to help

coordinate UU clergy involvement in projects. We recently granted \$1,000 to the UU Legislative Ministry of Maryland for these efforts. In North Carolina, SSL is acting as a portal for communications between local UU leaders and a network of more than 1,000 UUs statewide who want to help defeat the anti-LGBT amendment on the May ballot. In addition, SSL is providing direct support to the Protect NC Families Campaign to defeat the amendment, specifically the leaders of the interfaith effort. We recently granted \$2,500 to the campaign to Protect NC Families. SSL has also provided financial support to the Minnesota UU Social Justice Network to help defeat the anti-LGBT amendment on the November ballot in Minnesota. In the next month, SSL will partner with the UU State Networks to host a strategy webinar for UUs in states working on marriage equality. We will also be recruiting activists nationwide to phone bank against the anti-LGBT amendments in North Carolina and Minnesota.

In the past year, SSL has provided strategic support to clergy and congregations across the country, advising them on how to apply for an effective SSL grant, helping to craft letters to the editor or testimony for anti-discrimination measures, and how to put on effective public witness





that will amplify the messages of equality and justice. In November, SSL partnered with CLF to put on the first-ever virtual [Transgender Day of Remembrance](#) service.

SSL uses its blog and social media networks to promote LGBT issues including repeal of DADT, passage of statewide employment non-discrimination acts, and repeal of DOMA. Often, we are ahead of the curve. For instance, we issued an early call to action on the SSL blog when the Chicago Catholic Archbishop compared LGBT activists to the Ku Klux Klan, reaching out to Faith in Public Life, HRC, New Ways Ministry, and Equally Blessed with the story. New Ways Ministry praised the UUA's effort in this [blog post](#).

In September and October 2011, SSL spearheaded the UUA's involvement in the interfaith DREAM Sabbath campaign. The event, organized by the Interfaith Immigration Coalition and the office of Senator Dick Durbin, was envisioned as "an initiative enlisting churches, synagogues, and mosques around the country to dedicate time during their regular weekly worship service to a conversation about the DREAM Act." SSL recruited UU congregations to participate, particularly in states with senators who have historically been on the fence about the DREAM Act, and compiled a [resource page](#) to help congregations plan their DREAM Sabbath services. All told, 58 UU congregations in 26 states took part in the DREAM Sabbath campaign.

SSL's [blog](#) has been a vehicle for promoting education about immigrant and migrant issues. Last year, we ran multiple articles from individuals participating in border tours; from clergy participating in fasts to protect copycat SB1070 laws; from UUs protesting a "ban ethnic studies law" in Arizona; from UU clergy working in interfaith partnership in Alabama and Georgia; and many, many more.

***Story about Judy Cardenas of Denver, CO:***

Last year, SSL was contacted by Judy Cardenas in Denver. Her husband, Raul, is undocumented, and was scheduled for deportation. SSL Campaign Manager, Dan Furmansky, worked with Raul, Judy, their minister, and members of the congregation's immigrant justice task force to create an awareness and advocacy campaign to keep Raul with his children and wife and in his home. SSL provided \$250 in funding to produce a video about the family, and helped draft the script. Then, SSL created a multi-tiered campaign of



Raul Cardenas and his daughter



urging SSL supporters to communicate with members of Congress to intervene, as well as to reach out to immigration officials.

SSL supporters generated thousands of faxes, emails, phone calls, and petition signatures to immigration officials on behalf of Raul with the goal of keeping his family intact. In November 2011, Immigrations and Customs Enforcement (ICE) agreed to a motion to administratively close Raul's deportation. Read more [here](#).

Recently, SSL generated several hundred messages to Congress in support of a bill to keep Indonesian Christian refugees from being deported and persecuted in their homeland, a unique campaign shared with the New Sanctuary Movement.

### *Thirty Days of Love*

SSL created and promoted the "[30 Days of Love](#)," a month long campaign that ran from Martin Luther King, Jr. day in January 2012 to Valentine's Day in February 2012. Every day they sent out emails with reflections, stories, connections, and action items to promote love and our shared values. The response to this initiative has been overwhelmingly positive.



### *College Campus Initiative*

Standing on the Side of Love is embarking on an exciting new initiative focused on promoting social justice and advocacy work on college campuses. SSL has been engaging in dialogue with the UUA Youth and Young Adult Office, UU campus ministry leaders (both professional and student), and other stakeholders on increasing the SSL presence on college campuses. To formalize this process, SSL and the UUA Campus Ministry Associate, Kayla Parker, are putting together an advisory team to help guide this vision. The budding partnership between SSL and the Youth and Young Adult Office on this initiative will be formally announced to the wider SSL community in early February.

The generosity of the UU Veatch Program at Shelter Rock allows SSL to create and promote resources, to support our congregations in their public advocacy work, and to be the public voice of our shared principles. This funding makes our work possible and brings these programs and values to the public, demonstrating the significance of our liberal religion.



## Justice General Assembly

Our [2012 General Assembly](#) in Phoenix, AZ, is on target to bring an estimated 3400 UUs of all ages to Phoenix to engage in immigration, racial, and economic justice. Joining with the people of Arizona, we will worship, witness, learn, and work together. We will leave General Assembly grounded in our faith, energized for justice, and with resources to bring this work home to our congregations.



This GA will have as a prime objective raising the capacity of all our congregations to engage with community-based partners to do effective advocacy and witness. Over 100 workshops and presentations will focus on justice issues, including topics such as the spiritual foundations of justice work and the theology of social justice, as well as a more tactical focus on organizing. All participants will be afforded opportunities to experience social justice through service, witness, and reflection. There will be hands-on projects working directly with Arizona partner organizations. We expect to do work with voter registration and direct human services. Congregations will learn to assess their strengths and weaknesses and learn skills for social justice work according to their region, congregation size, and resources.

We will partner with communities in Arizona to bring attention to the injustices and human rights abuses they face. Participants will witness in ways that reflect our commitment to justice, equity, and compassion for all. Saturday evening we will gather to witness at the Maricopa County's Tent City jail. We will also do hands-on work with our community partners. Projects will take place in a variety of settings, and will include multigenerational teams and accessible venues.

## Office of International Resources

The Office of International Resources (IRO) works with congregations and international partners to uphold our sixth principle: "The goal of a world community with peace, liberty, and justice for all." Their goals are:

- To provide resource to congregations for their international engagement.
- To manage historic and new international UU and interfaith relationships according to principles of right relationship and mutuality.





- To assist the diverse coalition of UU organizations with international missions in collaborative strategies.
- To promote UU values through international human rights work at the United Nations and through other international program partners.

The IRO has been the leader in an effort to build a collaborative approach for all of the various independent UU international organizations. Our ongoing work is largely focused on preparations for GA 2012, including joint proposals, events, exhibit space, and branding. We hope to build sufficient trust in that work to take yet bolder steps in FY13.

The [UU Holdeen India Program](#) (UUHIP) has moved into a new stage of its development this year as the director of the program has changed for the first time in the 27-year existence of this terrific program. Transition issues that have been managed include relationships with long-term partners, developing service-learning opportunities, and expanding connections with UU congregations. The service-learning opportunities and a UUHIP “roadshow” both launch in the late spring of 2012.



Derek Mitchell, new director of UUHIP.

UUA relationships with UU partners around the world benefited from a gathering of the five largest UU groups (from Canada, India, the UK, Transylvania, and the USA) at the UUA in November 2011. Gathered together by the International Council of Unitarians and Universalists (ICUU), we were able to identify areas for collaboration for the sake of the global UU community in areas like ministerial training, service/learning, and social justice. Similarly, the International Office has managed UUA relationships with interfaith partners in Japan, especially Rissho Koseikai, which we hope will lead to close collaboration in social justice work internationally.

The UU Veatch Program at Shelter Rock also provides funding for the International Panel of the UU Funding Program (UUFPP). Grants from that panel commonly fit into justice, self-sustenance, and right-relationship programs with which the International Office is deeply involved. The collaboration between UUFPP and the International Office adds an efficiency and strength to this important work.



### *Faith Without Borders*

The Faith Without Borders program is designed to assist congregations in creating and sustaining effective ministries of international engagement. The International Resources Office hopes that this program will provide a useful framework for all congregations: those that are already deeply engaged in international ministries; those who are only beginning to develop a vision of international ministry; and those anywhere else on the spectrum of engagement.

Faith Without Borders invites congregations to create, maintain, and expand their international ministries in seven program areas:

1. Spiritual Support
2. Education
3. Justice-making and Advocacy
4. Partnership
5. Faithful Stewardship
6. Pilgrimage and Witness
7. Associational Leadership



Congregations participating in the Faith Without Borders program receive practical assistance and consultation in all stages of their international engagement from the IRO. Similarly, the IRO will celebrate the international engagement of Faith Without Borders congregations with denominational recognition.

### *UU-UNO Merger*

The UU-United Nations Office (UU-UNO) represents UU values at the United Nations by advocating for issues such as LGBT rights, peacemaking, international rights for women and children, and climate change. The UU-UNO, which has operated as an independent organization since 1971, recently finished merging with the UUA. Both the UUA and the previous UU-UNO board signed the merger agreement in June 2011, and in most operational ways we are acting as a merged (or actively merging) organization. The UU-UNO is now legally a part of the UUA and an office of our International staff group.

In addition to the legal matters related to the UU-UNO/UUA reintegration, the programmatic integration has also been an important goal this year. UU-UNO staff are growing in familiarity with UUA culture and policies, and systems integration (for website, databases,



communications, and financial/fundraising) is proceeding well. By June 2012, these systems issues will be entirely integrated.

The UU Veatch Program at Shelter Rock provides support to the UU-UNO so they can continue their advocacy work and represent our values on an international scale. The UU Veatch Program at Shelter Rock makes it possible for the UU-UNO to exist as a strong difference-maker at the United Nations. Excellent UU-UNO programs like the global LGBT human rights work, Spring Seminar, Every Child is Our Child, the Envoy Program, and many more are only possible because of this support. The UU Veatch Program at Shelter Rock's ongoing support of the UU-UNO through re-integration with the UUA will open new avenues for UUs at the United Nations.

### *UUA/UU-UNO LGBT Uganda Fund*



The Rev. Mark Kiyimba and  
President Morales

The objective of the UUA's relations with Uganda is to support UUs and LGBT human rights activists in expanding safety and rights for Ugandan LGBT people. Because of the challenging situation in Uganda, the [Rev. Mark Kiyimba](#), minister of the UU Church of Kampala, Uganda, has spent nearly all of FY12 in the United States, which has been an excellent opportunity for him to share his struggle, hopes, and dreams with UUA congregations. He

participated in classes at Meadville/Lombard Theological School which was a benefit for all involved. He was keynote speaker at the LGBT Human Rights event organized by the UU-UNO and held at Union Theological School. After the Rev. Kiyimba has returned to Uganda, the UUA will continue to support the Ugandan LGBT human rights organization Eddoboozi in its coalition building, advocacy, and safe-space creation work. We will also be a partner in an interfaith theological conference that is planned for the summer of 2012 with LGBT human rights as a theme.

### *UUA/UUSC Japan Relief Fund*

The objective of the [Japan Relief Fund](#) was to support UUA and Unitarian Universalist Service Committee (UUSC) partners as they responded to the earthquake and tsunami that struck northeastern Japan in March 2011. This fund raised over \$500,000 and was directed through three of our historic faith partners: Rissho Kosei-kai, the Konko Church of Japan, and Tsubaki Grand Shrine. Each of these partners contributed to direct relief efforts for their members and



the religious buildings that were impacted and destroyed by the earthquake. Key constituencies served through these partnerships are marginalized groups and, specifically, women. Outcomes included direct relief, the creation of a community center, and a telephone hotline for non-Japanese women in affected areas.

In March 2012, I visited our partners in Japan and met with members of the UU congregations, toured the Rissho Kosei-kai facilities, and commemorated the victims of last year's earthquake and tsunami in memorial services.

### *Service/Learning Opportunities*

The International Office has developed [service/learning opportunities](#) for key constituencies, especially seminarians, in variety of contexts in FY12. Opportunities now exist with faith partners in Uganda, northeastern India, Japan, and the UK. By the end of FY12, opportunities will exist in Transylvania, as well as with social justice partners through the UU Holdeen India Program and the United Nations Office. Related to these programs is the development of a joint-venture between the UUA and the UUSC for service/learning. And, in that effort, the UUA has contributed to service/learning experiences in Haiti and developed service/learning trips on the US/Mexico border in preparation for GA 2012.

The process of developing a Joint Venture proposal between the UUA and the UUSC has been rich in learning and lessons. Most importantly, it has been an exercise in effective collaboration between two organizations. We've learned about changing capacities, expertise, and organizational focus.

### *Socially Responsible Investing*

Socially Responsible Investing (SRI) ensures that our investments are reasonably consistent with our values. The UUA has been strongly committed to SRI for over forty years. Our commitment springs from our faith, and from our deep conviction in the dignity of all human beings. The UUA is constantly engaged in SRI activity from shareholder resolutions, to community investing, to affordable housing and other justice initiatives.



As of 12/31/11, \$1,059,155 of [UU Common Endowment Fund](#) (UUCEF) assets are invested in community investments. Over fifty congregations participate in the UUA matching program whereby the UUA will match a congregation's community investment up to \$10,000.

48% of the UUCEF has some type of screen for securities selection, from as little as eliminating tobacco companies to a fully screened portfolio that favors good corporate citizens and avoids those which are not, based on UU values.

The UUA's investment committee has encouraged our investment consultants, New England Pension Consultants (NEPC), to bring managers that have more focus on environmental, social, and governance (ESG) issues to the table. This has been an ongoing process for several years and has led to discussion with other investors about pushing leading consulting firms in this direction. The new approach would be to collectively put more pressure on consultants, such as NEPC, to use ESG factors in their evaluation of managers and performance results. We would also urge them to include managers with ESG expertise in their list of recommended managers.

Shareholder Advocacy is focused on results that change corporate policy in order to have broad impact. This year [Wal-Mart adopted the gender identity nondiscrimination policy](#) requested in the resolution that the UUA filed. As a result of this new policy employees across the country are now empowered to address discrimination when they encounter it. Because Wal-Mart is the largest employer in the United States, we believe that this raises the bar for corporate best practices and will thus have an effect far beyond a single company. In a private conversation, a member of the company's Pride Committee told us that the UUA's consistent pressure as a shareholder was instrumental in raising the policy question and ultimately leading the company to revise its nondiscrimination policy and training program. Shareholder annual meetings are held in the spring and we will see more results for 2012 filings at that time.

In addition, the UUA has been filing a resolution at Verizon for the last five years asking that the company add "gender identity or expression" to its non-discrimination policy. This provides protection to transgendered people and those in transition, among others. This resolution



received support from 34% of the shares voted two years ago and last year was omitted by Verizon on a technicality. We filed it again this year.

Very recently, UUA Treasurer and Chief Financial Officer Tim Brennan received a letter from Verizon's office of the general counsel saying that the company has agreed to adopt the policy. Therefore, we will be withdrawing our proposal from consideration at the annual meeting. This is a significant victory for the UUA's shareholder advocacy program.

Over the last five years, shareholder resolutions that the UUA has filed or co-filed have pushed companies to add gender identity or expression protection covering 2,954,000 employees.

The UUA's program in socially responsible investing requires significant resources to support the work of the Committee on Socially Responsible Investing as well as a significant portion of the time of the Treasurer and the Assistant to the Treasurer. The funding from the UU Veatch Program at Shelter Rock is the only dedicated funding that is supporting this work. Without it, it would be difficult for the UUA to continue with this level of commitment to socially responsible investing.

### Beacon Press

Our press continues to be a significant voice for witnessing our values. Beacon Press highlights this year included publishing Anita Hill's important book about race and justice, *Reimagining Equality*, which received almost unprecedented levels of media attention, including TV and Radio interviews on all the major networks and press coverage in Time, Newsweek, and daily newspapers across the nation. Beacon and the UUSC will be bringing Anita Hill to the Justice GA in June.

Beacon also brought out two new books in their *King Legacy* series, and launched a new initiative, with the support of The Veatch Program at Shelter Rock, to create new books of Dr. King's work specifically for middle and high school students.

The press has a new book, *Sacred Ground*, by Eboo Patel, whose first book *Acts of Faith* is our current UU Common Read. This one is about the importance and promise of meaningful



religious pluralism in fighting Islamophobia in America. Eboo continues to work with our youth with his organization, Interfaith Youth Corp.

The press has also continued to bring out important books on environmental issues, including Cynthia Barnett's *Blue Revolution*, proposing a "water ethic" for the U.S. The UUSC selected Barnett's book for their annual "Get-Together," program, a corollary to our "Common Read."

Beacon continues to show leadership in LGBT publishing, with several new titles that have been especially well received, including *A Queer History of the U.S.* They had the foresight to get that out just before the state of California began mandating the teaching of LGBT history in schools.

And of course, since we're here in Arizona, many of you will remember that Beacon had the vision to bring out Margaret Regan's book about immigrants in Arizona, *The Death of Josseline*, just before Governor Brewer signed 1070 into law.

And all this while continuing, for the 10<sup>th</sup> year in a row, to operate in the black.

### Friends of the UUA Matching Gift Challenge

At their fall 2011 meeting, the President's Council, an advising body of the UUA, donated \$100,000 in matching gifts to the Friends of the UUA program. Stewardship and Development combined that with \$100,000 of the \$900,000 FY12 grant from the UU Veatch Program at Shelter Rock in order to create a triple match challenge. Each dollar raised will be matched by the President's Council and the UU Veatch Program at Shelter Rock! These matching gifts will help the UUA create and strengthen the programs and projects that support the three priorities outlined above. Each dollar will go three times as far to promote *getting religion* (through programs like the [Leap of Faith](#)), *growing leaders* (through resources like [Tapestry of Faith](#)), and *crossing borders* (through [service/learning trips](#) and [social justice work](#)). We began promote this challenge in February 2012, with a goal of completing the match by the end of FY12.





## Looking Ahead

Unitarian Universalism is at a crossroads. In a rapidly changing society, our religious movement must be nimble and adaptive in order to thrive, inspire, and create a more harmonious world. In my essay "[Congregations and Beyond](#)" I believe that our core values appeal to far more people than are attracted to (or likely to be attracted to) our congregations. We have treated this as a problem to be solved by devising ways to get people to become members of our congregations. But the reality of today's world is that not everyone who shares our core values will want to become part of a traditional congregation. The fact that so many share our values is an enormous opportunity, not a problem. The future relevance of our faith may well depend on whether we can create a religious movement beyond, as well as within, the parish. I am confident that together we can seize this historic opportunity for our faith.

In February, we brought together a spectrum of people doing innovative work both within and beyond congregations, including board member, the Rev. Jeanne Pupke. Out of this consultation we identified three primary areas of focus:

1. Congregational transformation -- looking primarily at how to help congregations "lower their walls" and become more focused on their surrounding communities. One possible initiative will be holding a conference on "Congregations as Community Centers."
2. New modalities -- identifying technological and future-oriented tools for connecting potential and identifying Unitarian Universalists. We envision a social network "hub" that will allow users to seek out and connect with others in small groups, in congregations, or as individuals interested in common cause and community.
3. Culture Change -- we are examining all of our current practices through this lens of how we are reaching people both within and beyond congregations. We are also developing partnerships with key stakeholders and innovators such as Church of the Larger Fellowship (CLF), UU Ministers Association (UUMA), Liberal Religious Educators (LREDA), etc.

I have placed the Rev. Terasa Cooley (Director of Congregational Life) in charge of ushering a series of initiatives forward. She is assembling a cross-staff group team who will implement new ideas and bring this lens to the work of their staff group.

We recognize all of this work as "shared ministry" which invites others into leadership. The UUA's work is to help assemble the network, not to do all the work ourselves.





Our approach is two-fold:

1. Continue excellent service to our congregations  
The UUA would continue to do all the important things we do now to support congregational health. That includes credentialing of religious professionals, creating resource materials, consulting with congregations, and so much more!
2. Create a movement beyond congregations  
People should be able to connect to our religious movement in a variety of ways and at different levels of commitment... And in truth, we already do this, but we can expand and develop new ways of interaction.

### **Continue Excellent Service to Our Congregations**

In the next year, the UUA will be solidifying its regional staff group structures to become more economically sustainable, agile, and responsive to congregational needs. We will shift our programming even more in the direction of creating learning communities between and among our congregations. We will develop a comprehensive set of strategies to connect with UUs beyond our congregational walls.

The entire Congregational Life Staff Team was recently trained by Brandeis social scientists in the use of the Logic Model approach to strategic goal development and evaluation. This allows us to focus specifically upon identifying:

- Outcomes desired;
- Stakeholders and partnerships;
- Buried assumptions that may get in the way of our progress;
- Specific initiatives and strategies tied to the outcomes; and
- Methods of measurement of effectiveness.

This process will be applied to all major initiatives to effectively evaluate progress, success, and challenges. As part of our measurements, we are conducting a baseline study to determine who accesses our services and in what way. This will allow us to measure improvement over time.

A primary measure of congregational vitality is assessing its ability to look beyond its own membership and to be a force for justice in the community. Our challenge is how to build on this increased interest and help provide mechanisms for focusing as well as expanding their efforts.



## Strategic Review of Professional Ministries

The Ministries and Faith Development staff group will work to further implement the eight recommendations outlined by the [Strategic Plan for Professional Ministries](#). Those key strategies include:

### *Recommendation: Aggressively Recruit Leaders*

- Develop recruiting strategy in partnership with identity-based schools, and the UU professional associations.
- Significantly improve the UUA website to focus on leadership, not the process of credentialing.

### *Recommendation: Support Multicultural Immersion Learning*

- Create multicultural learning communities for congregations and leaders engaged in significant multicultural ministries.
- Create service immersion trips that are grounded in UU theology involving clergy and seminarians.

### *Recommendation: Reimagine and Evaluate our Credentialing Efforts*

- Create assessment framework for UU ministry.
- Reform regional sub-committees on candidacy function and structure.
- Evaluate current district care systems and build a successful model.

### *Recommendation: Expand Transitions Systems*

- Shift to twice-a-year transitions system.
- Improve interactive settlement system online.

### *Recommendation: Support Advanced Learning for All Religious Professionals*

- Develop learning opportunities for cross-disciplinary UU professionals.

### *Recommendation: Be More Strategic in the Use of Scholarships & Grants*

- Target scholarship monies to promising and diverse candidates for our ministry.
- Create incentives for potential seminarians of color to attend UU identity schools.

### *Recommendation: Measure What is Truly Important*

- Develop online surveys to solicit feedback on UUA programs and initiatives for use in monitoring reports and other assessments.
- Identify key information needed for use in a “dashboard” of key measurements of progress in each major area of the Association.

### *Recommendation: Go deeper: Partner with Related UU Organizations*

- Enhance relationship with religious professional organizations.
- Re-examine appropriate relationship with board committees and other groups with the goal of intentionally clarifying roles and mutual accountabilities.



## Resource Development Office

The Resource Development Office will expand the Tapestry of Faith family of resources this next year to provide UUs faith development programs for new constituents, including preschoolers and UU parents, and introduce resources on new topics, such as theological diversity in our congregations. RDO will continue to respond to the Association's most timely faith development needs with discussion guides, webinars, and other tools. Training programs will be a focus, with an emphasis on using emerging technologies for virtual meetings, distance learning, and community building among constituent groups. Some projects underway include:

### *Faith Development Programs and Resources:*

- Circle of Trees (multigenerational Tapestry of Faith program)
- Tapestry of Faith for Preschool (ages 2½ to 5)
- The Theologically Welcoming Congregation (adult program)
- Tapestry of Faith Teacher Development
- Tapestry of Faith Parent Education
- Happiness (youth, young adult, adult program)
- Interfaith leadership manual (high school)
- Video/Discussion Guides for YaYA and YaYA of Color (series will continue with workshops on Identity Caucusing and other topics)
- Tapestry of Faith App (iPhone/Android)
- iPad Games for Children (Louisa May Alcott, etc.)

We will continue to process feedback and gather testimonials. We plan to survey a sample of our congregations regarding their use of Tapestry of Faith programs.

We know from our contact with field staff and religious professionals, as well as from individuals' feedback, how enthusiastic our users are about the materials we have published. We regularly hear from our constituents about different ways they are using Tapestry of Faith programs and resources, in Religious Education programs and a variety of other faith development contexts from home schooling to lay leadership development.

RDO regularly engages stakeholders and experts at the developmental beginning of a curriculum project. Their input helps to ensure the project will effectively meet a real need in the field. Further, all Tapestry of Faith curricula undergo a field test process that generates



detailed feedback via electronic surveys. This valuable input is reviewed, evaluated, and integrated into updates and revisions.

Tapestry of Faith programs and resources affirm and strengthen UU identity by nurturing spiritual and ethical growth, a transforming faith, and vital communities of justice and love. Tapestry of Faith curricula are grounded in the concept of a living, active faith. In the future, RDO will continue to provide faith development resources deeply grounded in Unitarian Universalism and the values that respond to current needs in our faith communities and movement. With this mission, we expect to mirror and advance a progressive agenda for our local communities and nation.

### Youth and Young Adult Office

The UUA's Youth and Young Adults Ministries Office (YaYA) embraces a vision of young adult ministry that is as diverse as the young adults we serve. The young adult time of transition and discernment is a universal experience, but one that is different for every person. Ministering to young adults means partnering with them wherever they are in their search for truth and meaning.

We recognize the need for content delivered in a variety of ways, because our young adult constituency consumes information through multiple venues. This includes blogging, webinars, and social networking platforms, as well as more traditional forms of email, congregationally-based communication, and publications. We hope to push the boundaries of current thinking in how to communicate through technology in the coming year (e.g. smart phone apps, social networking beyond Facebook, podcasts, etc.).



Carey McDonald, Director of  
the Youth and Young Adult  
Ministries Office

Young adults represent a tremendous opportunity to expand our faith's ministry through new approaches, forms, and identities. Healthy ministry of any kind occurs through constantly evolving intentional community, and is built by listening deeply and supporting each person wherever they are on their journey. The growing segment of our country's young adults who are liberal, spiritual, searching, and unaffiliated represents a huge growth potential opportunity



for Unitarian Universalism, but we first have to focus on creating the infrastructure necessary to support the ones we attract.

Youth leadership today across the country is diverse in structure, but is as vibrant as it has ever been. We understand that youth ministry must be grounded in congregations that support youth and embrace multigenerational leadership. We aim for our work to be value-added by doing things congregations or districts do not have the resources to do (e.g. collecting best practices, creating online resources). YaYA also advocates for youth empowerment and interests across the denomination.

Each district, region, and cluster has developed a different organization of youth leadership and staff support, following the elimination of the national YRUU structure in 2009. In practice, this means that some places have much more support available for supporting congregational and regional youth programs than others. YaYA seeks to work with districts to help connect them to the larger vision of youth ministry, and to identify and assist them with their needs, wherever they currently are in their ability to equip congregations for youth programming, to improve the quality of youth ministry nationwide. This will also include outreach and input from UU partner and professional organizations, such as LREDA and the UUMA.

College students have been under-resourced and underserved by Unitarian Universalism and denominational leaders in the last few decades. YaYA's campus ministry efforts are currently focused on trying to support and grow successful programs and help new ones get off the ground.

We promote a vision of campus ministry as part of the mission of local congregations, assisted by district and national support. Over the last year, YaYA has connected existing campus ministry leaders in support and camaraderie to lay the groundwork for more focused leadership development. In the coming year, we aim to provide more in-depth resources for long-term growth of campus ministry groups.





Janice Marie Johnson,  
Multicultural Growth Director

## Create a Movement beyond Congregations

The UUA's Multicultural Growth and Witness staff group is already on the forefront of building a movement beyond congregations. This work primarily takes shape around empowering and collaborating with partners working for social change and justice.

## Multicultural Growth and Witness

Next year, Multicultural Growth and Witness goals will focus on developing UU congregations' and community leaders' multicultural leadership competencies and capacity to cross cultural borders to fully welcome those who are considered our cultural "Other" and to collaborate and partner in right relationship in interfaith and cross-cultural coalitions working for social change and transformation. If UU leaders and congregations are to effectively advocate for change they must have the skills, attitudes, and resources to form and maintain diverse multicultural coalitions.

Multicultural leadership development work will include identifying the core competencies of multicultural leadership and community building, partnering with UU leaders and congregations committed to and demonstrating skills in multicultural leadership skills, and retooling the volunteer consultants and facilitators to align with the above goals and objectives through the Multicultural Leadership Institute led by Janice Marie Johnson, Multicultural Growth Director.

Multicultural Growth and Witness' new key initiatives for the next year include:

*Key Initiative# 1: Launch national campaign against ICE ACCESS.*

Launch a national campaign to change the response of states and localities to the Immigration and Customs Enforcement Agreements of Cooperation in Communities to Enhance Safety and Security (ICE ACCESS) hold requests and unlimited access of ICE agents to prisoners.

A benchmark of success will be to have at least 20 diverse teams in cities across the country engaged in local campaigns to change their communities' policies by June 30, 2013. Diverse



teams will include members from more than one faith community and member(s) from at least one migrant rights organization.

*Key Initiative #2: Support LGBT work in our faith community.*

Continue to provide direct support to UU congregations, state networks, and activists in key states with LGBT initiatives, as well as to allied LGBT organizations. Support will be provided primarily by the SSL Campaign Director and the (as yet to be hired) LGBT Program Coordinator with other staff and resources assisting as required.

Benchmarks of success will include achieving the legislative goals of one or more initiatives and active involvement with individuals, UU congregations, networks, activists, and allied LGBT organizations.

*Key Initiative #3: Develop economic justice platform.*

The UUA is deeply concerned about the growing unemployment levels, a legislative climate that threatens to make significant reductions in federal and state funding for the most economically vulnerable, and a number of states that threaten to reduce the ability of workers to bargain collectively. Therefore, the Multicultural Growth and Witness staff group is committed to developing an economic justice platform in order to address this disturbing trend.

Multicultural Growth and Witness will increase our involvement with Interfaith Worker Justice (IWJ), Faith Advocates for Jobs, and the National Day Laborers Organizing Network (NDLON). We will also begin participating actively in the Washington Interreligious Staff Community (WISC) Domestic Human Needs (DHN) working group. The WISC Heads of Washington Offices of Advocacy, a group that includes the Rev. Craig Roshaven, the Witness Ministries Director, has identified economic justice as a priority and is actively working on producing a “Faithful Budget” document.

Multicultural Growth and Witness continued initiatives for the next year include:

1. Environmental Justice and Advocacy in partnership with the UUA Green Sanctuary program, UU Ministry for the Earth (UUMFE), and the WISC Environmental Justice working group.
2. Supporting and increasing the involvement of congregations and leaders in CBCOs.



3. Providing strategic support to clergy, congregations, and advocacy organizations including State Action Networks (UU legislative ministries) across the country.
4. Providing strategic support to our Arizona Immigration Ministries and other leaders and organizations across the country involved in addressing immigration justice issues.
5. SSL's College Campus Initiative pilot program.
6. Continue to use SSL's blog to lift up the stories of members of groups that have been historically marginalized and oppressed.
7. Continue to use SSL's blog and social media networks to promote LGBT issues including passage of state and local employment non-discrimination acts, anti-bullying initiatives, and repeal of DOMA.
8. Supervision and support of the Women's Issues Program Associate.
9. Continued support and involvement in the Muslim solidarity campaign, Shoulder-to-Shoulder.

Benchmarks of Success include:

- 20 UU congregations and 40 leaders engaged in interfaith coalitions working on immigration issues.
- Number of UU congregations engaged in SSL Campaign initiatives.
- Number of UU congregations participating in Multicultural Growth initiatives and intentional multicultural ministries.
- Protecting the most economically vulnerable from budget cuts.
- Preserving the rights of workers (especially public employees) to bargain collectively.
- Protecting vulnerable workers from wage theft and unsafe working conditions.
- Identifying opportunities for UU leaders and congregations to be involved in advocacy for the above initiatives.

One of the key roles of Multicultural Growth and Witness will be to equip these leaders and congregations with the skills, attitudes, and techniques necessary to effectively relate to coalition partners from a wide variety of ethnic, class, and religious backgrounds. Many of our leaders are already equipped to begin this work through their participation in anti-racist, anti-oppression, and multicultural workshops and programs. The need for this type of education and skill building will increase as the number of congregations involved in broad-based coalitions increase.

### **Faith Without Borders**

Experience is critical to crossing the borders of culture and social class. In the next year, the International Office at the UUA will continue to expand its relationships, connections, and opportunities for international experiences. Some of the key initiatives include:





- Leverage the reintegrated [UU-UNO and UUA programs](#) (international and otherwise).
- Provide [service/learning opportunities](#) with faith and social justice partners.
- Develop new and integrated [congregational engagement strategies](#).
- Complete the redesign and launch of the [Faithful International Engagement](#) workshop materials.



UUA International Office Staff: (l-to-r) Holly Sarkissian, Nicole McConvery, Celestine Cox, Eric Cherry, Derek Mitchell, Bruce Knotts

In addition, the UUA's International Office is working closely with the UUSC on the development of a joint venture, the UU College of Social Justice. I am pleased to announce [the Rev. Kathleen McTigue](#) as the inaugural director, beginning full-time in July. She brings many years of successful parish ministry and deep involvement in the promotion of peace and human rights. This joint venture reflects the fact that, while the UUA and the UUSC have differing overall objectives, they share a common and vitally important interest in increasing UU engagement in global faith and justice activism. Taking the principles of our faith out into the larger world is essential to both the enduring vitality of our congregations and our effectiveness in advancing justice.

#### Mission Description:

*The UU Leadership Learning Joint Venture will educate and activate the leaders who will help realize our UU vision of a just global community. By providing solidly developed and well-resourced service/learning and justice education programs, Unitarian Universalism will have an enduring and systematic approach to helping leaders transcend the boundaries of difference, empower themselves and others, and become effective allies in fostering faithful global citizenship. These leaders will build a stronger Unitarian Universalism, one capable of making manifest our vision of a world that honors the inherent worth and dignity of every person and fosters global community.*

#### **Socially Responsible Investing**

The UUA will continue to balance risk, return, and justice as it makes its investment decisions. We believe that reasonable returns can be achieved within tolerable risk levels, as we incorporate UU values into the investment choices we make. We will use our leverage as asset owners to push companies and capitalism towards social justice.



The Socially Responsible Investing work will continue with the following major planned activities:

- Partnering with the NY City Office of the Comptroller to represent their pension funds at corporate annual meetings around the country where resolutions on issues such as LGBT rights will be presented.
- Continuing dialogues with companies where we have filed resolutions.
- Pressing our investment consultant, NEPC, to attend more closely to SRI/ESG investment opportunities.
- Arranging for UU representatives to attend corporate annual meetings where we have submitted shareholder proposals.

As with past years, a major benchmark that indicates progress is the slow and steady increase of shareholder support for the resolutions that we file and co-file. But even more important is raising the issues before the companies' boards of directors and senior management. Ultimately the goal is not to raise a ruckus at the annual meeting, but to foster real change. Over the last several years we have been fortunate to play a role in getting companies to change important policies, such as adding gender identity/expression to their non-discrimination policies and undertaking serious efforts to measure and disclose their environmental impact.

The number of people affected by these resolutions is extremely broad. The UUA likes to target companies that have a wide reach because the passing of new corporate policy touches that many more lives as these policies and practices become widely adopted in an industry. Resolutions have instigated change at companies such as Wal-Mart, Goldman Sachs Group, Dr. Pepper Snapple Group, Lowes Corporation and Bristol-Myers Squibb. The exact number is difficult to measure, but our work has affected hundreds of thousands of people nationwide.

### **UUA Communications**

The administration of the UUA recognizes the need to evaluate, examine, and reorganize its current communications strategies and tactics among its various staff groups, in order to better reach and serve our various constituents and, in doing so, to implement our principles. If our movement is to grow and thrive, it is imperative that we examine and improve how we communicate with our various stakeholders.



The Communications Task Force has developed a set of recommendations specific to UUA communications. Key recommendations include:

*Create managerial system to evaluate communications, with goal of constituent involvement.*

Evaluate current communications efforts and consider possible revision, elimination, or consolidation of communications based on outward-facing constituent needs rather than inward-facing staff requests. A sub-group consisting of Leadership Council, the Communications Task Force, and primary communications coordinators should be established to achieve this recommendation.

*Evaluate public perception of Unitarian Universalism and devise a strategy to raise understanding, awareness, interest, engagement, and excitement in our faith and in the UUA.*

We must be proactive in shaping the message about Unitarian Universalism in the wider world. This requires an in-depth, thorough analysis of current public perception. It is recommended that an external consultant be hired to do this work.

*Develop and implement UUA branding.*

In order to convey pertinent messages from our organization, in our voice, all UUA communications should be easily identifiable as coming from the UUA. This should involve a UUA tagline or slogan, a style guide to be used by all staff, and an evaluation of the look and feel of the UUA logo, letterhead, blogs, newsletters, email signatures and appearance, websites, social media accounts, pamphlets, educational resources, etc. Individual UUA staff groups should be discouraged from creating separate logos. It is recommended that an external consultant be hired to do this work.

*Implement a unified email marketing system.*

At present, a number of databases are used to manage constituent information, especially email addresses. Standing on the Side of Love, UUA email lists (Mailman), and Raiser's Edge all maintain separate contact lists. UUA departments use separate Constant Contact accounts or various other email systems. Overlap cannot be accounted for, and subscribers cannot make



universal changes to their subscriptions. To remedy this, email databases and delivery systems must be centralized.

*Enforce and enable use of Raiser's Edge for contact data management.*

Database management is essential to effective communications. In order to know who to reach and how to reach them, we must have good data on our constituencies that is updated frequently. It is important that all staff groups use Raiser's Edge to maintain all contact information of constituents.

*Align online material with UUA communications goals.*

In order to effectively engage with visitors to UUA.org, the following must be done:

- Determine what content is missing, redundant, or outdated on UUA.org.
- Assess and improve quality of website content.
- Coach UUA staff that author and edit website content on UUA.org-specific standards, style, and writing.
- Vet requests for new blogs.
- Monitor search engine placement and recommend improvements.
- Dedicate resources to oversight and improvement of UUA intranet.
- Decide if RE material is best distributed and shared via UUA.org. Is there another place where this could live that might be more effective, dynamic, and interactive?

The challenge of reimagining UUA communications on a broad scale may seem daunting at first; however, with careful planning, faithful collaboration among all staff groups, and steady measures of progress, change is possible. UUA leadership has an opportunity to improve UUA communications; the processes and attitudes UUA staff carry to their work; and—most importantly—the world's understanding of Unitarian Universalism as a relevant, growing, vitally important religious movement for the 21<sup>st</sup> century.

## **UUA Fundraising**

Like many nonprofits today, fundraising at the UUA faces many challenges including the economic downturn, greater industry competition, growing costs of fundraising, and donor fatigue. The UUA has big dreams and wants to achieve real change. But real change needs real funding. If we are going to be the religion for our time, if we are going to be the religion of choice for individuals who seek a welcoming, liberal faith community, then we must have the financial



resources to effectively institute policies, practices, and programs that create real growth, momentum, energy, and change.

Therefore, Stewardship and Development is currently in the exploratory phase of the feasibility of a multi-year comprehensive campaign. The purpose of this campaign would be to empower donors and member congregations to generate more cash and planned gifts for the wider UU movement, the UUA, and UU affiliate organizations in order to strengthen our movement for years to come. This exploratory process is helping us understand the opportunities and challenges of initiating a comprehensive fundraising campaign and shape our messaging, identify areas of funding that interest our donor population, gauge enthusiasm, and discover potential prospects.

In FY13, in order to help our loyal individual donor's dollars stretch further during these difficult financial times, the Friends of the UUA direct mail program would like to again leverage \$100,000 of the \$900,000 grant for a new matching gift challenge. This matching gift challenge will be widely publicized on our website, in our direct mail, through social media, and in our e-communications.

## Conclusion

I have provided some highlights from 2011-12. This is by no means an exhaustive list. The good work of our staff is happening at a dizzying pace. Collaborating across staff groups is helping the UUA to be not only more responsive but more creative and proactive. This will stand us in good stead as we must become increasingly more agile. The religious landscape worldwide is changing rapidly. Our programs and initiatives, rooted in our UU values, seek to address these changes in unique, innovative, and creative ways. We must seize the great opportunity and possibilities before us.

As we continue to focus on the priorities of Get Religion, Grow Leaders and Cross Borders, the future work of the Association will focus on these four initiatives:

1. UUA-UUSC: The College of Social Justice is an exciting opportunity to give UUs unprecedented access to global service/learning experiences and deepen the commitment to justice-making.



2. Strategic Plan for Professional Ministries: As we implement these recommendations, we will make the biggest impact in developing entrepreneurial leadership and gain a deeper understanding of effective leadership.
3. Communications Task Force recommendations: Communications is essential to everything we do. If we value having our voice represented in the public square, if we hope to engage UUs and those who share our values in transforming lives on a grand scale, we must take a good hard look at our current communications systems.
4. Congregations and Beyond: To realize our potential as a vital international religious movement, we must continue to serve our congregations and serve those who identify as UUs and who connect with our faith by other means than a traditional church community.

The heart of the work of the UUA is to serve as prophets of the possible. We must adapt and learn new ways as an institution. I am confident that together we can seize this historic opportunity for our faith.

