

Leading Into Our Shared Vision

Report to the
Board of Trustees



by

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Table of Contents

Executive Summary	3
Association of Unity Churches International Strategic Plan	8
Process Used to Create Our Plan	8
Step 1 - Clarify the Vision, Mission, and Core Values	8
Step 2 - Be the Best We Can Be	9
Step 3 - Take an Inventory (SOAR)	10
Step 4 - Visualize the Future	12
Step 5 - Profile Your Constituents	14
Step 6 - Design Strategic Objectives and Goals	14
Step 7 - Assess the Resources	19
Step 8 - Take Action	19
Step 9 - Keep Track	19
Step 10 - Make Strategy a Habit	20
Conclusion	20

Executive Summary

Since January 2006, our Association of Unity Churches International, including the Board of Trustees, Home Office, and member ministries, has steadily been working toward development of a strategic plan that will enable us to consciously and intentionally build an organization and take actions that will enable our Unity movement to have an even greater impact in the world.

During the January 2006 mid-year meeting, I (Rev. James Trapp, President and CEO of our Association), shared a vision that came to me after much prayer and meditation on the future of our Association. When I presented it, it was received with great acceptance and enthusiasm from the members of our Association. It has become the basis for much of the work that was completed since that time.

From Ideas to Expression Visionary Image

"We are the fastest growing transformational spiritual movement in the world. Congregants' lives are being transformed in a powerful and profound way. As a result, Unity churches and centers are growing faster than any other movement or denomination anywhere, and we plant more churches than any other organization in existence. The ministers, licensed teachers, and ministries in Unity are whole and healthy. Our ministries are models of prosperity and abundance. Enlightened leaders are attracted to and developed on all levels of our Association - local, regional, national, and international. Through the work of our Association of Unity Churches International, we are a major player in bringing forth "a new heaven and a new earth" by helping people fulfill their spiritual potential and our shared vision of bringing forth a world that works for everyone."

-- Rev. James Trapp, January 2006

After this vision was shared at the January 2006 mid-year meeting, ministers, licensed teachers and lay people identified the following top three strategic directions:

1. Grow Unity and create a worldwide presence
2. Enhance leadership development to build capacity throughout our movement
3. Positively impact the human condition.

We started right to work on these priorities. First, our Identity Clarification Team created new vision and mission statements and discerned and defined our core values, all of which describe who we are and what we will bring to the world.

Our Association's Vision: *Centered in God, we co-create a world that works for all.* This vision is inclusive of the entire earth, not just its people. In addition, it acknowledges that we will work with God, as well as other partners to co-create a world that works for all.

Our Association's Mission: *We create and support vibrant, diverse spiritual leaders and communities that foster transformation and inspire people to make a positive difference in our world.* This describes the part we play in achieving the vision we hold for the world.

Our Association's Core Values:

- **Spirit Led** - We are centered in God. Spirit leads our thoughts and actions as we co-create a world that works for all.
- **Integrity** - We act from a place of wholeness and are ethical in all our actions. We keep our word.
- **Diversity** - We believe that all people are created with sacred worth. We promote greater understanding among people in a spirit of unity.
- **Transformation** - We are a dynamic movement on the cutting edge of spiritual evolution. We teach universal spiritual principles that change lives.
- **Abundance** - Living in the infinite flow of God's good, we draw from God's inexhaustible supply and wisely use our rich resources to serve the world.

The Identity Clarification Team also created a statement of our theological beliefs and teachings. This statement has been published as a booklet entitled, *Unity: A Path for Spiritual Living* which was presented at our convention in June 2007. The booklet is now available from our Association's home office for a nominal charge.

As the Identity Clarification Team was doing their work, many other action teams were focusing on all facets of our Association and our support for churches, centers, and alternative ministries, as well as the international Unity movement. These teams (listed below) identified many proposals and ideas within each of these areas:

- Leadership Models
- Leadership Training
- Credentialed Leadership Development
- Increased Youth Participation
- Laity Participation
- Identity Clarification
- Church Growth and Development
- Expansion
- Promotion/Marketing/Technology
- Wordsmith
- Collaboration with Mission Compatible Organizations
- Be a Voice in the World
- Spiritual Social Action
- Education & Training
- Crisis Response
- Worldwide Peace

As these teams completed their work, I recognized that we needed to assess our present situation. So, working with key Association staff members, we not only assessed our capabilities and reviewed proposals from the action teams, but also surveyed

ministers and others in the field to identify the highest priorities. Interviews and an online survey of a random sample of our membership yielded vital information about what areas of service and programs are of the highest priority. We found that the following were the most important:

- leadership development
- organizational/church development
- education
- ministry employment
- presence/public relations to our constituents and the world.

As we were completing this work, it became apparent that we needed to reorganize our Association's Home Office in order to accomplish programs and projects in each of these areas. Therefore, we created a new structure to achieve the desired results. The reorganization took place after our January 2007 mid-year meetings and included completely redesigning job descriptions and accountabilities in many cases, as well as hiring of new staff members. I also created a new position, the Vice President and Chief Operating Officer and hired a well-qualified person to perform in that role. Additional new hires will be added to fully fill out the new organization. These include Directors of Leadership and Organizational Development, Education, and Church Planting, as well as a Director of Transition Ministry/Peacemaking and Director of Development. Below is our current structure:

- President and Chief Executive Officer
- Vice President and Chief Operating Officer
- Vice President of Leadership and Organizational Development (including Education and Worldwide Services)
- Vice President of Minister and Ministry Services
- Vice President of Administration and Finance
- Vice President of Communications

The Home Office is now positioned much more effectively to do the important work that is associated with the priorities listed above, as well as generally performing our mission in service to our vision.

In the fall of 2007, in order to move our Association forward toward our vision, I worked with our Association Home Office Leadership Team to develop our new strategic plan which clarifies the work that we will undertake. The plan was designed to honor and implement the work that began in January 2006 and continued throughout 2007. We evaluated the recommendations that were created and the surveys we have completed since I became President and CEO, as well as a myriad of other inputs to develop this plan. The plan includes three strategic intents and associated strategic objectives. They are as follows:

- **Strategic Intent #1: We are the fastest-growing transformational spiritual movement in the world.**
 - **Strategic Objectives:**
 - **Strategic Objective 1:** Thriving churches and centers
 - **Strategic Objective 2:** Enlightened leaders (credentialed and lay leaders) who are mission-focused and who develop other leaders and support people in fulfilling their spiritual potential
 - **Strategic Objective 3:** Visionary spiritual education, development and support for people of all ages
 - **Strategic Objective 4:** Thriving new churches and centers

- **Strategic Intent 2: We are a major player in bringing forth “a new heaven and a new earth.”**
 - **Strategic Objectives:**
 - **Strategic Objective 1:** Modeling an enlightened organizational paradigm between and among all levels of our Association
 - Home office / National / Regional / Churches and Centers
 - **Strategic Objective 2:** Collaborative partnerships to carry out shared strategic objectives and goals
 - **Strategic Objective 3:** People and ministries fulfilling our shared vision of co-creating a world that works for all
 - **Strategic Objective 4:** A worldwide Unity movement, united by a common vision to co-create a world that works for all

A third strategic intent was added by our Association’s Home Office Leadership Team, recognizing that it would assist in fulfilling our vision in the future.

- **Strategic Intent 3: We are a catalyst for unifying New Thought**
 - **Strategic Objective 1:** Strategic alliances for fulfilling a common vision

These strategic intents and strategic objectives will focus and guide our efforts toward achieving our mission and fulfilling our vision. They will serve as our focus for many years into the future. To begin to actualize them, we have developed one goal under each of the strategic objectives (see pages 16 - 18). We will develop and accomplish many more goals under these strategic objectives until we reach our strategic intents.

Each goal will be further amplified through action planning that will lay out how the goals are to be accomplished. Activities in the action plans will be designed by cross-functional teams to ensure a whole system approach. (Note: Action planning on two major goals began in November 2007, and additional planning will be carried out beginning in January 2008 with ministry teams participating.) Actions plans will describe the specific actions that will lead to implementation and achievement of the goals, as

well as the measurements of success for each goal. Resources will then be allocated as needed to the action plans, and the work will begin.

At the same time the strategic plan was being created, our Association's Home Office was undergoing another transformation: a complete transformation to a project-based system of budgeting to directly support our strategic plan. The work on this budget was extensive, and the results will be presented to our Board of Trustees for the first time in February 2008 and then to our membership once the Board approves.

Based on our planning and budgeting work, it has become obvious that funding for some of our goals is not yet available and must be sought during the action planning stage and beyond. We are now developing a greater capacity to work with potential donors and to communicate our plan of work to them and cultivate their support for it. We invite all Association members to support this plan through your prayers, work on ministry teams and other teams, and your financial contributions, as well. We affirm that, as we step out in faith, the needed resources will be provided. With God and your support, we know we will be successful in taking our Association to the next level.

The strategic plan we have designed is a living document, and we intend to monitor its progress, as well as the environment in which we are operating. It will be adjusted as needed to keep it relevant and on-track so we are able to achieve and celebrate our well-earned successes in the near future.

Next page

Association of Unity Churches International Strategic Plan 2008

Strategic planning focuses on creating the future. It is a disciplined effort to produce fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it. Strategic planning is a leadership tool used for one purpose only: to help an organization do a better job at focusing its energy. This ensures that the organization and its members are working toward the same goals and it enables them to assess and adjust the organization's direction when needed.

The planning process is strategic because it involves intentionally choosing a desired future and developing an approach to achieve it. Strategic planning implies that some organizational decisions and actions are more important than others. Much of the strategy lies in making the tough decisions about what is most important for organizational success. It involves a set of decisions about what to do, why to do it, and how to do it. And, it focuses on preparing the best way to respond to the circumstances of a dynamic, changing environment, whether or not its circumstances are entirely known in advance. Finally, being strategic means being clear about the organization's strategic objectives while being aware of the organization's resources and incorporating both into all elements of work that lead to performance of the mission. We have fully considered all this in designing the new strategic plan for our Association for the purpose of performing our mission and achieving our vision in the world.

In October 2007, our Association's Home Office Leadership Team began an extensive strategic planning process that led to the design of the Strategic Intent, Strategic Objectives, and Goals you see listed below. The following describes that process and provides detail to give you a more complete understanding of the work we are undertaking and with which we are asking you to participate and support. It is critical to our success that we are all on the same sheet of music and that we unify our efforts to grow the Unity movement.

Process Used to Create Our Plan

Step 1 - Clarify the Vision, Mission, and Core Values

Our Identity Clarification Team worked over a year's period of time, with input from many ministers and lay leaders from across the country to discern our vision, mission, and core values. The following were recommended for approval and ultimately accepted in 2007:

Our Association's Vision

Centered in God, we co-create a world that works for all.

Our Association's Mission

We create and support vibrant, diverse spiritual leaders and communities that foster transformation and inspire people to make a positive difference in our world.

Core Values

- **Spirit Led** - We are centered in God. Spirit leads our thoughts and actions as we co-create a world that works for all.
- **Integrity** - We act from a place of wholeness and are ethical in all our actions. We keep our word.
- **Diversity** - We believe that all people are created with sacred worth. We promote greater understanding among people in a spirit of unity.
- **Transformation** - We are a dynamic movement on the cutting edge of spiritual evolution. We teach universal spiritual principles that change lives.
- **Abundance** - Living in the infinite flow of God's good, we draw from God's inexhaustible supply and wisely use our rich resources to serve the world.

Step 2 - Be The Best We Can Be

Understanding our "value proposition" (our unique value offering) is crucial. It is what we do best that draws people to us, rather than to other organizations, spiritual paths, etc. Extremely successful organizations deliberately make choices to be unique and different in activities that they are really, really good at and they focus all their energy in these areas.

While in the process of discovering our value proposition, our Association's Home Office Leadership Team discussed those things that Unity, as a spiritual movement, does better than any other spiritual movement or organization. We found that, among many other things, Unity has a positive, uplifting message that focuses on the teachings of Jesus and how they can be used to transform lives. We believe the kingdom of heaven is now, and we teach principles to support people in recognizing this in their lives. Unity's heritage is steeped in prayer with Silent Unity, and Unity has a unique metaphysical interpretation of the Bible. Unity places a strong emphasis on self responsibility with a head and heart approach. Unity honors all people and is inclusive, believing in the inherent worth of all. And finally, Unity is on the cutting edge evolutionarily and supports the closer integration of science and theology.

Then, we looked at what our Association of Unity Churches International does better than any other spiritual organization. (This is our Association, in general, as well as our Home Office.) We found that that our vision, mission, and core values are

unique, enabling us to focus our efforts on those things that are most important to us. The way we collaborate with and involve people through ministry teams and other program and project teams is exceptional. We also appeal to a cross section of people with different religious backgrounds in our churches, centers, and other ministries. We have distinctive youth and family curricula that are being used by other spiritual groups, and our YOU and youth activities are great. Our spiritual social action team's creation of projects for our ministries will enable the ministries to become contributors who are recognized in their communities for their good works.

As we reviewed our Association, we also noted that we have gifted people whose talents have not yet fully been tapped. Our credentialing processes and our ethical and professional standards are hallmarks. We found that although church autonomy is important, our collective Association is key in providing needed support and benefits; for instance, our pension plan for ministers is the only one within the New Thought movement. These are only a few of the many things that we believe set our Association apart.

Step 3 - Take an Inventory (SOAR)

The inventory technique we used is an appreciative inquiry process. We began with a strategic inquiry, assessing our *strengths* and *opportunities*. Then we created our *appreciative intent* and discussed measurable *results* we wanted to achieve, based on the results of field surveys and other research. This is only our first look at our SOAR inventory, and we intend to continue the dialog, involving everyone in the discussions as we move forward so that we can refine the results.

We had assessed our *strengths* (greatest assets and capabilities) to a great extent in the previous Step 2; so we began this step by looking at the best possible *opportunities* that are available to us now and the potentially important areas for growth. Some opportunities are:

- Enhancing church growth, especially small churches and centers
- Taking advantage of the readiness for change and a new ways of "doing church" (new forms emerging)
- Locating geographical areas ripe for new churches and centers
- Creating communities for spiritual growth
- Tapping the huge population of people who would resonate with the Unity message - engaging the "cultural creatives"
- Creating an integrated leadership curriculum
- Involving lay people through leadership development
- Cultivating young people as leaders
- Designing new leadership role for regions
- Becoming an enlightened organization - modeling a new way of being
- Creating a more coherent relationship with Unity School, Unity Institute, Religious Science, etc
- Taking full advantage of technology

We will be incorporating these into our goals and action plans as we move forward with this strategic plan.

Then we shared *aspirations* for our preferred future. These aspirations involved becoming one seamless organization, from our Board of Trustees to our Association's Home Office and Regions, as well as our ministries, sharing a common organizational culture. This would involve transformation from hierarchical structures to the new model of "Holacracy." (More information about Holacracy will be shared below.) Another aspiration is that all ministers and ministries are thriving models of prosperity and that all feedback loops are positive, indicating that our Association is working for the benefit of all. We also aspire to lead by example so that others outside Unity are transformed. And, a future aspiration is that we are the catalyst for unifying all energies of New Thought into a cohesive transformational movement in the world to co-create a world that works for all.

Finally, we discussed measurable *results* we want to create. Of the many we discussed, below is a list that we are considering, some of which will be included in our action planning for achievement of our goals:

- Increased name recognition for Unity and our Association
- Increased visibility in media and web presence
- Increased numbers and size of churches and centers, specifically more program-size churches
- Increase in testimonials on spiritual transformation within Unity population
- Increase in churches with healthy youth & family ministries
- Decreased median age of congregants and more men and ethnic diversity
- Increased numbers of ministerial candidates especially younger candidates)
- Increase in enrollment at Unity Institute and in other ministry paths
- Increase in tenure of ministers
- Decrease of colleagues in peer review
- Increase in ministers retiring with adequate assets; increased salaries
- Enhanced spiritual health of ministers and lay leaders
- Increased numbers of lay leaders
- Increased numbers and percentage of people in service activities, both within their churches/centers and in their communities and the world
- Increased numbers of mentors
- Increased tithes/donations, both within our churches and centers and for our Association
- Increased usage of Association services
- Increase in shared goals with Unity School and Religious Science
- Increase in collaborative partnership with like-minded organizations
- Receipt of the Spirit in Business award for our Association
- Increased attendance at Association conventions, etc.
- More positive feedback on resources used - tracking systems, surveys, etc.

To fully reflect upon all aspects related to designing our strategic plan, we also considered it important to assess our environment. If we are aware of our environment, we will be better able to be responsive as situations change. We believe this must be an

ongoing effort and are asking the Board of Trustees to create a new ministry team, the Future Trends Team, which will help us answer questions such as these:

- What is happening in the US that will affect us?
- What is happening in the world that might affect us?
- What are the strengths and weaknesses of others in our arena?
- What are the driving forces behind any trends?

Our initial look at these questions indicated that in the US, other generations are surpassing baby boomers in numbers and that many of them have no church background. While the Muslim populations are increasing worldwide, mainline Christianity is decreasing and the US is becoming culturally less Christian. Many denominations are adopting Unity-like messages; however, some people are actually leaving churches to protect their own spirituality. And, increasingly, boundaries are being obscured between the secular and the sacred.

Within the US, people are also experiencing increased stressors in their lives as business has become a 24/7 operation due to globalization of markets. This has also caused loss of jobs to overseas manufacturers. Another trend is the aging of the population that may potentially overload Social Security and exacerbate the healthcare situation we face. On the other hand, technology continues to expand, presenting an increase in available information options, as well as the possibility of misinformation. And, the extensive wireless communication culture is something that cannot be ignored.

Further, trends in the US indicate that while we live in a celebrity-driven culture, due to the media and materialism a central feature in our society, people are changing their giving patterns. Even though leisure time is down, younger generations and others have a great desire to be of service. We also have a large wealthy class that is looking for ways to contribute so they can see their money making a difference.

Globally, there is a rise of extremism, terrorism, and other threats, such as nuclear proliferation and social unrest due to a widening gap between the haves and have nots. The world is flat because of the Internet and although other nations aspire to be like America, anti-American sentiment is up. Nations like China and India whose economies are growing rapidly will exert greater influence on consumption of natural resources and ultimately on sustainability of the planet's systems.

On the surface, we may wonder what all this has to do with Unity as a movement. These are trends that we can view as opportunities, rather than challenges. They will inform how we develop transformational programs, as well as how we support the worldwide Unity movement, among other things. We will continue to become more sophisticated in the way we look at our environment and how we create opportunities as we increase our ability to monitor and even predict future trends.

Step 4 - Visualize the Future

A strategic vision (intent) is the image of an organization's future and it indicates: the direction it is headed; the focus it should have; the niche it should try to occupy;

the activities to be pursued; the capabilities to be developed. By forming a strategic intent we delineate what kind of organization we are trying to become and infuse the organization with a sense of purposeful action. The idea is to think BIG! The strategic intent should answer the question: What will our organization look like five to ten years from now?

To develop our strategic intent, we began with the visionary image presented at our mid-year meetings in January 2006:

VISIONARY IMAGE

"We are the fastest growing transformational spiritual movement in the world. Congregants' lives are being transformed in a powerful and profound way. As a result, Unity churches and centers are growing faster than any other movement or denomination anywhere, and we plant more churches than any other organization in existence. The ministers, licensed teachers, and ministries in Unity are whole and healthy. Our ministries are models of prosperity and abundance. Enlightened leaders are attracted to and developed on all levels of our Association - local, regional, national, and international. Through the work of our Association of Unity Churches International, we are a major player in bringing forth "a new heaven and a new earth" by helping people fulfill their spiritual potential and our shared vision of bringing forth a world that works for everyone."

This visionary image presented us with two major strategic intents that give us a sense of purposeful action and answer the question of where we will be in five to ten years from now:

- ***Strategic Intent 1 - We are the fastest-growing transformational spiritual movement in the world.***
 - Congregants' lives are being transformed in a powerful and profound ways
 - Unity churches and centers are growing faster than any other movement or denomination anywhere
 - We plant more new churches than any other organization in existence
 - Our ministers, licensed teachers, and ministries are whole and healthy
 - Our ministries are models of prosperity and abundance
 - Enlightened leaders are attracted to and developed on all levels of our Association - local, regional, national, and international

- **Strategic Intent 2 - We are a major player in bringing forth "a new heaven and a new earth."**
 - People are fulfilling their spiritual potential and our shared vision of co-creating a world that works for all
 - We are a model for an enlightened organizational paradigm (*added by Leadership Team*)

Our Association Home Office Leadership Team added a third strategic intent for future action:

- *Strategic Intent 3 - We are a catalyst for unifying New Thought.*

Once we discerned these strategic intents, we checked them against our vision and mission and determined that all three will directly support the accomplishment of our Association's vision and mission.

Step 5 - Profile Your Constituents

Before going any farther on our strategic plan, we looked again at the wants and needs of our constituents. We recognized that we are all constituents of our Association, on some level, since we all support one another. However, we will focus on our ministries and their congregants/members/participants. If we want to move our organization from where we are now to being highly successful, we know we need to meet our constituents' wants and needs better than anyone else. So, we will continually upgrade our constituent profile by answering:

- What are our constituents' wants/needs, motivations, and characteristics?
- How can we uniquely provide value to our constituents?
- What should we improve to grow our "constituent support rating?"

Because we had just completed a survey of our ministers and ministries in late 2006, we used the information that resulted from that survey in identifying the wants and needs. The survey indicated that the top priorities are leadership development; organizational development (church growth); education; ministry employment; and presence/public relations with our constituents and the world. These are foremost in our focus areas for this plan.

Step 6 - Design Strategic Objectives and Goals

Strategic objectives and goals are like stair steps to the vision and mission. Realistic strategic objectives and goals are developed after the SOAR analysis and constituent profile.

Strategic objectives set the agenda and are broad and global in nature. They give action to the mission and vision and will take several years to achieve. During our planning process, we created nine strategic objectives under our three strategic intents. They indicate how we will achieve our strategic intents and provide steps that will lead us to fulfilling our mission and vision:

- **Strategic Intent #1: We are the fastest-growing transformational spiritual movement in the world.**
- **Strategic Objectives:**
 - **Strategic Objective 1:** Thriving churches and centers
 - **Strategic Objective 2:** Enlightened leaders (credentialed and lay leaders) who are mission-focused and who develop other leaders and support people in fulfilling their spiritual potential
 - **Strategic Objective 3:** Visionary spiritual education, development and support for people of all ages
 - **Strategic Objective 4:** Thriving new churches and centers
- **Strategic Intent 2: We are a major player in bringing forth “a new heaven and a new earth.”**
- **Strategic Objectives:**
 - **Strategic Objective 1:** Modeling an enlightened organizational paradigm between and among all levels of our Association
 - Home office / National / Regional / Churches and Centers
 - **Strategic Objective 2:** Collaborative partnerships to carry out shared Strategic Objectives and goals
 - **Strategic Objective 3:** People and ministries fulfilling our shared vision of co-creating a world that works for all
 - **Strategic Objective 4:** A worldwide Unity movement, united by a common vision to co-create a world that works for all
- **Strategic Intent 3: We are a catalyst for unifying New Thought.**
 - **Strategic Objective 1:** Strategic alliances for fulfilling a common vision

These strategic objectives will serve to focus our efforts for many years to come. At the Home Office, we have made them the framework for our activities, including our new project-based budget format. Along with the Board of Trustees, we will also be asking that our ministry teams unite their efforts to support them and the goals we have set to actualize them. It is only with unified support that we will have the resources we need to complete our work in these important areas.

Once strategic objectives are created, goals are set to achieve each major objective. Goals should be measurable and quantifiable and support the strategic objectives. Effective goals must state how much of what kind of performance, by when it is to be accomplished, and by whom. They can be achieved in a one to two-year timeframe. It's important that strategic objectives and goals build on strengths and capitalize on opportunities while taking into account the environment in which we operate.

During our planning sessions, we set goals that addressed our major priorities under our strategic objectives. (The only strategic objective for which we did not set a goal was under Strategic Intent 3 above. This is will be set when the time is right. First, we have important work to do on Strategic Intent 1 and 2.) Although we only set one

goal under each strategic objective for now, we intend to add more goals when they are timely and appropriate to ensure our Association continues its growth and evolution.

These goals specify outcomes we hope to achieve as a result of the activities we undertake, rather than just activities we will do. They describe the results or impacts that directly answer the questions, "How would you know you succeeded at X? What are the outcomes that would make the biggest difference to the constituents, staff, donors, and/or others?" They measure success directly against key performance opportunities (or challenges), and they inspire people to excel. Their achievement is itself a motivator. Here are the goals we set (with strategic intents and strategic objectives repeated for clarity):

- **Strategic Intent 1:** We are the fastest-growing transformational spiritual movement in the world.

- **Strategic Objective 1:** Thriving churches and centers

- **Goal 1:** To create greater vitality within the entire Unity movement, we complete a pilot program wherein 100% of pilot group are thriving model ministries by December 31, 2011.
- **Measurable outcomes:** Cultural change capacity; coherence (shared identity and future); church/center "ownership;" making a difference; spiritual growth/transformation.

Note: Action planning began in November 2007 on this goal with ministers and lay leaders from the field, as well as members of Unity Institute and our Association Home Office. Members of ministry teams will also be engaged. Once action planning and program development are complete, a pilot group will be chosen for concentrated effort and support until the transformational work is completed. As the project is carried out, we will not only work with the pilot group, but we will share successful practices and tools with all ministries in our Association so all can contribute to and benefit from our learning.

- **Strategic Objective 2:** Enlightened leaders (credentialed and lay leaders) who are mission-focused and who develop other leaders and support people in fulfilling their spiritual potential

- **Goal 1:** To begin the cultural shift to community-centric model of ministry, 25 ministers, their entire boards, and Licensed Unity Teachers complete a transformational leadership development program by September 30, 2011.
- **Measurable outcomes:** to be developed

Note: Action planning also began in November 2007 on this goal with ministers and lay leaders from the field, as well as members of Unity Institute and our Association Home Office. Members of our ministry teams

will also be engaged. Once action planning and program development are complete, we will begin with a group of 25 ministries that will be chosen for this leadership development program. (Each ministry must agree to complete the entire program since measurable outcomes will be studied.) Initially, the program will also be open to other Unity credentialed and lay leaders, space permitting. Ultimately all ministries can participate.

- **Strategic Objective 3:** Visionary spiritual education, development and support for people of all ages
 - **Goal 1:** To cultivate the spiritual development of young adults, we establish 100+ new young adult ministries (Next Generation Unity & Campus Outreach) by September 30, 2012.

Note: Action planning for this goal will be carried out by a ministry team and our Association's Home Office staff, beginning in January 2008.

- **Strategic Objective 4:** Thriving new churches and centers

- **Goal 1:** To demonstrate a new paradigm for church/center creation, we pioneer seven (7) new program-size churches/centers by July 31, 2012.

Note: Action planning for this goal will be carried out by a ministry team and our Association's Home Office staff beginning in July 2008. We will also be hiring a new Director to lead this work.

- **Strategic Intent 2:** We are a major player in bringing forth "a new heaven and a new earth."

- **Strategic Objective 1:** Modeling an enlightened organizational paradigm between and among all levels of our Association

- Home office / National / Regional / Churches and Centers

- **Goal 1:** To actualize the mission and vision of our Association, the Home Office demonstrates the Holacracy organizational paradigm by September 30, 2009.

Note: Action planning will begin in late January 2008 with a team from the 2007 Regional Appreciative Inquiry Summit, as well as ministry teams, if they choose to participate.

Briefly, Holacracy is the next step in the evolution of human organizations. It embraces everything known about organizations so far and represents a quantum leap to a higher order of organization, one capable of artfully navigating in a world of higher-order complexity and increasing uncertainty. It includes a set of interwoven models, principles, practices and systems that will enable us to evolve virtually all aspects of our current

organizational dynamics. Its core concepts include: integrative decision-making (to ensure everyone has a voice); dynamic steering (for faster group process, greater flexibility and increased agility); and requisite alignment (for a just-right, “natural” fit between structures, roles and accountabilities). If you resonate with the themes, “Spirit as the workplace” or an enlightened organization, then the practice of Holacracy will fit perfectly with our aim of maximizing organizational cohesion, vitality, and effectiveness.

- **Strategic Objective 2:** Collaborative partnerships to carry out shared strategic objectives and goals

- **Goal 1:** To fulfill our shared vision, we co-create a model partnership with Unity School that includes a new common culture from which we develop collaborative projects that benefit the Unity movement by December 31, 2008.

Note: A joint meeting of the two Boards will begin development of an overarching vision in May 2008. Action planning may proceed after that.

- **Strategic Objective 3:** People and ministries fulfilling our shared vision of co-creating a world that works for all

- **Goal 1:** In order to shine a light on the Unity movement and what we stand for, 250 Unity ministries are committed to and actively involved in Spiritual Social Action in the areas of world peace and compassionate humanitarian action by December 31, 2011.

- **Goal 2:** In order to co-create a world that works for all, 75% of all Unity ministries will be committed to and actively engaged in sustainable living practices (EarthCare) by December 31, 2011.

- **Note:** Action planning for these goals is being done by the Spiritual Social Action Ministry Team

- **Strategic Objective 4:** A worldwide Unity movement, united by a common vision to co-create a world that works for all

- **Goal 1:** This goal and the associated action plan will be developed by the Worldwide Unity Movement Ministry Team by May 1, 2008.

- **Strategic Intent 3:** We are a catalyst for unifying New Thought

- **Strategic Objective 1:** Strategic alliances for fulfilling a common vision

- **Goal 1:** This goal and action plan will be developed in the future as opportunities arise.

Step 7 - Assess Your Resources

Once the strategic objectives and goals are designed, it is time to do a resource assessment. One of the biggest stumbling blocks to all well laid strategic plans is time and money. It is important to prioritize key goals by asking: Do we have the human and other resources to achieve our plan? Does implementing these goals make financial sense? What should our priorities be? (What is on the front burner?) What do we need to put on the "back burner" now? What needs to be in the parking lot for future consideration?

In designing our strategic plan, we prioritized goals, as indicated above and also ensured that we included ministry teams to support their achievement. We funded the goals to the maximum extent possible in the fiscal year 2008 and 2009 budgets. We do not currently have enough resources in terms of people or funds to carry out all the goals. We will be hiring additional staff members at the Home Office to lead the work on some of the goals. We will also be seeking to raise funds for some of the work that is currently unfunded. We ask all ministries to keep our goals in your prayers and to tithe whenever possible to ensure we can achieve all our goals in support of our Association's constituent members.

Step 8 - Take Action

Action planning is carefully laying out how the goals will be accomplished. Action planning includes specifying specific outcomes and actions for each strategic goal. It also involves specifying responsibilities and timelines -- who needs to do what and by when, as well as specifying methods to monitor and evaluate the plan in order to ensure we know who has done what and by when. It is important that the people who are to carry out the plan be involved in action planning. They should design the action plans and be responsible for making sure each task is accomplished.

For this strategic plan, we have already begun action planning as noted above. Each goal will have several activities associated with its accomplishment, and these activities will be designed by cross-functional teams to ensure a whole system approach. We have already included credentialed and lay leaders from our local ministries, as well as Unity Institute and our Home Office in the action planning. The result has been a rich dialog that has broadened the understanding of the challenges and also the view of the work that needs to be completed. We are also considering the recommendations that were created by the teams that arose from our mid-year meetings in January 2006 (see Executive Summary above for a list of the teams). These proposals are being reviewed for incorporation into the action planning phase of our strategic planning.

Step 9 - Keep Track

Once the plan is complete, it is important to put the measurements and targets from the goals on a scorecard. This will act as an instrument panel, guiding us toward our vision and mission. With this scorecard, we can actively track progress on a monthly basis. It will enable us to work with people or teams that get bogged down. It will also

enable us to celebrate our achievements. We will be creating this scorecard in March 2008, after our ministry teams and our board of trustees meet.

Step 10 - Make Strategy a Habit

Leadership that is devoted to the successful implementation of the strategy and the strategic plan is crucial. The plan needs to be supported with people, money, time, systems and, above all, communication. We will take specific steps to communicate the plan to everyone in our Association. At our Association's Home Office, we will hold monthly strategy meetings to report on the progress toward achieving our goals. And we will take corrective actions when needed and guide these actions so as to adapt as our environment changes.

More than anything, strategic planning is only useful if it supports strategic thinking and leads to strategic leadership -- the basis for an effective organization. Strategic thinking means continually asking, "Are we doing the right thing?" rather than "Are we doing things right?" We must continually make that assessment using three key requirements about strategic thinking: a definite purpose in mind; an understanding of the environment, particularly of the forces that affect or impede the fulfillment of the purpose; and creativity in developing effective responses to those forces.

We have developed a comprehensive strategic plan that will achieve our mission and vision. We have also created an organizational structure, as well as budgets for fiscal years 2008 and 2009 that will provide many of the resources to successfully carry out the strategy. Other resources will be provided by ministry teams and donors to our Association. The design of our strategic plan will enable us to keep our attention on the "big picture." And inputs from our Board and ministry teams will enable us to adapt to changing circumstances and keep our Association relevant.

Conclusion

In conclusion, we are confident in the plan we have designed. An organization without a plan is like a car without a steering wheel. So, it is important for us to plan the work we have ahead of us and then, with great diligence, to work the plan. However, our strategic plan is a living document. It does not have to be perfect or 100 percent complete so we can start using it. We have put our plan on paper, and we will communicate it with everyone. We will enroll our ministry teams in our strategic objectives and goals, along with our Association's Home Office staff and others. And we will focus and lead more strategically, focusing on our strategic intents. All this will ensure that we will be celebrating our well-earned successes in the future!

Let us lead into our shared vision together so that together we will co-create a world that works for all!