

1Unity Executive Summary

2018

JANUARY 2018

- Core Team fully formed and initial meetings begin
- Initial focus on designing the organizational and legal entity structure in a “top down” approach

SPRING 2018

- Marketing Departments begin integration
- Core Team continues work on org design

MAY 2018

- Both boards approve moving forward with “1Unity” and the Core Team to continue to research business models/structures

JUNE 2018

- Core Team presentation to convention with commitment to have org design done by June 2019

OCTOBER 2018

- Marketing integration provides feedback that the process needs to shift to more “organic” letting the tactical and operational elements play a stronger role in the organizational design
- Regional field updates include message on the shift in direction of the Core Team

Next Steps:

- Move from functional design to organizational design and structure (identify leaders and roles)
- In parallel, finalize the legal and entity structure(s)
- Finalize Board and Advisory Council governance structure and details
- Determine communication plan for final design

2019

FEBRUARY 2019

- First in-person Joint Board meeting held in Houston, TX

SPRING 2019

- Core Team and Joint Board Mission Statements finalized
- One Unity Facebook page launches
- Shared Services Agreement between UWM and UWH is drafted with focus on IT and Marketing

SPRING 2019 (CONTINUED)

- Decision to create separate paths for organizational design and legal entity decisions
- Joint Board sub team created to review the Unity Identity Statement and develop working mission statement for the future of the Unity Movement

MAY 2019

- Joint Board meeting held at Unity Village
- Unity Working Mission Statement
- Proposed organizational design
- Asked Alexandra Scott, Unity’s Recruiting, Diversity and Inclusion Officer to join our meetings periodically with a specific intention to: