



Annual Summit Highlights
Tuesday, February 5, 2019
Unity of Houston, Texas

Opening Prayer & Meditation led by Rev. Paulette Pipe

1. Unity Worldwide Ministries [UWM] Update

- CEO Rev. Donna Johnson
 - We are in the middle of a sea change—from Ariel’s song in *The Tempest* by Shakespeare “... Full fathom five thy father lies; of his bones are coral made; those are pearls that were his eyes; nothing of him that doth fade; but doth suffer a sea-change into something rich and strange....”
 - Association of Global New Thought [AGNT]: serving on the AGNT Leadership Council with UWH CEO Jim Blake; Barbara Fields is the Executive Director of AGNT.
 - In 2017 the AGNT Leadership Council made the decision to re-commit and re-envision “Seasons for Peace and Nonviolence” into a relevant program for spiritual and social uplift that addresses the challenges we face today.
 - From the creative process/exploration over the past year, a new curriculum was developed with a spiritual focus called “Spiritually Guided Social Uplift Ministries” [S.U.M.]; the curriculum has nine modules based on New Thought principles.
 - To explore the curriculum modules offered to participating churches and centers, please go to the following website: agnt.today/social-uplift-ministries
 - Curriculum begins February 20, 2019
 - The S.U.M. curriculum is free to members of AGNT—both to individual members [\$50/year] and organizational members [\$250/year] which includes 5 individual accounts for minister and key members of their community: agnt.today/get-sum-curriculum.
 - Our primary way to communicate to field members is through our newsletter *The Path*; if you are not currently receiving *The Path*, *Unity Leaders Journal*, or our *Important Communications*, please go to our website to subscribe: www.unity.org/enews
 - Unity Worldwide Spiritual Institute (UWSI) is offering a new program called “Spiritual Explorers” designed to reach people beyond our Unity congregations who are spiritual, but, not religious; for more information on the curriculum go to our website at: UnityWorldwideMinistries.org/uwsi/spiritual-explorers or watch our YouTube video introducing the program: youtube.com/watch?v=9v8idCW9-nQ

- **UWM Board of Trustees Chair Rev. Sharon Ketchum**
 - The UWM Board has approved an EarthCare covenant adopted by Unity Worldwide Ministries; the covenant will be on the UWM website soon.
 - Goal is for all ministries to participate in EarthCare Program paths: UnityWorldwideMinistries.org/earthcare-program.
 - First level is a covenant which “fulfills the prayer and vision steps; and, provides a statement of commitment to the EarthCare Program by the leadership of the ministry.”
 - Social Action is evolving as we seek a long-term movement of change and consciousness; seeking to discover what we do well and find a better way for us all to be together.
 - [2019 People’s Convention](#) will touch on this subject “One Humanity, Many Stories, Infinite Blessings.”
 - Some of the highlights for convention will feature an interfaith service, movie night with three subjects that relate to social action, a live video to share how your divinity shows up, and—our main topic for the week—how do we create a world that works for all?
 - UWM Board is looking at diversity and recently added a millennial to the board: Rev. Shad Groverland from Unity of Boulder, Colorado. The board is trying to be conscious of where we may have created silos.
 - The Great Lakes Region has become an auxiliary member with UWM. Also serving as auxiliary members are the Northwest and Southeast Regions.

- **CFO/COO Rev. Bruce Verkruyse**
 - UWM has a financial intention to be transparent and begin reporting our quarterly numbers in *The Path*.
 - Would there be resistance from the field to UWM listing, as was done in the past, a donor list? UWM would like to share who is giving and at what levels.
 - [Help Unity Grow \[HUG\] Fund](#) has given \$39,000 in gifts and \$250,000 in loans at 2% below the prime lending rate.
 - 21% of all revenue received in 2018 came in the month of December, bringing UWM back into the black. Reminder to everyone that UWM exists to support each and every member of Unity.
 - Our restricted funds have grown to \$1.4 million to support our programs.
 - Intention to hire additional bilingual support for Spanish-speaking ministries and partnering with Unity World Headquarters in how to spread our message internationally.
 - Seeking to renew two Templeton Grants: (1) AV podcasting equipment/training and social media; and (2) Unity digital media and marketing.
 - Annual cost of \$35,000 for UWM to maintain our old building at 401 SW Oldham Parkway. Our UWM Board is suggesting we take action in the near future by either selling or leasing the building; looking at \$225,000 with any necessary updates needed in order to lease out the building; estimating receipt of \$800,000 if we sell it. Building is still being used as our warehouse, although in mid-2019 that will change with moving items on grounds to Unity Village.

- **Director Member Services Rev. Cynthia Vermillion-Foster**
 - Team of eight staff that are providing services/resources for ministers/ministries.
 - Member Services assists with developing whole leadership teams; current online training available for entire church leadership teams on our website: UnityWorldwideMinistries.org/trainings.
 - Invitation to ministries to engage with us in April with a book study on *Canoeing the Mountain*. Check our website for information: UnityWorldwideMinistries.org
 - More information to come as we lean into new procedures with our credentialing process; have combined our Admissions, Licensing and Ordination, and licensing/ordination ceremonies together with UWSI, Unity Urban Ministerial School, and the Field Path Program; have also completed a revision of the rubric standards for a Unity minister.
 - Beginning to develop ways to support the changes/re-visioning of ministry and the variety of ministries we serve.
 - Noticing a slight increase in upheaval/conflict within ministries experiencing change. Ministry Leadership Coordinator Rev. Doug Duerr is working with our consultants, teaming them with these ministries in order to provide the needed support.

2. Unity World Headquarters (UWH) Update

- **CEO Jim Blake**
 - UWH is three-fourths of the way through a three-year strategic plan.
 - First area of focus was to extend our reach and make new friends so that we can introduce them to the Unity profile.
 - Have partnered with *Celebrate Your Life* and are one of the sponsors for their International Women's Summit in Phoenix, Arizona, this March; will have a booth at the event and create an hour-long show with Unity Online Radio featuring event speakers showcased. Strategy is to introduce them to what we do.
 - Second area of focus was to develop streams of consistent revenue with Unity Village using a soft launch phase with Vision 2020.
 - Creating new venues for events so we can bring more to the campus.
 - Renovated Rickert Fillmore's home and listed it as an Airbnb and within the first month it generated \$6,000 and was honored by Airbnb.
 - Have now begun renovations on a second cottage with four bedrooms; through a generous donation will begin renovations on a chalet, villa, and manor on Hummingbird CT.
 - Third area is culture. Have completed diversity training with staff and currently working on implicit bias training.
 - UWM staff members will also be participating in the trainings.
 - Leadership Teams of both UWM and UWH are meeting together every other week.

3. Core Team Update

- Core Team members: Chair, Rev. Carolyn Mathlin, Rev. Ken Daigle, Rev. Richard Bunch, Rev. Sharon Ketchum, Rev. Donna Johnson, Rev. Bruce Verkruyse, Jim Blake, Guy Swanson; Project Manager Jennifer Peek
 - Team has been meeting a little over a year together; currently meeting by conference call every two weeks.
 - Have been working with Jennifer Peek, founder of Peek Advisory Group, for the past year as a facilitator with the team and now serving in the capacity as Project Manager with the Core Team. peekadvisory.com
 - Team began by meeting to discuss creation of an organizational structure combining Unity Worldwide Ministries and Unity World Headquarters as one entity under *One Unity* [now being called just “Unity”] and in October 2018 that direction shifted.
 - Focus is now internal with staff/department collaborations (combining or collaborating) in duplicated areas such as: Marketing, Human Resources, Development, etc.
 - New focus allows leadership of both organizations to be present to supporting staff for a better understanding/ability to work within Unity Worldwide Ministries’ and Unity World Headquarters’ strategic and cultural differences.
 - Working with a targeted implementation schedule/timeline holding team members accountable and on track.

4. Focusing Forward Report - Co-Chairs Rev. Julie Armour and Rev. Richard Bunch

- “Focusing Forward - discovering, discerning, designing Unity’s future”
 - Vision: “A world powerfully transformed through the growing movement of shared spiritual awakening.”
 - Mission: “Advancing the movement of spiritual awakening and transformation through Unity, a positive path for spiritual living.”
 - Purpose Statement: “We provide long-term solutions for the health and prosperity of Unity.”
- Team began about 1½ years ago and now includes numerous sub-teams such as: Funding, Gen XYZ, Pastoral Care, Prayer Chaplain, Congregational Care, Ministerial Care, Spiritual Director Training, Music, Sacred Social Action, Spanish-Speaking, Technology, Youth & Family
 - Focusing Forward meets monthly with team Chairs and sub-teams.
- Current focus and vision of Focusing Forward is to explore, research, and recommend:
 - What are the essentials needed in a ministry in 2030?
 - How do we share and disseminate new and innovative programs?
 - How do we support our ministries in creating their own Focusing Forward Programs?
 - How do we develop different streams of revenue within ministry e.g. thrift stores?
- Technology Team
 - Chair Rev. Jean-Marie Schweizer is leading this sub-team with projects on how to bring ministries into the here and now so they have a chance in 2030.
 - Five projects focused on for ministry support: (1) centralized administration with church management systems; (2) Unity audio social media to feed into current social media streams; (3) Unity virtual education to help bring classrooms online; (4) technology for audio/video livestreaming; and, (5) Unity tech support.

Facebook page where questions can be asked in order to know how to support ministries.

5. Breakout Group Questions

Attendees were divided into small groups to discuss the following questions:

“What are the three most pressing areas you’d like to see addressed?”

- Full-scale media presence with social media, radio, television
- More public dissemination of information to those in non-leadership roles
- More uniformity with Unity churches as far as what is available in each church
- Community involvement with all Unity churches especially where there’s no New Thought presence
- Provide assistance with media training to churches who want to use it
- How can you fill empty buildings at Unity Village to increase the energy?
- Clarity on who we are with Unity Worldwide Ministries/Unity World Headquarters - create a brochure that explains the difference between the two organizations
- One central call center for both organizations [UWH and UWM]
- Clarity on what “Unity” is and is not - come up with a list
- Both organizations merging into one, not two organizations pretending to be one
- Expansion of constituents to bring more into Unity
- Development of a thriving business model to insure long-term financial support for ministries - “no money, no mission”
- Express our Unity principles, staying away from political issues that divide us
- How to engage all ministries in the *One Unity* process
- Written agreement on combined activities of UWM/UWH and sharing this with the field
- Sharing what shifts are happening in the movement and being transparent in the process of the Core Team’s work
- Intermingling with other denominations and how to come together without losing our Unity identity
- When the Fillmore’s were part of headquarters, they distinguished what is part of Unity and what is not, so who is currently leading the philosophy of the Unity message, and, can there be more dialogue with the field about that now?
- To create a vision of healthy ministries/networks from the micro to macro, to the regions, families, and individuals in how we practice principles—looking for a driving force behind all of this—together if we could have one cohesive vision for Unity, that is not then separated as one mission that then gets interpreted to ministries.
- To expand our ways of serving, supporting churches, and our constituents of all ages by creating vibrant ways to communicate and opportunities that go outside-of-the-box thinking.
- How do you bring in the membership without losing it as you merge into one organization?
- No diversity on the Core Team. How can diversity be represented in bringing balance to the whole?
- Better website organization. Be cognizant of how people access information and be clear and concise in communications.
- What will happen to Silent Unity in the merger?
- How can the unified organization help ministries survive in times of changing technology; and, what can they provide in technology for smaller ministries?

- How can *One Unity* help us understand what church is becoming and how we can take advantage of those changes?
- Fear of field being disconnected from the communication of what is going on with *One Unity*. How can we *not* take advantage of this process and end up doing our own thing?
- Development of leadership around lay members.
- Presentation of a unified message: mission and value statement.

“What are the benefits you expect to see if we are One Unity?”

- More power in that two will become one—modeling our principles.
- Will reduce confusion in the messaging with internal/external audiences.
- Consistency as there will be a single point of contact for information quickly and easily.
- Save money, donations will go to one place, easier for public to access information.
- Consciousness raising in the world.
- Leveraging the collective network.
- Information sharing.
- Less of a sense of competition between regions/churches.
- Seeing ourselves in the field as part of a whole and one team.
- Trainings will be more unified and more of them.
- Ability to be something greater.
- Ability to livestream meetings and summits so people can see them virtually.
- Shared resources with no duplication of services.
- Congruency of the message.

“What questions do you have for the Core Team?”

- **“How can individual ministries support the team in a more involved way?”**
 - Hold the vision and it will manifest.

Response:

- The organic nature in which you are approaching this will reveal the complexity of solutions necessary to answer what you are working with. All facets working well in concert together, not in competition, utilizing and maximizing of efficiencies, human resources, projects, in concert with each other, but complex enough to have representation and a voice for all with no facets getting left behind. That will be the vision I hold going forward.
- **“In what ways could our organizations make an easier connection between the mainland United States and our international entities?”**
 - Part of the Core Team’s timeline is to explore how can we come together in a more effective way and how do we strengthen, not only the practices, but all those participating. The intention is to create a more firm connection between what both organizations are doing internationally.
 - In UWM’s research we have found in order to effectively serve internationally you need a separate department staffed and budgeted whose sole focus is this work. In other words, where a foundation can be formed in order for success. First though we need to do a study on the ministry side to find out how can we best serve all ministries, then,

determine how do we grow internationally. It's a big question that will take substantial funds to get to where we are successful.

- Intention is to pursue funding to assist connecting our internationals through UWSI and our national schools and a necessity is having the technology infrastructure available to support our connections.
 - “Coming together in *One Unity* would foster the idea of church without walls.” Don't believe we are currently reaching all of our English-speaking ministries with one voice. When we have a coherent message altogether as one to our English-speaking members, then we can advance into the different languages/nations in coming together. Baby steps are not small to the baby; they are life-changing.
 - Reminder that what works well in an English-speaking community may not work well in Spanish-speaking communities.
 - In other denominations such as the Unitarians and Baptists, they have separate organizations that run and fund their international programs. International is much bigger than anything we can tackle tomorrow and will take more funds than we think we may need.
- **“Have heard the way the Core Team has been evolving has changed, but the timeline has not; what is the current timeline?”**
 - The timeline is organic and flexible, holding us accountable to the process.
 - Part of the timeline is about collaborating and combining some internal departments.
 - Our process in moving towards becoming one is more than a timeline.
 - When we complete timeline targets we can report out what has been accomplished.
 - **“Every time someone gets up to talk about how to move forward it is always with ‘in concert with our message’ so what does that mean?”**
 - “One power, one presence.”
 - In 2006, about a dozen people were commissioned to answer that question and spent 18 months working on basically an elevator statement which is “Unity is a positive, practical, progressive approach to Christianity based on the teachings of Jesus and the healing power of prayer. Unity honors the universal truths in all religions and respects each individual's right to choose a spiritual path.”
 - This statement appears in a booklet called [Unity: A Positive Path for Spiritual Living](#) which can be ordered through [UnityWorldwideMinistries.org](#).
 - Statement was approved by the conference body although never a requirement to use.
 - **“Is there a full understanding of all the legal and tax implications of merging?”**
 - Yes, we do understand the nature of the two organizations and we are in the process of sorting out how to work together.
 - Unity Worldwide Ministries is a 501(c)(3) membership-driven organization and Unity World Headquarters (UWH) is a more traditional 501(c)(3) with a self-perpetuating board—two very different organizational structures.
 - Unity Worldwide Ministries also has an overall group tax exemption, an umbrella for all churches, so that entity needs to remain regardless of our merging, as it is your protection from the IRS. Therefore we can't just eviscerate either entity.

- Unity World Headquarters is based on an IRS Private Ruling letter from 1929 when the Fillmore's applied for tax exemption and the IRS denied their application because they had formed as a "C Corporation" in the state of Missouri with the four Fillmores [Charles, Myrtle, Lowell, Rickert] as a for-profit. The Fillmores challenged the ruling all the way to the U.S. Tax Court of Appeals and won on the predication that they promised to give all remuneration back into the entity to grow the movement; purpose of the IRS Private Ruling is wide ranging from educational, to running a monastery, to health and welfare.
- **"What shadow work is being done to heal the rift between Unity Worldwide Ministries and Unity World Headquarters?"**
 - The Core Team started over in this process last October being honest about what are the odds of making this successful and that meant opening up about things that go unsaid or unclaimed within the history between the two organizations—the fear, anger, attitude—and owning all of it in order to make a step forward.
 - To add to the transparency side we need to educate what it means to become one organization. Unity Worldwide Ministries is a member-based organization whose members have a voice in what happens and elects their own board. That doesn't happen at Unity World Headquarters. If you want a voice in what is happening, then we need to have a conversation about whether we stay a member-based organization, or, do you want to be a standard corporate organization where the board is appointed and you are accountable to them and not to a membership. Not sure how many are understanding this difference and it fundamentally changes everything.
 - Do not lose the nuance of what was just said because if we are really coming together as one, then what does that mean for the structure in terms of whether there is still a membership or something else entirely? We don't have the answer to that question right now as we are just now working on the logistics.
- **"What are the things the Core Team isn't sharing?"**
 - Strategically it makes sense to not share everything all the time; the team does not always know where we are going, so to lead everyone on a path that is not clear even to us would not be fair. There is no intention to withhold information, but there are strategic decisions made of when to share information.
- **"What is the Core Team doing to proactively heal and work with the staff with all of the changes?"**
 - Currently the joint Leadership Teams are meeting every other week to discuss, among other things, department changes and both CEOs are working on melding the culture of both organizations.
 - Boards from both sides are in conversation with staff so there is transparency both ways.
 - When collaboration with some departments was implemented, it became clear that we needed to be more tangible in addressing the culture shifts, so this is a feedback-rich and evolutionary process.
 - This goes beyond staff. We even have ministry teams now asking how long our Board of Trustees will be around, and, if the board will be affected by the coming changes; so

we are in the question of what are our sacred cows and we know that we are committed to moving forward with the idea of becoming one.

- **“What are the metaphysical tools *One Unity* is using and can the field participate?”**
 - Prayer and visualization.
 - The more we put our focus on the future possibilities, the more we stop holding onto the past where those things may not be true anymore for us. We are inviting everyone to look at what is possible as we create an open, transparent culture.