

**A Report to
the Board of Trustees
of
Unity Worldwide Ministries**

**By
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Introduction

At the beginning of 2020, the Board of Trustees of Unity Worldwide Ministries (UWM) hired [John Wimberly](#) as a consultant to help them achieve the following outcomes:

1. Establish a clear consensus on UWM's purpose for the next 3-5 years. Using this purpose, UWM can create goals and strategies to realize the purpose. Clarity of purpose will also enable UWM to better align its people, congregations, staff, buildings, and financial resources with a new strategic vision.
2. With clarity of purpose and proper alignment of resources to achieve the purpose, the UWM organizational culture will begin to develop, with supportive nurturing by the board and CEO, a sense of trust, competency, productivity, teamwork, and joy in serving its membership and the world.
3. The consultant will lead conversations with the board regarding best practices for a board-staff relationship with the goal of building trust between the two. As in any organization, deepening this trust will be an ongoing task for the interim CEO and, ultimately, the permanent CEO.
4. Help shape a clear consensus on the purpose of the central office staff and a new staff design to implement UWM's purpose. The consultant's suggestions regarding options for a new staff design will simplify the process for the leaders assigned the task of finalizing a staff design. The consultant, skilled and experienced in the area of staff design, will remain available to the CEO to share thoughts on developing a high performing staff team.
5. The consultant will help UWM's leadership and staff understand some of the best practices being used by organizations around the country.

To achieve these outcomes, the consultant conducted one-on-one interviews with every member of the UWM central office staff. He also conducted eleven focus groups to obtain feedback from laity, LUTs, and ministers regarding their opinions about: 1) the purpose of UWM going forward, 2) the purpose of the central office staff, and 3) the purpose/function of the board. There were more than 100 participants in the focus groups. The consultant also met with the board at its January meeting in Atlanta.

This report is intended to: 1) summarize the opinion trendlines and patterns in the focus groups, 2) share the consultant's findings flowing from the staff interviews, and 3) make some recommendations regarding a possible staff/organizational redesign to implement UWM's purpose, once it is clarified.

The report will be food for thought for the board prior to its virtual meeting May 6-8, 2020. The consultant recommends that the board consider making the report public so members, ministries, ministers, and UWM staff can be engaged in the planning and staff design processes as they move forward. Transparency is at the heart of organizational best practices in the 21st Century.

I. Focus Groups

Focus groups are a powerful tool to identify what members of a movement are thinking. As explained in an article originating at the University of Arizona,

“...participants are selected because they have certain characteristics in common that relate to the topic of the focus group. The moderator or interviewer creates a permissive and nurturing environment that encourages different perceptions and points of view, without pressuring participants to vote, plan or reach consensus (Krueger, 1988). The group discussion is conducted several times with similar types of participants to identify trends and patterns in perceptions. Careful and systematic analysis of the discussions provide clues and insights as to how a product, service, or opportunity is perceived by the group.”¹

For the purpose of this planning process, an open invitation was extended to members, ministries, and ministers of UWM to participate in one of eleven 90-minute focus groups moderated by the consultant. Well over 100 individuals signed up with more than 100 participating. There most definitely were a lot of “different perceptions and points of view.” That being said, there were also some real points of convergence about what UWM needs to be doing in the future. The focus group conversations provided the consultant with a statistically healthy sample size to ascertain the “clues and insights” of what UWM’s membership is thinking regarding several key questions:

- What do I love about being a part of Unity?
- What is the purpose of UWM within Unity?
- What is the purpose of the central office of UWM?
- What is the purpose of the UWM board?
- How can we serve you better and more effectively?

What do we love about being a part of Unity?

The first question about why people love Unity is important because UWM needs to preserve and build upon these qualities/experiences. Planning away from these key characteristics of the Unity experience would be a clear mistake. The responses of participants were filled with emotion and commitment. There was also considerable agreement on why they love being a part of the Unity movement. The major points of consensus were:

- Practical teachings. Time and again, participants stated their attraction and commitment to the five basic principles of Unity and their practical, simple nature. One person called it “a user-friendly approach to life.”
- We are not told what to believe.
- Inclusivity. For the most part, the inclusivity affirmed was related to the wide scope of beliefs held by Unity members. There was also a yearning for Unity to be more inclusive regarding age, class, race, and ethnicity.
- An emphasis on spiritual growth, personal transformation, and evolution.

- A feeling that “everywhere I go I have a family.”
- Focus on personal goodness not sinfulness
- An emphasis on education and empowerment.
- Numerous people mentioned the positive flow from 12 Step programs to Unity.

What is the purpose of UWM within Unity?

As might be expected, there was difference of opinion in the responses to this question. However, there were many strong areas of agreement, including the comments below. Not all the responses below are formal purposes. But they came up in the discussion of purpose and could be worked into a purpose statement.

- Support ministers and ministries.
- Become a world-class service provider with UWM the provider and ministries the client.
- Stay focused on Unity values.
- Create an environment with accountability built in.
- Create best practices to share amongst laity, LUT’s, and ministers.
- Develop a healthy appreciation for the role of conflict.
- Connect ministries.
- Develop better support for ministries in transition.
- Define regional roles.
- Strengthen evolving ministries.
- Strengthening vocational services.
- Reduce the length and bureaucracy of credentialing.
- Help ministries grow.
- Focus on creating a talented, committed minister pool.
- Focus on marketing.
- The funding model is outdated and needs to be rethought.
- Need for a CEO at UWM who can do both leadership and management.
- Lack of focus. Focus on the bigger purposes and stop focusing on putting out fires.
- Rethink the pioneering concept.
- Focus on core issues. Keep core work in-house, outsource everything else.
- Do administration expertly.
- Education.
- Resources for ministries.
- Legal and financial governance support for ministries.

Other purposes expressed but with less unanimity:

- Be on the cutting edge of ministry.
- Try a zero-base approach to rebuilding UWM in which one starts as though there is no current staff or program and considers what is needed today and in the near future.
- Get out of an us-them model (UWM vs local ministries).
- Outsource a legal expert for ministries to access.

- Have more UWM board members from larger ministries.
- Showcase successful leaders and ministries.
- “If we can’t do it well, don’t do it.”
- Get certification for the seminary.
- Better infrastructure for youth ministry, including college ministry.
- Who supports (define “support”) ministers not serving congregations?
- Develop different strategies for larger congregations than smaller ones.

Key Point of Divergence

One point of divergence kept coming up in different ways. Within Unity (and many other denominations), there is a tension between those wanting more “standardization” and structure within the Unity movement and those who want more independence/autonomy. Indeed, at times the consultant heard the same person expressing both sides of the tension as participants discussed different subjects, e.g. on one issue the participant wanted autonomy, on the next issue she/he wanted structure. One person expressed frustration saying, “We know we are stronger together, but safer alone.”

The consultant believes this tension is an area that needs much more explicit conversation. It is a normal, healthy tension in high performing organizations. Ministries understandably want a high degree of autonomy in many areas. In other areas, focus group participants were clearly calling for some “standards” or “norming.” When this tension is not acknowledged and addressed explicitly as decisions are made, it can become a subtext that undermines the work of a denomination. It is very challenging for the Board of Trustees and staff to do their jobs and propose new ideas when there is a lack of clarity on the issue of autonomy versus denominational norming.

As examples, some participants liked the attempt to create uniform by-laws for ministries; others thought it was heavy handed. Some participants liked the idea of using an established formula for ministries to support UWM; others thought giving should be discretionary by the ministries. Some participants think there should be a baseline belief system for Unity members; others think giving people the right to believe what they want is essential to Unity.

What is the relationship between autonomy and being connected within Unity? It would probably be helpful for the Board of Trustees to lead the denomination through a discussion of this question. Whatever the conclusion, creating clarity about what to expect in terms of autonomy will help the board and staff to know who expects what and work within that framework.

Lack of clarity on this issue will create continuing frustration and division in the denomination. Not everyone will like where the conversation leads or ends. Indeed, some may even leave. However, given the corrosive impact of not addressing the autonomy-connectionalism tension, it is a conversation that is avoided at a very high cost to morale and productivity.

Creating a Purpose Statement

Using the data in the focus groups and their own insights, the Board of Trustees needs to develop a strong, clear Purpose Statement that will describe the destination of where UWM will be in ten years. The Purpose discussion will be in response to the questions: Who are we? What do we want to do? The ten-year implementation process can be broken into three segments (for example, 3-3-4 years). Once the destination is known, the Purpose Statement for the first three years will detail what needs to be done to start moving forward from what is to what will be.

In addition to shaping decisions by the board, the long- and short-term Purpose can be an important tool in understanding the gifts and experience needed by UWM's next Chief Executive Officer. UWM's current mission statement is: *Advancing the movement of spiritual awakening and transformation through Unity, a positive path for spiritual living.* While beautiful and inspirational, does it help in everyday decision-making? Does it help shape the staff design and budget priorities? The consultant doubts that it does.

Using convergence points from the focus groups, there are many options for a purpose statement. Whatever Purpose Statement the board generates in its May deliberations, at the end of the day, Unity needs a Purpose Statement that will serve as a filter for what the board chooses to authorize or not authorize over the next 3-5 years; what the staff will do and not do; what will be funded and not funded.

II. Central Office Interviews and Consultant Thoughts on Them

A. Staff Interviews

The consultant interviewed every member of the central office staff, including those who work remotely from other locations. In the interviews, he was not concerned with performance evaluation. His primary questions were:

- What do you do?
- What aren't you doing that you probably should be doing if given the time and/or authority to do so?
- Do you have the appropriate resources to do your work?
- Are there any staff positions that need to be added to the central office staff?
- Any comments on what the central office should be doing to further the work of ministries?

The purpose of the interviews was to:

1. Allow the consultant to suggest possible changes for a new staff design and hear current staff reactions.
2. Determine if staff have the proper software, hardware, tech support, and other resources.
3. Identify large problematic areas of concern that need to be addressed in order for a new Purpose to be accomplished.

Consensus Points

There were a number of issues that kept coming up in virtually every staff interview.

Workload

Almost every staff member believes that she/he has an overwhelming workload. The metrics supporting these statements involved overflowing inboxes, unanswered voice and email messages, and a sense of not being able to complete one's work. The source of the too large workload seems to come from past reductions in the size of the staff. While the staff was reduced, the workload was not. Instead, the work of departed staff members was rationed out to existing staff. The consultant believes another major factor is the attempt of the central office to be "all things to all people." There seems to be no formal filters which allows managers to say, "No, we don't do that."

Assigning work of former staff to current staff has resulted in workloads that do not always make sense. At times, a single staff person is doing three, quite different types of work. The staff person may have the skills to do Type A work but not Type B or Type C. This problem can only be resolved by a better rationalization of job descriptions and assigning staff to do work for which they are highly skilled.

Non-rationalized, overwhelming workloads also help explain complaints the consultant heard in Focus Groups about unanswered emails and voice messages. When employees are overwhelmed, they oftentimes will appear unresponsive or uncaring to the constituency they are serving.

While staff members did not complain about being underpaid, the consultant asked if the staff received raises (merit or cost of living). The staff has not received any type of raise for at least three years. Obviously, this is not desirable. Another factor has to do with competitive salaries. Are the UWM staff salaries commensurate with other comparable organizations in the Kansas City metro area? This question needs to be addressed.

Silos

During interviews, the consultant repeatedly heard frustration about the silos at the central offices such as Education and Member Services. The consultant did not hear about overt hostility between the silos, as sometimes occurs in organizations. However, he did hear a great deal of desire for increased cooperation and coordination between the silos. Breaking up silos and creating an overall sense of team within an organization is how successful, productive, healthy organizations function. Many are the organizations where there are one or more successful silos, but the organization fails to achieve its purpose.

There are multiple reasons silos appear in organizations. The key in "de-siloing" an organization is not to blame the silo leaders who may be doing their job very well. The key is to recruit strong executive leadership that knows builds a team-driven organization at all levels beginning with a strong executive leadership team. An incredible resource for building this type of leadership team is *The Five Dysfunctions of Team* by Patrick Lencioni.²

Working with the board, the executive leadership team can create a new staff design. The skills and experience of current staff can then be matched to the new design. The end product of such a redesign process will be a non-silo approach to accomplishing UWM's purpose. It will result in:

- Shared planning of programs
- Shared planning of resources needed (software, hardware, copiers, web pages, etc.)
- Shared administration
- Shared approaches to budgeting
- Shared marketing strategies
- Shared staff design (there could be administrative people who work in both silos)
- Shared continuing education opportunities for staff

Software

The staff's work is greatly hindered by the use of multiple software systems within UWM. The finances are done using QuickBooks Pro and QuickBooks Online. Some of the staff do not like the move to QuickBooks Online. Other work is done using the Blackboard, Genius, and NEON software programs. These programs are not compatible. This produces a lot of multiple entries of data.

Some of the software is incapable of doing basic tasks. For one example, money for online course registrations is not easily tracked. As a result, the staff does not have accurate data for something as basic as who has paid and how much revenue a particular course is generating.

Another issue regarding data is the reality that, after data is entered digitally into software, many of the hard copy forms are manually filed. In the 21st Century, this is a flawed administrative practice. One of the advantages of a digitalized information system is that it can be stored in multiple locations (cloud, hard drives, etc.) so hard copies can be discarded.

Finally, how much of the data being accumulated is actually being used and is the time and hassle required to follow up with ministers and ministries to accumulate data worth the time and salary expense? Working with denominations, the consultant routinely finds that a lot of information is accumulated at considerable cost and irritation, but little of it is used in meaningful ways to further the purpose of the organization. Asking some hard questions about what data is absolutely essential is an important task moving forward. Making it possible for ministers and ministries to fill out forms online is also crucial.

Accountability

It is not unusual in faith-based organizations to find accountability issues. UWM is no exception. Many staff members expressed frustration that there is a low level of accountability within the organization. Lack of accountability, in general, results in low staff morale.

One of the strengths of team-driven organizations is that accountability is generated from within the teams, not simply top-down. Team members hold one another accountable for

completing the team's assigned tasks. Turning the central office staff into a team-driven staff will be key to changing the culture and productivity of the central office.

B. The Board

Conversations with the board itself in January, the focus groups, and staff interviews led the consultant to a number of conclusions. Right or wrong, the conclusions should create lively and healthy discussions at the May 2020 board retreat.

In a best practice scenario, a Board of Trustees is the strategic thinker/leader of an organization, not a manager. For example, a board does not manage finances as much as make sure finances are managed. It does not manage staff as much as make sure staff are well managed. In contrast to the best practice, the UWM board has become a "working board."

Due to periodic leadership vacuums within UWM over a number of years, the board has been forced to abandon the best practice of boards and instead "put out fires." It has had to move from strategic leadership to hands-on management. The necessity to deal with everyday management issues has been so intense, the board was forced to abandon its normal procedure of meeting quarterly. To deal with the large number of "fires," it has had to meet monthly. As it became more of a hands-on manager, the board was, wittingly and unwittingly, pulled into management issues in almost every area of UWM's work.

While this evolution of function is understandable and perhaps even commendable to deal with the pressing short-term problems that demanded a leadership and management response, it is not a viable long-term way for a board to operate. Board members will become burned out. Word will get out that being on the board means hands-on management and many capable people will refuse to serve on the board. The Chair of the Board will be forced to spend more time on the job than is reasonable, producing burn-out. The staff will feel as though the board is interfering in its work. Strategic thinking and long-range planning will be replaced by short-term, crisis thinking. Proactive, purpose-driven work will be replaced by reactive, situationally oriented work.

The consultant congratulates the Board for understanding the problems they have inherited regarding the role of the board at UWM and the need to discern a new way of being for the future. At the May board retreat, the board can determine for itself which best practices it wants to embrace for the future, how it can reimagine its role vis-à-vis the staff, how it can create accountability within the denomination, and how it can lead UWM strategically to grow the movement. After communicating its new self-understanding to the denomination and central office staff, the board can once again begin to enjoy the process of leading.

III. Possible Courses of Action

The following thoughts are descriptive, not proscriptive. They flow from the focus groups and interviews and are intended to spark the collective imagination of the board, staff, and members of Unity when it comes to reimagining and redesigning UWM's operational life.

- **Embrace best practices for Boards of Trustees.** The board will consider returning to quarterly meetings, define clear (who does what), accountable board-staff and board-denomination relationships, and adopt a proactive, strategic leadership role in the Unity movement. It will be important for the board to make sure board-related teams and committees do not attempt to manage the staff assigned to them. Staff should be managed by the CEO. The CEO should be held accountable for the overall productivity of the staff.
- **Hire a Skilled, Committed Chief Executive Officer.** Leadership matters. UWM needs a strong CEO who can create a leadership team that works as a high-performance team. The consultant believes the Board of Trustees would be wise to consider lay as well as ordained individuals for this position. It will also be important to reach out to possible candidates as well as encouraging people to apply. Budgeting money for executive coaching is another option to consider.
- **Overall Staff Design.** Once the board approves a Purpose Statement, the interim CEO can begin designing several options for a staff to fulfill the purpose. The process would answer the crucial question: What staff does UWM need to fulfill its purpose? Once the staff design is created, current staff can be assigned to positions consistent with their skill sets and experience. New staff can be added as deemed necessary. The CEO will not have to determine only what staff should do but also *what they should not be doing*. The current staff workload is not sustainable. Quality of work will inevitably be sacrificed by overwhelming quantity. Ministries and ministers may not like the consequences of a reduced workload which will mean reduced services. But at a certain point, one must acknowledge that you get what you pay for. If ministries are not willing to finance a large central office workload, it must be reduced. The central offices cannot take an “all things to all people” approach. The money is not there for such an approach.
- **Financial Management.** The consultant is not convinced the organization needs a “Chief Financial Officer.” Another option would be: Management of macro financial management issues can be outsourced to an outside consultant who works with the CEO and Board Treasurer; a part-time in-house bookkeeper; and a part-time administrative person (this could be part of a shared, larger, full-time position) to handle financial tasks not requiring accounting skills such as receiving checks and posting other financial data. Such a set-up would give staff and ministries a readily available go-to person (the bookkeeper) to answer questions regarding financial questions while the board would have a source of advice (the outside consultant) for macro level planning and decision-making.
- **Financial Foundation.** The current strategy of hoping congregations will tithe support for UWM is, at best, producing uneven results. Can there be a multi-layered approach for ministries to participate in UWM? For example, could there be a “basic membership”

which provides a limited number of services to member ministries and ministers? This “basic membership” would be available to ministries whether they tithe or not. There would another and much broader level of services available to ministries that tithe. “Basic membership” ministries could access the broader level by paying for them as used. For example, “basic membership” ministries would need to pay for a consultant to come in and help resolve a conflict. Tithing members would obtain the service without additional cost. Can such an approach be implemented without having a full-denomination vote? If not, why not? There are surely other multi-tiered strategies that could be devised. One thing we know: the current strategy of accepting what ministries are willing to give yet providing them with a wide range of services is not viable moving forward. Unity is not the only denomination facing this issue. Many others have the same dilemma. Whether UWM embraces such a concept or not, it needs to determine the cost and revenues from each of its programs using an Activity Based Costing method.³ With the new financial tracking system being created, this will be possibility. As net profit/loss is determined for each service provided, the board will have another important metric to consider continuation of certain programs. UWM may well decide to provide a service that loses money. But, at least, it will know that important fact. Finally, UWM may want to examine the hire of a development person.

- **Administration.** Hire a Director of Operations to lead a reorganization of the administrative work in the central office. Again, the consultant does see the need to create a title of Chief Operations Officer. An administrative reorganization would include using an outside information technology consultant to create a functioning system for everything from ministries and ministers doing their annual reports virtually to registration and payments for online classes and events being quick and easy. The software chosen as the heart of the information system should be user-friendly and include significant training for staff. All staff would be required to be up-to-speed in the use of the information technology. UWM needs responsive 24/7 tech support. To do/lead all of this work, UWM may find it more cost effective to hire a Director of Information Services (IT). The Director of Operations can also analyze the work of administrative assistants to centralize that work in better rationalized positions and create greater efficiency. Some organizations have found it important to detach administrative assistants from specific program areas since program area work tends to be seasonal. It also breaks down silos. Having the equivalent of a pool of administrative assistants with a team leader assigning work as it arrives can work well.
- **Customer Service.** Central offices for denominations increasingly are adopting customer service approaches to working with their ministries and ministers. The Director of Operations will want to make sure this happens in the central office. Customer service involves everything from timely responses to email and voice messages as well as efficient follow-up on conversations.
- **Communication.** Any realignment of staff needs to look carefully at the communication and marketing areas. Is the website aimed at the world, ministries, or both? Does the website have a branding or information approach or both? Is the website utilized for educational, governance, and/or other uses?

- **Accreditation Processes.** The consultant repeatedly heard complaints about the processes leading to ordination, becoming an LUT, and Continuing Education requirements. Some raised the question of whether Unity needs its own seminary, especially given its unaccredited status. A special team can be created to streamline accreditation processes and examine if there is a way to have some education done in non-Unity seminaries with core Unity courses taught online or in Lee's Summit.
- **Regions.** The consultant believes an evaluation of the role the regions and regional representatives play in the Unity movement would be helpful to all. Much has changed for faith-based communities with the advent of the 21st Century. Regional bodies in all denominations are experiencing major changes. A special team might be appointed to consider the relationships between regions, regional representatives, UWM, and ministries and make recommendations to the Board of Trustees. Analyzing middle judicatory trends in other denominations will be enlightening.
- **Implementing Change.** The board should consider whether it needs to put every proposed major change up for a full membership vote at the annual conference. Can some major things be implemented by the action of the board? Pure democracy has clear virtues. However, it can also lead to the "tyranny of the minority" where a minority of the membership is able to block much-needed change. Major change is often the product of inspiring, courageous leadership, not majority sentiment. That being said, if the board implements change, it will need to do an excellent job of preparing the way for change: holding focus groups to hear reactions to proposed changes, over-communicating the necessity for a proposed change, and making sure the rollout of the change is successful.

Conclusion

While the task of aligning an organization's resources (people, finances, and facilities) around a clear purpose can be daunting, the leaders and members of UWM can be grateful that they build on a solid foundation: the love members have for what they experience in Unity. The consultant was impressed and moved by the responses focus group participants gave to the question: What do you love about Unity? Change is much more challenging when a faith community's base is dissatisfied with their spiritual experience.

Leadership will face doubts about the ability of a major realignment to succeed. The consultant heard repeated references to relatively recent planning processes that produced little or no meaningful change. However, the consultant also heard a sense of urgency that things must change. The board will want to communicate clearly and regularly the progress it is making as performance measures are achieved. There is nothing better than results to dispel doubt!

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¹ <https://cals.arizona.edu/sfcs/cyfernet/cyfar/focus.htm>

² https://www.amazon.com/Five-Dysfunctions-Team-Leadership-Lencioni-ebook/dp/B006960LQW/ref=tmm_kin_swatch_0?encoding=UTF8&qid=1587390695&sr=8-3

³ Activity Based Costing (ABC) is widely used in the business world. A business that has multiple products will determine what it costs to make each product, what revenue each product generates and the net profit or loss from each product.