

Report to the Board of Trustees  
Unity Worldwide Ministries  
By  
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Re: Feedback from Focus Groups on Proposed Purpose Statement and Priorities  
July 20, 2020

### **Methodology**

The consultant conducted seven focus groups at various times of the week/day. The overall participation was lower than the original focus groups held prior to the Board's planning retreat. The participant total of 59, however, is certainly a representative sampling.

### **Proposed Purpose Statement**

*Develop, equip, and support the worldwide Unity movement for today and tomorrow in innovative, evolutionary, and cutting-edge ways.*

In general, there was approval of the overall thrust of the Board's proposed Purpose Statement. Participants liked the "develop, equip, and support" emphasis. They also liked the emphasis on being more innovative in approaches to UWM's work. While some questioned the exact wording, there were many positive comments about not "staying in a box" by becoming more innovative and cutting edge.

Not surprisingly, there were suggestions to change the specific wording of the statement. They include:

1. Should we narrow the scope of UWM from the "Unity movement" as a whole?
2. If UWM is going to describe itself as "worldwide," how will that become evident in its work in the future? If there isn't a substantive effort to be worldwide, drop the word.
3. Eliminate "innovative, evolutionary, and cutting-edge ways."
4. Add "thrive"
5. Add "sustainable"
6. Add "grow" instead of "support"
7. Need something that gives an outward orientation to UWM's work
8. Add "collaborate"
9. Do we need "today and tomorrow?"
10. No external focus
11. Why we do what we do is not addressed in the purpose statement.

Given the overall approval of the statement's main thrust and the comments above, several options seem to be available to the Board.

### **Priorities**

The conversation around the priorities was much more robust. There was general agreement that Human Resources and Infrastructure need name changes as Priority areas.

The comments, organized by priority areas, were:

- 1. Education: To provide accessible, leading-edge training to equip current and future Unity leaders to expand and grow our movement**
  1. UWSI needs to offer non-synchronous classes to speed up the process for students.
  2. Missing focus on spiritual growth for local Unity leaders.
  3. Focus on Youth Ministry.
  4. Shouldn't there be a common videoconferencing platform through UWM instead of using both Collaborate and Zoom?
  5. Can we teach one another horizontally (ministry to ministry, clergy to clergy) instead of vertically (from UWSI or the central office)?
  6. Need a focus on leadership development in the post-high school/post-college age groups.
  7. Get rid of the collaborative learning portal.
  
- 2. Promotion/Marketing: To evolve our movement through state-of-the art website, social media, and promotional technology**
  1. Love this priority! Multiple people said this.
  2. Make websites and communications through Unity more user-friendly.
  3. Have an online calendar that members can access to enter things
  4. Where is the external focus (marketing and promotion) in the purpose statement?
  5. Need to make sure the local ministries have the product we are marketing nationally.
  
- 3. Infrastructure: To create and sustain infrastructure that allows us to fulfill our purpose with efficiency, flexibility, and excellence**
  1. International ministry doesn't really exist. We should either stop saying it does or devote the resources needed to make it powerful. What can ministries around the world really expect from UWM?
  2. Grow the movement online.
  3. Have a portal where clergy enter their annual reports, list CEU courses, etc.
  4. Better technology for placement services.
  5. Do programs/tech/etc. with age segmentation in mind.
  6. Unity calendar online that can be edited by teams, staff, etc.
  7. Do group purchasing of tech.
  8. Several comments about preference for not hiring current Board members for top leadership positions at UWM.
  9. Create minimum tech standards (online access speed, OS, Office 365, etc.) for local ministries and help them make the purchases needed to reach the standards.
  10. Like the "subscription model." Numerous comments to this effect.
  11. Use a professional recruiter for the Executive Director position.
  12. Enthusiasm for separating Executive Director and Spiritual Leader functions into two positions.

4. **Member Services: To provide best business practices and tools to support meaningful, thriving, and healthy relationships between leaders and their communities**
  1. International Ministry clergy standards need to be upheld as non-Unity clergy are in some positions of leadership in ministries.
  2. Placement services need to be reviewed and upgraded significantly.
  3. Connect congregations with congregations who are having success doing this or that.
  4. Minister and Minister Care category should be “church professionals” to be inclusive of all staff.
  5. Move credentialing to education and eliminate everything else listed under Human Resources, as it isn’t done with the quality needed. This would reduce the priorities to three instead of the current four.

### **Staff Leadership Feedback**

The consultant asked the staff directors for Membership Services and Education to comment on the Purpose Statement and Priority areas. They suggested specific strategies that I strongly advise the Board to consider when strategies are compiled and prioritized. They also had suggestions for the wording attached to their specific priority areas. In Education, the suggestion from Deborah Frownfelter’s UWSI Advisory Team is:

*Education: To provide content for personal spiritual growth and development for all ages and to prepare current and future leaders for creating healthy spiritual community.*

Cynthia Vermillion-Foster and Diane Venzera, from membership services, responded by suggesting the following language for the Education Priority to broaden the priority beyond USWI to include educational work done in Membership Services:

*Education: To provide knowledge and experiential based content which stimulates personal and collective spiritual growth and development for all ages, prepares current and future leaders, and builds healthy communities.*

For Membership services, Cynthia suggest using their current purpose statement: “*To build and develop healthy, vital, and sustainable spiritual communities through online learning modalities that are easily accessible, state-of-art, and relevant in today’s rapidly evolving world.*”

### **Conclusion**

Reflecting on all the comments made in the focus groups, the consultant believes the Board identified priorities that are consistent with what “the field” wants/needs. It is significant that there were no suggestions of an entirely different priority area. Only one person suggested dropping an entire priority area (Member services except credentialing).

I believe the comments regarding a lack of external orientation for UWM are worth further discussion. The research on organizations is clear: those with an external orientation are far more likely to thrive than those focusing on their own internal members and organizational dynamics. The priority areas have some significant pivots to an external orientation. The decision to focus on growth is the ultimate external orientation for any group. To grow, one needs to understand and successfully engage one’s societal environment. The new emphasis on technology and communications has the potential to reorient externally if the work includes

communications aimed at the non-Unity universe. While the priorities have significant external orientation, the purpose statement does not. Adding a few words to the current statement can resolve that issue.

As is well researched, trust is easy to destroy within an organization and slow to build. The focus groups have certainly been a step in the right direction when it comes to creating trust between the Board and staff, Board and field, and staff and field. The transparency created by posting updates and reports on the UWM website have also helped. Hopefully, the next steps in this planning and implementation process will continue the trust building.

The next step for the Board is to finalize the Purpose Statement and Priority areas (with accompanying language explaining the priority). Meanwhile, small teams of people who have skill sets for the various priority areas will meet to brainstorm strategies to accomplish the Priority and Purpose Statement. With those strategies, in addition to the strategy suggestions from the two sets of focus groups, the Board will have reached out to a diverse group of engaged Unity people to get input. At that point, the Board can create a limited number of prioritized strategies to begin transforming UWM into an entity capable of achieving its stated Purpose.