**Strategic Goals Achieved in 2021**

**Update to the Field**

**Outward Focusing**

- **Membership Model.** Clarified our membership service model and will roll out at the 2022 Annual Summit.

- **UWSI Review.** Completed reviews for M&RS, SEE, and LUT Programs. Three teams reviewed each of these programs. Rev. Anna Shouse was the chair for the M&RS review. Dr. Rev. Jane Simmons was the chair for the LUT Program review. Wendy Karr, LUT, was the chair for the SEE Program review.

- **Education Redesign.** Began discussions with stakeholders in September 2021 to redesign our educational program. We are in the process of drafting specialist programs and currently have outlines for two.

- **YFM Curriculum.** Created a Youth & Family Ministry Curriculum; rollout will be January 1, 2022.

- **Spiritual Direction.** Hired Joni Lorraine as the Coordinator for the UWSI Spiritual Direction Certificate Program which began in September 2021 with 15 students.

- **eLearning.** Increased development of eLearning webinars and trainings that focus on continuing education for Unity credentialed leaders, board members, volunteers, and youth ministry teams. We are aligning our offerings with our purpose statement, recruiting subject matter experts both within and outside of Unity, and creating a yearlong catalog of offerings.

- **Resources.** Created digital resources, such as microlearning and self-directed training modules that provide asynchronous learning opportunities for credentialed leaders, board members, volunteers, and youth ministry teams.

- **International.** Began discussions with the International Advisory Council with a goal of finding out how they want to move forward together in their areas of the world and how UWM can support them. We are working on a business plan for an international department within UWM to support international ministers/ministries.
➢ **Website.** Launching by February 2022 on the [www.unity.org](http://www.unity.org) website: “Find a Unity Community.” Completing work for the site.

➢ **Testing-Out Process.** Developed a testing-out process for individuals with deep knowledge and/or experience in Unity. This is currently in the pilot stage.

➢ **Ethics Review System (ERS).** Added, and the UWM Board approved, the ability to rescind an ordination.

➢ **Care & Connections Specialist.** Created an internal position to reach out to leaders and communities on an ongoing basis, connect with and provide pastoral support to families when a credentialed leader passes, and coordinate support for those experiencing loss and challenges such as fires, hurricanes, etc.

➢ **Ministries.** Hired an Evolving Ministry Coordinator to work with study groups (seed ministries), alternative ministries, and full-member ministries to provide deeper support for all ministries.

### Inward Focusing

➢ **Technology.** Hired a Technology Manager to lead a new internal technology team and transition to a cost-effective, cloud-based, agile technology environment. This was accomplished with installation of Office 365 and the collaboration platform Teams.

➢ **Donors/Grants.** Focused on our donor database management in NEON. We created an interim development plan to nurture our donor relationships and enhance our grant initiations.

➢ **Database.** Implemented interim solutions for our customer relationship management (CRM) in our NEON database. Updated our Annual Minister/Ministry Report (AMR) so it can be completed online through a fillable form and uploaded into our database system. Reviewing our registration system for events to be able to upload into NEON.

➢ **Human Resources.** Developed a best-practice stage 1 return to work process using a hybrid work schedule. Phase 2 return to work will begin March 1, 2022, bringing more staff back into the work environment. Developed a best-practice employee guidebook.

➢ **Audit.** Developed strong financial and human resource controls; accurate, timely monthly financial reporting. Completed an audit for 2020; results were an unqualified opinion (clean audit results).

➢ **Entrepreneurial Operating System (EOS).** Implemented a business management system to facilitate the execution of the strategic plan, keeping staff focused on UWM’s purpose, creating a shared structure and operations system for all departments.
➢ **Core Values & Core Focus.** Created core values and a core focus that are part of all decisions made in serving the field. The internal core values are: inclusive, supportive, and resourceful. The core focus is: “Develop and empower Unity credentialed leaders and partner ministries.”

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**Strategic Goals for 2022**

➢ **DEI Program.** Begin training with Dr. Amanda Kemp (Racial Justice from the Heart) January 2022. The initial stages of training will be private mentoring which begins January 2022, followed by a UWM Board of Trustees and UWM staff training February 2022. Develop ongoing training for staff and field members with our focus on “Unity in the Community.”

➢ **SpiritGroups.** Agreement to lease the small groups program called SpiritGroups from Mendhi Audlin for three years at which time UWM will own the contract. This is a program specifically designed for small ministries in support of growing the ministry. Rollout August 2022.

➢ **EarthCare.** UWM will begin providing/funding for the EarthCare Team administrative assistance, technology, online webinar/training/workshop support, and other resources as needed in furthering the team’s strategic plan and focus.

➢ **Redesign Education.** Will continue to design the specifics of specialty areas for our education process and ensure all stakeholders voices are heard throughout the process.

➢ **Ministry Development.** Begin redesigning what we offer to ministers/ministries. Ensuring what is created is innovative and current with the needs of those in the field. Formerly called “Member Services” this area will now be called “Ministry Development.”

➢ **Membership Service Model.** Will continue to refine our service model, rolling out to the field by the fourth quarter of 2022.

➢ **Ministry Planting System.** Create a practice for establishing/developing thriving ministries. The system will also allow existing ministries the opportunity to reexamine the effectiveness of their own ministry and make appropriate changes.
➢ **International Team.** Create an international team within UWM to assist those ministries around the globe, providing them with the services and resources needed. Claudia Maltos-Young has been promoted to International Department Manager and will be hiring a full-time Spanish-speaking assistant and a part-time English-speaking assistant for the department.

➢ **IYOU Event.** Create an onsite IYOU event for 2022.

➢ **Website.** Launching “Find a Community” on Unity World Headquarters' website. Redesign and launch Unity Worldwide Ministries’ new website.

➢ **Mid-Week Ministry.** Create/videotape a weekly service that ministries can use.

➢ **Youth & Family Ministry Support.** Hired Rachel Gaither as the Young Adult Coordinator and will hire a YFM Coordinator to focus on resources.