

UUA Strategic Plan

Our Strategic Vision and the FY 2014 Budget

April, 2013

Introduction

Our shared vision—the Ends of the Association

Our shared vision is an image of a religious people who are deeply relational: connected to our traditions, to our sources, to one another in congregations, and among one another as a larger movement.

Our [Global Ends](#) statement begins, “Grounded in our covenantal tradition, the member congregations of the Unitarian Universalist Association will inspire people to lead lives of humility and purpose, connection and service, thereby transforming themselves and the world.” The draft revised statement affirms “A healthy network of covenanted Unitarian Universalist congregations and communities, in accountable relationships and alive with transforming power, moving our local communities and the world towards more love, justice, and peace at a justifiable cost that does not undermine long term sustainability.” The existing Ends and the draft Ends are not in conflict. Quite the opposite is true; they are two ways of describing the same shared values and aspirations. Both statements of ends lift up that our faith is ultimately *relational*. Our covenantal tradition affirms interconnection, wholeness and interdependence as lying at the core of our theology. Spiritual deepening, covenanted vibrant religious community and collective action for justice are inseparable from one another.

Structure of this report

In this report we will present a proposal for a new headquarters in the context of implementing our larger vision expressed in the Ends. While there are practical reasons for a move, there are also compelling religious and symbolic reasons. Our faith has always been about embracing new possibilities, openness to change and trusting the future. We are a faith that honors the past, but we are called to be faithful to our aspirations.

This report moves from the general to the specific, the strategic to the tactical. The presentation is in the following order:

- Our strategic environment
- Core convictions
- Overarching strategies for realizing the Ends
- Five and ten year plans—programs to reach the Ends
- How the strategy shaped budget choices
- Concluding remarks

Our strategic environment

The need for spiritual community is constant

With all the changes in the religious landscape of America, we must remember that the need for spiritual community is a constant of the human condition. Indeed, we live in an era of unprecedented social isolation and lack of intimacy. In this context, the need for religious community is greater than ever.

“Church” is a declining part of American life

The decline in both mainline and evangelical churches is accelerating. The “nones”—the number of young adults expressing no religious identity—has doubled in a decade. It went from three percent to 12 percent in 50 years—then leaped from 12 to 33 percent since the year 2000. Going to church is simply not the social norm that it was a generation or two generations ago. This presents enormous challenges and opportunities for Unitarian Universalism.

The future is multicultural and multi-faith

The majority of Americans will soon be of ancestry that is not European. In particular, there continues to be a rise of Hispanic and Asian Americans. Many “interracial” marriages are producing millions of children who fit no easy racial or ethnic category. The mixing of cultural traditions includes a mixing of religious traditions.

Core convictions

Unitarian Universalists aspire to be a deep and engaged religious movement

The most thorough expression of the aspirations of our people came through the ["Gathered Here"](#) initiative that invited people into Appreciative Inquiry conversations. Gathered Here showed clearly that we aspire to a faith in which our spirituality is deep, experiential, relational, and moves us to action. Below are the [main themes](#) the Gathered Here leadership team identified. We are at our best when we:

- Grow into our best selves and honor the divine in each person.
- Practice “spiritual justice”: justice making grounded in faith and worship.
- Embrace fellow travelers within and beyond our faith, building community together.
- Proactively invite people to share themselves and their gifts.
- Have such a strong sense of our religious purpose and identity that we must act on it.
- Covenant together to create sustained relationships across all ages and cultures.
- Transcend geographic, national and language barriers.
- Experience spiritual depth, individually and collectively.

Unitarian Universalism has enormous potential

Our potential is not theoretical. It is demonstrated by hundreds of thriving and growing congregations across the nation. Our theology is open to the wisdom of all traditions. We are committed to multiculturalism and anti-racism. Our advocacy for the inclusion of LGBTQ people is consistent with the direction of the larger culture. Our uniting of spirituality with work for justice is what millions seek. We have a new generation of ministerial leadership that is passionate and brilliant. Our lay people are committed, skilled and creative. *No other religious group has the positive potential of Unitarian Universalism.*

Collaboration is essential to our success

All organizations succeed to the extent that they make use of the talents of their people. The UUA staff is committed to working in collaboration with all constituencies to shape our work. For example, the [Leap of Faith](#) initiative that seeks to build learning communities among congregations was largely designed by ministers of our fastest growing churches. The new [“Congregations and Beyond”](#) effort is being “crowdsourced” by cutting edge UUs working in non traditional settings. The [Strategic Review of Professional Ministries](#) was a collaborative effort drawing on input from a number of groups and individuals. We are at historic high levels of collaboration with the [UUMA](#), the [UUSC](#) (the College of Social Justice joint venture), our identity seminaries and the United Church of Christ.

The UUA has a critical role to play in leading change

The UUA staff must play a central role in helping our movement adapt to a rapidly changing environment. Just as collaboration is essential, so is leadership and coordination.

Overarching strategies for realizing the Ends

Engage the religious affections and aspirations of our people

We must ground all of our work—outreach, worship, public witness, faith development—in our religious values and our spiritual tradition.

Unleash, guide and resource our people

The UUA fills a complex role. At one level, we develop resources. At another level, we also lead by expressing our common vision and by being advocates for new directions. Our staff is already in the process of shifting from content creation to “curation.” Curation refers to the role of vetting and sharing resources as opposed to creating them.

Develop leadership that is entrepreneurial, courageous and grounded

The task of helping to grow lay and professional leaders is a collective responsibility. Congregations play a critical role. Our seminaries and professional associations have an essential part to play. In addition, the UUA has a role in casting a vision and providing resources.

UUA must be a prophet of the possible

Organizations adapt to a changing world only when they can create and sustain a sense of urgency. Urgency is not panic. Urgency is a sense that what we need to do is important and that we have the capacity to do it. A critical part that the UUA must play is to be an advocate for realistic, ambitious, doable changes.

Help our movement cross the borders of race, class and culture

Just as the UUA has provided leadership in the area of anti-racism, we must also lead change to help our people cross the borders of class and culture. This is best accomplished through providing experiential learning and volunteer opportunities in combination with education and spiritual reflection.

UUA should be a national and international voice for compassion, peace, justice and equality

The UUA has long had the role of being the voice for our movement at the national and international levels. Indeed, many of the great issues before us (immigration, economic justice, environmental justice) are inherently international in scope.

Five and ten year plans—programs to reach the Ends

We live in a period of rapid and unpredictable cultural upheaval. Just a decade ago no one was predicting the meteoric rise of the “nones” in American culture. Ten years ago we could not foresee the impact of social media or the pervasive effects of mobile computing.

The rate and unpredictability of change put a premium on flexibility and adaptability. This means that bold, entrepreneurial leadership and collaboration will be key.

The next five years: strategies

The UUA is going to have to do two critically important things both in the short term and over the next generation.

Partner with our member congregations as they face the cultural and demographic shifts that are under way.

Explore ways that Unitarian Universalism can expand beyond its base of traditional congregations. In actual practice, supporting our congregations and reaching beyond our base converge and are interdependent.

Nurture congregational vitality and connections among congregations

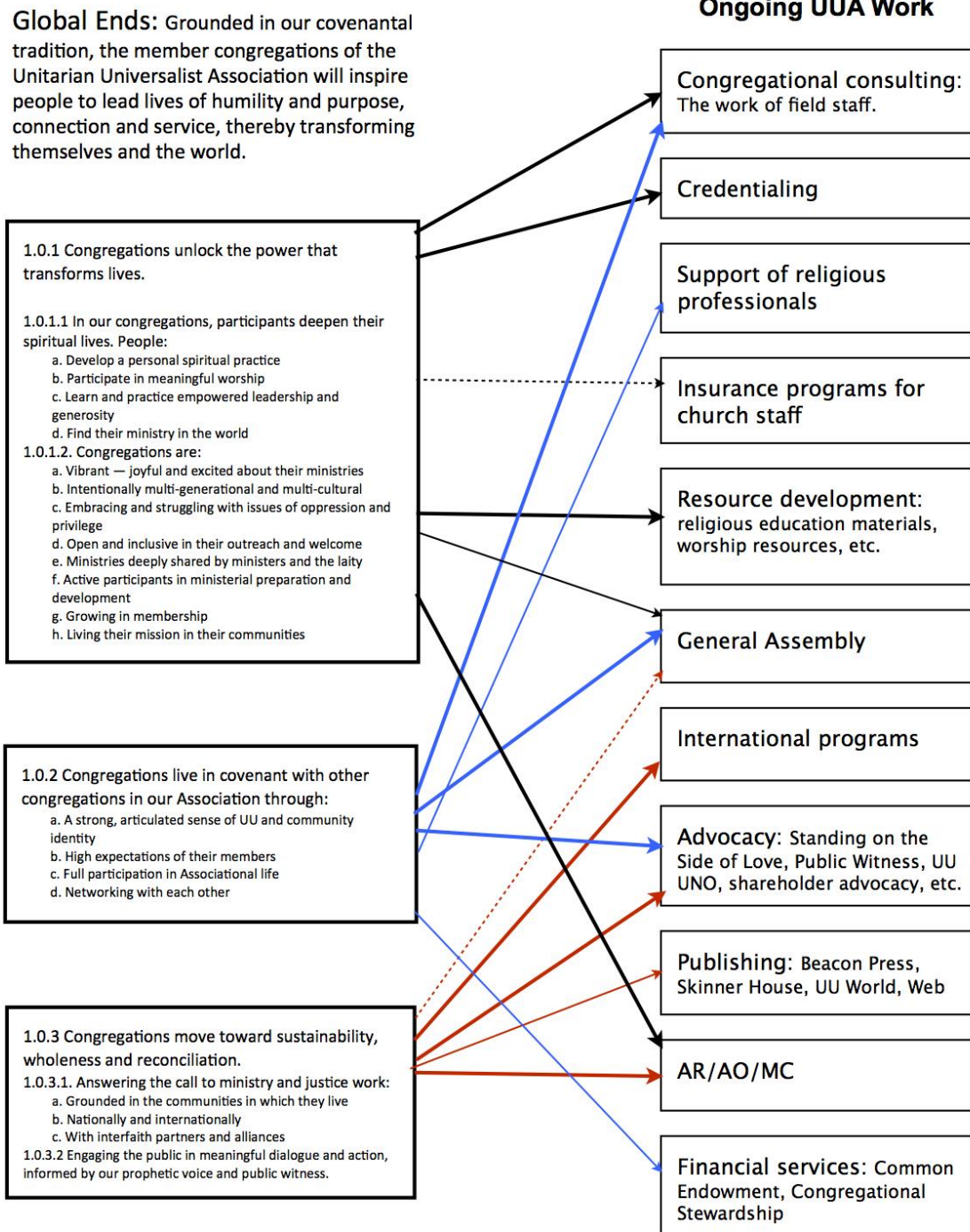
The overwhelming majority of the UUA staff's efforts support the vitality of our member congregations. These efforts span a broad spectrum that includes: consultation with congregations through our field staff, credentialing and continuing development of religious professionals, financial services such as health insurance and retirement fund management, development and dissemination of resources for worship and faith development, General Assembly, settlement services for ministers and religious educators, and more. In addition, the staff takes an active role in expressing our shared values in public witness and initiatives like Standing on the Side of Love and our efforts to expand diversity.

All of the work of UUA staff is intended to realize the shared Ends of the Association. Both the major areas of ongoing work and the new initiatives of the last three and a half years support more than one of the sub Ends.

The following charts illustrate the connections between major areas of staff effort and both the current and the draft global Ends.

Global Ends and the ongoing work of the UUA staff

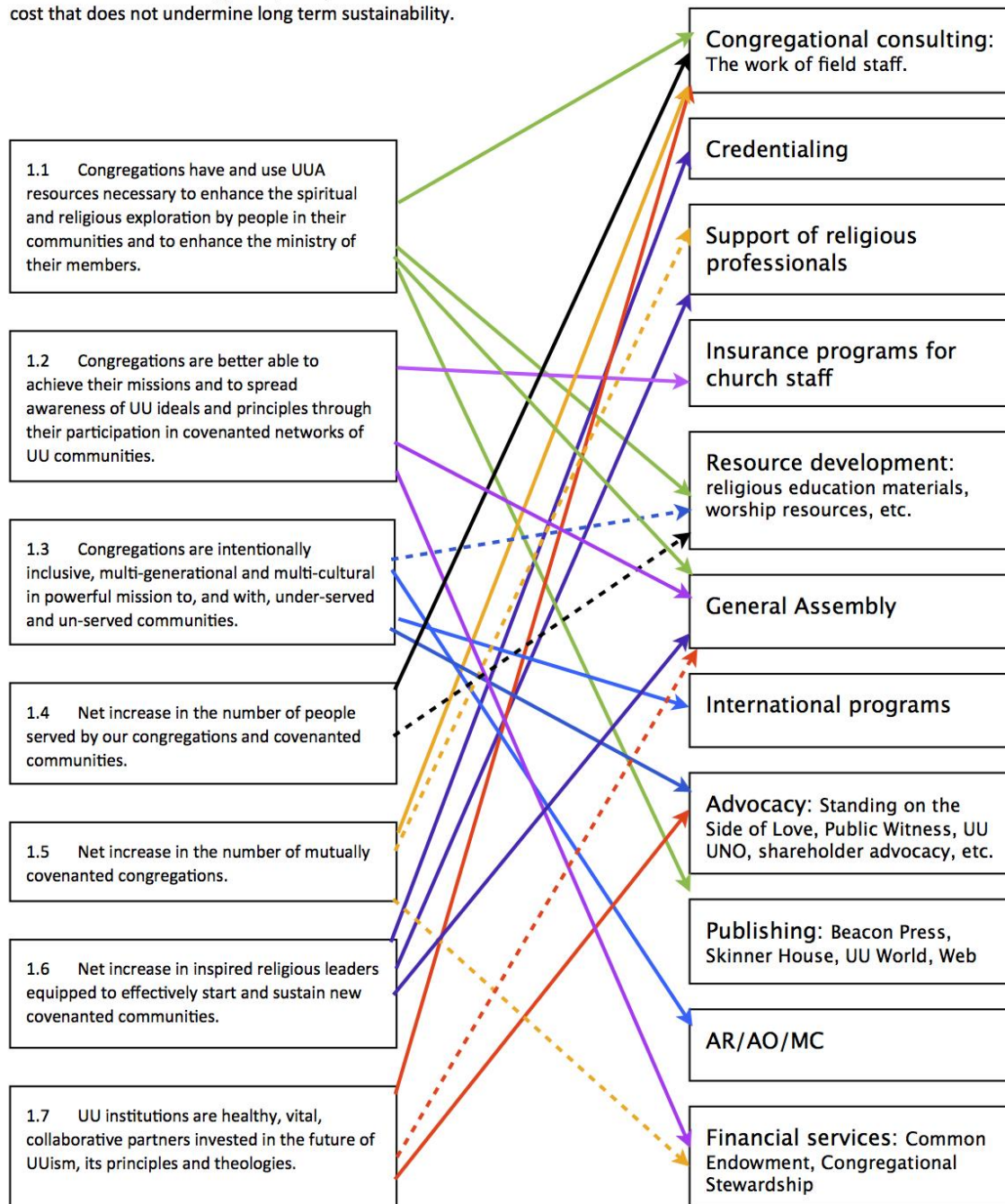
[Thin and dotted lines represent connections that are less strong.]



Draft Global Ends and the ongoing work of the UUA staff

Draft Global Ends: A healthy network of covenanted Unitarian Universalist congregations and communities, in accountable relationships and alive with transforming power, moving our local communities and the world towards more love, justice, and peace at a justifiable cost that does not undermine long term sustainability.

Ongoing UUA Work

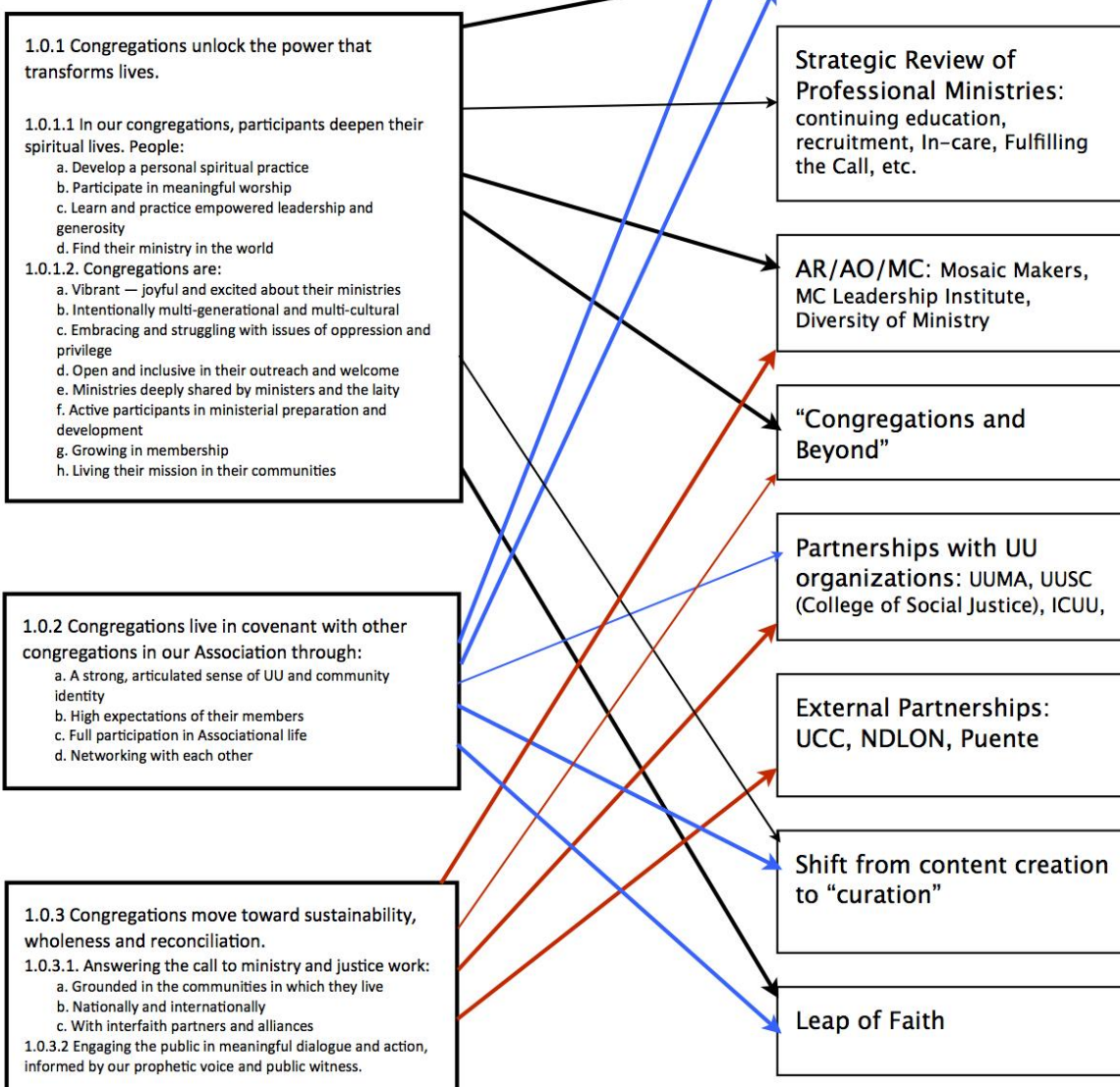


In addition to our ongoing core activities and programs, this administration has undertaken a several strategic initiatives. These, too, are in support of the current and draft revised Ends. The major initiatives include [regionalization](#), the [Strategic Plan for Professional Ministries](#), [Leap of Faith](#) (partnering congregations with growth potential), [Gathered Here](#) (Appreciative Inquiry conversations throughout the Association), new programs to promote diversity and, most recently, the [“Congregations and Beyond”](#) focus on reaching out beyond our current base. Each one of these efforts was designed as a broad collaboration between headquarters staff and a variety of stakeholders.

The following charts illustrate some of our recent initiatives and shows how they support current and draft revised Ends of the Association.

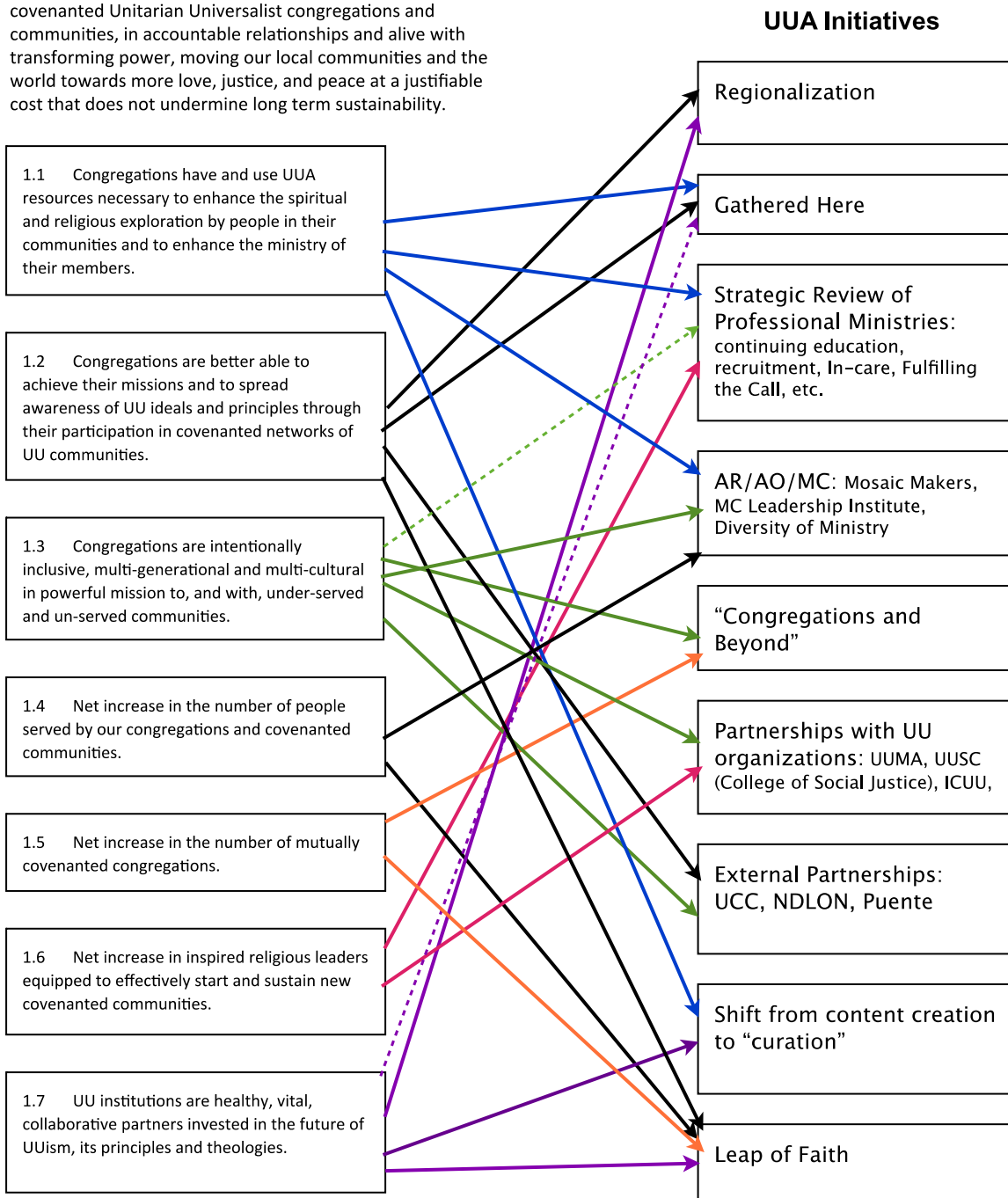
Global Ends and the recent initiatives of the UUA staff

Global Ends: Grounded in our covenantal tradition, the member congregations of the Unitarian Universalist Association will inspire people to lead lives of humility and purpose, connection and service, thereby transforming themselves and the world.



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Reach beyond our current membership

The second part of our overall strategy, beyond our efforts to nurture congregational vitality, is to realize the enormous potential of Unitarian Universalism by engaging people who are not now part of our Association. This includes the hundreds of thousands who identify as UU but are not members of congregations and the literally *millions* of people who share our values and perspective but who are wary of organized religion. We have called this initiative “Congregations and Beyond.” The new developments in our culture can be a historic opportunity for Unitarian Universalism.

In actual practice, this work of reaching beyond our walls must be done in close collaboration among Association headquarters staff, field staff and our congregations. Work in this area will include expanding our use of social media and support of new forms of congregational formation such as online communities and multi-campus congregations.

The next five years: tactics

In the next five years we will initiate new efforts to seize our historic opportunity. In addition, we will carry forward the implementation of key initiatives that are currently under way.

Implementation of Strategic Plan for Professional Ministries

recommendations: We will expand our implementation of [the recommendations](#) that came from the Strategic Review of Professional Ministries. This will include development of a program for entrepreneurial ministerial leadership, a new program for recruitment of the next generation of ministers, full implementation of the “Fulfilling the Call” initiative on assessment of ministers.

Diversity in ministry: With respect to increasing diversity of religious professionals, we will continue a shift from a concentration on initial settlement to the nurturing and support of the increasing number of people of color who serve our congregations.

Create a new image for Unitarian Universalism: As part of our determination to reach those outside our membership, we intend to position the UUA as a key leader in progressive religion in the United States. This will require a new communications strategy, a new web presence, and expanded use of electronic media.

Nurture new forms of congregational organization: We will support outreach by helping form new congregations and new forms of congregational organization. This will include such diverse initiatives as on line communities and multi-campus congregations.

Regionalization: We will complete the process of regionalization of field staff. This is well under way now.

From content creation to curation: Implement the shift from a focus on content creation to “curation.” This is aimed at harnessing the creativity and initiative throughout our movement. We should also mention that the number of field staff has increased over

the last decade. The UUA has a higher percent of its human resources in the field than ever before.

Public Witness and Social Justice: We will expand our social justice and public witness efforts in close collaboration with individual congregations, clusters, and statewide advocacy networks. We will also build on the precedent of having UCC leadership at Justice GA and build new alliances with other religious progressives.

Stewardship: We will develop and implement new models of stewardship and support for our Association. The pilot program [“GIFT”](#) (Generously Investing for Tomorrow) in the Southern Region will serve as a model and testing ground. We will also conduct a new comprehensive fundraising campaign.

The next ten years and beyond

It would be arrogant and unwise to believe we can predict with any precision what cultural shifts will affect Unitarian Universalism a decade out. One major change is certain, however. The ethnic and cultural diversity of Americans will continue to increase. All of the people who will enter young adulthood in the next generation are already born, and they include large increases in Latinos and Asians, as well as children whose racial and ethnic backgrounds are so mixed that current categories are becoming less and less descriptive.

Similarly, it is harder than ever to predict the size and configuration of our Association. The rapid increase in the number of unchurched may affect us in significant ways. So far we have avoided the large declines that have affected mainline congregations. On the other hand, the rapid growth in numbers and diversity in many of our congregations shows that we have tremendous growth potential. Our best estimate is that the number of staff will change slightly (probably plus or minus ten percent), but that the work that they do will change significantly.

While our work will change in some ways we cannot predict, the two main strategic directions will continue for a long time. In ten or twenty years we will still devote much of our effort to supporting our member congregations. We will also be exploring new ways of engaging millions of people who share our values, who long for spiritual community and who want to join with others to heal the world.

How the strategy shaped budget choices

This strategic vision was circulated to the Leadership Council in advance of our budget meetings and discussed at the outset of our deliberations. Throughout the process we were clear that the difficult budget decisions we had to make needed to be shaped by our strategic vision.

The strategic vision that calls for partnering with our congregations and also exploring ways to reach beyond our current membership, as well as the tactics listed above, shaped our budget decisions in a number of ways. Below is a list of major budget priorities driven by our strategy:

- **Direct service to congregations:** We protected our field operations that consult directly with our congregations. In spite of the fact that 10 positions were cut from the staff, we maintained the staffing level in the field. In addition, we are committed to proceeding with the regionalization of services throughout the Association.
- **Reaching beyond our membership:** While we had to find economies in a number of areas, we preserved our efforts to create a communications strategy designed to reach beyond the walls of our current congregations.
- **Strategic Review of Professional Ministries:** We are in the process of implementing the recommendations of this review. Further implementation this year involves dissemination of the “Beyond the Call” professional development initiative, completing design of a program for developing entrepreneurial ministry, and the Panel on Theological Education’s work to develop a recruitment program.
- **Comprehensive Campaign:** We will launch a comprehensive fundraising campaign in this budget year.

Concluding remarks

This is a time filled with challenges and opportunities for our faith.

The challenges include a rapid rise in Americans who have rejected all religious institutions and rapidly growing ethnic and cultural diversity. We simply cannot continue to practice Unitarian Universalism the way we did a generation or two generations ago.

Yet this is also a time of historic opportunity. We see UU congregations that have excellent leadership and sense of mission thriving and growing. These congregations are proof that our liberal religion can feed the human hunger for spiritual community. The generation that is rejecting religion is not so much against religion as it is against hypocrisy and narrow-mindedness. They are hungry for spiritual community that is liberating, deep and engaging. Our challenge is to help our faith feed that hunger.