

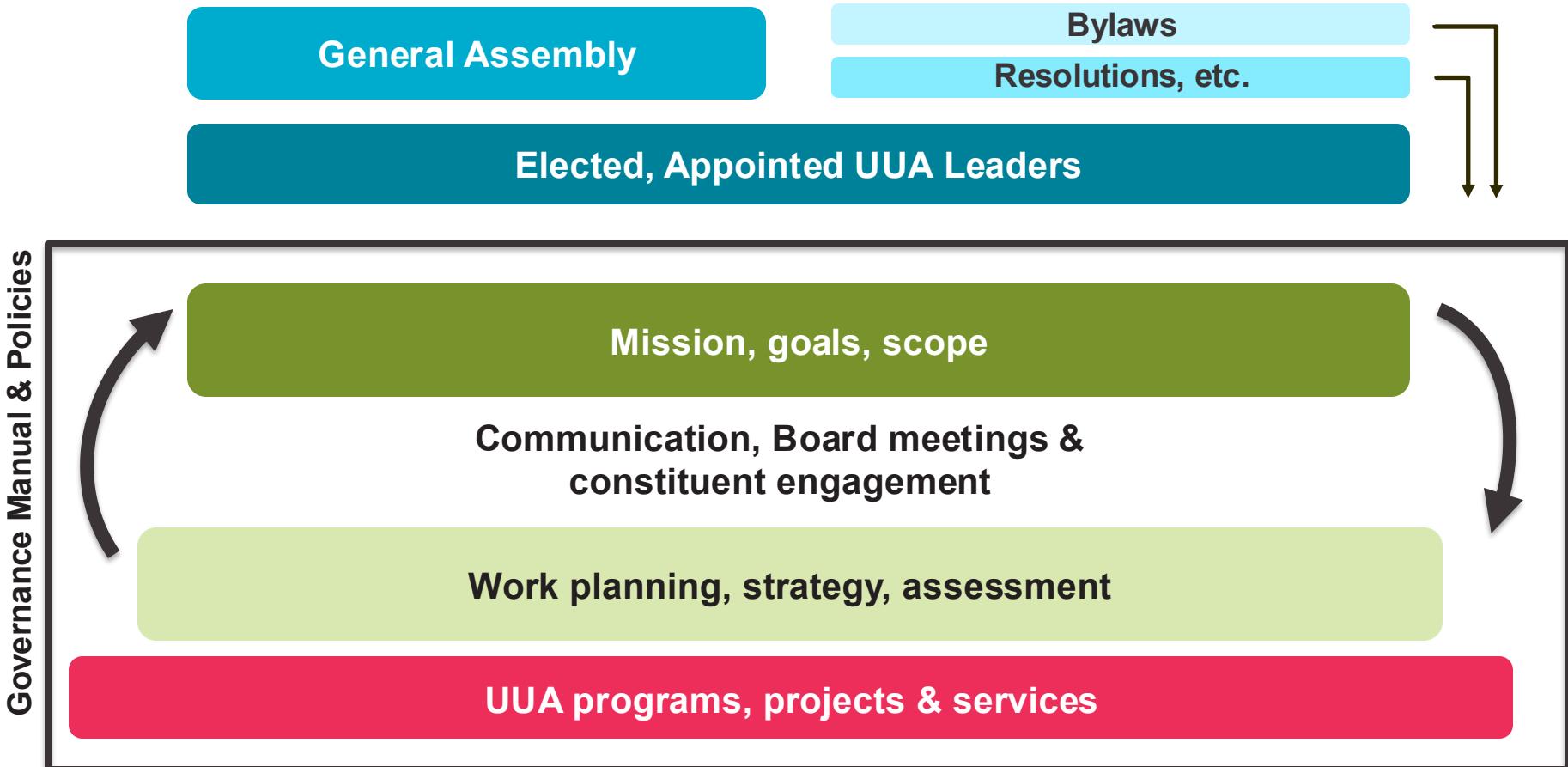


UUA Board of Trustees – January 2026

STRATEGY & PLANNING



October discussion recap





Strategy & Planning Working Group

Key questions

- How can the Board help ensure the UUA is able to manage priority-setting over time, through leadership transitions, while maintaining continuity, responsiveness, and meaningful roles for elected leaders?
- How can we deepen clarity around the UUA's mission and values, especially in relation to what goals the annual budget approval supports?
- How can Board members better be in touch with a wide range of constituents, to inform their work?





Elements of Strategy

What does “success” mean?
How will you know?

What resources can you
use? What do you need?



Where are you headed? What
is yours to do?

What is your unique strength?
What is NOT yours to do?

Where do you start? How do
you build momentum?

Governance & Policy for Strategy & Planning





Section C-2.1. Purposes

The Unitarian Universalist Association will devote its resources to and use its organizational powers for religious, educational, and humanitarian purposes. Its primary purposes are:

- a) to assist congregations in their vital ministries,
- b) to support and train leaders both lay and professional,
- c) to foster lifelong faith formation and spiritual development,
- d) to heal historic injustices,
- e) to support and encourage the creation of new Unitarian Universalist communities, and
- f) to advance our Unitarian Universalist values in the world.

The Unitarian Universalist Association will actively engage its members in the transformation of the world through liberating Love.





Proposed Approach

Mission / Purpose

Scope / Interpretation

- Develop interpretations of what each element of the UUA's purposes requires (mission areas and sub-areas of work)
- Interpretations are drafted by the Administration and received/affirmed by the Board; replaces the "global ends"
- Discuss draft interpretations at April 2026 meeting, alongside budget approval
- Focus this year on core mission elements a), b), f), incorporate c)
- In future years, develop interpretations for elements d) & e), as well as scope for core internal functions and "holding the heart of the faith"





Proposed Approach

Example

Purpose Element F – Advance UU values in the world

- Mission areas – Communications, Justice Organizing, Publishing, Values-Based Investing, Global Connections
- Sub-areas for Communications
 - Publish UU World magazine and digital publications to connect with congregational members
 - Maintain uua.org as the front-page for Unitarian Universalism
 - Promote UU values through public statements, news media and social media





Proposed Approach

Goals / Metrics

- Once mission area and sub-area interpretations are completed, administration identifies metrics and/or goals for each area and sub-area
- Identify measurable 1-5 year goals for each mission sub-area, with clear metrics for impact (e.g. expanded dashboard)
- Goals will be grounded in outcomes from Meet the Moment, as well as staff strategy, planning & assessment
- Present these, or a subset, at October 2026 Board meeting





Discussion Questions

- Does this strike the right balance between Board and Administration roles?
- What information does the Board need from staff in advance to engage these discussions fully?
- How can stakeholder input be involved at the Board level, in addition to the staff level?
- How often are mission interpretations revisited/reaffirmed? How often are goals and impact metrics reviewed?
- How do we best embody a sustainable cycle of feedback, strategy and impact?

