

Implementing Our Strategic Vision

Report to the UUA Board of Trustees

The Rev. Peter Morales, President

April, 2012

Introduction

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.” Our shared vision is an image of people with deep connections: connections to our traditions, to our sources, to each other in congregations, and among one another as a larger movement.

Understanding the centrality of interconnection at the core of our vision is essential. Spiritual deepening, intimate religious community, vibrant congregational life and collective action for compassion and justice are inseparable from one another.

In this report we will present the coming year’s budget in the context of implementing our larger vision. This report moves from the general to the specific, the strategic to the tactical. The presentation is in the following order:

- core assumptions and convictions
- overarching strategies
- programmatic initiatives
- implications for FY 13 budget
- five year vision
- concluding remarks

Each section follows from the former. Our strategies follow our assumptions; program initiatives are an implementation of the strategies; program priorities drive the budget. All of this leads to a vision of where we would like to be in five years.

Core assumptions and convictions

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 mainline churches continues. The “nones”—the number of young adults expressing no religious identity—has doubled in a decade. It went from 3 percent to 12 percent in 50 years—then leaped from 12 to 25 percent in the last decade. Going to church is simply not the social norm that it was a generation or two generations ago.

The future is multicultural

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.

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 LGBT people is consistent with the direction of the larger culture. We have a new generation of ministerial leadership that is passionate and brilliant. No religious group I know of has the positive potential of Unitarian Universalism.

Unitarian Universalism is overflowing with talent, idealism and passion

This is true at all levels. Our lay people are skilled and committed. Our challenge as leaders is to engage this passion and help provide channels for its expression.

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 UU’s 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.

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

We must engage the religious affections and aspirations of our people

This is what I mean by our need to “get religion.” We must ground all of our work—outreach, worship, public witness, faith development—in our religious values and our spiritual tradition.

We must 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.

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.

We must 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.

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.

Programmatic initiatives

The follow are some of the central program initiatives that seek to implement our vision.

Leap of Faith

This initiative seeks to develop a culture of mentoring and mutual learning among our congregations. It was based on our convictions that we have outstanding resources within our association and that collaboration among congregations is key to our success. Its structure was designed in close cooperation with a group of ministers representing our most innovative congregations. The pilot implementation has also been evaluated by professional outside program evaluators.

Gathered Here

This initiative, still underway, is a way to help our congregations “get religion” by getting in touch with what they truly value. It is also a way of building relationships across congregations and throughout our movement. Finally, it is a way for the UUA Board and UUA staff to be in touch with our people in a deeper way.

Strategic review of professional ministries

This review, conducted in the first year of this administration, laid out a number of goals. It is significant that these goals were developed in consultation with professional associations (UUMA, LREDA, UUMN, UUSCM) and with our seminaries. It also took input from a number of individuals. The goals laid out are now guiding the work of the Ministries and Faith Development staff group and are the subject of a separate report.

UUA/UUSC Joint Venture (“College of Social Justice”)

This collaboration is an attempt to pull together the resources and strengths of the UUSC and the UUA. It is beginning with a concentration on experiential learning and volunteer service opportunities that are cross cultural.

Congregations and Beyond

This is the name we are giving to a group of developmental activities that seek to engage people who share our values but who are not currently members of our congregations. The implications of this work, still in the design phase, are enormous.

Implications for FY13 budget

All of the initiatives above are included in the FY13 budget proposal. Admittedly, we would like to have more financial support for some of them. This budget represents what the UUA Leadership Council believes, after long deliberation, is the best balance between maintaining the essential programs that support our congregations (credentialing, resource development, consultation, financial services, publishing, etc.) and seizing the opportunities before us. Specifically, we have included funding for the following initiatives:

Congregations and Beyond

Our initial funding will allow for modest exploratory work aimed at looking into understanding better the people who are linked to Unitarian Universalism but not currently members of congregations. We will also explore some of the technical options for creating a hub and platform for communications.

Communications

We will implement some of the top recommendations of the internal task force charged with a review of UUA communications.

Joint Venture with UUSC

We have included \$75,000 as our part of the initial funding for the “College of Social Justice.”

Strategic Review of Professional Ministry implementation

We will continue our work in areas including mentoring, continuing education, the development of behavioral rubrics for ordained ministry and expansion of multicultural experiences.

Five year vision

Nurture congregational vitality

The vast 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 development of religious professionals, financial services such as health insurance and endowment investment, development of resources for worship and faith development, 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 in our ministry.

In the coming years we will continue to expand what has been most effective—the close collaboration with congregations, stakeholder groups and leaders. We will continue the process of regionalization of congregational services. Regionalization allows for us to be more effective in the use of our staff and more versatile.

One of the areas we must expand is development of a culture of collaboration and learning across our congregations. Our pilot program called “Leap of Faith” was a modest beginning from which we learned much.

In five years our field staff will be significantly more adept at meeting the needs of our congregations. Our transition to regionalization will be complete.

Develop methods to engage people beyond our congregations

The most exciting development in the last year has been our growing focus on reaching people beyond our congregations. We have long recognized that many people who identify as Unitarian Universalists are not members of our congregations. Our ministers are increasingly serving in settings outside the parish—hospices, hospitals, the military, nonprofit organizations.

In the coming year we are shifting some staff resources to do developmental work in this area. We are convinced that this is an initiative that, if done well, will help our congregations to connect with more people.

We also believe that we can connect with people who share our values and who can help us be more effective advocates for compassion and justice.

In five years we will have the capability of engaging tens of thousands more people, informing them of important events and inviting their generous support of important initiatives.

A UUA staff that is agile, cutting edge, leads change through collaboration

While we believe that the UUA staff must adjust to a rapidly changing environment, the size and distribution of our staff is not likely to change in a major way.

While we are committed to continuing the process of regionalization, that process is a matter of allocation of field staff resources. It does not require a major investment in regional offices. Indeed, that would be expensive and counterproductive. Regular gatherings of regional staff supplemented by electronic communications is more efficient

and agile. Regionalization has much more to do with field staff resource allocation than with physical location.

Similarly, the size of our headquarters staff will remain constant. The staff functions that are performed currently at headquarters do not lend themselves to decentralization. Those activities include finance, communications, publishing (both Beacon and Skinner House), human resources, IT, support for credentialing of religious professionals, and the administrative functions of the office of the president.

The key for us is to develop flexibility in our physical headquarters that allows for a variety of meeting sizes and the implementation of better electronic communications that make possible better collaboration among staff, volunteers, and stakeholders.

In five years we hope to be well settled in to a modern, flexible, hospitable headquarters facility that allows us to work together more effectively.

Concluding remarks

This is a time filled with challenges and opportunities.

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 the opposite is also true. We see UU congregations that have excellent leadership and sense of mission thriving and growing. These congregations are proof of the need that our liberal religion call fill and the good it can do in the world. 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 at the UUA is to do two things simultaneously. First, we must expand and improve all our work that nurtures our congregations. Second, we must help our congregations and our entire movement to reach beyond its membership. There are vast numbers who share our values and our faith. We must use all the means we have to reach out to them.

We can do this. We have the idealism. We have the passion. We have the skills. Working together, learning from one another, supporting one another, we can truly make Unitarian Universalism the religion for our time.