

# **UUSJ Strategic Planning Process 2019-2020**

## **Mission/Vision Team Report to the UUSJ Board**

**June 10, 2020**

**Team Members:** Charlotte Jones-Carroll, Terry Grogan, Serena Lowe, Pat Behenna, and Gary Magnuson.

**Assignment:** The Team was tasked to review the existing UUSJ Vision Statement and Mission Statement, and if necessary, develop alternative statement versions that better reflect where the UUSJ is in its 2019-2020 strategic planning process.

**Background:** Strategic planning is a key function of an organization's management that helps to set priorities, allocate resources, and ensure that members and staff of the organization are working towards common goals and objectives. However, for strategic planning to be effective, there are two important tools that are needed – a vision statement and a mission statement. These statements serve as a guide for developing objectives and goals in the organization, thus providing a road-map for what the organization desires to achieve.

**Importance of Vision Statement:** A vision statement is used to describe a preferred **future state** of the organization, i.e., what the organization hopes to become in the future. It provides long-term direction for the organization. It also communicates the purpose of the organization to members, staff, and stakeholders and provides them with the inspiration to achieve that purpose.

**Importance of Mission Statement:** A mission statement describes the **current state** of an organization. It provides detailed information about what the organization does, how it does it, and who it does it for. Unlike the vision statement, it is short-term in nature. However, it is related to the vision statement as it outlines primary organizational goals that are intended to achieve a desired future for the organization. The mission statement therefore is an essential building block of the organization's strategic planning.

**Team Actions:** At the May 3, 2020 UUSJ Strategic Planning meeting that discussed UUSJ moral owners and vision and mission statements, Team members volunteered to accept the task of reviewing the existing UUSJ mission and vision statements, and developing possible alternative statements for the UUSJ Board's consideration. The Team began its work with a Zoom meeting on May 18, 2020, utilizing input from the May 3 meeting. Team continued its work via email to review submitted comments and suggested edits from Board members, and to exchange ideas. This led to the final versions that are presented in this report for the Board's consideration.

## **Proposed UUSJ Vision Statement:**

### **A just, compassionate and sustainable world community**

*We began with UUSJ's current vision and brought forward key elements of the existing vision that we believed were important to maintain (just, sustainable, world). We then discussed the importance of visualization, and felt the vision would be stronger if it embodied a "world community" (consistent with language in UU principle 6) and to "personalize" the statement. We also included the word "compassionate" in alignment with UU Principle 2 ("Justice, equity and compassion in human relations"). We also removed the words "We envision." Did not think the words were necessary in a vision statement.*

*We realize this is an ambitious statement, but believe it speaks to the heart of what UUSJ embodies and envisions for the future.*

## **Proposed UUSJ Mission statement:**

### **Advance equitable national policies and actions, aligned with UU values, through engagement, education and advocacy.**

*This proposed Mission Statement succinctly describes the current "business" of the UUSJ, what it does and how it does it. It also describes its primary goals, to advance equitable national policies and actions.*

*Having the UUSJ mission aligned with UU values based on its 7 Principles, sets it apart from other organizations' missions. Stating for all who may be interested, its strategic importance.*

*Therefore, bedrock of the proposed Mission Statement are the foundational values and moral guides of Unitarian Universalists. What better guide for UUSJ strategies and activities to define and accomplish its mission.*

*The Team also addressed the terms "federal" and "national", and took the position that national was more inclusive and less limiting regarding matters that are of mutual concern with state and local government. We also chose the recommended word, "engagement" instead of "empowerment" to recognize that others are empowered without UUSJ but may need to be engaged and educated in order to advocate. In addition, we included "actions" with policies, to again be more inclusive and include federal matters outside of policies, such as regulatory changes and executive actions that are not in line with existing policies.*

*We recently confirmed that among UUSJ's moral owners are people impacted by systems of oppression. As UUSJ discusses how to listen more to and take better account of ideas and goals of such people, we will likely have many moments to convey our mission. We need a succinct way to let those groups know what our values and principles are. "Equity" comes right out of our second UU principle. Rather than refer to the hundred-word statement that embodies all our UU principles, this proposed mission statement uses the essence of what matters to us in human relations, in a way that should inspire these moral owners to recognize us as an ally.*