

**MORRISTOWN
UNITARIAN UNIVERSALIST
FELLOWSHIP**

***STRATEGIC PLAN 2022
Soaring into the 20s!***



Congregational Summary of Strategic Plan

**MUUF Strategic Planning Task Force
February 2022**

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I. Introduction

This document is the culmination of months spent refining our vision, defining our core values and assessing our strengths and weaknesses. The goal of this Strategic Planning is to help us, as a UU community, align our gifts and resources with our core values, and help position us to take advantage of opportunities to be a force for positive change in the world.

This strategic plan falls at a pivotal moment that we could not have anticipated. The COVID-19 pandemic was a disruption of societies across the globe on a grand scale. This upheaval has been the impetus for much introspection and change on both personal and societal levels. This plan reflects this upheaval, as we strive to be more, to do more and to engage more fully both within our community and with those outside our walls.

II. Strategic Planning Process

A. What the strategic planning process included

A new planning cycle began with the Board in 2019. A Strategic Planning Task Force was engaged and started working in late 2019, just before COVID hit. We were able to start again in fall 2020 and held a Strategic Planning Summit in May 2021. After the Summit, teams worked on six Strategic Directions in Action Planning Teams and developed plans for each of the directions. These plans were condensed and worked into an overall Strategic Plan, presented here

III. Strategic Planning Summit

Summary of the Summit available at:

<https://morristownunitarian.sharepoint.com/:w:/r/sites/StrategicPlanning/Shared%20Documents/Writing%20the%20Plan/2021%20MUUF%20Strategic%20Planning%20Summit%20Summary%20-%20Carol%20Johnson.docx?d=wea48719259a64c1f88a896f08c9929b2&csf=1&web=1&e=Hh0f3Z>

IV. Vision for Morristown Unitarian Universalist Fellowship's Future

The members and friends of the Morristown Unitarian Universalist Fellowship envision a large, well-recognized, multi-cultural, vibrant congregation with expanded facilities supporting a greater range of programs, ready to make a difference in our region and in the wider world.

We hope to welcome more people to join this congregation from varied backgrounds, heritages, and identities. We wish to use the principles of UUism to guide our interactions and activism. We wish to become a more justice-seeking and environmentally-aware congregation, ready to work with community groups to seek social and environmental justice and to prepare for climate change.

We want to share the joys of Unitarian Universalism and its moral philosophies, and promote and enable spiritual growth for individuals and for our community. We want to retain our members, and keep our youth and young adults engaged in UUism as they become fully integrated members of our congregation and of society at large. The next generations are key to the growth of our fellowship and UUism as a whole.

In order to achieve this, we need to expand and diversify our membership to provide the community connections, volunteer resources, and financial support needed to develop the programs and facilities which will make a difference in our community and in the world.

V. Summary of New Initiatives

While there are a number of action steps on the tables and within each Team's list, many are continuations of programs and ideas that were already in planning stages or in process at MUUF prior to the Strategic Planning process. Those works are included in this strategic plan in order to assist with planning throughout the Fellowship. The new initiatives are as follows:

Team 1: Expanding Community and Congregational Involvement

- Establish a Volunteer Resources Team with a Volunteer Coordinator (Year 1)
- Recruitment of a Denominational Affairs Liaison with UUA
& Central Eastern Region (Year 2)
- Review & develop programs to retain members and youth. (year 2-3)
- Hiring of music assistant to expand musical ministry (year 4-5)
- Development of a Campus Ministry (year 4-5)

Team 2. Enhancing and expanding socially responsible activities and service

- Reinvigorating SEAC + Social Justice chair & have a yearly retreat (year 1)
- Obtain recertification of MUUF as a Green Sanctuary (year 1-2)
- Increase preparedness for climate emergencies (year 3-4)

Team 3. Improving organization systems

- Improve support for new leadership & succession (year 1)
- Form an IT task force to improve online systems, record keeping and access (yr 2)

Team 4. Strengthening and expanding our Lifespan Learning Program

- Increase transparency of communications across Lifespan Learning
& adjacent groups (year 1+)
- Increase Youth retention & involvement (years 1-5)
- Hire Youth Minister or Assistant Minister (year 3-4)

Team 5. Creating effective outreach and publicity

- Start & maintain a professional promotional campaign (year 2)
- Promote visibility (year 2-5)
- Improve online content & access (year 1)
- Provide transportation hub to MUUF for services/events (year 2-3)
- Guide us through congregational growth (year 1-2)

Team 6. Improving the financial health and physical home of our congregation

- Perform analysis of congregational giving
- Align revenue raising

VI. Terms Associated with the Action Steps

Members of the Strategic Planning Task Force reviewed the individual action steps within their designated strategic direction and associated each action step with at least one term to categorize its purpose. The appended spreadsheet lists the action steps and the terms (“keywords”) associated with them. In some cases, action steps within different strategic directions are associated with the same term, demonstrating common purposes across the strategic directions. The terms are as follows:

Learning: Furthering multi-generational learning and faith development in the congregation and the wider community.

Outreach: Establishing avenues and contacts for connecting with members of the surrounding community

Communication: Communicating our message to one another and to the wider community, including being a vital online presence. Being an intentionally multiple platform congregation.

Service: Providing service opportunities for our members and friends.

Welcoming: Welcoming visitors and potential visitors to worship, programs, community life, and service opportunities within the congregation and the wider community.

Retention: Keeping our youth and adult members within the Fellowship and the UU movement.

Youth: Providing programs and ministry for faith formation and leadership development among the Fellowship’s youth.

Finance: Ensuring financial sustainability and resourcing of our current and future efforts.

Facilities: Maintaining and expanding our facilities as needed for safety, functionality, and environmental stewardship.

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Reading the Tables:

Years active: 1=Year of implementation; 2=Year(s) active continuation

Costs associated with each step are indicated by the following (“\$” column):

0=0, \$=<\$100, \$\$=\$101-1000, \$\$\$=\$1000-10,000, \$\$\$\$=>\$10,000

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VII. The Strategic Directions: Proposed Implementation Plan

1. Strategic Direction 1:

Expanding Community and Congregational Involvement

- A. This strategic direction concerns social and cultural involvement of our congregation both within MUUF and with outreach to the community at large.
- B. Strategic Direction 1 is important to the future of Morristown Unitarian Universalist Fellowship because
- We desire to make a difference in our community. MUUF members want to have social connections and be a part of something larger than themselves. With the new building being completed within the next few years, we have an opportunity to become a community center with numerous activities including learning and teaching opportunities in social and environmental justice, social activities such as gatherings and parties, and providing information to the community about UUism.
 - We need to improve the ability of congregants to “plug in” to the groups and teams at MUUF, and provide a larger pool of volunteers to help keep our groups and teams vibrant and active.
 - We want to make our congregation and building more welcoming, including welcoming people from other cultures, ethnicities, LGBTQ+, and others. We want to make sure we are known as a welcoming congregation, and provide newcomers with the ability to get to know us and find their place with us.
 - We want to increase retention rates of our youth and young adults, welcoming them by hosting youth and young adult groups for social engagement, as well as opportunities to serve within the community.
- C. Morristown Unitarian Universalist Fellowship’s current strengths in this area that we want to build upon are as follows:
- We have a strong activist community and we’d like to make MUUF visible in their work.
 - Community engagement within (Cinema Circles, Covenant Circles, Community Circles, Neighborhood Groups) -- long term groups, in-person and via Zoom, getting to know one another within the community.

D. Proposed Plan for Implementation -

Expanding Community and Congregational Involvement

There are several broad goals within this strategic direction of expanding community and congregational involvement. Broadly, these goals include providing opportunities for social connection among our members and opportunities for newcomers to connect to our community, making our congregation more welcoming to a wider variety of people, activating a Volunteer Resources Team to encourage and facilitate volunteerism, expanding our connection to other UUs, providing opportunities to connect to community affairs and opportunities to learn, expanding our musical ministry, and developing programs for youth and young adults to become and stay connected with UUism and MUUF.

The resources and efforts to achieve the goals within this Direction include increasing volunteer efforts in some quarters, especially those designed to increase our membership and therefore our volunteer pool. Funds will be required for some of the goals, especially in expanding our musical ministry (hiring a part-time assistant for the Music Director) and youth outreach (hiring a Youth minister or Assistant minister – also reflected in the Lifespan Learning section).

Strategic Direction 1: Table of Action Steps

#	Short statement of action step	Implementer(s)	2	2	2	2	2	2	Goals: measures of success	\$
			0	0	0	0	0	0		
			2	2	2	2	2	2		
			2	3	4	5	6	7		
1	Provide opportunities for social connection within the congregation.	FUN				1	2		At least one social activity planned for the congregation per month. (Minimal fee can make it self-sustaining.)	\$
2	Provide opportunities for newcomers to connect and mentor them into membership.	Welcoming, RE		1	2	2	2	2	At least 50% of newcomers connected with a member for personal interaction. Ask MUUF visitors if they were invited.	0
3	Make our congregation more welcoming to all people.	Welcoming, MUUF Ambassadors, 8th Principle community	1	1	2	2	2	2	Renewal of Welcoming Congregation status. At least one speaker per year on diversity issues.	\$\$

4	Activate Volunteer Resources Team.	Volunteer Coordinator; Leadership dvmt; Skills & Interests Survey team	1	1					Year 1: Volunteer Resource Coordinator(s) active and working with S&I and groups; Year 2: Yearly Leadership training & Dvmt of Pathways to Service	\$\$
5	Expand UUism within & beyond the congregation	Communications Director; MUUF Ambassadors; Denominational Affairs committee		1	2	2			Regularly updated webpage & advertisement for ongoing events, Denominational Affairs liaison identified	\$
6	Provide opportunities for congregants to plug in to community affairs.	Communications; MUUF Ambassadors				1	2	2	At least one new discussion group implemented each year.	0
7	Provide opportunities to learn.	RE, speakers, GEM			1	2	2	2	At least one speaker per year brought in for a seminar or speaking engagement; also, at least one environment-themed educational program per year.	\$\$
8	Develop a campus ministry and youth/young adult outreach program.	Minister, DRE, Outreach; Youth or assistant minister					1	1	Hiring of youth minister or assistant minister to coordinate and develop campus outreach office.	\$\$\$\$
9	Expand our musical ministry.	Music director & committee to hire an assistant					1	1	Hiring of a music assistant or coordination of volunteer team.	\$\$\$

Strategic Direction 1: Descriptions of Action Steps

1 Provide opportunities for social connection within the congregation. Opportunities to participate in FUN activities - Cinema Circles, dance parties, outings. Invite people to form long-term groups, pair seniors with youth, etc. Host more monthly/annual events: Halloween parties, Family Fun nights, Dances at the Mansion, games, reunions for RE grads, "Home from College" events, etc.

2 Provide opportunities for newcomers to connect and mentor them into membership; Layers of welcoming on Sunday mornings (front door, welcoming table, ushers, Coffee Hour ambassadors, building tours, quarterly newcomer luncheons, etc.); Invite newcomers by providing personal contacts with current members; UU RE for adults & kids

3 Make our congregation more welcoming to a wider variety of people: Renew & retain our Welcoming Congregation status (LGBTQ+, annual renewals); Host interfaith panel

discussions (e.g. UUC Somerset Hills); find common ground to invite open mindedness & dialogue among different groups of people. Bring in folks from other groups (e.g. Wind of the Spirit, GAAMC) to talk with our members. Address the challenge of bringing in new people from around the community - including challenges of transportation/location/language.

4 Activate Volunteer Resources Team (including Leadership Training) and develop a more overt pathway for volunteers to step into service to our community. Invite congregants to connect and to serve. Make Skills & Interests information updates part of yearly pledge cycle Provide training and opportunities to step up to leadership. Encourage volunteers to develop new activities as desired by members. e.g. mid-week services, discussion group after Sunday service, etc., as well as step into roles currently held by long-term volunteers who are ready to pass the mantle. Encourage potential volunteers by starting with short, easy projects, and develop engagement. Make our activity groups clear in intent and direction so seekers can find a way to plug in.

5 Expand UUism within the congregation by recruiting a Denominational Affairs Liaison and by increasing participation in UU Faith Action NJ and its task forces, and in UUA affiliates (such as UUMFE, BLUU, DRUMM, Side with Love, UU@UN, and UU the Vote).

6 Provide opportunities for congregants to plug in to community affairs, Interfaith/intercultural groups, political action committees, discussion groups. Establish support groups related to social connections or specific concerns/issues within the congregation and outside the congregation. Collaborate with other civic groups and plan combined activities and/or attend activities (e.g. other churches, indigenous groups, political action committees, demonstrations, marches, etc.)

7 Provide opportunities to learn; Bring well-known speakers/activists/musicians. Ask Speakers Bureaus, Folk Project, others, for ideas. Provide "Neighboring Faiths" & OWL opportunities for adults. Have workshops on language sensitivity, inclusiveness, etc. Educate about climate change and related topics via documentary films, speakers, discussion groups, etc.

8 Develop a campus ministry and youth/young adult outreach program for young people in the community; Identify and establish relationships with local colleges and youth service providers.

9 Expand our musical ministry; provide paid assistance for the Music Director or a team of volunteers to establish a children's or youth choir, music ensembles, and other programs.

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2. Strategic Direction 2:

Enhancing & expanding socially responsible activities & service

- A. This strategic direction concerns social justice endeavors to improve life for vulnerable communities and individuals; widening our circle of concern so as to become good allies; practicing antiracism and compassionate communication; and using advocacy, education, and action to contribute toward a livable future in the midst of the climate crisis.
- B. Strategic Direction 2 is important to the future of Morristown Unitarian Universalist Fellowship because
- Social justice is a critical part of our faith, connected with issues such as housing, women's rights, the 8th Principle, racial justice, economic justice, the environment, and fairness and justice for indigenous people. If there is a signature social justice issue for MUUF, it is the environment. Our congregation needs to keep social justice front and center and a vibrant part of our community.
 - We want to be many MUUF members working collaboratively under a big umbrella, so that we develop more of a sense of shared endeavor and progress. Also, we want to listen to and learn from our youth, supporting them in practical ways as they become involved in social justice initiatives.
 - We need to widen the circle to think of not only those who share our faith, but also the whole country. We need to move forward together with other groups, learning about them so that we can be good allies and help them move ahead.
 - We must bring people together, becoming a more welcoming congregation (not just the Welcoming Committee).
- C. Morristown Unitarian Universalist Fellowship's current strengths in this area that we want to build upon are as follows:
- Some of our members have already joined with other groups and communities, including UU Faith Action NJ, NJ Together, Wind of the Spirit, Family Promise, and others.
 - The Immigration Ministry accomplished a lot pre-pandemic, and they are planning to aid refugees from Afghanistan.

- In Rev. Alison Miller, we have an ambitious, bold minister who is not afraid to take on important issues. She puts herself out in the local community as well as much farther afield (e.g. activism at the Dakota Access pipeline).
- Our size is beneficial: we are one of the bigger UU congregations here in New Jersey. We have lots of talented people; we're well organized.
- We have a long history of social justice and Welcoming. Very early in our history, we supported GAAMC by providing them space to meet.
- Environmental activism at the Fellowship began decades ago and is still strong today.
- We continued to connect with others throughout the pandemic. We hired a Communications Director so we can reach out more and share our story, activities, etc.
- To sum it up, we are an active, good-sized congregation with a bold minister. We are increasing our awareness and outreach.

D. Proposed Plan for Implementation -

Enhancing and expanding socially responsible activities and service

The 8th Principle plan that was developed this past year is an important part of enhancing and expanding socially responsible activities and services at MUUF. Programs over the next 1 to 2 years will include anti-bias/anti-racist training, bystander intervention training, and education on reparations. The 8th Principle Community and social justice groups at MUUF will remain in dialogue throughout this period.

Racial justice intersects with all facets of social justice. To increase the effectiveness of our social justice work, we will offer training in allyship and in respectful, compassionate listening.

We must reinvigorate our social justice teams, especially in relation to economic justice, with a focus on alleviating poverty, hunger, and homelessness. Steps in this multi-year process will include determining a new, transparent, vibrant name for SEAC; recruiting a Social Justice Chair; enlisting more volunteers; inviting congregational input; and arranging for social justice teams to gather for an enlivening retreat each year for annual review and goal setting to achieve focus, impact, and effectiveness.

Our social justice teams will be ready to help the Director of Religious Education in teaching children to appreciate the natural world and value social action.

An important goal over the next 3 to 5 years is to attain recertification of MUUF as a Green Sanctuary. This process will include social justice projects under the guidance of the UUA’s Green Sanctuary program.

Throughout the next 5 years, MUUF will continue its commitment to make our existing and planned buildings as green as possible (ultimate goal: carbon neutral). With input from the Green Earth Ministry, MUUF will aim to decrease the amount of waste it produces, by, for example, reducing its dependence on single-use plastics.

Lastly, this Strategic Direction calls for implementing measures to increase preparedness for climate emergencies, so that we can protect our congregation and care for our community. This includes provisions for emergency food, housing, and natural disaster relief.

We envision a culture at MUUF of anti-racism and compassionate communication; allyship with marginalized groups and individuals, including immigrants, indigenous people, and BIPOC communities; vibrant social justice teams and leaders working to alleviate poverty, hunger, and homelessness; and a congregation that strongly advocates for and models solutions to address the climate crisis.

Over the next 5 years, we envision continuously making our buildings more sustainable by lowering energy consumption and reducing waste. We see the Fellowship 5 years from now as a recertified Green Sanctuary that has taken meaningful steps to prepare for climate emergencies.

Strategic Direction 2: Table of Action Steps

#	Short statement of action step	Implementer(s)	2	2	2	2	2	Goals: measures of success	\$
			0	0	0	0	0		
			2	3	4	5	6		
1	Implement the 8th Principle plan.	Minister, 8th Principle Community , other volunteers, trainers	1	2				At least 3 trainings per year for 2 years, then as needed	\$\$
2	Offer training in respectful, compassionate	Board Trustee for Justice, Equity, and Compassion; COM;	1	2	2	2	2	At least one training program every other year; practice groups ongoing	\$

	listening and in allyship.	SJ Chair; Compassionate Communication Practice Group									
3	Help DRE realize goals relating to environmental appreciation and social action.	DRE , RE teachers, GEM	1	2	2	2	2	2	2	At least 2 RE lessons per year about environment and/or social justice	0
4	Reinvigorate our MUUF social justice teams.	Board Trustee for Justice, Equity, and Compassion; SJ Chair	1	2	2					New name for SJ group, SJ chair, more volunteers, congregational participation on teams and in programs	\$
5	Attain recertification of MUUF as a Green Sanctuary.	GEM , Lifespan Learning, Administrator. SJ teams related to environmental justice	1	2	2	2				Determining and carrying out actions, reporting, recertification	\$\$
6	Make our existing and planned buildings as green as possible.	GEM , Gateways Taskforce, facilities team, staff, Finance Committee, and solar partners	1	2	2	2	2	2		Monitoring of mansion's emissions, with measurable reduction year to year; monitoring and reducing volume of waste	\$\$
7	Increase preparedness for climate emergencies.	GEM , Facilities, Fellowship leaders, Communications Director	1	2	2	2				Lists of vulnerabilities and action to address them: emergency housing, food, water	\$\$

Strategic Direction 2: Descriptions of Action Steps

- 1 **Implement the 8th Principle plan** developed in 2020, including offering anti-bias/anti-racist training, bystander intervention training, and education on reparations; maintain an ongoing dialogue between the 8th Principle Community and Social Justice groups at MUUF.
- 2 **Offer training in respectful, compassionate listening** to raise effectiveness of our SJ work; allyship training; awareness of how racial justice intersects with all facets of social justice.
- 3 **Help DRE realize goals relating to environmental appreciation and social action** for children, leading them in appropriate social justice programs.

4 **Reinvigorate our MUUF social justice teams**, especially in relation to economic justice, with a focus on alleviating poverty; determine a new, transparent, vibrant name for SEAC; recruit a SJ chair; find more volunteers; invite congregational input; arrange for members of SEAC to gather socially for a retreat each year for annual review and goal setting that will achieve focus, impact, and effectiveness.

5 **Attain recertification of MUUF as a Green Sanctuary.**

6 Continue collaboration in support of GEM's and MUUF's commitment to **make our existing and planned buildings as green as possible** (ultimate goal: carbon neutral) and to reduce our waste stream as much as possible, for example, reducing dependence on single-use plastics.

7 Implement measures to **increase preparedness for climate emergencies**, so that we can protect ourselves and care for our community.

3. Strategic Direction 3: *Improving Organization Systems*

- A. This strategic direction concerns organizing ourselves around effective and rewarding engagement with our goals. Our support network for our volunteers should enable them to build on our deep history of working together, minimizing the need to rediscover and reinvent previous foundational work and minimizing the technical challenges presented by our infrastructure.

- B. Strategic Direction 3 is important to the future of Morristown Unitarian Universalist Fellowship because “Systems [that] promote positive behaviors” aren’t just about changing our protocols. We need to show we care deeply for and support those who step forward to fulfill our shared ministry. By showing heartfelt respect for their efforts, we demonstrate our 1st Principle with our actions. Better access to shared knowledge promotes a sense of trust and inclusion. Our commitment to trust and inclusion supports our recruitment effort, by presenting visitors with our evident confidence in and commitment to each other, expressed through our welcoming behaviors and welcoming facilities. Walking our talk on these issues could draw both visitors and the congregation to greater and greater engagement with our ministries, shifting from tentative to active participation. Personal responsibility and achievement in volunteer work would be balanced by improved continuity and connectedness, as these roles are passed from person to person over time. The reassuring support and knowledge the community can offer would invite greater participation, if it were clear this is our practice.

C. Morristown Unitarian Universalist Fellowship’s current strengths in this area that we want to build upon are as follows:

- Paid staff, and volunteer staff working together effectively.
- Accessibility of SharePoint material to give us common touchstones to work from.
- Website, Email communication, Newsletter, and Zoom as a way to work together. (Facebook posts during service creating new modes of interaction)
- Community of helpful people, willing to share information and expertise.
- A strong tradition of Greeters, and the Welcome table.
- Upkeep, remodeling from painting to parking lot to Gateways show commitment.
- Multiple avenues for communication to help reach more of the community.

D. Proposed Plan for Implementation - **Improving Organization Systems**

Over the next 5 years, we envision broader participation in leadership of MUUF committees and groups, resulting from the visibly increased support and continuity for those involved in fulfilling our ministry. We will additionally use this internal culture of service to enhance our presentation to newcomers as a welcoming community with an inviting sense of evident concern for each in our shared ministry. Our welcoming character will include accommodation of a wide range of engaged participants at all levels from online to our services to our sponsored events. Through these efforts we will show ourselves to be an invaluable touchstone for promoting our ideals and of UUism writ large.

Strategic Direction 3: Table of Action Steps

#	Short statement of action step	Implementer(s)	2	2	2	2	2	Goals: measures of success	\$
			0	0	0	0	0		
			2	2	2	2	2		
			2	3	4	5	6		
1	Evaluate Organizational structure of Committees and Board roles.	Board, Networks, COM	1	2				Refined organizational structure and clear delineations of lines of communication to the board, the groups, and the congregation.	0
2	Improve support for leadership and succession.	Board, Minister, Nominating, Engagement Board,	1	2	2	2	2	New guide for committee leadership based on these initiatives.	0

		Task Force TBD, SP Trustee, Engagement (with COM, Network endorsement)								
3	Focus on Welcoming Potential Members and Building Community within MUUF	Board, Caring Hub, COM, Communications Director, Congregation, DRE, Engagement, Minister, Parents, Staff, Stewardship, WEFT - current and former members	1	1	2	2	2	2	Increase in frequency of subsequent visits for new contacts / guests.	0
4	Form an IT task force.	Board, Minister, Nominating, Communications Director		1	1	1			Deliver costed project plan.	\$\$

Strategic Direction 3: Descriptions of Action Steps

- 1 **Evaluate Organizational structure of Committees and Board roles.** Consider essential activities - building blocks and associated actions. Implement changes as needed.

- 2 **Improve support for leadership and succession:**
 - A. Model foundational agreements for committee/group leader at the beginning of their terms.
 - B. Ceremonially celebrate and lift up new leaders at the beginning of their terms as part of increasing our culture of service and gratitude.
 - C. Develop a template for Leadership Commitment to Successor Success when term is over (a draft is available, commitment to provide successor support, store knowledge gained over one's term that can be passed on in a usable format, etc.).
 - D. Establish a Documentation and Storage Policy
 - a. Where documents are to be stored (Realm, Sharepoint, Google Drive, etc.)
 - b. Security, Confidentiality
 - c. Retention and version control

d. Names of authors(s) and contributors to each document as well as dates of revision

E. Refine and publish Annual Plan and Report Guidelines.

F. Develop a sample Committee Covenant (Guidelines based on Right Relations).

3 **Focus on Welcoming Potential Members and Building Community within MUUF**

A. Catalog and document best practices, at MUUF & elsewhere, for inviting and welcoming. Interview internally (Minister, WEFT - current and former members, etc.) to collect, restore and store institutional knowledge

B. Review, revise, supplement and make available a set of pamphlets and posters for visitors, as well as versions available on the web.

C. Reach out to new guests after services to acknowledge their participation and make connections.

D. Create an easily accessed system for collecting concerns about people not showing up and for follow up contact.

E. Interview congregants about their experiences this year, time and talent perspectives.

F. Make web page more welcoming; evaluate effectiveness periodically (Interview users about their experience re what works well, what doesn't) Reintroduce Realm to congregation.

G. Develop an inviting and welcoming ethos among the congregation throughout all aspects of the membership life cycle. From the first impression on entering the building, through continuous improvement in the inviting - welcoming - membership - engagement processes. Interview recent new members - what went well in their inviting/welcoming experience.

H. Consider Spanish-language services - evaluate if this is desired: who would we serve? how?

4 **Form an IT task force.** Assess what works well, what needs improvement. Develop a MUUF systems requirements document detailing what systems, processes need to be changed, or added. (May include some projects to assess alternatives e.g. Google, Microsoft.) Deliverable would be a costed project plan. Members-only subsystem should include document management, data warehousing (sourcing profile data from Realm). Provide a no/low-code apps/forms

development platform. Institutionalize annual update of personal profiles (cell phones etc.) in Realm - - publish directory and make available to each member and friend. Maintain directory with adds, corrections either by office/volunteers or self-service in Realm.

4. Strategic Direction 4:
Strengthening and Expanding our Lifespan Learning Program

- A. This strategic direction concerns affirmation and support of both personal and congregational growth through learning. Lifespan learning provides opportunities for people of all ages to participate in experiences and activities that teach and affirm our UU principles.
- B. Strategic Direction 4 is important to the future of Morristown Unitarian Universalist Fellowship because it is a concrete way to bring our principles to life and help build community both within and outside our walls. Lifespan learning provides a welcoming space for all to question, wonder, and build community on Sunday mornings and beyond.
- C. Morristown Unitarian Universalist Fellowship’s current strengths in this area that we want to build upon are:
 - a. our forward thinking members
 - b. committed staff and volunteers
 - c. current wide ranging programming
 - d. software that is not currently fully utilized (ex Realm)

D. Proposed Plan for Implementation

Strengthening and Expanding our Lifespan Learning Program

There are 4 broad actions for implementation to strengthen lifespan learning in the next 5 years; increasing transparency of communication, creating and formalizing self-sustaining systems for lifespan programming, implementing programming both unilaterally and with partners, and increasing youth participation.

Increased transparency of communication across lifespan learning and adjacent groups, such as the Welcoming, Engagement and Fun Team and the Eighth Principle Task Force, will allow for better integration of subjects and programs taking into consideration youth and adult monthly and yearly congregational themes. Integration provides efficiency which allows for greater volunteer satisfaction. Greater satisfaction with project outcomes leads to

the desire to volunteer for more projects setting the stage for positive reinforcement and beneficial outcomes.

Conscious creation and nurturing of self-sustaining systems will ease program creation and implementation while ensuring all constituencies are taken into account. Our goal is to reach across the ages both within and outside our walls.

Lifespan learning touches upon many areas of congregational life but perhaps none more than outreach to the community. One of the areas difficult to separate is the recommended creation of a campus ministry. While this is a community outreach function it would ideally directly lead to increased participation in lifespan learning programs. The campus ministry, if implemented, will need to be integrated into lifespan learning communication systems.

Implementation of this part of the strategic plan will allow us to focus on what we want to accomplish and why, while easing the logistical how. Most of the recommended activities do not require a large influx of money; what is required is staff and volunteer commitment to the yearly setting of goals and regular review with any necessary course correction.

In five years, once these plans are implemented, MUUF has the potential to be a notable and meaningful member of the local community, a treasured partner and resource for beneficial and effective action.

Strategic Direction 4: Table of Action Steps

#	Short statement of action step	Implementer(s)	2	2	2	2	2	Goals: measures of success	\$	
			0	0	0	0	0			0
			2	2	2	2	2			
			2	3	4	5	6	7		
1	Increase transparency of communication across lifespan learning and adjacent groups.	Adult Program Committee has begun this, Communications Director, DRE, Minister, Network, Tech Committee	1	1	1	1	1	1	Quarterly meeting of all affected parties to determine effectiveness and make necessary course corrections. Cost is dependent on hiring of new staff hence the range from \$ - \$\$\$	\$ to \$\$\$
2	Create/ Formalize self-sustaining systems for lifespan programming.	DRE, Adult Programs Committee, All Staff, Family Chapel Personnel, Finance Committee,	1	1	1	1	1	1	Yearly review with 6 month check in for course correction. Success will be measured using the following information: variety of programming offered,	\$\$

		Minister, Music Director, Adult Program Committees, RE Council, REC, Tech Committee, Volunteer Coordinator						number of participants both within and outside MUUF members, participant feedback and coordinator feedback. Numerical goals (ex. % increase in intergenerational programming, time needed to set up/ run a program) to be determined during the first meeting of each year.	
3	Implement programming to help people become more active in congregational life.	Minister, DRE, Adult Programs Committee, RE Council, SEAC	1	1	1	1	1	Yearly review, with 6 month check in for course correction. Success to be measured using factors such as number of outside parties collaborated with and number or % of programs that attain their particular goal(s). Numerical goal such as number of collaborative programs we want to be a part of, to be determined during the first meeting of each year.	\$\$
4	Increase youth retention.	RE, Programs, Youth minister?		1	1	1	1	At least one young adult group regularly meeting for discussion and/or activities.	\$\$

Strategic Direction 4: Descriptions of Action Steps

1 **Increase transparency of communication** across lifespan learning and adjacent groups. Actions may include new personnel (staff or volunteer position) and implementation of self-sustaining systems including iterative processes for continual improvement. Potential Actions: Hire an assistant or youth minister: Duties to include campus ministry, liaison ensuring lifespan learning is fully integrated into all new uses of technology.

2 **Create/ Formalize self-sustaining systems for lifespan programming**, including choosing programming, training internal and hiring external facilitators, ensuring intergenerational programming, creation and implementation of mentorship programs, and coordination between committees (see communication in yellow). Training activities to specifically include providing

opportunities for MUUF members and friends to become part of the lifespan learning teaching team. Systems to be reviewed and revised on a regular basis. Increase upstairs/downstairs connections (RE and congregational activities) and parent involvement.

3 **Implement programming** both unilaterally and in conjunction with outside parties (local and national, religious and secular) **to help people become more active in congregational life**, benefit our congregants, benefit our local community and benefit the world community.

4 **Increase youth retention:** Involve children and youth in activities outside RE, such as music ministry (e.g. children's choir, jazz ensemble), community service (including environmental and social justice actions), discussion groups and listening sessions. Provide a safe place for youth to hang out and socialize (e.g. YAC - Young Adult Cafe). Provide a bridging group between high school and fully integrated adult membership. Provide volunteer positions and programming for youth of all ages and ensure the smart use of technology and possible expansion of youth outreach through campus ministry.



5. Strategic Direction 5:
Creating effective outreach and publicity

- A. This strategic direction concerns manifesting greater visibility and awareness, congregational growth, and meaningful relationships between us and our surrounding communities.
- B. Strategic Direction 5 is important to the future of Morristown Unitarian Universalist Fellowship because it is inherently important to any organization, particularly a faith based organization, to connect with the larger community, share its message, and promote its values. Along with that, inviting and enrolling new members is necessary for our future.
- C. Morristown Unitarian Universalist Fellowship's current strengths in this area that we want to build upon are as follows:

Our greatest strength is our congregation. Word of mouth and individual connection are vital to outreach and publicity. Beyond that, the specific talents of various individuals in our congregation are a great resource for outreach and publicity. And we are active in our community.

- D. Proposed Plan for Implementation

Creating effective outreach and publicity

We have a wonderful thing in UUism – both as a movement and as a congregation. We want to share our good fortune with others and let them know we are here – their spiritual home. At the same time, we want to expand our membership and increase our volunteer base and our pledging so we can have all the programs and activism we dream of.

There are many ways to get our name and movement out into the wider community. We propose several, including social networking, outreach, and a promotional campaign to get the word out that we are growing (see our new building!) and we are working toward a better future for our community. Let’s let our spiritual siblings know who we are and how to find us!

Strategic Direction 5: Table of Action Steps

	Short statement of action step	Implementer(s)	2	2	2	2	2	2	Goals: Measure of success	\$\$
			0	0	0	0	0	0		
			2	2	2	2	2	2		
			2	3	4	5	6	7		
1	Expand UUism within the larger community.	Communications Director; MUUF Ambassadors		1	1	1			Attendance at Elevator Speech workshop(s). Implementation of sales of T-shirts & visible wearing at rallies and gatherings.	\$\$
2	Promote online content	Communication Director, social media person	1	2	2	2	2	2	Publish details for upcoming events at least one month in advance and document online accounts and instructions for future promotion managers. This may include: - generating or acquiring visual media - publish multiple times - use targeted paid promotion	\$\$
3	Connect with and utilize Local community online promotion.	Communication Director, MUUF members	1	2	2	2	2	2	Identify at least 4 online communities - publish content regularly (at least 3(?) posts per week total) - re-crowd source new communities at least yearly	0
4	Improve Event	Communication	1	2	2	2	2	2	Assessment of numbers	\$\$

	advertising.	director								attending events & effectiveness of advertising methods	
5	Utilize Direct mail.	Communication director & committee,	1	2	2	2	2	2	2	Fliers and/or greetings sent at least 1x/year	\$
6	Provide transportation for individuals unable to get to MUUF.	Board, Welcoming committee		1	2	2	2	2	2	Setup of online or phone-reservation system for those needing transport.	0
7	Promote Visibility at events.	Communication director, Promotion committee	1	2	2	2	2	2	2	Promotional materials are used at every public event. Every 6 mo. inventory and assess what is needed for upcoming events. Set up events marquee (city approval, ordering, installation)	\$\$
8	Start a Professional promotional campaign.	Board, marketing company/groups, UUA	1	2	2	2	2	2	2	Engagement of other UU churches in area; engagement of marketing agency, evaluation of marketing effects	\$\$\$\$
9	Plan & promote the Grand opening of the new MUUF Fellowship Hall.	Board, staff, Gateways		1	1					Grand opening party & extended events	\$\$\$

Strategic Direction 5: Descriptions of Action Steps

- 1 **Expand UUism within the larger community** by becoming more open to discussing UUism and MUUF. Become more visible in the community by encouraging members and friends to invite others to attend MUUF, personally or on social media. Develop a workshop on how to personalize and use the MUUF "Elevator Speech" about UUism.
- 2 **Promote online content;** Being a vital online presence for members, friends, and others in the wider community. Being an intentionally multiple platform congregation. (Website, Facebook, YouTube, etc.). Update MUUF Website. Publish short/edited video highlights of Sunday service and events.
- 3 **Connect with and utilize Local community online promotion;** example: Mom& Dad Morristown. Crowdfsource the congregation to identify online communities where MUUF activities can be promoted.

- 4 **Improve Event advertising**- online & print; - ads, newspapers, fliers - for annual and other events at MUUF, speakers, etc.
Set up an Action Alert Network to recruit for, publicize, and notify congregants of upcoming social justice events needing support, including climate protests, teach-ins, and educational programs (e.g., Sunrise Movement events and programs)

- 5 **Utilize Direct Mail** - postcards and fliers to new neighbors. visitors, annual greeting to all neighbors & invitations to major events

- 6 **Provide transportation** for individuals unable to get to MUUF for services or events.
Evaluate possible shuttle from key points in Morristown or campuses.
Have several volunteers available for Sunday services and other events.
Make sure people are aware of the service and it is easy to arrange.

- 7 **Promote visibility at events** we already do
Have promo material available for any event manager to use for any public event to make us visible: T-shirts, buttons, signs (for marches, etc), Feather flags, pens, bags, etc.
Ask the Youth group to make and sell MUUF T-shirts for members to wear at functions and out in the community.
Set up Display Marquee sign board on Columbia Turnpike; -ex: title of sermon/
upcoming events.

- 8 **Start and Maintain Professional promotional campaign**
As recommended for any organization, allocate 5-15% of operating budget
 - A. Identify marketing organization
 - B. Develop comprehensive promotional strategy and plan
 - C. Engage our congregation
 - D. Execute and maintain promotional plan
 - E. Periodically review results (visibility, response, new attendance, new members)
 - F. Evaluate impacts & adjust plans accordingly

- 9 **Plan & promote the Grand opening of new MUUF Fellowship Hall:** make it a community affair with much fanfare and display of MUUF activities.

6. Strategic Direction 6:

Improving the financial health and physical home of our congregation

- A. This strategic direction concerns management of MUUF finances and financial security, maintenance of our building, and the completion of our Capital Campaign to build a Fellowship Hall in a responsible and sustainable manner.
- B. Strategic Direction 6 is important to the future of Morristown Unitarian Universalist Fellowship because: In order to have members meet, gather, and celebrate MUUF principles, it is important that the financial health and the physical home of the congregation receive on-going management. MUUF requires a commitment by its members, and oversight by administrative staff, Board and various committee members, to promote the development and stewardship of operating funds, endowment funds, and capital improvement funds. Annual pledges and giving provide the funds for human resources and maintenance of our building. The endowment fund allows for contributions and legacy giving and would offer support of the annual operating fund. The capital fund, established as needed, is funded by a capital campaign for specific facilities improvements.
- C. Morristown Unitarian Universalist Fellowship's current strengths in this area that we want to build upon are as follows:

MUUF has the strength of a committed and capable volunteer membership and capable staff. The congregation has been generous with its contributions to annual giving and capital campaigns that allow us to maintain and improve our existing facilities. The combination of staff, Board, and committee oversight has resulted in fiscally responsible use of funds and resources. It is anticipated that this strong partnership will work together to maintain annual giving as required, increase endowment to a mature level, and fund capital improvements as needed.

- D. Proposed Plan for Implementation -

Improving the financial health and physical home of our congregation

In order to plan for our financial stability and future growth, we need to perform analyses of historical and current giving within the congregation, align revenue raising for operations, endowment, and capital campaigning, ensure financial support and stability in stewardship, pledging, and capital reserves; manage our endowment to growth and appropriate use; and steward our facilities expansion and improvement plan to completion.

In five years, we expect our new building to be completed, our capital reserves to be at an appropriate level, our endowment policies to be completed, and our expanded congregation to continue to be generous in their financial support of our building and programs.

Strategic Direction 6: Table of Action Steps

#	Short statement of action step	Implementer(s)	2	2	2	2	2	Goals: measures of success	\$
			0	0	0	0	0		
			2	2	2	2	2		
			2	3	4	5	6		
1	Perform analysis based on current and historical state of congregational giving.	Administrator and Representatives from Finance, Endowment, & Capital campaign.	1					Report to Board and congregation	\$
2	Align revenue raising	Representatives from Finance, Endowment, & Capital campaign	1					Annual report to the congregation.	\$
3	Ensure Financial Support.	Stewardship Board Member and other Board members	1					At least one yearly educational opportunity for the congregation to see how spending occurs and how much is needed for financial and congregational health.	0
4	Ensure financial stability	Finance Committee	1					Annual report to the congregation.	0
5	Manage our Endowment.	Endowment Committee	1	1				At least one yearly educational opportunity for Endowment and Legacy giving; mature endowment defined and used for work by Endowment Cmte; principal in Endowment increased yearly by contributions/legacy giving	\$
6	Steward our Facilities Expansion Plan and continue capital improvements.	DRWW Capital Campaign Team & Gateways Facilities Team	1	1	1	1		Attainment of needed budget to begin building; approval by Congregation to implement Final Phase; completion of building	\$\$\$\$

Strategic Direction 6: Descriptions of Action Steps

- 1 **Perform analysis based on current and historical state of congregational giving.** Factors to be considered: membership, pledges, rentals, other revenue sources and future growth in membership and/or giving needed
- 2 **Align revenue raising** for a) financial operations, b) endowment, and c) capital campaign - and communicate with membership, alumni, and community
- 3 **Ensure Financial Support:** Educate congregation regarding Stewardship and Annual Pledging to create and deepen understanding and commitment to the needs of the Fellowship. Explore fundraising opportunities including grants. Explore possibilities for increasing rental revenue from groups who share our values.
- 4 **Ensure financial stability:** Financial support, pledging, other income: Plan for capital reserves
- 5 **Manage our Endowment** to growth and appropriate use: Educate and make membership aware of the Endowment including Legacy giving. Grow principal through contributions and Legacy giving. Define a mature endowment and establish Finance policies to support appropriate distribution guidelines and asset allocations consistent with the goals of the Fellowship.
- 6 **Steward our Facilities Expansion Plan** and continue capital improvements: Establish FEP budget and impact on annual operating budget giving. Develop funding sources including contributions, loans, grants. Educate and communicate to membership the final phase of the Capital Campaign and obtain Congregation approval in a Vote. Implement Final Phase of Project.

VIII. Proposal for Monitoring and Revising Our Strategic Plan

- A. Orientation of committee and other lay leaders to the plan for incorporating into and informing their annual goals
- a. The Strategic Plan will be available for reading online and in print (in binders in the main office and the RE office) for members and new leaders, who will be encouraged to read it and determine what applies to their group's purview.
 - b. The Strategic Plan oversight committee (the "SP Council") will include the SP Trustee, Network Trustee, Minister or Admin, representatives from Finance, Lifespan Learning, and the Committee on Ministries (COM), and an at-large member appointed by the Board, if needed.
 - b. Monthly reports shall be made to the Board by the SP Trustee, with quarterly updates to the Congregation via newsletter and other means such as announcements in the Sunday Service and in the appropriate Realm and Sharepoint sites. An annual report will be submitted for the Annual Meeting.
 - c. Communications regarding the SP to membership and from groups to the Board & COM will be tracked by the Network Trustee and communicated to the SP Trustee and SP Committee. These will be reported with the SP updates as appropriate.
 - d. If changes are needed (either from the Board or from relevant group(s)), the SP Committee will work to address and decide whether to incorporate the change(s) into the Strategic Plan. The SP Trustee will submit any revisions to the Board for approval, and will then present it to the Congregation at the next scheduled report.
- B. Periodic & Annual Reports should include the following:
- a. What have we accomplished?
 - b. What challenges in implementation have we faced?
 - c. What have we learned?
 - d. What changes in the plan do we propose or observe?
- C. Placement and retention of plan documents:
- a. The complete Strategic Planning Document and associated appendices will be available on SharePoint, Realm, and in binders in the main office and RE office.
 - b. There will be original versions available for reference, and an online working document which can be edited by the SP Trustee and appropriate persons for making comments and amending timelines or goals, as needed. Versions will be saved whenever major changes are made and versions renamed by date.

IX. Conclusions

We envision MUUF as a vibrant member of the Morristown and New Jersey community; a positive force in a changing world. To be that force, we need more people willing to work to achieve it. Not just the people who have been working so hard for so long, but also people with renewed energy and enthusiasm for continuing the work. By investing in the means of bringing in and retaining members, we can make sure our positive influence reaches out to the community and beyond.

We want to return to a new “normal” in our congregation that welcomes all seekers, values our volunteers and provides support for our leaders and those who work for change. We want to work towards environmental stewardship, social and environmental justice actions, and anti-racism. We want to support a thriving multi-generational Religious Education program that fills the spiritual needs of the members of our congregation as well as members of the community. We want to retain our youth in the UU community. We want to share our Community with those who are seeking what we have in Unitarian Universalism. We want to have a strong financial standing and a well-loved and cared-for facility that provides the backdrop for all we do.

We have invested ourselves and our finances to build a Fellowship Hall worthy of our work. This Hall can be a gathering place, a place of education, a base for activism: a Community Center serving our congregation and those who share our values and dreams. Let us continue to invest in MUUF by reaching out to those who are seeking us and letting them know we are here. We can show the world what being a Unitarian Universalist means, and welcome those who may find their home with us. Our community will grow, both in members and good works.

Submitted by The Strategic Planning Task Force:

Nan Perigo, Chair, SPTF

Alison Miller, Minister

Hazel Bell, Member, SPTF

Linda DeLap, Member, SPTF

Edith Lee Ng, Member, SPTF

Kendall Martin, Member, SPTF

Dan Reidy, Member, SPTF

(Also Anna Leistikow & Talley Summerlin)

X. APPENDIX A. Summit Summary

(summary by Carol Johnson) Online at <https://morristownunitarian.sharepoint.com/:w:/r/sites/StrategicPlanning/Shared%20Documents/Writing%20the%20Plan/2021%20MUUF%20Strategic%20Planning%20Summit%20Summary%20-%20Carol%20Johnson.docx?d=wea48719259a64c1f88a896f08c9929b2&csf=1&web=1&e=Hh0f3Z>

XI. APPENDIX B. Summit presentation of county & local demographics

by Talley Summerlin. Presentation at https://drive.google.com/file/d/1w_FQLf3HZPlqaXXfsq07cO2CyejgsxsR/view?usp=sharing

XII. APPENDIX C. Resources & Links

Link to Strategic Plan Report & Documentation on Sharepoint: <https://tinyurl.com/ez3awzb4>
(SP Documents & Presentation online at <https://tinyurl.com/yncr62ex>)

Strategic Plan - Discussion on JamBoard: <https://tinyurl.com/4e742ue9>
aka https://jamboard.google.com/d/11Dk0MwGgytjnVGigv-hWHMEQ_fx4PE6_YliLV3ZqAn8/edit?usp=sharing

XIII. APPENDIX D. Attendees & Volunteers

Our heartfelt thanks to all those who participated in early discussions, attended the Summit, hosted discussion groups, and/or worked on an Action Planning Team. We couldn't have done this without you.

XIV. APPENDIX E. Proposed Implementation Plan (Spreadsheet)

Read-only version can be found at <https://tinyurl.com/yckkfswp>
or
https://morristownunitarian.sharepoint.com/:b:/s/StrategicPlanning/ESvdYrUOMz9Dg-ObnBsTR1MBEjeqnO6d2T8XfMXf2_EXEg?e=qGQY3F

XV. APPENDIX F. Slides of Summit activity “MUUF Annual Report 2026”

Link to Slides from the Summit:

XVI. APPENDIX G. Summit Packet (agenda & workbook)

(Complete set available online at <https://tinyurl.com/ez3awzb4>)