

St. Andrew's Episcopal Church

2017-2022 Strategic Plan

Condensed Version



Mission, Vision Statements and Core Values

Mission Statement: “Embrace, Engage, Enhance the World Around Us” (tag line)

Empowered by the Grace of God, St. Andrew’s is a church that is an inviting, caring, loving community that welcomes all who enter our doors to use their time, talents, and treasures to create meaningful partnerships with our internal and external communities. Through reflective worship we renew our understanding and our commitment to do God’s work and embrace the collective wisdom of all generations.

Vision Statements:

1. To foster an environment that accepts all who wish to serve God, by encouraging and supporting ministries that have personal meaning.
2. To establish community outreach that meets the needs of our local and external communities, encourages multigenerational participation, and supports sustainable partnerships led by passionate and engaged parishioners.
3. To create an engaging, spiritual and reflective worship service that invites all to participate and supports the balance between the traditional and the new.
4. Through focused direction and alignment of resources, St. Andrews will thrive and be financially healthy.

5 Year Strategic Goals- 2022

Underlying assumptions and operating principles:

- The below goals will be achieved by creating engaged work teams that represent multigenerational perspectives who work to gain perspective and understanding of likes and dislikes and who will create plans that balance the many viewpoints.
- All efforts will be made to consider which historical perspectives and rituals should be embraced while considering the needs of the newer generations.
- All plans and recommendations must include a budget and/or a plan to fundraise or apply for grant funding to support the recommendations. Vestry approval is needed prior to commitment to funds over and beyond budgeted amounts.
- Consider current trends and demographics, including external factors that the church may help meet an important need or fill a gap in the internal and external community. Keep in mind how current crisis those in the world affect those around us and consider ways for the church to be responsive. Reflect how St. Andrew’s may assist those around us to manage the pace of change and modern day stressors.

Measureable 2022 Results included the following.

1. Active participation- Increase the active number of parishioners who participate in some type of internal/external community outreach and worship to 100 by 2022. (Current active participation as of 2016 is 65)
2. Community outreach- Increase the number of external community programs/partnerships hosted/supported at St. Andrew's by 10 by 2022. (This is new partnerships and does not include existing programs and these programs do not need to continue from one year to the next)
3. Enhance worship/spiritual services and programs- Improve and/or expand programming around religious education (children- adult) and worship (service and music) as identified by new specific plans and increased participation.
4. Financial Goal- Utilize 3% or less of endowment to balance yearly budget. (As of 2016 current use of endowment is 6%).

Key Concepts around 2022 Results:

Active participation- In 2017 further work is needed to explain and define what active means. It should include internal and external partnerships and support of ministry. It may include a program that is supported by an individual or a group every year, or it could be active participation in worship ministry. St. Andrews needs to encourage individual and group passion that supports God's work and creates a sense of spiritual renewal and a feeling of giving.

Community outreach- This is specific to creating partnerships with businesses, and/or organizations that aligns with our member's passions and interests and fosters a sense of connectedness. Outreach should consider diverse interests and needs as well as opportunities to come together and bridge the generations. The idea of partnership helps St. Andrews be connected with the external community and provide an opportunity to do God's work beyond our doors.

Enhance worship and spiritual services and programs- Our current programs are meeting important spiritual needs of our parishioners. Yet there is a need to further expand how we can grow spiritually and how we might enhance spiritual renewal programming. Over the next 5 years, groups of interested parishioners, representing multi-generations, will explore ways to build and enhance three main components: music, religious education, and worship. It is important to evaluate and enhance so that St. Andrews can continue to grow and generate a passionate and engaged parish.

Financial Health- With alignment of goals we hope to make budget decisions around the strategic planning. Our financial health will build as we increase fund raising, identify grant opportunities, grow our numbers as a church community and through active partnerships.

5 year Strategic Plan 2017-2022

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p>Active participation</p> <p>Increase the active number of parishioners who participate in some type of internal/external community outreach and worship to 100 by 2022. (currently 65 active parishioners)</p>	<p>Increase active participation by 10 to a total of 75 active parishioners by Dec 31, 2018.</p> <p>Identify a work team (multigen representation) to determine a way to define and count the number of “active participants”.</p> <p>Determine frequency of reporting of numbers to vestry for status updates.</p> <p>Coordinate reporting metric to leads of committee and implement a process for a final yearly count for the annual meeting and achievement of set goals.</p> <p>Consider community needs and internal interest in supporting and coordinating programs that parishioners are “passionate” about. Remove programming that utilizes resources that others are not passionate about.</p> <p>Actively “actively encourage” others to assist with internal programming. “Many hands make light work” concept.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Increase active participation by 10 to a total of 85 active parishioners by Dec 31, 2019.</p> <p>Work teams continue to assess and understand needs of the community and the interests of the parishioners.</p> <p>Identify specific “target” programs and identify plans for outreach and recruitment.</p> <p>Expand and communicate the importance of being involved. Implement programming that speaks to the passion of the parishioners. Remove programming that does not so to balance the resources.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Increase active participation by 15 to a total of 100 active parishioners by Dec 31, 2021</p> <p>Complete a survey and/or focus group to understand what continues to involve people and what programs may no longer serve the internal and external community interests.</p> <p>Further develop the culture of involvement and reach out to those who may be reluctant.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p>Community outreach- Increase the number of external community programs/partnerships hosted/supported at St. Andrew's by 10 by 2022. (these will be new programs in addition to our current partnerships and programs)</p>	<p>Identify working committee to include multigen representation</p> <p>Identify needs and like interests in local community and determine a partnership (short or long term).</p> <p>Implement at least 2 newly identified programs/partnerships.</p> <p>Report number of programs/partnerships to vestry on a predetermined frequency. Report at annual meeting, the number and type of programming and level of participation</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Complete a new assessment of local community and parish interests.</p> <p>Develop and implement a plan to participate in at least 4 new programs/partnerships.</p> <p>Provide routine updates to vestry and identify funding sources if needed.</p> <p>Determine fund raising or grant support to financially support newly considered programs.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Develop and implement a plan to participate in at least 4 new programs/partnerships.</p> <p>Provide routine updates to vestry and identify funding sources if needed.</p> <p>Determine fund raising or grant support to financially support newly considered programs.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p>Enhance music, religious education and worship services and programs-</p> <p>Improve and/or expand programming around religious education (children- adult) and worship (service and music) as identified by new specific plans and increased participation.</p>	<p>Music Program Complete a full assessment and provide recommendations for vestry approval related to the current state of the music program and potential enhancements to meet the diverse needs across generations.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) Dec 31, 2017.</p> <p>Implement plan and initiate key components of approved recommendations by May, 31, 2018.</p> <p>Complete full implementation of plan by Dec 31, 2019.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p>Religious Education Complete a full assessment and provide recommendations for vestry approval related to the current state of the religious education for children through adults by May 31, 2019.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) by Dec 31, 2019.</p> <p>Implement plan and initiate key components of approved recommendations by May, 2020.</p> <p>Complete full implementation of plan by Dec 31, 2020.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p>Worship Service In collaboration with Rev. Julie Carson, complete a full assessment and provide recommendations for vestry approval related to the current state of the worship service and it's ability to touch a wide generation of people and integrate traditional and new ways to worship by Dec 31, 2020.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) by May 31, 2021.</p> <p>Implement plan and initiate key components of approved recommendations by Dec 31, 2021.</p> <p>Complete full implementation of plan by Dec 31, 2022.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p>Financial Goal- Utilize 3% or less of endowment to balance yearly budget. Currently 6% of endowment being utilized.</p> <p>Funding sources should consider annual stewardship campaign, available grants through Diocese or with community partnerships, fundraising programs and funding campaigns.</p>	<p>No more than 5% of endowment to be used to offset budget for 2017 & 2018.</p> <p>Create a document that includes current identified budget for each lead/chair person of program.</p> <p>Establish a process to ensure any additional funding requests are vetted and approved before committee implements programming.</p> <p>Collaborate with committee chair /lead to assist in identifying funding sources.</p> <p>Require financial updates from committees throughout the year to measure progress and support as needed.</p> <p>Establish a working group (multigen) to identify future funding sources and to increase grant opportunities and increase fundraising opportunities by May 2017.</p> <p>Establish 2 new fund sources by Dec , 31 2017.</p> <p>Implement one new funding source by May 31, 2018 and the second fundraising opportunity by Dec 31, 2018.</p> <p>Evaluate effectiveness of new fundraising sources- modify or change as needed for programming by May 31, 2019.</p>	<p>No more than 4% of endowment to be used to offset 2019 & 2020 budgets.</p> <p>Continue with work group to identify funding source and identify one new fundraising opportunity by May 31, 2019.</p> <p>Identify a plan for additional funding sources to include considerations of education about estate planning and capital campaign by Dec, 31, 2019.</p> <p>Vestry approval of funding sources plan by May, 2020. Communicate and initiate initial components of plan by Dec 31, 2020.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p>No more than 3% of endowment to be used to offset 2021 & 2022 budgets.</p> <p>Communicate and initiate initial components of funding source plan by Dec 31, 2020.</p> <p>Complete funding source plan by Dec 31, 2021.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>

Part IV- Strategic Tools and Operational Principles

Create committee template for assigned chair/co chair

Include:

- types of committee members to consider based upon our assumptions- (ie intergenerational- are most generations represented with the committees)
- resources needed to meet the desired outcome
- budget needs, consider grants, fundraising to support initiative
- consider if a community partnership is possible (either to make part of or support the initiative)

Create a vestry goal tracking tool to monitor progress and provide clear and easy way to ensure yearly goals are on target.