

Strategic Plan for St. Mark's Episcopal Church, Honey Brook, PA, 11/05, Revised 4/21/07 (abridged)

The Mission of St. Mark's Church:

Nurturing relationships with God and with each other in Christ.

The 2011 Vision for St. Mark's:

We believe that God has a vision for St. Mark's as a Faithful, Thriving, Growing and Self-sustaining Christian community.

We have four main goals in achieving this vision:

Faithful: Developing stable Leadership and Ministry for the future,

Thriving: Actively involved in Spiritual and Interpersonal Growth,

Growing: Increasing Membership to 250, and Attendance to 140 by the end of 2011

Self-sustaining: Becoming Financially Self-sufficient by the end of 2011

Prayer for St. Mark's:

Gracious God, through the gift of the Holy Spirit, you equipped your disciples to grow your church with the proclamation of the Gospel and the deepening of commitment to you; fill us with your blessing that we may serve your church faithfully, deepen our relationships with vitality, welcome new disciples into our midst, and provide generously for the ministry you have given us; through Jesus Christ our Lord, Amen.

Why this vision?

Each of these goals is necessary to maintain an effective Christian ministry and witness at St. Mark's, in fulfillment of our Lord's mandates and our baptismal promises. A thriving ministry needs effective leadership; a true Christian community needs spiritual and interpersonal growth; we are called to make new disciples; a parish ministry needs financial resources to sustain these ministries. Without pursuing these goals, our financial savings will run out, and we will be faced with closing our doors. The parish can return to part-time ordained leadership, but even this leadership will require at least doubling the current level of financial giving, and part-time leadership often sacrifices elements of vitality. Diocesan policy no longer permits a parish to operate with Sunday supply clergy only.

At the Vestry Retreat in February, 2007, we reviewed our progress in the original Strategic Plan of 11/05. Our discernment led us to revise the plan goals to 250 members and 140 in attendance (from 350/250), and to extend the plan out to 2011 (from 2010). This relieves the stress to our physical resources (buildings and parking), but increases the average pledge per household in 2011 to \$1,875. We feel that these new goals, while still aggressive, are more attainable and more appropriate to our gifts and resources.

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11/05, Revised 4/21/07 (abridged)

The Mission of St. Mark's Church: Nurturing relationships with God and with each other in Christ.

The 2011 Vision for St. Mark's: We believe that God has a vision for St. Mark's as a **Faithful, Thriving, Growing and Self-sustaining** Christian community.

Faithful: Developing stable Leadership and Ministry for the future,

1. A full vestry of nine qualified and equipped lay leaders
2. Each ministry has a 2nd person sharing leadership and fully equipped to lead alone, including administration, Christian formation, worship, vestry, and planning.
3. Each ministry has well articulated succession/shared leadership plans and leadership development plans
4. Strategic plans exist for the parish and for each ministry: articulating mission, goals, objectives, timetables, resources required & implementation plans; by Jan 2006.
5. Clear goals and mutual expectations exist between clergy & vestry with regular review.
6. Effective administrative structures are in place that support & enhance the effectiveness of the ministries in meeting their goals
7. Develop an expansion plan for beyond 2011.

Thriving: Actively involved in Spiritual and Interpersonal Growth,

1. Sunday Attendance = 56% of members (by 2011, that would equal 140).
(average attendance in 2005 is ~70 or 65% of membership)
2. The number of Adults involved in Christian formation programs = 35% of Adult membership (by 2011, that would equal 66).
3. The number of people 18 & under involved in Christian formation programs = 90% of Youth membership (by 2011, that would equal 56).
4. The number of adults involved in parish ministries = 50% of Adult membership (by 2011, that would equal 94).
5. The number of people who attend parish life events = 100% of the attendance figure (In 2011, = 140).

Growing: Increasing Membership:

- Sunday attendance of 140 (from multiple services) by the end of 2011
- Membership of 250 by the end of 2011
- Attendance = 56% of membership

Self-sustaining: Becoming Financially Self-sufficient by the end of 2011

- Pledge income + investment income and other donations = operating expenses. Projections suggest that this will mean a \$10,000 – 20,000 increase each year, to pledges of 150,000 by 2011. Increases will come from increases in existing pledges, and from new member pledges.

We will achieve these goals through God's grace and our response of regular prayer for our ministry and people, generosity of time, talent and treasure, organization and dedication to the plan that we adopt.

We believe that God has a vision for St. Mark's as a **Faithful**, Thriving, Growing and Self-sustaining Christian community.

Goal #1: Faithful: Developing stable Leadership and Ministry for the future:

WHY?

For St. Mark's to fulfill our purpose as a church, and for our continued viability as a parish, we must develop leaders and ministries that have the talent and dedication to endure, thrive, and leave a healthy, vibrant heritage. Without adequate lay leadership, ministries will falter and stall due to lack of support, direction, encouragement, nurture, and engagement. Good leadership development will foster an involved and empowered community, and support effective ministries that pursue a unified vision.

As we grow, ministries and relationships become more complex, requiring a well-organized system of ministry and leadership. With good leadership and helpful structures, we are well equipped to pursue the church's mission.

WHAT?

This goal has seven objectives, each with an action plan (How? Who? When?):

1. A full vestry of nine qualified and equipped lay leaders
2. Each ministry has a 2nd person sharing leadership and fully equipped to lead alone, including administration, Christian formation, worship, vestry, and planning.
3. Each ministry has well articulated succession/shared leadership plans and leadership development plans
4. Strategic plans exist for the parish and for each ministry: articulating mission, goals, objectives, timetables, resources required & implementation plans; by Jan 2006.
5. Clear goals and mutual expectations exist between clergy & vestry with regular review.
6. Effective administrative structures are in place that support & enhance the effectiveness of the ministries in meeting their goals
7. Develop an expansion plan for beyond 2011.

HOW? WHO? WHEN?

These goals will be achieved, through God's grace, by developing plans, improving ministry structures, improving business practices and accounting, and providing leadership development for vestry and ministry leaders. The primary people responsible for this work are the vestry, (especially the priest, Rector's Warden and Treasurer), as well as the leaders of the various ministries. The most intensive work will occur in 2006, with leadership development ongoing throughout the next five years (and beyond).

Pursuing this goal will largely affect the leadership and vestry. The one project with the largest involvement and more direct impact is the effort to structure our ministries to provide clarity of responsibility and coordination with the vestry.

See notes on specific action plans. For detailed plans for each of the seven objectives, see the complete detailed plan.

Specific Action Plans include:

- Plans from each ministry to cover questions of: shared leadership, leadership development and succession, and ministry goals & plans.
- Clear goals & mutual expectations for mutual ministry review between priest and vestry.
- Implementation of accounting improvements and internal controls.
- Expansion plans for beyond 2011, looking especially at future building needs.
- Implementing a committee structure to better organize our ministries and connect them to the vestry and our parish-wide goals.

One suggestion for a structure of ministry proposes the following:

Six committees oversee various teams of ministry. Chairs are appointed by the priest and the Rector's Warden, and report to the vestry. Chairs serve a maximum of three years before rotating off (and can chair again after one year). This provides for fresh ideas and requires chairs to recruit and train co-leaders for a depth of leadership. This also allows chairs to experience other ministries (including vestry). Committees are charged with implementing the long term and short term plans of the vestry, and providing input to the formation of future plans. Committees are made up of team leaders and set broad plans for this area of ministry. Teams then do the work of the committees (some committees do the hands-on work as well, depending upon the scope of the committee). Each team also has brief goals, plans, co-leaders and succession plans.

Worship:

reviews & plans general strategies for worship & music (subject to approval by the priest)
Meets four times each year (Epiphany, Easter, early Pentecost, October)
Support teams: Altar Guild, volunteer recruiters, Choir.

Christian Formation:

Evaluates & plans Christian Formation ministries. Includes support team leaders.
Support teams:

Sunday School, Nursery, Children's Chapel, Sunday Study & Adult Formation,
Youth Ministry, Daughters of the King.

Evangelism & Parish Life:

Evaluates & plans events & support program for enhancing parish relationships, drawing in new people, welcoming visitors and integrating newcomers. Plans ahead six months and reports regularly to the vestry. Evaluates and supports communications.

Support teams:

Hospitality, Kitchen, ECW, Communications (Publications & Website).

Pastoral Care:

Addresses pastoral needs. Oversees, trains & supports pastoral visitors.

Outreach:

Implements service, outreach & mission projects, including donation raising, awareness raising, opportunities for personal engagement in outreach ministries, and connections to missions work and missions opportunities.

Support team: Daughters of the King

Stewardship & Vocation:

Acts similarly to an executive committee, overseeing administration, money and property, as well as leadership development & review.

Support teams:

Buildings & Grounds, Pledging, Cemetery, Treasurer & Accounting Warden

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Goal #2: Thriving: Actively involved in Spiritual and Interpersonal Growth:

WHY?

Central to our mission is growth in our relationships with God and with each other in Christ. Growth in these areas also fosters ongoing vitality, increased membership and increased stewardship of time, talent and finances. All these contribute directly to our vision and the mission of the church.

WHAT?

Spiritual and interpersonal growth cannot be measured, but there are indicators of vitality in these areas that can be measured: involvement in worship, formation, ministry, and parish life.

This goal has five objectives, each with an action plan (How? Who? When?):

- 1) Sunday Attendance = 56% of members (by 2011, that would equal 140).
- 2) The number of Adults involved in Christian formation programs = 35% of Adult membership (by 2011, that would equal 66).
- 3) The number of people 18 & under involved in Christian formation programs = 90% of Youth membership (by 2011, that would equal 56).
- 4) The number of people involved in parish ministries = 50% of adult membership (by 2011, that would equal 94).
- 5) The number of people who attend parish life events = over 100% of the attendance figure (In 2011, that would equal 140).

HOW? WHO? WHEN?

These goals will be achieved, through God's grace, by developing effective worship, formation programs, ministries and parish life events (and the leaders to lead them) and by personal recruiting participants and leaders.

This goal is chiefly the responsibility of the Vestry and ministry leaders (especially Christian Formation, and Evangelism & Parish Life), but is also based on the enthusiasm and involvement of each parishioner. Achievement of these goals can be regularly assessed—perhaps three times each year by the vestry.

RESOURCES?

\$2-3000/yr for Parish Life/Evangelism Events. By 2010/2011, based on growth projections (goal #3), we will need ~10 6 adult Small Group leaders and 10-146-8 Sunday School leaders.

See notes on specific action plans. For detailed plans for each of the five objectives, see the complete detailed plan.

Specific Action Plans include:

- Worship committee committed to high standards for our liturgy.
- Lay Leader for Adult Formation Ministry by 2008.
- Adding 1-2 new small groups or evening functions for adults each year (will require ~6 leaders by 2011).
- Expanding Sunday School per the projections below (will require 8-10 leaders by 2011).
- Active personal recruitment of people to be involved in ministries.
- 3+ major Parish Life Events each year and periodic Parish Lunches (~\$2-3000/yr).

Projections for Membership, and targets for Christian Formation involvement:

	Total Members	members 0-18 yrs	Youth Target	members 18+ yrs	35% Figure	Adult Target
2004	85*	14*	13	71*	24	
2005	134*	38*	34	96*	37	24*
2006	138*	41*	37	97*	34	36*
2007	160	46	41	114	40	40
2008	180	49	44	131	46	46
2009	200	54	49	146	51	51
2010	225	58	52	167	58	58
2011	250	62	56	188	66	66

(Actual figures marked with an asterisk)

“Number of people involved in” is defined as the number of people each of whom has spent at least 6 hours in the activity (Formation or Parish Life Events). Thus we are unlikely to have all 56 kids in Sunday School at the same time, but 56 of them will have attended at least six hours over the course of the year.

We are planning on creatively using space both in the church building and the Parish House to accommodate a growing Sunday School.

We believe that God has a vision for St. Mark's as a Faithful, Thriving, **Growing** and Self-sustaining Christian community.

Goal #3: Growing: Increasing Membership & Attendance (250/140 by 2010):

WHY?

Answering the call to make disciples of Jesus Christ is a key way that we embody nurturing relationships with God and with others in Christ. To realize our vision of a self-sustaining parish, we recognize that growth in attendance and membership is critical.

Growth of 250 members and 140 attendees will help us to achieve long term viability and stability without further intensifying our financial needs.

WHAT?

We will build Sunday attendance to 140 (from multiple services) by the end of 2011, and membership to 250 by the end of 2011. As we grow, we will hold attendance at 56% of our membership or higher. Attendance at the "end" of the year can be measured by the average of the last four months of the year. **Growth in membership will come from who we are and how we reach out for, welcome and integrate people into the life and ministry of the parish.**

See the charts of growth projections for further analysis of the path to reaching this objective. These charts include estimates for adult and youth populations.

HOW? (See Action Plans for each component).

Who we are: People will be attracted to a congregation that is authentic, vibrant and energetic in worship, ministry, spirituality and personal relationships (addressed primarily in goals 1 and 2).

How we reach out: People will visit a new church primarily based on the personal invitation of others, and partially on the reputation built in the community. Lastly, contact with the public (buildings & grounds, advertisements, community events, news reports) can develop interest. Thus our evangelism efforts will be based on the personal commitment and invitation extended to others by our members. Specific programs then serve to support this base with venues for forming contacts with the community through communications and community events.

How we welcome & integrate: We will provide a welcoming environment for the visitor, forming personal contacts and a sense of open community. Our personal follow-up with notes, gifts, calls, and welcome dinners will nurture connections with the congregation. We will track newcomers to intentionally integrate them into the life of the church and to value and further develop their ministry.

WHO? WHEN?

Teams from the (proposed) Evangelism & Parish Life committee will lead this effort. Buildings & Grounds will address facilities needs. See charts and Action Plans for timeframes.

RESOURCES?

All require active leadership. **\$2,000/yr** for events, **\$600/yr** for hospitality, **\$20,000** for parking, **\$20,000** for universal access. Increases in Maintenance expenses may be necessary. For a more detailed analysis, see the complete detailed plan.

Charts of Growth Projections (actual figures marked with asterisk):

Year	members at end	attendance at end	Jan – Easter	Easter-Summer	Fall-Christmas
2005	134*	71*	60-85*	50-70*	65-85*
2006	138*	69*	70-90*	55-70*	60-80*
2007	160	80	60-90	60-80	70-90
2008	180	95	75-90	70-90	80-100
2009	200	110	90-110	80-90	100-120
2010	225	125	110-130	90-110	115-133
2011	250	140	120-140	100-120	130-150

This pace indicates introducing a second service by Lent of 2008

Pace of growth (net growth):

Each Spring: +10 attendance = 5 households;

Summer: 1 household

Each Fall: +10 attendance = 6 households

Yearly Growth projections:

Additions:

2 x 4 person family = 8

4 x 3 person family = 12

4 each: couple = 8

6 each: single = 6

16 households = 34 (8 kids)

Subtractions:

1 x 4 person family = 4

1 x 3 person family = 3

1 each: couple = 2

1 each: single = 1

4 households = 10 (3 kids)

Net Yearly Growth:

1 x 4 person family = 4

3 x 3 person family = 9

3 each: couple = 2

5 each: single = 5

12 households = 24 (5)

ACTION PLAN: Who We are:

- Development through Goals #1 and #2 (Leadership, Spiritual & Interpersonal growth).
- Ongoing development and improvement of worship that is grounded in our relationship with God, true to our Anglican heritage, providing an authentic expression of worship and prayer for our congregation, forming connections to the personal lives of worshippers, and actively involving the laity (especially youth) in leadership.

ACTION PLAN: Reaching out to potential newcomers:

- Teaching and nurturing active hospitality, active welcoming, and the practice of personal invitation among members.
- Highly polished and effective communications internally and externally (newsletter, service leaflet, other mailings, website, signs, etc.).
- Community events such as barbeques, concerts, etc.
- Relationships with Tel Hai, Heatherwood, and other housing development communities.

ACTION PLAN: Welcoming Newcomers & Integrating new Members:

- All members will engage in active and warm welcome.
- Hospitality team will deliver gift bags for visitors, send notes to visitors, and invite repeat visitors to welcome dinners.
- Buildings & Grounds will be well maintained to enhance welcome.
- Expanded parking will allow for growth.
- Provide wheelchair access to enhance our welcome (donations as of 4/07 ~\$11,000).
- We will provide newcomers with opportunities to connect to the life of the church, to deepen their relationships with God and with members, and we will welcome and further develop their ministries.

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Goal #4: Self-Sustaining: Increase Stewardship to cover expenses by 2011:

WHY?

To continue as an organized parish ministry, we need appropriate and sustained financial resources. Diocesan policy no longer permits long term supply clergy (Sundays only) as an option for clerical leadership. A budget for St. Mark's with a thriving ministry will generally require at least \$100,000 with part-time clergy and over \$140,000 with a full-time priest. Inflation alone will continue to drive costs higher. Our savings is limited, and any parish ministry must be built on the commitment of its current members. Financial Stewardship is a Christian mandate, and is expressive of our relationship with God and each other in Christ.

God's provision for our generous stewardship is true for established members as well as newcomers. Since newcomers generally arrive on a learning curve for giving, this increase will be borne primarily on existing members (in future years, existing members would naturally include those who are presently newcomers).

WHAT?

Pledge income plus plate, donations and investment income will equal or exceed our expenses by 2011. Projections indicate that this implies a pledging level of \$150,000 increasing pledges by \$10,000 - \$20,000 each year. This increase will come from increases in existing pledges (~\$10,000 each year) and from new pledges (~10 new pledges totaling ~\$10,000 each year).

Though we will put downward pressure on budget growth, projections assume increases to keep pace with inflation (especially fixed costs such as health care, pension, taxes, utilities, insurance). Our growth projections also imply necessary increases in staff, in particular a part-time Parish Secretary, assumed funded at low levels.

HOW? WHO? WHEN? (See the charts of projections & further analysis)

This goal will be achieved, though God's grace, by the leadership giving of existing members, and through further education and targeted invitation to existing and new members to pledge and increase giving. All parishioners will increase giving to help this effort. We will increase giving among all levels of givers, both those who give generously and those who give modestly.

We will teach Stewardship: through preaching, newsletters (and targeted mailings both for status reports on household pledging and for invitation), Christian Education opportunities, the personal testimony of lay people in worship, studies, fellowship hour, and Sunday School.

The Vestry and a proposed Stewardship & Vocation committee will lead this effort.

Summary of Pledge forecasting:

Year	# of Pledge houshlds	Average pledge \$	Total pledge \$	Total \$ Increase	Av'g % \$ rise	Av'g \$ rise	# of New pledges	Total \$ of New pledges
2005	41*	\$1,257*	\$51,000*	\$8,577*	23%*	\$238*	9*	\$4,642*
2006	48*	1,449*	69,550*	12,524*	24%*	358*	13*	8,830*
2007	48	1,563	75,000	-500	-1%		10	6,000
2008	56	1,607	90,000	7,000	9%	145	10	8,000
2009	64	1,719	110,000	10,000	11%	178	10	10,000
2010	72	1,805	130,000	10,000	9%	156	10	10,000
2011	80	1,875	150,000	10,000	8%	139	10	10,000

2007 numbers are based on pledge data as of 3/07 that includes significant reductions.

Operating Budget forecast:

In this chart, total expenses are held to a 4% inflation rate. Thus, (with \$ in thousands) our growth would look like:

Year	Total	Pledges	Interest	Donations	Diocese	Deficit	Attendance	Members
'05	\$147*	\$49*	\$23*	\$11*	\$30*	\$34*	71*	134*
'06	\$138*	\$67*	\$24*	\$7*	\$25*	\$15*	69*	138*
'07	\$144	\$75	\$20	\$8	\$20*	\$21	85	160
'08	\$150	\$90	\$15	\$8		\$37	100	180
'09	\$156	\$110	\$13	\$9		\$24	120	200
'10	\$163	\$130	\$12	\$9		\$12	130	225
'11	\$170	\$150	\$10	\$10		0	150	250

“Donations” includes plate offerings, donations, gifts restricted for operations, misc income. ”Interest” includes investment income (interest & dividends, but not gains & losses) and investment income from the Cemetery Fund used for operations. Recent investment income has been high, but with reductions in capital and uncertain future rates, future estimates are lower.

(Actual figures are marked with an asterisk)

This would mean doubling our attendance (from '06), and doubling the number of pledging households and increasing the average pledge (80 households at \$1875 vs. 1/07 figures of 40 pledging households at \$1600). Each year, this would mean increases of \$15-\$20K in pledges, 15-20 in attendance, and 20-25 in members (in '05, attendance & members increased by 15 & 45; in '06, pledges increased \$19K).

These projections forecast a depletion of savings of \$143,000 between January, 2005 through January 2011. However, Capital Gain and loss will also impact our savings as well. Capital Gains in 2005 were \$14,946 and in 2006 were \$63,288.

Our unrestricted financial assets were approximately \$407,000 as of 12/31/04, \$396,000 as of 12/31/05, and \$418,500 as of 12/31/06 (primarily due to capital gains).