



ST. BARTHOLOMEW'S
EPISCOPAL CHURCH

Strategic Plan Update

August 2019

Mission:

We are called to be disciples of Christ, revealing His Life, Love and Light to the World.

Vision:

St. Bartholomew's Episcopal Church is a radically welcoming, inclusive faith family – sharing and teaching the love of Jesus Christ through our worship, actions and outreach – transforming ourselves and the world.

Radical Hospitality – Vision

St. Bartholomew's is the benchmark for Christian hospitality and fellowship, exceeding the expectations of all.

Outreach - Vision

St. Bartholomew's shares the love of Jesus Christ and positively impacts the local and global communities by equipping, empowering and inspiring all members in outreach.

Radical Hospitality and Outreach – Strategic Goals

GOAL #1: Recruit 100 new families to St. Bart's over 3 years (by 3Q2022) and retain 90% of current parishioners

1. Build a viable Invite Welcome Connect (IWC) program in 2019
 - a. Vestry and Ministry Leadership participate in summer IWC training sessions
 - b. Leaders attend monthly Newcomer Coffee to meet, capture contact info and follow up with new members
2. Hire a Development Officer (Resource Management co-goal) by 6/1/2020
 - a. Leadership committees (Vestry, Finance, Personnel) partner to write and post job description by 3/1/2020
 - b. D.O. builds team to develop a roadmap that depicts what happens with newcomers Invite Welcome Connect by 9/1/2020
 - i. Communicating St Bart's message to the community, other invite messages
 - ii. Coffee hour meet, greet and follow-up
 - iii. Contact information and database entry
 - iv. Phone call follow-up
 - v. Time, talent & interest information
 - vi. Re-design the welcome sign-up sheet to be more inviting toward potential new members including how the church can play a role in their lives. More "what can we offer you", less "what can you do for us." Create separate sign-up sheet for ministry interest sign-up.
 - c. D.O. team conducts parish wide time, talent, interest survey by 9/1/2020
 - d. D.O. team completes Shelby Database hygiene by 12/31/2020
 - i. Verify data, add new data, searchable
 - e. D.O. team to devise strategy to engage local seniors by 2021 Annual Meeting
 - f. D.O. team to institutionalize and organize small group dinners that mix existing parishioners and newcomers

GOAL #2: Successfully transition Thrift Shop to Escondido over the next year while retaining 75% of the 2018 income and developing a role in Outreach

1. In partnership with Thrift Shop leadership and other outside advisors, develop a Business Plan for new Escondido Thrift Shop by 10/1/2019
 - a. Re-launch plan including communication and social media strategy
 - b. Revenue projections for 2020
 - c. How to continue to accept local Poway donations
 - d. Partnership strategy with local churches (Presbyterian, Trinity)
 - e. Paint the thrift store truck with St. Bart's "All are welcome, no exceptions"
 - f. Promote Feeding San Diego/St. Bart's events via Thrift Shop

GOAL #3: Increase Feeding San Diego clientele to 100 families per week over the next three years (by 3Q2022)

1. Develop succession plan and shared leadership model for this ministry by 12/1/2019
2. Develop marketing communication plan to promote ministry to St Bart's and the wider community by 12/31/2019
 - a. Utilize Nextdoor.com and other digital platforms to connect existing and potential clients to the St. Bart's food distribution events
3. Develop, trial and implement plan to engage parish members in active participation in this ministry—sign up Sunday, training, youth leaders once a month, etc. by 3/31/2020

Christian Formation – Vision

We teach and equip the world to be faithful and loving disciples of Jesus Christ.

Youth – Vision

Children and youth are engaged members of our parish family through all stages of growth; learning, serving, living, and leading others to be disciples of Christ

Youth and Christian Formation – Strategic Goals

1. Regular, ongoing engagement with: Once a month, Youth responsible for running (i.e. day of event leadership + staffing) the Feed San Diego project; Engage Youth with Interfaith; ministry in Mexico
2. Recruit and hire a new Youth Leader who connects well with the Youth that has sustainability; involve Youth in the interview and selection process; Leader to be identified by 3/1/2020
3. Create a monthly space for the participants of Sunday School to explore their faith; opportunity to put spiritual practices into action
4. Plan social events for families of preschoolers and also for parishioners with children
5. Bible studies: scheduled so people who work can also attend; at least one new opportunity for working people; consider locations not on campus
6. Leadership development: Train lay leaders for leading these types of groups; chairs and co-chairs to build continuity and term limits
7. Build affinity groups: young adults; young couples; families; retired

Resource Management - Vision

Fulfilling current obligations and anticipating emerging needs, the Resource Management team provides guidance, leadership, consultation and solutions – enhancing effective stewardship of parish resources and maintaining a culture of fiduciary stability, while planning and developing facilities to realize God’s vision for St. Bartholomew’s.

Resource Management – Strategic Goals

Goal 1: Achieve an operating income of \$1.5 million per year by 2023 by increasing pledging and creating new revenue streams.

1. Complete/update the analysis of our current membership and pledge history by December 31, 2019.
2. Increase the number of pledging families to at least 400 by 2023 through growing overall membership. (Net annual membership growth over loss by death and relocation)
3. Hire through the operating budget a full-time, development officer by March 31, 2020. This position could be full or part time. (See Invite Welcome Connect goal in RHOR Pillar)

Goal 2: Change the culture of vestry to be an advocacy, leadership, and accountability organization.

1. Vestry will own the Strategic Plan and be responsible for monitoring and managing the implementation.
2. Vestry members will participate in providing announcements at services.
3. Each ministry will have a designated vestry contact person. That designation will be assigned to each vestry seat – it will carry over to the new person elected/appointed to the seat.
4. Vestry will assume the leadership role of managing the business of the parish.
5. There will be an annual vestry training program/retreat on a topic chosen by the vestry.
6. Each vestry meeting will have time available for topics of discussion brought forth by the members.
7. To help the membership understand and become interactive with the vestry, the vestry will have a leadership role in a Sunday forum 9 times a year to interact with parishioners, take questions, get feedback, and exchange information.

8. Develop by January 1, 2020, a vestry member welcome package that includes duties, responsibilities, Episcopal church guidelines, legal implications, member contact information, etc.
9. Identify by December 31, 2019, a team that can make property management recommendations and decisions.
10. Investigate and upgrade Shelby database to meet strategic goals for membership by December 31, 2019.
11. Train personnel who use the system.
12. Finance committee will develop a business plan for the new development and community center by January 2022.
13. Meet or exceed our 8-million-dollar capital campaign goal by December 2021.

Worship and Music – Vision

Our worship services are a vibrant and engaging opportunity to express our love and reverence of Jesus Christ.

Worship and Music – Strategic Goals

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Goal 1: Develop a music education program for children and youth

1. Expand/formalize the current program to include both choral and instrumental components, starting in the 2020–21 school year (with two meetings per week, one after school and one after church on Sundays). Increase average attendance to 12 children/youth by June 2021.
2. Schedule regular musical offerings (e.g., once a month or a few times a quarter) by children/youth in church services.
3. When the budget allows, add an additional staff person to assist with the program.

Goal 2: Present a yearly dramatic production with a musical component

1. Starting in spring 2021, produce a yearly dramatic offering (such as a musical), with participation by both adults and children.
2. Encourage community involvement by holding open auditions approximately four months before each performance, with weekly rehearsals thereafter.
3. Additional discussion (funding): Children will participate for free; TBD whether adults will be charged a fee.

Goal 3: Develop liturgies that mark life passages

1. By September 2019, establish an initial liturgical calendar for events such as a blessing of the wheels, a blessing of the backpacks, and a pet memorial.
2. By December 2019, develop a survey to identify what life passages parishioners would like to mark. Based on the survey results, adjust calendar events to accommodate.
3. Review the calendar yearly to ensure it continues to meet parishioner needs.
4. Compile/reference written material to provide parishioners with scripted prayers for specific life situations and to direct them to additional prayer resources.

Goal 4: Become a North County community spiritual resource

1. Position St. Bart's as a spiritual resource where North County residents can congregate for prayer, candlelight vigils, etc., when a disaster occurs.
2. By March 2020, establish a communications and action protocol and liturgies to follow that can be adapted to specific situations, and develop a plan for communicating with clergy at nearby places of worship in the event of a tragedy or disaster.
3. Vestry review of proposal(s) regarding any physical space requirements to be identified (might fall under Resource Management).

Goal 5: Establish indoor and outdoor spaces for quiet prayer/meditation

1. By December 2019, identify one indoor location and one outdoor location that can be designated as spaces available for individuals or small groups of parishioners who want a quiet place to pray or meditate.
2. Once the spaces are ready, communicate to the congregation the days/hours when spaces will be open for use.
3. After completion of each phase of the campus redevelopment project, reevaluate whether these spaces are still appropriate, and if needed, identify new space(s).

Goal 6: Develop weekly worship services that meet the needs of both seekers and people with no religious affiliations

- By fall 2019, restructure the Wednesday Prayerful Pause to include a musical offering and meditative service. Review calendar to determine best time (possible reschedule to Thursdays).

Goal 7: Reconfigure the Sanctuary

1. Recruit a team and create an action plan and timeline by January 2020 that addresses the need for a large reconfigurable space available when the Parish Hall is removed (June/July 2020). Plan includes concept, logistics, timing and parish communications strategy. Changes to be considered include replacement of pews with chairs to permit reconfiguration, alternate choir location, improved AV systems.
2. Reconfigure the worship center to accommodate additional space needs resulting from demolition of the parish hall during phase 2 of the redevelopment project.
3. Establish strategy/plan for communicating to parishioners.

Next Steps

1. Review w/Father Mark for comments/improvements week of August 12th
2. Review plan with Vestry August 20 for approval and rollout to Parish Leaders
3. Review plan with Parish ministry leaders involved in each Pillar
4. Develop roll out plan to parishioners that may include:
 - a. Announce at Annual Meeting
 - i. excited about progress and path forward
 - ii. ask for thoughts, support and active participation
 - b. Father Mark sermon on the strategic vision, goals and plan (?)
 - c. Communicate all announcements, programs and decisions and relate them to the pillars of the strategic plan