

2018-2023

# St. David's Strategic Plan



Created by and for the  
congregation of  
St. David's Episcopal Church,  
Wayne, PA  
Draft Date: September 10, 2017

St. David’s Episcopal Church Strategic Plan

*We are a church on a mission to know God in Jesus Christ and to make Christ known to others.*

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## St. David's Episcopal Church Strategic Plan

*We are a church on a mission to know God in Jesus Christ and to make Christ known to others.*

### FORWARD

St. David's Church is a church on a mission to know God in Jesus Christ and to make Christ known to others. It is a mission that draws on two important aspects of the Christian life – knowing God in our own lives, and living in such a way that others may come to know the love and peace and forgiveness and hope that we are coming to know in God.

***God's vision is a big vision.*** He has given us gifts and charged us to use them in the biggest way possible. It's so easy to do things as we have always done them but growth calls us to constantly create new stories of possibility. Every few years we pause to listen for God in prayer and conversation with one another. We pause to catch a glimpse of God's vision and we write it down in a strategic plan. Proverbs 29:18 says that "without a vision, the people perish". ***We write the vision given us so that we may grow in our life with God and work as God's hands and feet to change the world.*** The purpose of writing the vision is to create a roadmap. We may not yet know all the details, but we know where we are going. And it will take all of us to get there!

The creation of this strategic plan – our "roadmap" - has involved hundreds of us at St. David's listening for God's call on our common life. We now have a glimpse of the vision of where God is taking us as we continue to live into our mission. The vision God has given us for the coming few years is:

***To raise up servant leaders who change the world by living their faith.***

Servant leadership is ***at the very core of living the Christian life.*** It is the model that Jesus portrayed in His earthly ministry. He told His first followers repeatedly that "Whoever wants to become great among you, must be the servant of all. (Matthew 20:26)

Servant leadership is ***a way of living that enriches the lives of individuals as they use their gifts for a greater vision*** than self. Servant leaders can create a more just and caring world.

Servant leadership ***calls us to operate as our best selves.*** It calls us to raise our awareness of who we are as well as the people around us. It calls us to raise our standards so that we can align with our purpose more fully.

***Living as servant leaders will require us to stretch our skills, our courage, our faith, and our strength.*** But remember, a muscle only gets strong by being tested.

Please take some time to read and pray through this strategic plan and consider how God is calling you into a life of servant leadership.

Grace and Peace.

The Rev. W. Frank Allen

Rector

January 2018

## Executive Summary

### **Background and History of the Planning Process**

This Strategic Plan was commissioned by Frank Allen and the Vestry of St. David's to create a Vision for the church that would inform our decisions regarding activities and actions taken by the church. The goal was to create a Vision that would be "Aspirational and Transformational" and to energize the congregation to work toward a far-reaching goal.

This document is the result of the efforts by members of the Strategic Planning Task Force, with involvement from Frank Allen and participation by a significant number of parishioners over the course of the past twelve months. A summary of the planning activities can be found in the Appendix.

### **This Document's Structure**

Within this document, the Vision Statements are listed in the first section.

Following the Vision Statements, each Theme has a section which is organized as outlined below:

- Vision (repeated from the first section)
- Goals (What are we aiming for?)
- Actions Required to Achieve the Goals (What do we need to do to achieve our Goals?)
- Measuring Progress (How will we know how we are going?)
- Assumptions (what are some truths we can build on?)
- Barriers and Unintended Consequences (what might hold us back?)

Following the themes are several sections containing our recommendations for next steps for effective implementation of this plan:

- Communications plan for this Strategic Plan
- Recommended Structure and Resource Requirements for Execution of this Plan
- Timeline for Action Plan
- Scorecard Template (for Evaluating Progress)

Finally, there is an Appendix:

- Detailed history of the steps performed in this planning process

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- List of Participants in the Strategic Planning Workshop
- List of Opinions from the Opinion Survey, including the level of alignment for each
- SWOT Analysis (developed prior to this Plan)
- Core Values Document (developed prior to this Plan)

## St. David's Episcopal Church Strategic Plan

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### Vision Statements

#### **Our Overall Vision for St. David's:**

To raise up servant leaders who change the world by living their faith.

#### **Our Vision for the Significant Theme Areas within St. David's:**

- **Children and Youth:** Our Children and Youth Programs inspire Children, Youth and the parishioners who support them to be committed to learning and living into the Gospel.
- **Communications:** We clearly and effectively communicate our mission, our gifts and community efforts so that our members and the community will know who we are and what we do.
- **Outreach:** All our members use their gifts of time, talent, and treasure in Outreach opportunities to help fulfill our mission of knowing Christ and making Christ known to others.
- **Leadership Development:** St. David's is a place where servant leadership is modeled and practiced by our laity, lay staff, and clergy, providing us with a continuous source of engaged resources for our programs, activities, and organizational structure.
- **Organizational Structure and Management:** The organizational structure for lay leadership, lay staff and clergy is highly effective, transparent, aligned with our Mission, is well-understood by all and enables the Parish to fulfill its Mission.
- **Resource Management:** St. David's is a community that has broad appeal to many who willingly give their talent and treasure to support our Mission.
- **Programs and Activities:** St. David's is a welcoming Episcopal community that provides programs and activities designed to deepen the spiritual, educational, and social connections of our members and community.
- **Worship:** St. David's is a spirit-filled Episcopal community which provides numerous and diverse opportunities for worship of God, openly welcoming believers, and seekers alike at its worship services.
- **Pastoral Care:** St. David's is an Episcopal community which provides confidential and loving spiritual care and connection for its members in times of illness, sorrow, or other need for support.



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### Theme: Children and Youth – Planning Leader: Tim Phelps

#### **Vision**

Our Children and Youth Programs inspire Children, young adults and the parishioners who support them to be committed to learning and living into the Gospel.

#### **Goals - Strategic**

- St. David's will be known for our outstanding Children's and Youth Programs.
- St David's Youth Group will be a greater attraction (than it is currently) for new families to join the parish.

#### **Goals - Tactical**

- Ensure that parents are involved in Sunday School and Youth programs.
- Consider enhancing our Confirmation program to include more opportunities for children to bond with each other in the program.
- Provide opportunities for Students to help lead Youth Programs.

#### **Actions Required to Achieve the Goals:**

1. Recruit and attract enthusiastic parishioners to participate in leadership of our Children and Youth Programs.
2. Define expectations (for whom: leaders, parents, and children?)
3. Create an organized, joy-filled process to train and support leaders.
4. Set expectations high for parents (does this mean that parents should have high expectations of outcome for their children who participate in the programs, or that the programs have high expectations for parental involvement?)
5. Establish a methodology for collecting baseline and annual opinions about our Children and Youth programs from our members, so that we can track our performance.
6. Establish a methodology for collecting baseline and annual data regarding why people are joining our church (so that we can track a percentage attributable to our Children and Youth programming).

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### **Measuring Progress**

- Within 5 years, more than 50% of our adult congregation members will think we have excellent Children and Youth programs.
- Within 5 years, more than 50% of our Children and Youth members will think we have excellent programming for them.
- Within 5 years, at least one external organization will contact us to learn about our Children and Youth programs (based on reputation/outcomes).
- Within 5 years, we will achieve a level of X new families joining the church per year, predominantly because of our Youth Group programs. (X to be determined based on current statistics).

### **Assumptions**

- Our Youth Group is an important program at St. David's Church.
- St. David's is a safe place for the youth in our parish.

### **Barriers and Unintended Consequences**

- None identified

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## Theme: Communications – Planning Leader: Dale Power

### **Vision**

We clearly and effectively communicate our mission, our gifts and community efforts so that our members and the community will know who we are and what we do.

### **Goals – Strategic**

- Develop a strategic communications plan addressing both internal and external issues
- Ensure that the impact of our outreach programs is communicated inside and outside the parish.

### **Goals – Tactical**

- Ensure that visitors can find the information they need on our website.
- Ensure that members know which staff are responsible for specific programs or activities.
- We should increase the effectiveness of our use of digital connectivity to engage more people in the church.
- Ensure that members know when we need volunteers for specific projects/activities.

### **Actions Required to Achieve the Goals:**

1. Sponsor lecture series.
2. Participate in interfaith organizations.
3. Improve our website – convey our personality and provide easy access to information for members and visitors.
4. Establish a methodology for measuring the success of our communications efforts.

### **Measuring Progress**

- New membership – measure increase in membership growth - tie this to effective communications.
- Positive public news – how will we measure this?

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- Make a difference in the community – this is a goal; how will we know if we achieved it?
- Survey – need to expand on this
- Metrics – need to expand on this
- Increased giving - this is a goal; how will we know if we achieved it?

### **Assumptions**

- The St. David's "brand" is a positive one.
- Our weekly bulletin is an effective means of communicating about church activities.
- I know how to connect with the groups I am interested in at St. David's.

### **Barriers and Unintended Consequences**

- I do NOT know how to find contact information for other members of the parish on the church website.
- The Dove is NOT an effective means of communicating about church activities

### **Additional comments from the Workshop Team:**

1. Communication allows our own community and the community at large to know who we are
2. Communication must be both internal and external
3. Communication includes measuring effectiveness
4. Communication must be modern and traditional
5. Communication is an important part of or growth and retention
6. Communication must include news of the positives, personality, and the progress we achieve.
7. Communication includes our parish, our diocese, and the public.
8. Communicate successes of our commissions, ministries, outreach, etc.

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### Theme: Outreach – Planning Leader: Martin Kimmel

#### **Vision:**

All our members use their gifts of time and talent in Outreach opportunities to help fulfill our mission of knowing Christ and making Christ known to others.

#### **Goals – Strategic**

- We will provide opportunities for 100% of our members to participate in Outreach activities in some manner, regardless of age, physical ability, or time constraints.
- Our members will understand how our Outreach activities are an essential part of our Mission and are core to our responsibilities as a Christian Community.

#### **Goals – Tactical**

- We should develop additional local outreach programs in lower income communities.

#### **Actions Required to Achieve the Goals:**

1. Create a sense of Christian responsibility to volunteer/do Outreach.
2. Make Outreach opportunities and the impact of Outreach more visible.
3. Create systems to track individual participation in Outreach activities.
4. Create resources to enable people to more easily join an existing St. David's outreach program or to start and support their own Outreach program at St. David's.
5. Create diverse Outreach and volunteer opportunities that fit into people's lives and enable participation by members of varying ages and physical capabilities.

#### **Measuring Progress**

- Within 2 years, we will have an accurate method of measuring the non-financial impact of 100% of our Outreach activities (people served, meals provided, pounds of food or clothing collected, etc.).
- Within 2 years, we will have an accurate method of measuring participation in Outreach by our members.
- Within 3 years, 100% of our members will participate in at least one of our Outreach activities per year.

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- Within 3 years, we will have established goals for increasing the impact of our Outreach activities – when we can establish accurate measurements as described above, and can set baselines.

### **Assumptions**

- The work that St. David's does changes lives around the world.
- The work that St. David's does changes lives locally.
- Our current outreach programs are effective.
- Outreach opportunities are important to all ages of members.

### **Barriers and Unintended Consequences**

- None identified

### **“Parking Lot”: Issues or Questions to Follow Up**

1. How to gather volunteers in this world

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## Theme: Leadership Development – Planning Leaders: Dick Bauer and Austin Hepburn

### Vision

St. David's is a place where servant leadership is modeled and practiced by our congregation, lay staff, and clergy, providing us with a continuous source of engaged resources for our programs, activities, and organizational structure.

### Goals – Strategic

- St David's will be a community that develops clergy to be servant leaders\*.
- St David's will be a community that develops its members to be servant leaders\*.

*\*Servant leadership is a philosophy and set of practices that enriches the lives of individuals, builds better organizations, and ultimately creates a more just and caring world. Servant leadership is best defined by Jesus Himself: "Whoever wants to become great among you must be your servant, and whoever wants to be first must be your slave—just as the Son of Man did not come to be served, but to serve, and to give his life as a ransom for many" (Matthew 20:26-28). In the Christian realm, all leadership should be servant leadership.*

### Goals – Tactical

- St David's will be known for its Lay Leadership development programs.
- St David's should help deserving Seminary students develop into successful clergy.
- A majority of our members will understand the concept and practice of servant leadership.

### Actions Required to Achieve the Goals:

1. Develop leadership education programs for clergy, lay and staff incorporating the fundamentals of Servant Leadership.
2. Create opportunities to educate our entire membership about Servant Leadership. (Examples: Have our Vestry and Clergy model the concepts in their work. Feature the concept of servant leadership in our "One-minute mission statements". Have people who learn about Servant Leadership begin talking about it within the programs/activities in which they participate.)
3. Create opportunities for more new leaders by encouraging succession planning in all our activities and programs.

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4. Create more opportunities for experienced leaders to mentor newer leaders within our programs and activities.
5. Develop a methodology and plan to help each of our programs and activities assess itself within the lens of "successful leadership" (to include needs for leadership education, defined succession planning and measuring the effectiveness of the leadership), and to support programs requiring assistance in this area.

### **Measuring Progress**

- Within 3 years, at least 75% of our programs and activities will achieve X rating on its leadership assessment (to be determined based on creation of the "assessment tool" described in the "Actions" section above.
- Within 3 years, at least 75% of our members will be able to articulate what it means to be a Servant Leader and will identify themselves as having these traits.

### **Assumptions**

- I am excited about the possibilities for the future at St. David's.

### **Barriers and Unintended Consequences**

- None identified



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### Theme: Organizational Structure and Management – Planning Leader: George Vosburgh

#### **Vision:**

The organizational structure for lay leadership, lay staff and clergy is highly effective, transparent, aligned with our Mission, is well-understood by all and enables the Parish to fulfill its Mission.

#### **Goals – Strategic**

- We will have a clear and intentional model of clergy leadership structure and development with an integrated clergy team with seamless transitions during turnover.
- Our Vestry is visible and known and the members of our parish understand the vestry's leadership function.
- Our lay leadership structure is transparent, ethical, and aligned with our Mission.
- Our lay administration of staff is transparent, ethical, and aligned with our Mission.

#### **Goals – Tactical**

- St David's should hire exceptionally talented associate clergy knowing they may become rectors at other churches.
- Ensure that clergy turnover has minimal impact on member's ability to know which clergy to ask for help/direction/support.
- Ensure that clergy turnover has minimal impact to our programs.
- Ensure that staff (non-clergy) turnover has minimal impact on our programs.

#### **Actions Required to Achieve the Goals:**

1. Develop effective on-boarding programs for clergy and lay leaders.
2. Create transparency in church operations and clear definitions of the roles of clergy and lay leadership, including the Vestry.
  - Ensure that the lay staff roles are defined so that members can understand who is responsible for all staff activities.

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3. Create an open and fair process for educating members about the roles needed on the Vestry and for members to express interest in serving on the Vestry ("Nominating Committee process").
4. Create a process for monitoring and reporting progress on the Strategic Plan to the Vestry, staff, and members on a regular basis.
  - o Consider structuring the Vestry Commissions to support the Themes of the Strategic Plan (see details later in this document).
5. Create a process for the Vestry to perform an Annual self-assessment similar to that which is used by PANO (PA Assn for Non-Profit Organizations) as a measure of organizational excellence, for determining areas of improvement, and for informing members of the results.
6. Create a process for gathering constructive feedback from departing clergy and lay staff team members (exit interviews by an objective third party) to be used in assessing our organizational strengths and opportunities for improvement.

### Measuring Progress

- Within one year, we will have a formal on-boarding process for new clergy, which defines their role and provides guidance for lay leaders working with new clergy regarding their responsibility for educating and supporting new clergy.
- Within five years, 75% of our members and 100 % of new clergy will agree that we have an effective on-boarding process for new clergy.
- Within five years, 100% of departing staff members (clergy) will express that St. David's is a "good place to graduate from".
- We continue to "buck the downward trend" in congregational growth, both in terms of overall numbers and in ministry engagement. *Need to be more specific on this measure.*
- Within five years, our Vestry self-assessment will achieve an annual rating of X (actual rating to be determined when the process is developed as described in the Actions above).

### Assumptions

- I understand the role of the Vestry.
- Our lay staff think this is a good place to serve.
- Our priests/clergy think this is a good place to serve.

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- We have a competent, committed lay staff.
- I know at least one member of the clergy with whom I would feel comfortable discussing my personal issues.
- Frank's leadership is critical to the success of St. David's.
- The turnover in clergy staff brings new energy and ideas.

### **Barriers and Unintended Consequences**

- None identified

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## Theme: Resource Management – Planning Leader: Kim Shiley

### Vision

St. David's is a community that has broad appeal to many who willingly give their time talent and treasure to support our Mission.

### Goals – Strategic

- St David's will be known as a community resource for sharing our physical financial, time and talent resources.
- Our pledging base is adequate to support our programs and outreach activities.

### Goals – Tactical

- St David's should be an environmental steward for the ecological resources of our property.
- We should ensure adequate funding for our programs in our budgeting process.

### Actions Required to Achieve the Goals:

1. Create a system to capture data (through ACS) to measure resource requirements for all 120 missions (facilities, money, and leadership).
  - Create a baseline for measuring number of engaged parishioners and number of people helped. (Adapt St. David's App for this?)
  - Train program leaders and staff to collect the data and record it in the system
2. Connect these results to the Stewardship Campaign (bring in our college students to help?)
3. Build our endowment – reinvigorate the 1715 Society.
4. Create a way to measure the resource requirements for each program along these three dimensions: Facilities, money, leadership.

### Measuring Progress

- Within 3 years, the number of engaged parishioners will have increased. "Engaged" is defined as having regular attendance at worship and involvement in at least one activity. (Need to determine the baseline based on current level)

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- Our grounds and facilities will be as good as or better than they are today – don't need more, but enhance what we have. Need to determine an objective measure of "goodness". Perhaps we can create an annual assessment process and use that to determine actions needed to maintain/improve.
- Within 5 years, our level of endowments will be doubled (general and Outreach). *(Need to determine the baseline based on current level)*
- Within 5 years, we will have a sustainable financial model for Day School. *How will we define "sustainable"?*
- Within 2 years, we will have an effective model of assessing the resource requirements for our major programs and use this model in our budgeting and resource allocation processes.
- Within 2 years, we will have developed an effective way to communicate with transparency around the tangible impact of our stewardship/Gifts. *Coordinate this with the Communications team.*

### **Assumptions**

- I pledge as much as I think I can afford every year.
- I believe my pledge has an impact on the activities of the church.

### **Barriers and Unintended Consequences**

- We are in the final year of pledge from a major donor, representing approximately 20% of our total annual income.

### **"Parking Lot": Issues or Questions from the Strategic Planning Workshop**

1. To grow engagement and support from our community, perhaps we should focus more on the Philadelphia region than international outreach.

### **Additional comments from the Workshop Team:**

Resource Management =Allocation of:

- Treasure
- Physical space (usage)
- Financial resources (budget)
- Talent (time and engagement)

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- Laity
- Clergy

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### Theme: Programs and Activities (Other than Children and Youth) – Planning Leader: Michael Brent

#### **Vision**

St. David's is a welcoming Episcopal community that provides programs and activities designed to deepen the spiritual, educational, and social connections of our members and the community.

#### **Goals – Strategic**

- St. David's will provide a wide array of well-organized programs and activities designed to appeal to a wide range of people, enabling them to use their spiritual gifts in a meaningful way.

#### **Goals – Tactical**

- Ensure that we have effective leadership transfer for our programs/activities to minimize burnout of lay leaders.
- Ensure that women are engaged in fellowship activities.

#### **Actions Required to Achieve the Goals:**

- Create an improved process for connecting new and current members to programs and activities based on their gifts and program needs/offerings. This process should include a role for a paid Lay Programs Director (not necessarily full-time) – to coordinate, communicate and measure participation in programs
- Create a process for measuring programs and activities (set a goal and determine how to measure the performance). Create feedback/data from program lay leaders for Program Director to adapt/modify.
- Develop and implement smaller fellowship groups and activities to deepen connections. E.g. women's fellowship "sisterhood".
- Engage current lay leaders to assist in recruiting and encouraging new participation and new leadership (set term limits and create succession planning).
- Gather metrics to support program participation and leadership rotation:
- Annually track the number of people involved in a program or activity where they were previously not involved.

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- Annually track the number of programs/activities where leadership rotation has occurred.
- Annually track the number of people taking on a program leadership role for the first time.
- Develop consistent calendar themes to coordinate programs and activities across generations.

### Measuring Progress

- Within 2 years, at least 75% of our programs and activities will have established at least one goal for itself and will have a method of assessing the program annually.
- Within 3 years, at least 75% of our members will participate in at least one program or activity per year.
- Within 3 years, at least 50% of our members will participate in a program they previously had not participated in, annually.
- Within 3 years, our rate of new members joining will meet or exceed X (to be determined based on setting a baseline now).
- Within 3 years, at least 10% of our programs/activities will rotate leaders in that year. (Not that 10%% of programs will rotate annually, but in any given year, 10% or more will experience rotation).

### Assumptions

- The variety of programs and activities at St. David's is a strength of the parish.
- Fellowship is a strength of the parish.
- The Men's Fellowship is a strength of the parish.
- Our music program is a strength of the parish
- The success of a program at St. David's is measured by how it helps people grow in their spirituality.
- The success of a program at St. David's is NOT measured by how many people are involved in it.
- We have a broad range of lay talent in our congregation.
- Our laity is dedicated to the church's success.



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- Personal invitations are the best way to involve people in new programs and activities.

### **Barriers and Unintended Consequences**

- None Identified.

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### Communications Plan for Rollout of This Strategic Plan

Create a Strategic Communications Committee that meets to:

- Create a strategic communications plan
- Define the internal and external issues
- Identify the specific outreach/educational programs that should be known outside our congregation. Example: A workshop on major gifts offered by a skilled member of our congregation and offered to other Episcopal Churches in the region who might not have that expertise in their congregation. Or, a youth leadership program that teaches high school students how to lead through multisensory opportunities: learning and experiential application
- Create a calendar with specific communications to the congregation regarding the vision and how we will live into it.
- Make the St. David's brand clear both internally and externally through a written plan. The perception of St. David's outside of our parish is left to chance. We need to be specific about who we are, where we are going, what we offer and how we reach out to the community.
- Search for stories that serve as memory hooks to help energize and raise the enthusiasm of the congregation.
- Identify the vehicles through which we will communicate internally and externally: Episcopal publications, interfaith publications, website, social media, etc.
- Identify metrics to measure progress
- Meet with church staff to discuss implementation to insure a successful roll-out.

After the initial plan is produced, the committee will meet quarterly to oversee the implementation of it.

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### Recommended Governance Structure and Resource Requirements for Execution of This Plan

The Strategic Plan provides the framework for the achievement of significant goals in support of a strategic Vision. It provides an outline of major actions needed to accomplish these goals and a high-level timeline (see the next section) for this plan.

Execution of this plan will require focus on developing annual plans of action for each of the Theme areas, including assignment of responsibility for each activity and for monitoring progress on a regular basis.

The responsibility for execution and monitoring of this plan lies primarily with the Vestry and Clergy leadership teams. We recommend re-alignment of the current Commission structure in accordance with the Themes expressed in the Strategic Plan to facilitate the oversight of Plan implementation.

#### **Mapping of Current Commission Structure to Strategic Planning Themes**

As can be seen below, there are several Themes which map directly to the purview a current Commission: Children and Youth Programs (Family Ministries), Outreach, Resource Management (Finance and Property), Worship, and Pastoral Care. We recommend these Commissions be charged with the responsibility for the goals, actions, and measurements of the items in this Strategic Plan for the Themes to which they map.

Two Themes map loosely to the current Commission structure: Leadership Development (Discipleship) and Programs and Activities (Fellowship). We recommend the responsibilities of these Commissions be expanded to incorporate the goals, actions, and measurements of the items in this Strategic Plan for the Themes to which they map. The Vestry may also consider re-naming the Commissions to reflect the additional scope.

There are two Themes for which no current Commission structure exists: Communications and Organizational Structure and Management. To achieve our Strategic Goals and Visions, it will be important to assign accountability to the actions in these two Theme areas. We recommend the Vestry consider if creation of new Commissions to support these Themes is required, or whether these areas can be administered through some other existing governance structure.

Within this framework, the Vestry can focus its attention on planning the work of governing St. David's using the Strategic Plan as guidance for creating annual work plans. Reporting on progress for each Theme can be incorporated into the regular reporting processes of the Vestry.

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### ***Themes***

- Children and Youth Programs
- Communications
- Outreach
- Resource Management
- Leadership Development
- Organizational Structure and Management
- Programs and Activities
- Worship
- Pastoral Care

### ***Commissions***

- Family Ministries
- None
- Outreach
- Finance and Property
- Discipleship
- None
- Fellowship
- Worship
- Pastoral Care

## Resource Recommendations for Plan Execution and Progress Monitoring

The Strategic Planning Task Force believes that the current Vestry and Clergy resources should assume the leadership for plan execution, along with the **possible addition of resources to support the Communications and Organizational Structure and Management Themes** (if it is determined that no existing Commission or other governance structure can accommodate this work).

The Task Force recommends using additional resources from the laity to create the detailed annual plans and to work on the specific action items within those plans, especially in the initial year of the Plan. Several participants in the Strategic Planning Workshop have expressed interest in continuing to work on the Themes they were assigned to in the Workshop. Use of these participants in this capacity would be a significant source of continuity for the Plan. Adding additional resources to support these action items will broaden the acceptance of new activities in support of the Plan's Visions and Goals.

As this Plan transitions from the Task Force to the Vestry, we anticipate the need for some support from the Task Force to assist with communications and handoff processes. This transition should be accomplished in the last quarter of 2017, with the Vestry fully "owning" the Strategic Plan by the end of 2017.

The role of the Vestry Wardens in ensuring adoption of the Plan cannot be understated. If we are to achieve the significant impacts outlined in the Plan, we will need to ensure the Vestry and ultimately the entire parish is aligned around the Vision and Goals of the plan. The Vestry must ensure that this Plan is inculcated into its governing activities, and not just a "sideline" item on the agenda.

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**Timeline (Draft – “starting point”)**

Area	2017 (planning)	2018	2019	2020	2021 and beyond
Children and Youth	Finalize actions and goals – answer questions about expectations Recruit resources to support plans	Create data collection methodology Create training process for leaders Begin measuring progress	Create improved recruitment process Begin formal reporting on progress	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate
Communications	Finalize actions and goals Recruit resources to support plans	Improve website Create measures of success Revise communications processes Begin measuring progress	Begin formal reporting on progress	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate
Outreach	Finalize actions and goals	Outreach education Improve communications	Innovative outreach programs	Additional annual activities Continue to measure and	Additional annual activities Continue to measure and

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	Recruit resources to support plans	about Outreach opportunities Create tracking and measurement system Begin measuring progress	Begin formal reporting on progress	report on progress toward goals Revise goals as appropriate	report on progress toward goals Revise goals as appropriate
Leadership Development	Finalize actions and goals Recruit resources to support plans	Create leadership education programs for Servant leadership model Develop succession planning for all activities Begin measuring progress	Create mentor programs Develop self-assessment process for all programs Begin formal reporting on progress	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate	Additional annual activities Continue to measure and report on progress toward goals Revise goals as appropriate
Organizational Structure and Mgmt.	Finalize actions and goals Recruit resources to support plans	Create onboarding process for new staff	Create Vestry self-assessment process Exit interview process	Additional annual activities Continue to measure and report on	Additional annual activities Continue to measure and

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		<p>Vestry recruitment process</p> <p>Governance for Strategic Plan reporting</p> <p>Begin measuring progress</p>	<p>Begin formal reporting on progress</p>	<p>progress toward goals</p> <p>Revise goals as appropriate</p>	<p>report on progress toward goals</p> <p>Revise goals as appropriate</p>
Resource Planning	<p>Finalize actions and goals</p> <p>Recruit resources to support plans</p>	<p>Data capture for resource requirements</p> <p>Create measurements required for goals</p> <p>Build endowment</p> <p>Begin measuring progress</p>	<p>Begin formal reporting on progress</p>	<p>Additional annual activities</p> <p>Continue to measure and report on progress toward goals</p> <p>Revise goals as appropriate</p>	<p>Additional annual activities</p> <p>Continue to measure and report on progress toward goals</p> <p>Revise goals as appropriate</p>
Programs	<p>Finalize actions and goals</p> <p>Recruit resources to support plans</p>	<p>Create improved process for connecting members to programs</p> <p>Develop measurements</p>	<p>Refine data reporting for programs/activities (tied to resource requirements)</p>	<p>Additional annual activities</p> <p>Continue to measure and report on progress toward goals</p>	<p>Additional annual activities</p> <p>Continue to measure and report on progress toward goals</p>



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		needed to support goals Begin measuring progress	Begin formal reporting on progress	Revise goals as appropriate	Revise goals as appropriate
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**Progress Scorecard Template**

<b>St. David's Strategic Plan Progress Scorecard</b>				
<b>Last Updated:</b>		<b>Date</b>		
<b>COMPLETED</b>				
<b>THEME</b>	<b>ACTION</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>	<b>STATUS</b>
<b>IN PROCESS</b>				
<b>THEME</b>	<b>ACTION</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>	<b>STATUS</b>
<b>2018</b>				
<b>THEME</b>	<b>ACTION</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>	<b>STATUS</b>

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<b>2019</b>				
<b>THEME</b>	<b>ACTION</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>	<b>STATUS</b>
<b>2020</b>				
<b>THEME</b>	<b>ACTION</b>	<b>RESPONSIBILITY</b>	<b>TARGET DATE</b>	<b>STATUS</b>
<b>2021</b>				
<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>

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<b>2022</b>				
<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>
<b>2023</b>				
<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>	<b>THEME</b>

## APPENDIX

### History of this Planning Process

#### Parishioner Surveys – Summer 2016

Work began in the summer of 2016 with the members of the Strategic Planning Task Force (hereafter referred to as "SPTF") interviewing approximately 125 members of the parish. Interviews were conducted with members of all ages and with varying degrees of involvement in parish activities.

The questions asked of each parishioner were:

- Why do you come to St. David's Church?
- What do you think we do well?
- What do you think we could do better?
- Where do you think we could be in 5 years?
- What, if anything, would cause you to no longer be associated with St. David's?

The SPTF members completed notes from these surveys and submitted them to the group anonymously. The notes were compiled and opinions were grouped based on similarity.

#### Opinion Survey – Fall 2016

From the opinions expressed in these interviews, the SPTF created an Opinion Survey consisting of approximately 100 opinions about St. David's, both positive and negative. These opinions represented actual comments made by parishioners during the interviews, for which more than one person expressed a similar comment.

Using a software tool from SchellingPoint LLC, the entire congregation, clergy, and lay staff were invited to participate in the Opinion Survey, in which each participant was given an opportunity to agree or disagree with each Opinion expressed. Agreement or disagreement was expressed in one of six values, ranging from Strongly Disagree to Strongly Agree. All responses to the survey remain anonymous, even to the administrator of the software tool (who could see who participated but not how they responded).

Using this software tool enabled the SPTF to determine the initial level of "Alignment" within the congregation regarding these opinions. That is, the degree to which the responses were similar. Note that similarity does not necessarily imply that the response was "Agree". In fact, we found that there were several opinions for which the responses were strongly aligned around "Disagreement". The SPTF was able to thus use the Opinions in the Plan in a manner which ensures that there will be a high degree of alignment around the Plan because of the responses in the Opinion Survey.

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Approximately 400 people participated in the Opinion Survey process.

### **Opinion Validation – Winter 2016**

Following the initial gathering of opinions and initial measurement of the level of Alignment about the Opinions, the SPTF provided another opportunity for participants in the first step to clarify their responses.

Using the same software tool, respondents received a customized survey (generated by the software) to complete. In this step, participants were asked to respond only to those opinions for which their initial response differed from the consensus of others. That is, if a participant originally said they “agreed” with the opinion but most others said they “disagreed”, the participant would see that opinion again in this step. They would have seen the opinion, what the consensus of the participants was, and what their response was. It is possible that some participants in the first step would not have received a survey in the second step, if all their opinions were aligned. However, most people would have received a survey with at least a few opinions to respond to on the second round.

The purpose of this step was to clarify the initial response, so the participant was asked to either explain why their response was different from others, or whether they wanted to change their response. This enabled a participant to reconsider whether they really held the opinion they originally expressed. Occasionally people either misread the opinion when responding, or respond but realize they don't have a strong opinion one way or another. This step enables them to change their response if either of these were the case.

This was an important part of the process, because the responses in this step provided additional insight into WHY people held the opinions they did. For those who felt strongly about their opinion and provided comments, their comments proved useful in determining what action the SPTF took regarding these opinions. Again, all responses remain anonymous.

Approximately 275 people participated in the Opinion Validation process.

### **Analysis and Theme Generation – late winter/spring 2017**

Using the output from the software, the SPTF analyzed each opinion to determine which were “aligned” and which may require additional analysis. The Task Force used this information to create Aligned Goals, Assumptions (starting points), Barriers and Unintended Consequences.

The Task Force then organized these Goals, Assumptions, Barriers, and Unintended Consequences into seven Theme areas:

- Children and Youth
- Communications
- Outreach

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- Leadership Development
- Organizational Structure and Management
- Resource Management.

Two significant areas of our parish life which were addressed in a few but not many opinions in the Opinion Survey are ***Worship and Pastoral Care***. Due to the small number of opinions on these topics, neither emerged as a Theme during the work of the SPTF. This should not be interpreted as implying these are not significant areas on which to focus our efforts as a church. Rather, the Strategic Planning team recognizes these areas as being core to the Church; that is, if nothing else, we must "do" worship and pastoral care as part of our church life. We therefore recommend the addition of two additional Themes with corresponding vision statements as outlined in the next section.

The consensus in the opinions expressed in these areas is that St. David's has high performance in these two areas and that we should continue to build on our successes here. There were no significant concerns within these areas. We believe we should view ourselves as being on a "Continuous Improvement Plan" for these areas rather than a "Transformation Plan" as we are with other areas.

### **Strategic Planning Workshop – June 2017**

The final major activity before creation of this document was a Strategic Planning Workshop, held in early June 2017. Approximately 50 people participated in a half-day exercise to help determine the Vision, Action Plan, and Measures of Success for the Strategic Planning themes. Participants were divided into teams, each assigned a Theme to work on during the workshop. The results of this activity are documented on the following pages. The complete list of participants at the workshop is provided below:

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### Participants in Strategic Planning Workshop

Held June 3, 2017

Name	Theme Name	Table Leader
Barber, Mrs. Susan E.	Children/Youth	
Dixon, Mr. Vincent	Children/Youth	
Francis, Mr. Charles Anderson (Carl)	Children/Youth	
Phelps, Mr. Paul Timothy (Tim)	Children/Youth	X
Waldron, Mrs. Gillian Shuman	Children/Youth	
Wilson, Dry Martin	Children/Youth	
Baldwin, Jay	Communications	
Eremus, Mrs. Margo	Communications	
Hall, Ms. Dana B.	Communications	
Power, Mrs. Dale	Communications	X
Satterfield, Mr. John F.	Communications	
Tucker, Michael	Communications	
Messner, Ms. Kristine Elaine (Kris)	Floater	
Petro, Mr. Thomas Michael (Tom)	Floater	
Arnold, Sandra	Leadership Development	
Bauer, Mr. Richard E. (Dick)	Leadership Development	X
Bonn, Dry Joseph (Joe)	Leadership Development	
Hepburn Jr, Mr. Austin Barry	Leadership Development	X
Kangas, Ms. Carol I.	Leadership Development	
Scauzzo, Susan	Leadership Development	
Wilson, Mrs. Jane	Leadership Development	
Helms, Janet	Organizational Structure/Management	
Lander, Mr. John Bomberger	Organizational Structure/Management	
Smoot, Mr. Richard (Dick)	Organizational Structure/Management	
Urwin, Ms. Julia	Organizational Structure/Management	
Vosburgh, Mr. George	Organizational Structure/Management	X
Wilcox, Mr. Ian Blake	Organizational Structure/Management	
Baldwin, Theresa	Outreach	
Gearhart, Mr. William Kipp	Outreach	



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Itin, Mrs. Mary Garrett	Outreach	
Kimmel, Mr. Martin	Outreach	X
Nagy, Susan	Outreach	
Smith, Mrs. Alison Kistler	Outreach	
Brent, Mr. Michael A.	Programs	X
Dolan, Mrs. Kerry Murphy	Programs	
Ebling, Mr. Byard Todd	Programs	
Gordon, Mrs. Nereida K.	Programs	
Miller, Ned	Programs	
Moon, Mrs. Karen Krischker	Programs	
Satterfield, Janis	Programs	
Cunningham, Mr. Terrence (Terry)	Resource Management	
Egan, Mrs. Janice	Resource Management	
Ferguson, Mr. T. Ritson (Ritson)	Resource Management	
McCallum, Mrs. Lucinda M. (Cindy)	Resource Management	
Shiley, Mrs. Kim	Resource Management	X
Waldron, Jeff	Resource Management	

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### **SWOT Analysis**

**As of September 2017**

#### **STRENGTHS AND WEAKNESSES BY FUNCTION**

##### **Organizational Strengths (internal)**

- Outstanding Rector with a demonstrated record of spiritual, organizational, outreach, and financial growth under his leadership
- Highly capable and motivated congregation with a depth of leadership and extraordinary talents
- A dedicated clergy, staff, and lay congregation
- A large majority of our congregation (80%+ of over 500 survey participants) is in strong agreement with respect to how we view St. David's at present as well as potential opportunities for future direction
- A lay led commission structure and ministries that encompass virtually all areas of church responsibility with energized and dedicated participants
- An excellent record of developing priests into Rectors over time
- An open, friendly, and enthusiastic culture
- The Rector's work developing a guide to help members and others discern their talents and spiritual gifts is a huge strength with respect to helping St. David's better live into our mission and achieve our vision for the future

##### **Organizational Weaknesses (internal)**

- While lay leadership in the congregation is a huge strength, there is no consistent and formal process for developing new and current leaders and rotating responsibilities to encourage ongoing participation of others
- No formal directory of member talents, skills, or interests
- Limited understanding of Commission structure, Vestry governance and volunteer opportunities
- Perception by some that the Vestry may need to dedicate additional time and commitment to strategic direction issues
- No formal plan to benefit from corporate memory of past leadership (commissions, ministries, etc.) to continually refresh leadership roles and welcome others into leadership roles

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- There is no formal communications strategy with respect to both internal and external communications and PR issues
- Leadership of some key ministries and commissions does not change on a scheduled basis and leadership practices may be deficient in some quarters.

### **Financial Strengths (internal)**

- A small and declining cadre of extremely generous benefactors who have led the way with respect to annual giving, capital campaigns, and special projects
- A strong balance sheet and improving operating performance
- Vastly improved financial administration practices in recent years
- A series of highly challenging and successful capital campaigns

### **Financial Weaknesses (internal)**

- Our endowment does not appear to be appropriate for a congregation of our size and resources
- Possible misperception of annual giving- "we don't need the money"
- Heavy reliance on a small group of aging and generous benefactors.
- Somewhat low percentage of annual giving participation.
- Perceived need to develop a long-term stewardship strategy (viz. millennials, etc.)
- Perhaps some new or existing members of the congregation may not be aware of St. David's stewardship/pledging practices if those practices vary from their prior giving experience.

### **Facilities Strengths (internal)**

- A magnificent and spacious campus and physical plant to include a new Chapel, meeting and office accommodations, a historic Church, Clergy House, Knewstub, Extensive Churchyard, Fair Grounds, and Rectory.

### **Facilities Weaknesses (internal)**

- Parking is a challenge with limited potential for future additional parking in the future
- High overhead costs of physical plant
- Limited affordable residences nearby for ministers and their families

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### **Program Strengths (internal)**

- A high degree of focus upon living into our Mission Statement and annual themes
- Generosity, kindness, love, friendliness, and warmth abound
- Strong and growing outreach initiatives
- Rich, varying, and effective worship, music & education offerings

### **Program Weaknesses (internal)**

- "Big pool" of talent where lack of invitation and connection can be a challenge
- Perceived opportunity to improve Youth and Sunday School programs
- Some newcomers or existing members may not know how to connect to opportunities that abound at St. David's. More personal invitations?

### **Other Strengths (internal)**

- A rich 300+ year heritage
- 19th largest parish in the nation and number 1 ranking in PA
- St. David's is an engaged, resource church within the Diocese of PA
- Strong financial support of and involvement in the Diocese of PA and communities less fortunate through outreach and other initiatives

### **Other Weaknesses (internal)**

- Lack of formal risk assessment process to identify, assess, and address potential "corporate" risks

### **OPPORTUNITIES (external)**

- Expand upon the Men's Fellowship model of inviting other congregations to participate with us and/or capitalize upon our established programs and resources
- Assume an expanded role as a resource church within the Diocese of PA
- Project management, Outreach, Youth, Leadership Development, etc.
- Cell tower and St. David's Episcopal Day School will be additional revenue sources

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- Greater outreach to children and young people in general
- Additional local outreach
- Expand external communications to promote church programs and invite others to participate
- Joint ventures with other churches and/or secular organizations
- More members/more contributions – but what is the limit?
- Knewstub building will be used for St. David's Episcopal Day School
- New technology (evolving social media and distribution devices/channels)

### **THREATS (external)**

- Terrorism (local and/or nationwide)
- Cyber attack
- Environmental disasters: fire, storm, etc.
- Potential high-profile PR issues
- Changing demographics and growing secularism
- Sudden loss of Rector
- Loss of most generous donors over time
- Change to taxation laws
- Risk of losing current members because of church shopping resulting from relocation, life transitions of one kind or another, social issues, the Episcopal Church, and/or a preference for a new church environment
- Outspoken political divisiveness could potentially disrupt and divide our congregation along political lines

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### Core Values

#### How is God calling St. David's to live out our mission?

The strategic planning process has completed a SWOT to clarify what will become our vision of our future. We have wrestled with questions such as:

- What are our gifts?
- What values do we hold most dear?
- How can we grow our faith while creating a broader reach to our and the larger community?
- How do the answers to the above questions translate to our various commissions and how will we know that we are on track?
- How can we create the biggest vision for our church that is sustainable, deepens our faith, and seals our connectedness with God and each other?

St. David's is a community with strong values. We have so many gifts in terms of talent, leadership, and hospitality, it's difficult to narrow them down to the ones we want to represent our entire community. Here are the values that we stand for as we go forward:

#### Love: The foundation of our Christian faith

- We are commanded to love others as we love ourselves
- The daily challenge of our faith is to treat others as we wish to be treated
- The energy of love is contagious. When it is present, miracles happen.
- The requirement to love others is the challenge that raises our awareness of the gifts of others.
- Living with love takes daily practice.

#### *Scripture*

- 1 John 15:12
- 1 John 4:16 We know and rely on the love God has for us. God is love. Whoever lives in love lives in God and God in them.
- Ephesians 4:2 My command is this: love each other as I have loved you.
- 1 John 4:12 We know and rely on the love God has for us. God is love. Whoever lives in love lives in God and God in them.

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### Generosity: Putting Christ's Love into Action

- Generosity starts with intention
- Intention must be followed by action. This means taking a stand for our beliefs and discipleship
- Helping others helps us, inspiring our hearts, widening our perspective
- Hospitality invites others in and connects us to each other and God.
- Actions can be tiny or big: they include ministering to each other, our community, and others outside
- We plant the seeds of connectedness always completing the circle of filling up and with Grace, in turn, filling us.

#### *Scripture*

- John 3:16: "For God so loved the world, that he gave his only Son, that whoever believes in him should not perish but have eternal life."
- Acts: 20:35: "In all things I have shown you that by working hard in this way we must help the weak and remember the words of the Lord Jesus, how he himself said, 'It is more blessed to give than to receive.'"
- Luke 6:38: "Give and it will be given to you. Good measure, pressed down, shaken together, running over, will be put into your lap. For with the measure you use it will be measured back to you."

### Joy: Even when we are in the most difficult circumstances, we can choose joy

- We experience joy, knowing we are forgiven
- We are filled with gratitude for our faith, our community of believers, and the work we are called to do
- We share our faith journey to those walking in the dark
- We accept His Grace as we stretch ourselves in living our faith
- We are humbled by the gift of His Love shared with others through our actions

#### *Scripture:*

- Romans 15:13: "May the God of hope fill you with all joy and peace in believing, so that by the power of the Holy Spirit you may abound in hope."

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- John 16:24: "Until now you have asked nothing in my name. Ask, and you will receive, that your joy may be full.
- 1 Peter 1:8: "Though you have not seen him, you love him. Though you do not now see him, you believe in him and rejoice with joy that is inexpressible and filled with glory."
- James 1:2-4: "Count it all joy, my brothers, when you meet trials of various kinds, for you know that the testing of your faith produces steadfastness. And let steadfastness have its full effect, that you may be perfect and complete, lacking in nothing."
- Acts 2:28: "You have made known to me the paths of life; you will make me full of gladness with your presence."

Welcoming: We strengthen our community through making every person feel like they count.

- Our community is strengthened when everyone feels welcome
- Acknowledging work done with appreciation fuels the engine of action
- We encourage ourselves to stretch beyond our current capability
- We show appreciation for all the acts of kindness and generosity performed and tell those stories to inspire others
- We walk our talk of welcome by offering our friendship, our thriving community, and the opportunity to be part of a big calling.

*Scripture:*

- Galatians 3:28: "There is neither Jew nor Greek, there is neither slave nor free, there is no male and female, for you are all one in Christ Jesus."
- Mark 10:13-16: And they were bringing children to him that he might touch them, and the disciples rebuked them. But when Jesus saw it, he was indignant and said to them, "Let the children come to me; do not hinder them, for to such belongs the kingdom of God. Truly, I say to you, whoever does not receive the kingdom of God like a child shall not enter it." And he took them in his arms and blessed them, laying his hands on them.
- Matthew 10:40-42: "Whoever receives you receives me, and whoever receives me receives him who sent me. The one who receives a prophet because he is a prophet will receive a prophet's reward, and the one who receives a righteous person because he is a righteous person will receive a righteous person's reward. And whoever gives one of these little ones



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even a cup of cold water because he is a disciple; truly, I say to you, he will by no means lose his reward."

Inspiring: By sharing our love of Christ and telling our story

- We inspire ourselves and each other by deepening our faith through discipleship
- Our actions both personal and as one body reflect our love of Christ and His teaching
- We share our skills with our community and other communities so that they will be strong
- We learn to tell our story in such a way to give others hope
- We celebrate one another, knowing that each person brings special perspectives, learning and points of view we might never have considered regardless of their status, success, etc.

*Scripture:*

- John 14:26: "But the Helper, the Holy Spirit, whom the Father will send in my name, he will teach you all things and bring to your remembrance all that I have said to you."
- Isaiah 55:11: "So shall my word be that goes out from my mouth; it shall not return to me empty, but it shall accomplish that which I purpose, and shall succeed in the thing for which I sent it."
- Ephesians 2:1-10: "And you were dead in the trespasses and sins in which you once walked, following the course of this world, following the prince of the power of the air, the spirit that is now at work in the sons of disobedience— among whom we all once lived in the passions of our flesh, carrying out the desires of the body and the mind, and were by nature children of wrath, like the rest of mankind. But God, being rich in mercy, because of the great love with which he loved us, even when we were dead in our trespasses, made us alive together with Christ—by grace you have been saved."

Compassion: We challenge ourselves by expanding our hearts in acceptance of those who need our help, comfort, and encouragement.

- We raise our awareness of need: individual, our congregation, our community, and the Philadelphia area
- We learn to release our judgement as we soften our hearts

## St. David's Episcopal Church Strategic Plan

*We are a church on a mission to know God in Jesus Christ and to make Christ known to others.*

- We see through new perspectives

*Scripture:*

- Colossians 3:12-13: "Put on then, as God's chosen ones, holy and beloved, compassionate hearts, kindness, humility, meekness, and patience, bearing with one another and, if one has a complaint against another, forgiving each other; as the Lord has forgiven you, so you also must forgive."
- 2 Corinthians 1:3-4: "Blessed be the God and Father of our Lord Jesus Christ, the Father of mercies and God of all comfort, who comforts us in all our affliction, so that we may be able to comfort those who are in any affliction, with the comfort with which we ourselves are comforted by God."
- Romans 12:20: To the contrary, "if your enemy is hungry, feed him; if he is thirsty; give him something to drink; for by so doing you will heap burning coals on his head."

### **Opinions and Degree of Alignment (From Opinion Survey Process)**

The enclosed list of opinions constitute the Opinion Survey conducted in Fall 2016. For each opinion on the Survey, respondents were asked to indicate their level of agreement on a scale from "Strongly Disagree" through "Strongly Agree". The options provided were:

- Strongly Disagree
- Disagree
- Slightly Disagree
- Slightly Agree
- Agree
- Strongly Agree

Note that by design, there is no "neutral" response option. If a respondent were unable to respond by agreeing or disagreeing with the Opinion on the survey, they were asked to not respond at all.

The Opinion Survey provides two significant measures of the participants' responses to the Opinions: The **degree of alignment** among the responses and overall **agreement/disagreement sentiment**. On the attached report from the survey, there are two numbers shown to the right of each Opinion. The first represents the level of

## St. David's Episcopal Church Strategic Plan

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alignment (Alignment Index) about the opinion and the second (Sentiment) represents the intensity of the consensus.

- The Alignment Index indicates how closely the group shares the same opinion (regardless of what the opinion may be). The maximum level of alignment is 100 (meaning that everyone's response is the same). In general, an Alignment Index over 80 indicates that the group has significant alignment of opinions. To be clear, "Alignment" is not synonymous with "Agreement with the Opinion". As an extreme example, a group could have an Alignment Index of 100 for the response of "Strongly Disagree". This would mean that everyone responded they strongly disagreed with the opinion in the survey.
- The Sentiment Index is an indicator of the degree of agreement/disagreement with the opinion. An index of -100 indicates strong disagreement while an index of +100 indicates strong agreement. Sentiment indexes less than -60 indicate strong disagreement while indexes greater than +60 indicate strong agreement. Sentiment indexes between -20 and +20 may be inconclusive, since they may indicate that the intensity of opinions is weak, or that there are opposing viewpoints which "net out".

# Alignment Cycle Report

## Creating a Strategic Plan for St. David's Church

### All Participants All Participants

#### Convergent

##### G GOALS/OBJECTIVES/INDICATORS OF SUCCESS

■ St David's will be recognized as a community resource for sharing our physical and financial resources.	91		65
■ We should ensure adequate funding for our programs in our budgeting process.	91		63
■ The Day School should be financially self-sustaining.	90		66
■ St David's will be recognized as a church that develops clergy to be servant leaders.	90		63
■ St David's should hire exceptionally talented associate clergy knowing they may become rectors at other churches.	89		61
■ St David's will be recognized as a church that develops members to be servant leaders.	87		55
■ We should have a formal process to evaluate the effectiveness of our numerous activities.	87		58
■ St David's should help deserving Seminary students develop into successful clergy.	86		52
■ St David's will be recognized for its Lay Leadership development programs.	86		51
■ St David's Youth Group will be an attraction for new families to join the parish.	86		55
■ St David's new Day School will be recognized locally as a leader in faith-based education.	86		54
■ St David's should be an environmental steward for the ecological resources of our property.	85		53
■ We should enhance our Confirmation program to include more opportunities for kids to bond in the program.	85		51
■ We should increase the effectiveness of our use of digital connectivity to engage more people in the church.	85		48

##### U POTENTIAL UNINTENDED CONSEQUENCES

■ We will need to plan for clergy turnover to minimize impact to our programs.	89		59
■ We will need to plan for Staff (non-clergy) turnover to minimize impact our programs.	83		46
■ We will have frequent clergy turnover from being a "clergy development" parish.	79		39
■ We will "burn out" the current (lay) leadership of some of our programs because we don't have effective leadership transfer.	77		33

##### B ISSUES AND BARRIERS

■ We do not communicate well outside the parish about the impact of our outreach programs.	74		33
■ Parents are not as involved as we need them to be in Sunday School and Youth programs.	74		31
■ We have members who do not understand the importance of making a pledge to the church.	72		33
■ We do not communicate as well as we could within the parish about the impact of our outreach programs.	69		22
■ Our pledging base is not as strong as it needs to be to support the activities of the church.	69		25
■ Our women's fellowship program doesn't engage enough women in the parish.	59		11

##### A UNDERLYING ASSUMPTIONS/CURRENT STATE

■ We have a broad range of lay talent in our congregation.	95		77
■ St David's is a safe place for the youth in our parish.	94		73
■ The St David's "brand" is a positive one.	92		69
■ Our music program is a strength of the parish.	92		69
■ Our priests/clergy think this is a good place to serve.	92		67
■ Our Youth Group is an important program at St David's Church.	92		68
■ Our lay staff think this is a good place to serve.	91		65
■ Our laity is dedicated to the church's success.	91		64
■ The variety of programs and activities at St David's is a strength of the parish.	90		64
■ The Men's Fellowship is a strength of the parish.	90		63

■ Our worship style is accessible. 90 64

## Moderately Convergent

### G GOALS/OBJECTIVES/INDICATORS OF SUCCESS

■ We should develop additional local outreach programs in lower income communities.	81		47
■ St David's will be recognized as a National Leader within the Episcopal Church for our Children and Youth ministries.	80		45
■ We should maintain contact with our alumni clergy and celebrate their successes.	80		43
■ We should use our history and architecture as resources for attracting new members.	80		41
■ We should have more opportunities to learn how to deepen our spirituality.	80		38
■ We should have a formal process for establishing and funding new programs at St David's.	80		37
■ Students should have an increased role in leading the Youth Group including budgeting.	79		36
■ We should have a formal program to encourage members to include St David's in their Legacy planning.	79		39
■ We should help smaller Episcopal congregations survive.	77		37
■ St David's should create an environmental sustainability plan.	74		38

### U POTENTIAL UNINTENDED CONSEQUENCES

■ We will exceed our available financial resources as we develop additional outreach programs. 56 9

### B ISSUES AND BARRIERS

■ We have not been effective in assimilating new members into leadership roles in our programs.	60		5
■ We don't have an easy way for members to know which staff are responsible for specific programs or activities.	54		6
■ We don't have effective tools for informing members when help is needed for specific projects/activities.	54		3
■ Our website is not as effective as it could be in communicating information to visitors (non-members).	50		2

### A UNDERLYING ASSUMPTIONS/CURRENT STATE

■ Frank's leadership is critical to the success of St David's.	93		75
■ I am excited about the possibilities for the future at St David's.	92		72
■ Outreach opportunities are important to all ages of members.	90		63
■ Our worship style is welcoming.	89		62
■ We have a competent, committed lay staff.	88		63
■ The work that St David's does changes lives around the world.	88		59
■ Fellowship is a strength of the parish.	87		59
■ We have many opportunities for spiritual growth in our parish.	87		56
■ The work that St David's does changes lives locally.	86		52
■ We are a welcoming community.	86		57
■ Personal invitations are the best way to involve people in new programs and activities.	85		48
■ Our weekly bulletin is an effective means of communicating about church activities.	85		47
■ I pledge as much as I think I can afford every year.	84		50
■ Our current outreach programs are effective.	84		47
■ I believe my pledge has an impact on the activities of the church.	83		48
■ I know at least one member of the clergy with whom I would feel comfortable discussing my personal issues.	82		56
■ The success of a program at St David's is measured by how it helps people grow in their spirituality.	81		41
■ I know where and how to sign up for St David's programs I am interested in.	80		44
■ I understand the role of the Vestry.	80		46
■ I know how to connect with the groups I am interested in at St David's.	79		41
■ We have a strong and effective Vestry.	78		37
■ I feel like I know what is going on at St David's.	78		37

## Divergent

### G GOALS/OBJECTIVES/INDICATORS OF SUCCESS

■ We should set a goal for giving away a percentage of the funds we receive each year.	71		28
■ We should have more opportunities for non-members to be connected to projects at St David's.	70		21
■ We should have a formal, staffed process for matching member's skills and interests to	69		21

needs in the parish.

■ St David's should be more involved in Diocesan ministries and activities.	68		11
■ St David's should open its doors to other local ministries not directly associated with the church.	67		16
■ We should have a special service for youth on our regular service schedule.	62		12
■ St David's should set limits to how many ministries/activities we offer in a year.	57		15

**U** POTENTIAL UNINTENDED CONSEQUENCES

■ Focusing more resources on outreach in the local community will reduce our commitment to our current international outreach.	61		-10
■ If we focus on extending verbal invitations to people to join ministries/activities we will create a "clique" environment.	54		-7
■ Committing resources to develop the Day School will negatively impact other programs.	50		-4

**B** ISSUES AND BARRIERS

■ We are not consistent in delivering the same message during verbal announcements at all weekly services.	67		-20
■ Our size makes it difficult to know more than a few other people in the parish.	60		-15
■ Due to clergy turnover, I don't know who I can ask for help/direction/support.	57		-15
■ There are activities in the church that are not openly accepting of new members.	56		-11
■ Our website is not as effective as it could be in communicating information to members.	52		-2

**A** UNDERLYING ASSUMPTIONS/CURRENT STATE

■ The Christian Education program is strong for all age groups.	70		29
■ The Vestry represents me and my interests in how the activities at St David's are managed.	69		22
■ Many of the people I consider close friends are part of the St David's community.	66		27
■ The turnover in clergy staff brings new energy and ideas.	66		20
■ I feel that my talents are maximized at St David's.	62		17
■ The Dove is an effective means of communicating about church activities.	58		14
■ I know what the Vestry is working on.	58		-11
■ The success of a program at St David's is measured by how many people are involved in it.	56		-2
■ I know how to find contact information for other members of the parish on the church website.	56		15
■ Turnover in clergy or staff makes me wonder who to ask for help/for direction/for support.	49		-1