

St Matthew's Strategic Plan - Implementation Progress Update

Bishop's Charter...

“Growth and Unity”



St Matthew's
Episcopal Church



- Background on the creation of the Strategic Plan (method), and its approval
- The Plan's Implementation Committee
 - Present and Former Members of the Implementation Committee
 - IC Activities/Tasks
- Strategic Plan Priority Efforts and Their Status
- Summary
- For Reference: The Complete 2020 St Matthew's Strategic Plan can be found on St Matthew's Website



- Father Chris' Faith Vision, then developing enablers for that Vision
- Review of past Church Surveys
- Church Environment and Conviction lists completed
- St Matthew's Self-Assessment (Strengths, Weaknesses, Opportunities, and Threats (SWOT))
- Weaknesses and Opportunities Ranking
- Development of Congregation Survey, Survey Distribution, and Analysis
- Development of Strategic Plan Efforts (quads) -- aligned to Weakness and Opportunity Ranking, and Survey
- Strategic Plan Organization and Prioritization Completed
- Development of Vestry Brief, Congregation Brief, and Path Forward Recommendations
- Approval of the Strategic Plan by the Vestry and Congregation in Dec 2020



- Vestry authorized the formation of a Strategic Plan Implementation Committee to act as a catalyst for getting Strategic Plan Efforts started – at the same time it approved its Duties/Tasks
- Implementation Committee Formed and had its first meeting in Feb of 2020. Present and former members of the implementation Committee:
 - Pamela Muery
 - Melanie Pezzula
 - Mike Hamilton
 - Jonathan Magee
 - Dorothy Peters
 - Lee Ann Mack
 - Sande Smith
 - Rebecca Franz
 - Diane Loehr
 - James Maddox
 - James Weaver



Implementation Committee (IC) Duties/Tasks

- Reports to the Vestry
- For priority Strategic Plan Efforts determined by the Vestry, evaluates how to implement using...
 - Existing groups/individuals
 - New individual volunteer help
 - Formation of new committees (temporary or permanent)
- Present ongoing implementation/restructuring plans/actions to Vestry for approval
- Recruit congregation members to lead efforts (and partially fill committees)
- Helps/mentor organization of first “New Committee” meetings when requested
- Informally monitor committees/individuals implementing the plan over the course of the year
- Develops and recommends updates to the Strategic Plan



IC Activities Since Approval of the Strategic Plan

- The Strategic Plan laid out 24 Efforts to be worked – 13 were considered Priority Efforts for 2021
- In January of 2022, the Vestry approved an updated version of these Priority Efforts. Since the Strategic Plan is a living document, it also approved adding to new Efforts, both considered Priority Efforts for 2022. They are...
 - Senior Adult Program
 - Preparation and Welcoming of the Assistant Rector
 - Adult Education
- IC Activities Method
 - For priority Strategic Plan Efforts, the IC evaluates how to best implement using...
 - ◆ Existing groups/individuals
 - ◆ Formation of new committees (temporary or permanent)
 - ◆ New individual volunteer help
 - Often the IC brainstorms methods to meet the intent of the Efforts. These ideas are handed-off to existing or new committee leads for their consideration
 - If a new committee, the IC attempts to recruit a Lead for it (and partially fill the committee should the Lead request)
 - If an existing committee will work the effort, the IC requests of the Lead any help the IC can provide
 - On occasion the IC checks committees/individuals implementing the SP to see if any help is needed



Priority Efforts for 2021

- Better Church Signage
- Church Task Restructuring (renamed - was Vestry Organization)
- Update Media Methods/Techniques
- Hiring an Asst Rector
- Church Gardening Club
- Father Chris Led Classes
- Establish and Publicize Endowment Fund
- Young Adult and Family Programs
- Visitors Task Force
- Youth Task Force
- Periodic Single Service Sunday
- Capital Campaign to Reduce Debit and Add to Building Fund

Priority Efforts for 2022

- Hiring an Asst Priest – Prep and Welcome
- Update Media Methods/Techniques
- Campus Planning
- Participation in Community Efforts/Activities
- Father Chris Lead Classes
- Young Adult and Family Programs
- Church Gardening Club
- Church Task Restructuring
- Senior Adult Program
- Adult Sunday School Participation

Priority Efforts for 2023

- Participation in Community Efforts/Activities
- Update Media Methods/Techniques
- Young Adult and Family Programs
- Church Task Restructuring
- Senior Adult Program

On the following charts, these to lists will be combined and the Efforts Status provided



Combined Priority Efforts for 2021/22 and Their Status

- Better Church Signage
- Church Task Restructuring (renamed - was Vestry Organization)
- Update Media Methods/Techniques
- Hiring an Asst Rector
- Prep and Welcome of the Asst Rector
- Church Gardening Club
- Father Chris Led Classes
- Establish and Publicize Endowment Fund
- Young Adult and Family Programs
- Visitors Task Force
- Youth Task Force
- Periodic Single Service Sunday
- Capital Campaign to Reduce Debit and Add to Building Fund

- Campus Planning
- Participation in Community Efforts
- Senior Adult Program
- Adult Sunday School Participation

Legend for the Status on the Next Four Pages...

- Completed: Effort successfully handed-off to a new/existing Committee to be worked. As in the Church Sign Effort, is totally completed
- Handed-Off: Effort accepted by a committee/individual to be worked. Often Efforts are perpetual and will never be "completed"
- Initiated/Ongoing: IC is currently discussing/brainstorming Effort often working with the existing Committee/Staff lead it might fall to for action
- Deferred: Time was not right for Handing-Off either due to prioritization, current interest, or near-term circumstances
- Closed: Effort was no longer needed due to a change in circumstances/needs



Combined Priority Efforts and Their Status

Effort	Status	Notes
Better Church Signage	Completed	Action was worked in parallel (Senior Warden, et al) with the development of the Strategic Plan and completed soon after the SP was approved
Church Task Restructuring (renamed - was Vestry Organization)	Ongoing	Given St Matthew's has transitioned from a "Transitional Size" Church to "Program Size" Church the IC looks for ways to better Church processes/organization and pass ideas to the appropriate Church Leadership
Update Media Methods/Techniques	Ongoing	IC brainstormed new ideas for improving communications and using media techniques within the congregation and also the community. Passed on ideas to Communications Staff Lead (Lee Ann) and insured funding for an expanded program in the Church Budget. IC continues to brainstorm ideas to improve our media techniques
Hiring an Asst Rector	Handed-Off and Completed	Rector actioned (who did the hard work!) while IC supported insuring Church Budget line items for Asst Rector pay and associated support/costs
Prep and Welcome of the Asst Rector	Handed-off and Completed	IC brainstormed and listed the many possible activities associated with preparing for (onboarding) and welcoming an Assistant Rector. These pages of ideas were then handed-off to the Vestry (primarily Diane Loehr) and Staff (primarily Cathy Williams) who had agreed to take on the Welcoming Task



Combined Priority Efforts and Their Status

Effort	Status	Notes
Church Gardening Club	Deferred	Due to difficulty in finding an individual to take on the full tasks envisioned, the IC put this Effort on-hold. Melissa volunteered to continue Lead of the gardening portion of the Effort as we continue in our search
Father Chris Led Classes	Deferred	Deferred until Rector finds the right class/subject to lead
Establish and Publicize Endowment Fund	Handed-Off	Enlisting and working with Kathy Shelton and Bobby Deneffe (primary authors) IC monitored the creation of the Endowment Fund Charter and its approval by the Vestry, and then Congregation. IC then found a Lead (Dan Rasmussen) and assisted in finding other committee members. Team is meeting periodically
Young Adult and Family Programs	Handed-Off	Due to COVID, until 2022 the Effort was deferred. Rachel Byrd is now leading the effort working with Father Dillion
Visitors Task Force	Deferred	Newcomers Committee just re-formed in mid-2023. Until its activities are fully determined, activities envisioned for the Visitors Task force is deferred
Youth Task Force	Deferred	Given COVID and the many activities Jann Eich has had planned, the effort was deferred given higher priority Efforts



Combined Priority Efforts and Their Status

Effort	Status	Notes
Periodic Single Service Sunday	Handed-Off and Completed	At the request of the IC, the 2021 Vestry identified at least 4 single service Sundays for 2022. IC will follow-up on this for 2023
Capital Campaign to Reduce Debit and Add to Building Fund	Closed	Due to the greatly accelerated and imminent pay-down of the Church mortgage, it was decided this effort was no longer required
Campus Planning	Handed-Off	IC found a Campus Plan Lead (Garrett Smith) and assisted in finding committee members. Committee is regularly conducting meeting and will be hiring an architect in 2024
Participation in Community Efforts	Handed-Off	IC brainstormed possible ideas for "Our Thing" – a community effort we can be known for in Madison - which is still to be determined. Facilitated first communications with the Madison School System and the Step-by-Step Program in 2022. The IC lead the Church's participation in the 2023 Madison Street Festival and after handed-off lead to Robby + Rachel Brueggeman
Senior Adult Program	Deferred	IC canvassed the Congregation on interest in a formal group, but little was shown. IC is monitoring informal Senior Adult activities.
Adult Sunday School Participation	Deferred	IC brainstormed ideas to increase adult participation in Sunday School and are working with Lee Ann (Education Staff Lead)



Vision and Mission Statement

Worship

Ministry

Education

Discipleship

Resource Development

Small Group Daily Prayer

Congregation

To the Greater Community

Adult

Youth

Growing New Members

Participation and Commitment

Communications

Resources and Facilities

Periodic Special Worship Opportunities during Week

Young Adult and Family Programs

Community Invitations to Church Events/Publicity

Multiple Small Group Dev

Youth Program Task Force
Deferred

Visitors Task Force
Deferred

Establish and Publicize Endowment Fund
Capital Campaign to Reduce Debt and Add to Building Fund
Handed Off
Closed

Better Church Signage
Completed

Hiring an Assistant Priest
Completed

Periodic Single Service Sunday
Completed

Adults Mentoring Youth Program
Handed Off

St Matthew's Team Participation in Community Efforts
Handed Off

Father Chris Lead Classes
Deferred

Deferred

Completed

Publicity to attract Young Adults/Families
Completed

Prep and Welcoming
Completed

Atmosphere of Unity

Church Gardening Club
Deferred

Programs to Attract High School Youth

Program to Increase Adult Sunday School Participation
Deferred

Deferred

Closed

Update Media Methods/Techniques
Ongoing

"Moving to Madison" PR
Ongoing

Developing a Campus Plan
Handed Off

Church Task Restructuring
Ongoing

Senior Adult Program
Deferred

Initiative Area

Effort

Priority Effort for 2021/22



- A Church's Strategic Plan is a living document - Efforts will continue to be added and closed
- Significant progress has been made in getting Strategic Plan Efforts initiated, being worked, or completed
- Every three or four years, a deep review of the Strategic Plan should be accomplished. This is being done in 2024 by the Strategic Plan Update Committee in 2024

For further background, the complete 2020 St Matthew's Strategic Plan can be found uploaded on St Matthew's Website



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Efforts Added to Strategic Plan Since 2020



Overview

- Effort Lead: TBD. Perhaps "Co-lead – one adult + one youth"
- Description: Identify local community/Madison opportunities and initiatives to provide community volunteer opportunities for congregation. Ensure the St Matthews Team is identified by wearing of same T-Shirt, etc.
- Effort Length: 6 months + ongoing

Tasks to Be Completed

- Determine need - work with local civil leaders, organizations to identify community engagement opportunities.
- Form a small group to research and identify Community effort opportunities. Select 2-3 initial opportunities.
- ID Leads... young adult lead and adult lead with vestry mentor
- Engage various fellowship group, EYC, etc.
- Establish working relationship with Community Leads (ensure we aren't "repeating" existing engagement efforts)
- Investigate any opportunities with UAH Episcopal Youth
- Publicize opportunities; design branded image
- Recognize volunteers – newsletter, website, others. Recognize Team on Hughes Rd Message Board
- **Brainstorm/survey to identify "Our Thing" and drive identity discussion**

Discussion

- Engage St. Matthew's adults and Youth in volunteering for Community efforts
- Increase St. Matthew's community visibility through support of and active participation in Community efforts
- Serves two purposes – we help our community and the community recognized our Church's contribution perhaps attracting new members
- Use Church message board on Hughes Rd to Publicized our support again attracting new members
- With Covid and other society-impacting events, there is opportunity to be more present in the community

Issues and Resources Needed

- St Matthew's T-Shirt for volunteers/participants
- Use of St Matthew's website / digital media

Funding					
Type	CY21	CY22	CY23	CY24	CY25
Salary	0	0	0	0	0
Recurring Cost	\$1500	\$1500	\$1500	\$1500	\$1500



Overview

- Lead: Lee Ann Mack
- Description: An ongoing effort to offer new adult programs and increase current participation based on St. Matthew's 2020 Strategic Planning Task Force Survey Results
- Phase 1: Ongoing

Tasks to Be Completed

- Establish a Fr. Chris Class
- Establish Spiritual Theology (Bible and Beer)
- Add a Propers study
- Encourage vestry attendance
- Promoting from Priest
- Wednesday Evening class
- Create 3 – 6 month phase for historically participating members input. Have reevaluation phase
- Explore alternative times to meet and facilitators to lead

Discussion

- When are parishioners returning?
- What can we offer other than Sunday school? (e.g. Study Bishop Curry's the way of Love, Christopher Webbers Books "A User's Guide to the Book of Common Prayer" or "Welcome to Sunday")
- Contemporary churches/Small groups
- Coffee Crowd?
- Are there specific struggles that can drive a focus group?
- How can we measure successful engagement?

Issues and Resources Needed

- *Covid, How many parishioners are returning?
- *Finding Facilitators, *Low Volunteering
- *Classroom Space

Funding					
Type	CY21	CY22	CY23	CY24	CY25
Distribution					
One Time Cost					



Overview

- Lead – TBD
- Description – Programming that brings our senior age parishioners together in fellowship based on St. Matthew's 2020 Strategic Planning Task for Survey Results
- Effort Length - TBD

Tasks to Be Completed

- Phase 1 -Informally survey senior parishioners of their interest in program
- Identify number of potential participants
- How often – Quarterly? Monthly?
- Reach out to seniors. Publicize
- Outline accommodations specific to the group, to ensure events are equipped for Senior Adults
- Phase 2 – Periodic reevaluation of program
- Develop Lead who creates a core group, perhaps with the rector

Discussion

- What ages
- What type of programs/events? (**Biblical:** Bible Study, Theology
- Group? **Social:** Bowling, Top Golf, Rocket City Rover?)
- How many required to create program?
- Determine the focus of this effort – to help Senior Adults through
- transitions? Support Senior Adults with specific need for
- community? Provide assistance through the church
- What would success look like?
- Seniors are a large portion of our parish numbers

Issues and Resources Needed

- Who will lead this? Asst. Priest? Senior?
- Will there be a line item budget?
- Consideration of those with handicaps
- COVID
- Transportation

Funding					
Type	CY21	CY22	CY23	CY24	CY25
Distribution		TBD			
One Time Cost					