STRATEGIC PLAN 2019-2023
June 2, 2018

ST. MARK'S
EPISCOPAL CHURCH

**St. Mark's Episcopal Church
3816 Bellaire Blvd.
Houston, TX 77025**

Facilitator

HTS | HERRERA TALENT STRATEGIES

Acknowledgements

For almost eighty years good people have come together at St. Mark's for the glory of God and to glorify God's people. The strategy of the Christian church is simple—bring someone else to the love of Jesus. To that end, I am grateful for the hard work of the staff, our vestry, the pillar committee members and strategic planning committee. These people carried on a St. Mark's tradition of thoughtful and prayerful work to make our church stronger in order to bring people to the love of Jesus more effectively. I am grateful for our Diocese, our Bishop, and my clergy colleagues who were willing to look at St. Mark's from the outside, and how we could be better. Mostly, I am grateful for the future. We will celebrate eighty years in 2019. Our forerunners dreamed of a parish that would do remarkable things. It is our turn to dream and do remarkable things for God.

Proposed STMEC Mission Statement

> "The mission of St. Mark's Church is to love, to learn, to worship,
> and to serve as a joyful Christian family."

Purpose of this document

This document serves as a touchpoint for members of the Clergy, Vestry, Staff and Parishioners of St. Mark's Episcopal Church as they make key decisions over the next five years. This document describes not only the results of the strategic planning process, but also the process itself should the church wish to review the path which led to any of its elements.

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Strategic Planning Committee

Rev. Patrick Miller, Rector of St. Mark's Episcopal Church, led a Strategic Planning Committee beginning in the Fall of 2017. The initial committee included four members of the Vestry selected to represent a broad range of areas of expertise and was focused on framing the strategic planning process. In practice, after the first month of planning, the entire Vestry served the purpose of the Strategic Planning Committee in reviewing outputs, providing guidance, and determining the inclusion or rejection of proposed elements to be contained in the Strategic Plan.

Strategic Planning Committee Members
Rev. Patrick J. Miller
Eleanor Cannon
Bob Lane
Daniel Shapiro
Fred Wasden

Vestry

Name	Term Ending
Eggleton, Peggy (Senior Warden)	2017
Hawkins, Will (Junior Warden)	2017
Bourgeois, Kelly	2019
Burgess, Jay	2020
Cannon, Eleanor	2018
Carlton, Amelie	2020
Clarke, Kate	2019
Cushman, Stasa	2017
Hanson, Paul (Treasurer)	2019
Husky, Steve	2018
Lane, Bob	2019
Round, Mary	2020
Saucier, Tracy	2018
Shapiro, Dan	2018
Stiernberg, Charlie	2020
Vetrano, Steve	2017
Wasden, Fred	2019

Strategic Planning Context

The overall objective the strategic planning process was to bring together the voices of the parish into a strategic planning document that will help guide future decisions – a touchpoint that strengthens the alignment between Clergy, Vestry, Staff, and other engaged leaders.

Coming off a very successful capital campaign in 2017 designed to pay off the debt used to redesign the Sanctuary, and seven years after its last formal strategic review process, the Rev. Patrick Miller

and the Vestry felt it was appropriate to revisit progress against the four pillars of St. Mark's current strategy (Worship, Welcome, Service, and Formation), as well as to frame upcoming decisions in the context of a 2019-2023 Strategic Plan. The capital campaign, upon completion, would allow St. Mark's to eliminate debt service payments which have comprised around 25% of the non-salary yearly budget. Removing this payment (and the uncertainty associated with interest rates) would provide the opportunity to reimagine how to align the full range of resources of the church and its members towards the fulfillment of its Mission. The result of this re-imagining process ("strategic plan") is not only an articulation of goals and objectives in each the pillars, but also of the alignment of leaders, teams, and investments to achieve them. In addition, this process was intended to provide an opportunity to revisit the operational aspects of the church administration: cadence of meetings, the tracking of committee/pillar success, individual and group capabilities, and the technology or facilities needed for success.

Critical to this effort was the need to bring the church community along on the journey by proceeding at a deliberate but measured pace. This would be achieved by building elements of the strategic planning process into the existing Pillar Committees. Patrick Miller, the Vestry and Staff, and an external facilitator (Herrera Talent Strategies) would progress this work during 2018, using already scheduled opportunities such as retreats/meetings during the year, and aim to have the 5-year strategic plan ready for launch in 2019.

The result of this planning process is a plan which built upon the solid foundation of St. Mark's Episcopal Church, allowing it to grow both in size and in its ability to carry out its mission.

The Strategic Planning Process

Phase I - Identifying and Assessing Strategic Priority Areas

The Vestry of St. Mark's attended a retreat in Galveston in January 2018. We used part of this time to ensure that the strategic planning effort prioritized the issues that were most important to the Vestry.

Inputs to the Jan 27, 2018 Vestry Retreat

Interviews

In advance of retreat on January 27th, 2018 our facilitator interviewed internal and external stakeholders to learn their perceptions of the strengths and upcoming key decisions for STMEC, in particular what the parishioners of St. Mark's could consider aspiring to and what they should aim to preserve as the church and its community change.

People interviewed

Clergy and Ministry Staff	Administration Staff and Vestry	Diocese and External Supporters

• Rev. Patrick J. Miller, Rector • Rev. Samantha Smith, Priest • Rev. Murray R. Powell, Priest Assistant • Kim Thompson, Director of Ministries • Alex Hillis, Youth Minister • Lynette Huron, Children's Minister • Renee Rybolt, Director of Choral Ministry • Cameron Dezen Hammon, Director of Music	• Tina Moses, Parish Administrator • Kim Thoss, Director of Finance • Josie Wilson, Administrative Assistant • Pam Johnson, Exec Assistant • 12 of 16 vestry members	• C. Andrew Doyle, IX Bishop of Texas • Kai Ryan, Canon to the Ordinary, Chief Operating Officer • Rev. Larry Hall, Ret. Rector Church of St. John the Divine • Rev. Carol Bruse, Senior Pastor, West. University Methodist • Rev. Barkley Thompson, Dean Christ Church Cathedral • Eric Moen, Congregational Engagement Officer, Episcopal Health Foundation

"Letters to the Diocese"

To help frame the church's opportunities and risks, the participants at the Vestry Retreat prepared a "Letter to the Diocese" dated five years into the future describing their vision of the church of St. Mark's to the Bishop. The letters included an imagined overview of its parishioners (number of families, etc.), noteworthy achievements and challenges overcome during the last five years, and how those were overcome. By sharing these initial visions of the future, the Vestry quickly determined areas of congruity and issues to be discussed in more depth.

Themes from the interviews and letters

The first major takeaway from the inputs to the Vestry Retreat was that **St. Mark's is in a great place from which to grow**. As Bishop Andrew Doyle stated, "St. Mark's is in a great place from which to grow into its next mission season. They have reached complexity, the school is healthy, it would be easy to not do anything differently and not take any risks in order to grow. However, maintaining the current number of parishioners is not enough to sustain that campus in the future - operating costs will outpace growth." The sentiment that growth was desirable and that staying put was not in keeping with the mission of the church was expressed by most of the external interviewees and was ratified by the Vestry.

The second key takeaway from the interviews was the importance of ensuring that growth should not be measured only in numbers, or Average Sunday Attendance (ASA), but that it should also reflect spiritual growth or depth both internally (individually through learning and collectively through the connections among parishioners), and externally through greater engagement with the community.

The material collected helped us frame an efficient and comprehensive conversation around the context of St. Mark's today as well as the challenges and opportunities to address over the next five years. We used the time together to collectively envision what achievement would look like

in each Pillar, and what issues or decisions will need to be addressed in the near future. The output of the Vestry Retreat was a reaffirmation of the topics emerging from the interviews which we can start thinking of as Strategic Priorities.

Strategic Priorities

The combination of interviews, parishioner survey data, Vestry and staff retreat outputs, and overall reflection by all those involved started to reveal a framework which grouped the aspirations of the participants into three general themes, which we were refer to as the Strategic Priorities.

STRATEGIC PRIORITY 1: Successfully transform the administrative operating model from Pastoral Church to a Program Church.

Within this strategic priority we seek to resolve some of the growing pains of an organization that is poised for expansion but which is constrained by its operating model ("ways of working") which have served it to this point. For example, where an informal walk down the hall was previously all the input needed for a decision, in a larger church, a stable decision may require contributions and alignment from many others. Whereas asking a few well-connected individuals previously sufficed to find out what events were happening at the church, we now see value in connecting the activities more broadly in a more formal and transparent way. Where connecting with the church currently meant finding some time with the Rector, in the future there would be too many families and not enough time for the Rector to appropriately visit with all newcomers. Those executing the programs of the Church may need to be organized in a different way. This strategic priority is intended to address the natural tensions evident in the current operating model, but also to lay the foundation for further growth. For a summary of the framework and a comparison of the Pastoral and Program church models, please refer to Appendix 6.

STRATEGIC PRIORITY 2: Increase the depth of parishioners' ties to the church and each other by elevating/enhancing/energizing the programs and activities in each of the four pillars

Hardly any of the interviewees, whether within the church or outside, believed that growth was desirable without simultaneously preserving and even improving the quality of the activities and programs at St. Mark's. Giving parishioners more opportunities for fellowship and connection to the church through participation in opportunities to love, learn, and serve beyond the worship services themselves was seen by the interviewees and Vestry as a way to enhance the community at St. Mark's.

STRATEGIC PRIORITY 3: Deepen our engagement in the community

The third strategic priority had to do with branching out from the campus of St. Mark's Church. This theme can be found in strengthening the Service Pillar, but also in changing the

congregations somewhat "introverted" culture by reaching out to newcomers more intentionally, extending beyond hospitality. The participants expressed a desire to find ways to connect the church and its activities in a more significant way with the geographical neighborhood in which St. Mark's is located. Not only would they intentionally seek to connect with newcomers in an organized set of activities from the initial greeting, following up, website (for example), but they would also actively and intentionally seek opportunities to connect their resources (time, talent, treasure) in service more intentionally to the neighboring community.

We will discuss these three priorities in more depth later. These high-level objectives then became the seeds for future discussions beginning with the March 3, 2018 retreat with the committees.

Phase II - Translating Strategic Priorities into Initiatives and Programs

Parishioner Survey: February 2018
In order to begin gathering input from the congregation on the strategic themes emerging during the planning process, we developed a survey. The Vestry selected the questions to be used, and the survey was built in Constant Contact, the platform that STMEC already uses for announcements and other communication with the parishioners. The survey included 24 questions and was open from Feb 6 to Feb 18, 2018. There were 116 responses from about 180 invitations, which was considered a good response rate. The questions we used are included in Appendix 5.

Staff Retreat February 20, 2018
Given the centrality of the Staff of St. Mark's in the activities of the church, their participation in the conversation about its growth was important. The goal of these sessions was to identify opportunities to increase operational efficiency to make the current workload more manageable, but also to determine what would have to change should there be additional growth (both in parishioners and programs) in the church as part of the strategic plan.

Committee Retreat March 3, 2018
St. Mark's had a retreat in March to allow the committees working in each of the Pillars (Worship, Welcome, Formation, Service), as well as others such as Finance, to gather and discuss their activities and plans for 2018. We used a block of time to allow these committees to take the input from the Vestry retreat as guidance to structure their work and to generate ideas for activities for the next five years.

The output from this workshop was a "wish list" of initiatives, ideas, or programs that were intended to contribute to each of the areas of the Strategic Plan. The committees provided an initial prioritization of their proposals during this session. A list of the ideas which were not selected for this Plan are included in Appendix 7.

Staff Retreat March 20, 2018
During the second staff retreat the participants shared their views on the feasibility of the proposals generated during the March 3rd committee workshop.

During the June 2nd Retreat the list of initiatives was reviewed and approved by the Vestry. One more initiative was added to establish a task force to research ways to encourage more newcomers and visitors to St. Mark's. The Vestry members then developed actions for 2018-2019 for the initiatives and assigned them owners. Finally, the Vestry operating model was discussed and approved.

Phase III - Confirmation of the Strategic Direction and Program Screening

Goals and Initiatives of the 5-Year Plan

Measurable objectives increase the value of the goal-setting process and increase the likelihood of their achievement. Throughout the planning process, we have focused on articulating clear goals and exploring ways to measure them. The result of these planning efforts is a map for STMEC's next five years that is inspiring, executable and achievable.

St. Mark's has set out to achieve the following over the next 5 years (2019-2023):

Goal	Baseline (2017)	Target (2023)
Average Sunday Attendance (ASA)	272	350
Attendance on Easter and Christmas	~800	1,100
% of parishioners pledging	42%	50%
Total collected from pledges, per year	$840K	$1.1M

Initiative 1.0: Revise St. Mark's Episcopal Church Mission Statement

Proposal:
Change the mission statement from "An extraordinary Christian family joyfully loving, learning, serving" to "The mission of St. Mark's Church is to love, to learn, to worship and to serve as a joyful Christian family."

Rationale: An effective mission statement can support the goals when it is embraced by the membership and used to guide the important decisions of the organization. During interviews, most stakeholders were not familiar with the current mission statement, nor did they indicate that it guided or was much referenced in their decisions.

"The whole congregation can remember it, they can all get behind it. That would be the one piece of major advice – it needs to be a short adage that every member of the church, that adage or vision statement, needs to be seen everywhere – in all our statements, in our sermons, who we are. Everything else is encompassed by that." - Rev. Larry Hall, retired rector of St. John's the Divine.

The proposed mission statement is presented in a format that calls out the important components of the identity as a joyful Christian family, and aligns with the pillars which structure the activities of the church. In the parishioner survey, 61% of respondents favored the revised mission statement, 5% preferred the former version.

At the time of this writing, the proposed action was to invite Kelly Bourgeois (vestry member) and the Rev. Samantha Smith to further wordsmith the Mission Statement (by June 2, 2018), and then to plan a process for the Fall of 2018 to gather input from others before the new Mission Statement would be formally accepted prior to January 1, 2019. Once it is accepted, here are some suggested actions:

- Place the mission statement in appropriate places on church communications (agendas, reports, communications to parishioners, bulletin, staff and clergy signature, footer, etc.).
- Define where in the recurring meetings there will be opportunities to review how the mission is being lived and how the activities and commitments support it.
- Include questions in future parishioner surveys determining whether congregants feel the church and its activities are aligned with the mission.
- Revisit the mission statement in 5 years (and avoid tinkering with it until then, unless it is really necessary).

STRATEGIC PRIORITY 1: Successfully navigate the transformation of its administrative operating model from Pastoral Church to a Program Church.

The first strategic priority of St. Mark's is to create the conditions for growth of the congregation. From various interviews, we identified the opportunity to rethink how the staff, Clergy, lay leaders, and volunteers spend their time supporting the activities of the church. A model which very neatly frames the relationship between the size of a congregation and the necessary operational model was found in, Congregational Vitality Series: Sizing Up a Congregation. The central thesis of the document is this:

"The size of a congregation acts as a key variable in those factors that determine the structure, functions, and style of relationships in its group life."[1]

With this framework in mind, we found that the organizational journey of St. Mark's at this point is to move from being a Pastoral Church to becoming a Program Church.

"Democratic organization and leadership by the laity are the keys to effective ministry in the program church."[2]

The elements of the Strategic Plan that are intended to support this journey are listed here, along with their rationale, and some suggested actions.

Initiative 1.1: Redefine the role and responsibilities of Staff, and formalize the expectations for volunteers and lay leaders, to support an operating model in line with a Program Church

Suggested actions:
- During the Fall of 2018 list the Roles and Responsibilities for staff positions.
- Link the personnel evaluation process to the new Roles and Responsibilities.
- Create a list of volunteer positions or opportunities, or types of volunteer work (short term volunteers, Formation leader, VBS counselor, committee leader, etc.
- Briefly outline volunteer responsibilities in a way that clarifies expectations and encourages participation.
- Ensure that new volunteers are able to learn the expectations and ask questions prior to volunteering (website, handout, conversations, etc.)
- Include expectation clarity in volunteer feedback mechanisms (after opportunity, or later during parish survey).

Initiative 1.2: Create a centralized church calendar and guidelines for posting events happening at St. Mark's that allows lay leaders more direct access to scheduling and reserving rooms, and at the same time reduces the administrative burden on needed staff, increases transparency of resource availability, and mostly, improves communication and coordination among the pillar committees

Suggested actions:
- Determine which is the best format or platform for this calendar. During discussion it seemed important that the calendar be both virtual (online) as well as physical (bulletin board).
- Develop guidelines for posting (who posts, who approves postings, when posts are removed, consistent format for posts, etc.) and communicate the guidelines.

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[1] Congregational Vitality Series: Sizing Up a Congregation; Congregational Development Services; Episcopal Church Center, NY
[2] Ibid.

- Develop guidelines for reserving STMEC facilities (rooms, materials, etc.) and for hosting events (safety, food, use of space and walls, clean up).
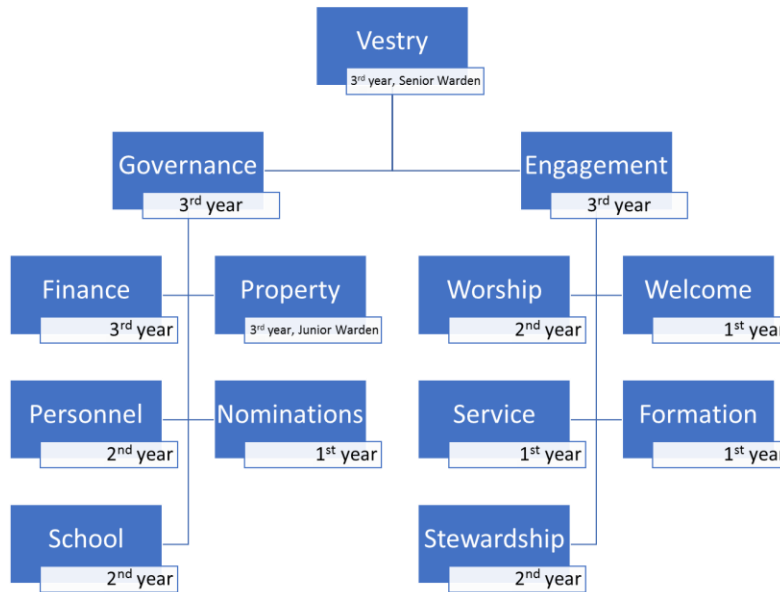
Initiative 1.3: Increase communication of critical information among the committees by including this as an agenda item in committee meetings – "What do you need from others?" and "What do you need others to know?"
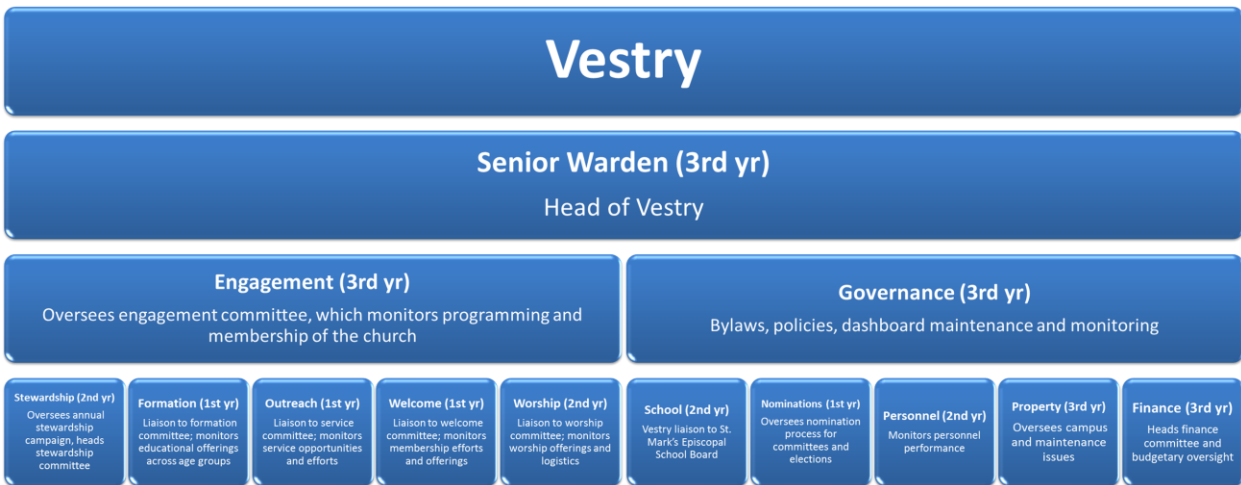
Suggested actions:
- Create a simple template that Committee Leaders complete after each meeting indicating items such as the agenda, who participated, key topic addressed, decisions to communicate, next steps, issues to escalate, and the key questions above.
- Governance committee or designate to determine who collects this material and how the information is transmitted to the other committees. This could be through staff or through Vestry liaisons.
- Develop and implement a strategy allowing committees to maintain agendas, discussions, research, etc. (non-confidential), to increase access and reduce reliance on email or distribution chains.

Initiative 1.4: Vestry model to be re-oriented against two overarching thematic responsibilities – healthy operation (Governance) and active participation of parishioners (Engagement). Vestry responsibilities amended to include direct participation in pillar committees. This initiative requires communication of the model, initial assignments, expectations, and meeting cadence within the larger staff, volunteer, clergy and Vestry community.

During the initial Vestry Retreat that was part of this Strategic Plan process, we looked for a way to increase communication between the Pillar Committees and the Vestry. In addition, we sought to increase the involvement of the Vestry in this work and to keep focus on the organizational and process changes (Governance) required for efficiency as well as the commitment of the Parish to building community and to increasing connections with the neighborhood (Engagement). During discussions, Sam Smith (Curate at the time) suggested the approach described below. This approach will be very helpful to the successful transition from a Pastoral to a Program church. One aspect of this structure is that each Vestry member is assigned to one of the Pillar Committees, and at the same time, to either the Governance or the Engagement Committee. This crossover approach leverages the personal investment of the participants keeping the meetings less formal than a departmentalized organization might be, but also allows information to be transmitted among the committees first hand by Vestry members. Having a Governance and an Engagement committee will allow the Vestry to keep their focus on these two critical Strategic Priorities. The initial assignments of the 2018 Vestry to these committees was as follows:

Vestry — 3rd year, Senior Warden

- **Governance** — 3rd year
  - **Finance** — 3rd year
  - **Property** — 3rd year, Junior Warden
  - **Personnel** — 2nd year
  - **Nominations** — 1st year
  - **School** — 2nd year
- **Engagement** — 3rd year
  - **Worship** — 2nd year
  - **Welcome** — 1st year
  - **Service** — 1st year
  - **Formation** — 1st year
  - **Stewardship** — 2nd year

Patrick Miller and Sam Smith then elaborated on the model to create a progression through committees for the Vestry members as described below.

Vestry

Senior Warden (3rd yr) — Head of Vestry

Engagement (3rd yr)	Governance (3rd yr)
Oversees engagement committee, which monitors programming and membership of the church	Bylaws, policies, dashboard maintenance and monitoring

Stewardship (2nd yr)	Formation (1st yr)	Outreach (1st yr)	Welcome (1st yr)	Worship (2nd yr)	School (2nd yr)	Nominations (1st yr)	Personnel (2nd yr)	Property (3rd yr)	Finance (3rd yr)
Oversees annual stewardship campaign, heads stewardship committee	Liaison to formation committee; monitors educational offerings across age groups	Liaison to service committee; monitors service opportunities and efforts	Liaison to welcome committee; monitors membership efforts and offerings	Liaison to worship committee; monitors worship offerings and logistics	Vestry liaison to St. Mark's Episcopal School Board	Oversees nomination process for committees and elections	Monitors personnel performance	Oversees campus and maintenance issues	Heads finance committee and budgetary oversight

Suggested additional actions:
- Document the expectations of Vestry Members at each level of this structure (as Pillar Committee Liaisons, as members of the Governance or Engagement Committees, and as overall Vestry members). These expectations should include guidelines regarding attendance, their role (vis a vis the Committee Leader or other members, for example), and what information they are expected to bring from each committee (e.g., observations about the health or strength of a Pillar Committee, issues which need to be escalated to another level, requests for support), as well as the decisions they are empowered to make on behalf of the Vestry (if any).
- Develop guidelines for how Vestry members are appointed to/or choose their committees.

Initiative 1.5: Restructure the physical configuration of the front office to allow more efficient use of staff time.

The current configuration of the office space at St. Mark's (in 2018) caused visitors to sometimes interrupt staff who were more than happy to meet with parishioners and newcomers, but who then might felt overwhelmed their regular duties as the church grows.

Suggested actions:
- Year 1: Look for inexpensive moves such as moving offices and ensuring that roles which are less impacted by interruptions are placed closer to the front door.
- Year 3+: Consider rebuilding the office space entirely.

STRATEGIC PRIORITY 2: Increase the depth of parishioners' ties to the church and to each other by raising the quality of programs and activities in each of the four pillars.

Worship Pillar

Goals: In support of the overall goal to achieve an ASA of 350 by end of 2024, from the current base of 272 ASA a rough breakdown of the targets by service is as follows:

Service	5-Year Target Increase in ASA	Annual Target
7:45 am	+10	+2
9:00 am	+10	+2
11:00 am	+30	+6
5:00 pm	+25	+5
Wednesday	No specific target set	

Initiative 2.0: Form the Worship Pillar Committee

In 2018, there was no active Worship Pillar Committee and it needed to be reconstituted.

Initiative 2.1: Create a mission statement for the Worship Pillar Committee

As a starting point:

The Worship Pillar Committee oversees the general process of growing the steady membership of the various church services and connecting parishioners and lay leaders directly to these services. It includes representatives from each of the services and provides feedback and makes proposals about how to more deeply engage parishioners in the services.

Initiative 2.2: Develop a talent pool of enthusiastic and qualified volunteers to serve as lectors, LEMs, acolytes and ushers. The Worship Committee should focus on making sure the right lay leadership are recruited, selected and trained to lead this work.   The lay leadership should then manage recruitment, expectation setting, and training of the volunteers.

Suggested actions:
- Worship Committee to create a list of regular volunteer roles required to support services as well as the lay leadership roles that would support his work.
- Worship Committee to set targets for recruiting and training lay leaders (and their backups).
- Worship Committee to search for lay leaders that can be in charge of training and recruiting others.
- Consider sequencing the roles in such a way that volunteers can "earn their way up" by serving at the entry level until qualified for elevation.

Initiative 2.3: Review the information contained in bulletin and make it more "user friendly" especially for visitors, e.g., instructions on when to sit, stand, kneel, which hymns and prayers will be followed, and liturgical context. Determine whether services require a modified bulletin (e.g., 5:00 pm service might need more liturgical context than other services.)

Suggested short term actions:
- Have the new bulletins "tested" by volunteers who are not already experts.
- Worship Committee can collect bulletins from other churches for comparison.
- Determine how church will know when the bulletins are effective.

Initiative 2.4: Record and post sermons and anthems from the 9:00 and 11:00 am services.

Suggested actions:
- Proposal to be further studied during 2019.
- Pros: Other churches post their sermons. People like to refer to them. Helps keep continuity with parishioners who travel, go to college, or move away.
- Cons: How many times would they actually be used? Is it worth the effort? Would access to on-line sermons reduce physical attendance?

Initiative 2.5: Support the Wednesday service by making it an event night wrapped around a meal.

Suggested actions:
- Proposal to be further studied during 2019.
- Pros: Wednesdays are "the other church night" culturally. This would allow some to increase their participation in the church community.
- Cons: Cost, could meals be offset with $ contribution (or is this nickel-and-diming the congregation)?

Welcome Pillar

Goals: The Welcome Committee supports of the overall goal to achieve an ASA of 350 by end of 2024, from the current base of 272 ASA, and attendance of 1,100+ on Christmas and Easter by 2024. (For a discussion of the findings from the Parishioner survey related to the Welcome Pillar see Appendix 8).

Initiative 3.0: Develop a Welcome Pillar Committee Mission Statement

Draft based on discussions during the Strategic Plan Process (starting point only):

> *The Welcome Pillar Committee aims to manage the visitor's first personal experience with the church, and culminates with the visitor finding their initial connection points with the church. Welcome goes beyond hospitality to helping newcomers build their own relationships among parishioners and with the activities of the church.*

It is a hypothesis of the Welcome Committee that parishioners who have several points of connection with the church are more likely to "stick" with their church (is it relationships, is it activities, is it depth of some type?). For this Strategic Plan and for this Committee, the focus is on helping visitors find their own relationships and activities by creating a comfortable environment for visitors to learn about the church, our community, and our values. The Welcome Committee is successful when visitors eventually become members of the church.

Suggested actions:
- The Welcome Pillar Committee to develop the Pillar statement by January 1, 2019

Initiative 3.1 Develop a newcomer Welcome Packet with items such as a pamphlet with upcoming activities, a list of ministries, clubs and groups in the church and next steps on how to sign up or participate.

Suggested actions:
- Welcome Committee to add it to their agenda with a timeline to be developed.
- Welcome Packet cost to be researched.

Initiative 3.2: Welcome Committee to coordinate the welcome presence at the door at every service –e.g., Ambassadors.

An active Ambassador program would ensure that welcome duties do not rest solely on the clergy, but also on the congregation. Ambassadors would find polite and friendly ways to welcome visitors, learn basic information about their interests and needs, and then would know enough about others in the church in order to make introductions, their activities at the church and how to invite them to the next relevant event. The Welcome Committee would find ways to determine how well the Ambassadors are doing (nothing complicated or formal), and would help them if necessary.

Suggested actions:
- Welcome Committee to develop the expectations for an Ambassador including how long they serve (one-off vs. quarter or semester), what to do, what not to do, how to get help with questions.
- Ensure that Ambassadors know the activities in the church for at least the upcoming week as well as events, study groups, etc. to help connect newcomers.

Initiative 3.3: Create a statement and a list of approaches that are considered "in-bounds" and some that are "out-of-our-comfort-zone" to help clarify expectations around Welcome

The particular style of welcome activities is not yet fully defined at St. Mark's. In other churches, it seems that there is cultural alignment about how "aggressive" or "passive" to be in welcoming newcomers, but the debate is ongoing at St. Mark's. As the Welcome Committee is reconstituted, it would be important that one of its first activities be to create a statement and guidelines about approaches that are considered "in-bounds" and some that are "out-of-our-comfort-zone" to help align activities around Welcome, including follow up of newcomers. As the framework from Congregational Development Services states, there should be "recognition and respect for the newcomer as an individual, rather than merely another potential member…. The newcomers will feel needed but used unless there is an evident concern for their own circumstances."[3]

Suggested actions:
- Welcome Committee to discuss this issue and develop guidelines by Jan 2019.

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[3] Congregational Vitality Series: Sizing Up a Congregation; Congregational Development Services; Episcopal Church Center, NY

Initiative 3.4: Ensure that the new website is welcoming and navigable enough that a visitor with no personal connections to the church but curiosity about St. Mark's can find a variety of people and activities as first points of contact.

Suggested actions:
- Engagement Committee to take into account considerations for first time visitors and web surfers when website is redesigned.
    - Revise website and conduct user tests with non-associated people to determine if first-timers can identify a point of contact within suitable parameters (e.g., 3 clicks); if not, revise until that is possible.

Initiative 3.5: Look into having a water cooler in Margaret's Parlor.

Suggested actions:
- Assign ownership for proposing a plan and date to approve.

Initiative 3.6: Create a task force to explore and recommend "off campus" newcomer growth strategies such as advertising, etc. to increase the number of new visitors to St. Mark's.

Suggested actions:
- The task force should be diverse.
- Set dates for meeting, brainstorming, research and reporting back to Welcome Committee.

Formation Pillar

Goals: The purpose of the Formation Committee is to deepen the engagement of parishioners in terms of connection with the church community as well as to support their spiritual development though learning activities.

The metric that best reflects the success of this Pillar is the active participation of parishioners in the activities of the church. The church members interviewed and who participated in the workshops for this plan also suggested that participation should aim to build a robust, active community across various age groups. The following targets were set for this 5 year plan:

Age Group	# of Active Participants	Who Runs Most of the Programs
Kids: Up to 12 years	40	Church Staff
Youth: 13-18 years	55	Church Staff

Young families: 20-30 somethings	45	Lay Leaders
30-50 somethings	To be determined	Lay Leaders
50+ years	60-70	Lay Leaders

Initiative 4.0: Consider changing the name of the Formation Pillar to the Learning and Community Pillar. This would bring this work into the new Mission Statement, and would be more meaningful to people inside and outside the church.

Suggested actions:
- Patrick to reflect and make a recommendation on this issue.

Initiative 4.1: Write the Formation Pillar Committee mission statement.

 Suggested actions:
- The Formation Committee should draft a statement about the objectives of the committee by July 2018.
- The statement can be based on this Plan, but should describe the formal processes to select events, how it will measure success, how it will be constituted (many of those interviewed stressed the importance of ensuring that the committee be comprised of different demographics from the parish).

Initiative 4.2: Expand Children's Ministries by finding lay leaders to help run it, coached and trained by Youth Ministry staff. Youth Ministry determines curriculum and seeks feedback from lay leaders to ensure that the program is delivering expected outcomes on a yearly basis.

In some churches, the children's ministry has more to do with finding and training bible study and activity leaders. In the conversations that were part of this Strategic Plan, there were concerns about whether the church should only have trained staff lead children's activities for legal reasons.

Suggested actions:
- Research activities for children's ministries by visiting other churches, discussing with staff at other churches, etc.
- Identify the activities that can be safely and effectively run by trained lay leaders and volunteers. Expanding the range of activities offered by working with volunteers and by reducing the burden on staff.
- Develop a plan to recruit and involve volunteers where appropriate.

Initiative 4.3: Make the Kid Min curriculum more liturgical (biblically-focused).

The central challenge for this initiative is to determine the proper balance of church teaching and non-church activity for the newcomers and members in the children's and youth programs. To find the ideal "both" rather than an either/or. Participants in this Strategic Plan process recommended finding more ways to provide accessible Gospel material in these programs

Suggested actions:
- Formation Committee to identify options for curriculum that are acceptable to the Rector
- Formation Committee to find ways to train youth leaders in the selected curriculum
- Determine a feedback mechanism to see if the program content is meeting the objectives of the Kid and Youth Ministries

Initiative 4.4: Formation Committee to propose a formal process to determine which events should be started, stopped, continued, as well as any other investment decision. Approval of the process to be granted by the Governance Committee.

Several of the external leaders we interviewed mentioned the importance of not trying to have too many events, but rather, doing fewer really well. As noted in *Sizing Up a Congregation*, "If the available resources of the present membership are strained, that is, if they are trying to do too many programs, the program church could project anxiety about needing recruits for committees and tasks." The Vestry should find ways to determine whether the volunteer and lay leader corps are stretched too thinly (e.g., an annual survey, or feedback collected through the Vestry-Committee liaisons) and include this in the analysis of the programs in which to invest.

One dimension for this analysis could be the burden on staff or lay leadership (labor cost) by grouping events into three categories:
 (a) Events the Staff plans and manages,
 (b) Events the Staff coaches lay leaders to manage
 (c) Events held at St. Mark's with little/no involvement by Staff (e.g., Boy Scouts, AA, Daring Way.

Another dimension for event analysis is actual budget cost, which are income generating and which are not.

Suggestions:
- Develop a process to evaluate events. The process should spell out what data is collected to make the decisions (attendance, participant survey, parishioner survey, lay leader input, etc.),
- Consider factors in the evaluation process to determine which events to start, stop, or continue every year.
- Determine criteria or thresholds for these costs and ways to assess the value or "return" on these costs.

- Determine how often the reviews are held and when during the year.
- Clarify who makes the decisions regarding event support.
- Additional recommendation: this process should be developed collaboratively (not just members of the Formation Committee, but others such as the current and prospective attendees of the programs).

Initiative 4.5: The Formation Committee should develop a way to collect information about the participation in events and sort the data by demographics to understand the breadth of appeal of its programs

To help determine the "return" on the cost, one dimension is whether it a program is helping broaden the demographic range of the parish. E.g., age groups, interest groups, etc. Another dimension of "return on effort" is whether the program has a loyal following among participants, and what those participants feel about the program.

Suggestions:
- Set targets for the number of participants, participation frequency for program types.
- Collect data on program participation that allows demographic analysis such as age groupings to start with might be <12 years, <18 years, <30 years, 30-50 years, 50+.
- Note: Do not forget intergenerational activities!
- The targets should be set by the Vestry.

STRATEGIC PRIORITY 3: Deepen our engagement in the community.

Service Pillar

Discussion: The recent experience of Hurricane Harvey and St. Mark's response created an increase awareness of the breadth of interest among the parishioners to serve the community and of their ability to rally to do so. The fact that the Service Committee has narrowed its focus from over a dozen different charity partners down to four was seen by most interviewees and many surveyed parishioners as a significant step forward in this Pillar. The feedback from interviews suggested the following directional changes:
- Find more opportunities to do "hands-on" service, beyond financial support of partners.
- Find ways to broaden the volunteer base involved in Service (more volunteers, children, families, etc.).
- Track success not only in terms of dollars contributed, but also number of hours served, number of volunteers, etc.
- Find ways to learn what the community needs and respond to that.

Initiative 5.0: Develop a transparent process to measure the success of our community partnerships, and how to add/replace new partners on an ongoing basis.

Suggestion:
- Include metrics such as # of attendees, participation demographics (which age groups are attending), and the satisfaction of those who participated.
- Add questions to the annual parishioner survey to determine the satisfaction of those who are NOT participating in the Service activities, and overall satisfaction with the community partnerships.
- Develop a regular routine to gather input, evaluate the success of the partnerships, and communicate outcomes of the process.
- Include questions in the parishioner survey regarding whether they are finding sufficient, quality opportunities to participate in service.
- Include ways for parishioners to nominate additional potential partnerships.

Initiative 5.1: Create a Service dashboard to measure the overall effectiveness of the Service Pillar

Suggestion:
- Establish metrics for Engagement (number of parishioners involved, repeat participation, hours devoted, etc.) as well as impact (people served, need reduced, etc.).
- Set targets for engagement and impact.

Initiative 5.2: Set a goal for volunteer hours for the entire parish (e.g., an average of 180 minutes per parishioner per year, achieved by over 80% of the parishioners). Find ways to communicate progress as a parish towards this goal.

In several of the interviews there was a celebratory tone regarding how well the parish had responded to Hurricane Harvey and how happy people were to help others. Some comments in the survey also indicated that there should be more opportunities for parishioners to give of their time (not just money) in service to others. The discussion around the topic of having a service goal was centered on expanding the participation rate of parishioners in service as well as having a visual commitment to service, as this would encourage members to create or support service opportunities to support a parish service target. It would be important to ensure that the feeling around a goal like this not come across as negative, or take away from those who happily give many much more of their time than "required" for the goal.

Suggestion:
- Determine parameters for a service goal for the church including participation goals, impact measurement and target, time frame, and how to track contributions to the target. Do not communicate the target until the Service Committee recommends the entire approach and it is approved by the Vestry.

- Define the communication plan around the goal so that it is framed in accordance with the values of the church.

Initiative 5.3: Develop a method to determine community needs (e.g., the geographic community described by proximity to St. Mark's church) and align service events and partnerships to serving that community. Assess progress by inviting community members to speak to the parish or by surveying the community.

Suggestion:
- Determine whether there are enough resources to lead this work through volunteers or hire a resource to lead the Service Ministry

Initiative 5.4: Reformulate Mission trips to make participation in local projects a stepping stone to international trips.

Suggestion:
- Develop a framework to connect Mission trips to increase enthusiasm for Mission work. (for example, must complete the local one, then the national one, then you qualify for Malawi).
- Note: The purpose of this initiative is to increase participation in Mission trips. If a hierarchical, progressive framework is not the best approach, then Service Committee can propose others.

Initiative 5.5: Sponsor an "all hands" project every year.

Suggestion:
- Make this a focus of the Service Committee.
- Ensure that the selected project allows maximum participation (i.e. families).
- Ensure the project is well communicated and coordinated with the other committees.

Initiative 5.6: Develop ways to better identify and serve those within the church community who have needs (in-reach opportunities).

One of the "growing pains" of an organization is the challenge with internal communication. In the case of the evolution from a Pastoral Church to a Program Church there is an opportunity to more formally invite those with needs inside the parish to let others know they need a hand.

Suggestion:
- Service Committee to develop the mechanisms to identify in-reach opportunities, communicate them, and provide follow-through. In discussions, some of the proposals included bulletin boards, a dedicated portion of the website, and a direct line for the clergy and staff to post needs as they hear them.

- Develop metrics or processes to determine if the church's ability to serve in-reach needs is improving

__Initiative 5.7: Create a "Volunteer's Checklist" that clearly outlines the expectations and responsibilities for volunteers including time commitment, roles, follow through, and safety.__

Suggestion:
- Service Committee to propose a list of responsibilities and expectations for some of the more common roles in Service:
    - The one-time event volunteer
    - The on-going program volunteer
    - The lay leaders "hosting" a Service opportunity or program
- The expectations would include everything from punctuality, who decides what, what to bring, what not to do/bring/wear, and what to report at the end (number of participants, satisfaction with the event, suggestions for next time, etc.).
- This doesn't need to be onerous. Keep it fun! (Ask readers from different demographics for feedback on the Checklists).

Appendix 1: Strategic Planning Roadmap Summary

	Phase I Define Strategic Priority Areas	Phase II Translating Strategic Priorities into Initiatives and Programs	Phase III Confirmation of Strategic Direction and Initial Program Screening	Phase IV-V Program Feasibility, Final Plan Design, Program Selection and Work Planning
	Dec 1- Jan 27th (Vestry Retreat)	Jan 27- Mar 3rd (Committee Retreat)	Mar to June 2nd (Vestry Retreat)	By Dec 2018
Key Questions to Address	• Which parts of the mission do the Vestry and leadership wish to emphasize going forward? • How should changes in the community inform the direction of the church over the next 5 years? • What opportunities and challenges does the current and forecasted environment present the church? • What strategic alternatives do our main stakeholders see for the church? • In each of the Four Pillars, what activities or achievements would you like to see five years from now?	• How do different stakeholder groups within the congregation feel about the church, its mission, and upcoming strategic choices? • How do prospective congregation members feel about the church and its programs? • What Program, organizational, or strategic changes should Management and the Vestry consider? (Start, Stop, Change, Invent) • What is the Vestry's initial feedback on the programs to be included in the strategy?	• At a high level, what is the expected impact and cost (financial, reputation, outreach, etc.) of the Program, organizational, or strategic changes that Management is exploring? • What are the initial perspectives on risks, barriers, and other considerations to implementing any of the programs or changes? • Based on alignment with the strategic priorities, which programs should be further researched for inclusion in the recommended strategy?	• What conversations and final input do we need prior to putting forth a recommended strategy for approval? • What is the best way to communicate the recommended strategy? • Does the Vestry approve the Strategy, and if not, what changes do they wish to see? • How will accountability for implementing the Strategy be maintained? What outcome review and governance processes will be used?
Key Activities	• Framed conversation around the context in which St. Mark's Church is today, and what challenges and opportunities to address over the next five years • Aiming for strategic direction, not specific activities and programs yet • Collectively envision what achievement would look like in each Pillar, and what issues or decisions need to be addressed in the near future, consider review of Mission, Vision, Values	• Facilitate committee workshops to create take guidance from Vestry and create a "wish list" of initiatives, ideas, or programs that are intended to contribute to each of the Strategic Priorities • Proposals are initially prioritized during this session, and then further studied later in the strategic planning process. • If we find that an area of interest in the Values is not sufficiently covered by any of the Committees, we can create an ad hoc group to address it during the workshop	• Summarize survey (?) results and feedback from the committee members on the Mission and Values regarding clarity and proposed emphasis in the Strategic Plan. • Follow up with Committee leaders and others regarding the ideas to ensure clarity, provide initial impact estimates and costs where easily available. • Prioritize initiatives to be further studied for clarity, feasibility and impact analysis (metrics, milestones), cost/investment (financial, people), image or reputation of the church, implementation risks, etc.	• Finalize strategic plan document • Consolidate and assign owner for the implementation roadmap • Define program and plan accountability and strategy review process

Appendix 2: Estimated Budget Impact

The additional financial impact of the priorities, programs and initiatives described in this report is minimal and the real resources to be increased are volunteers, their time and their talent. Only the water cooler and the cost of recording the sermons seemed to warrant a budget discussion.

Appendix 3: Implementation Roadmap

The Implementation Roadmap is a list of the performance milestones and standards that will be achieved year by year as part of this Strategic Plan. The purpose of the Roadmap is to inform the agenda of an Executive Committee meeting at the end of each year during which each item is reported upon and discussed.

Table: Implementation Roadmap (2018-2019 by quarter)

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
1.0 Revise the STMEC Mission Statement	Kelly and Sam lead revision process. Draft by Fall 2018 and approval process defined.					
1.1 Redefine role and responsibilities of Staff	Administrative lead to define job descriptions for all staff roles. Expectations defined for volunteer and lay leader roles. Clarity of volunteer roles assessed through feedback after events.					
1.2 Create a centralized calendar and rules	Administrative lead to define user requirements. Select platform. Define posting guidelines and responsibilities					
1.3 Communication across pillar committees	Create simple template for Committee leaders. Governance Committee to review effectiveness of connectedness across committees and present to Vestry					

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
1.4 Vestry model reoriented	Rector to clarify expectations, assignments, meeting cadence etc. of vestry roles					
1.5 Reconfigure front office	Administrative lead to look for inexpensive moves to improve office efficiency					
2.0 Form the Worship Committee	Fred, Sam, Eleanor reach out to members to create the committee					
2.1 Create the Worship Committee mission statement		The new Worship Committee drafts mission statement				
2.2 Develop talent pool of volunteers for Worship area.		Worship Committee identifies leaders of Ushers, LEM, Readers, Acolytes programs during Rally Day and and during the Sunday education time during the month of October, and has them work to curate more volunteers				
2.3 Bulletin review			Ad hoc Bulletin task force researches ways to lower barriers to entry in our services. (Look at alternatives from the "no Book of Common Prayer" paper to QR codes…, assess cost of paper.) (March 2018)			

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
2.4 Record and post sermons		Investigate the feasibility and cost of posting print and audio versions of sermons (Talk with Cameron about the podcast of the Sunday 5 service, talk to priests re accessibility of sermons)				
2.5 Wednesday service expansion				A task force from the Worship Committee and possible other members of the Vestry investigates the Wednesday programs at churches like St. Francis, St. martin's, St. John the Divine, Palmer Memorial, St. Catherine of Siena in Sugar Land	Implementation by Sept 2019	
3.0 Develop Welcome Pillar Committee Mission Statement	Sam drafts Mission Statement for Welcome Pillar and receives input via email	Mission Statement approved before Rally Day				
3.1 Newcomer welcome packet development		Small welcome packet designed and ready before Rally Day				

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
3.2 Establish a Welcome Committee and Ambassador Program		Find chair and committee by Jan 1. (whole committee helps)		Ambassador Program designed by Welcome Committee	Head of Ambassador Program who reports to Chair of Welcome in place by Fall 2019	
3.3 Welcome "in bounds" guideline development		Welcome Committee drafts, Vestry approves				
3.4 Website navigability for newcomers, visitors	Done. Website updated.					
3.5 Water cooler in Margaret's Parlor	Decide whether to purchase the cooler. Assign task leadership responsibility.	Celebrate installation of water cooler.				
3.6 Task force to recommend "off campus" newcomer strategies (advertising, etc.)	Determine membership of task force (Rector, and/or Nominating Committee). Recruit members for task force.	Task force and Welcome Committee set guidelines and conditions for success of task force.	Task force sets timeline for researching and making recommendations to Welcome Committee.			
4.0 Rename Formation to Learning Committee	Rector to make determination by July 2018					
4.1 Develop Formation Pillar Committee Statement	Jonathan Haywood, Chair of Committee, drafts Formation Committee mission statement (July 2018) and approve by Vestry during meeting					
4.2 Expand Children's Ministries, lay leaders, curriculum	Define roles. Develop training program.	Jonathan Haywood, committee and church staff review which activities that can be led by lay personnel. October 2018				

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
4.3 Make Kid Min curriculum more liturgical	Youth Minister with Samantha make recommendation on curriculum (July 2018). Approval by Rector.					
4.4 Formal review of Formation events	Formation Committee to propose success goals for formation events for next 6 months including return on effort/cost Define mechanism for collecting data. Define Stop/Continue/Enhance criteria. Approved by Governance Committee.		Goals for formation events set for next 6 months (on a rolling basis)			
4.5 Demographic analysis of events		Set targets for # of participants, participation for events. Dec 2019. Define mechanism for collecting demographic data				
5.0 Review community partnerships		Service Committee designs process with criteria (2 components) to assess community partnerships.	Process in place by Jan 2019			
5.1 Create Service dashboard				Service Committee defines what needs tracking by June 2019		
5.2 Goal for volunteers/service		Service Committee reviews Mission and Values, and sets goals by Jan 2019.	Targets and goals in place by January for 2019			

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
5.3 Method to assess community needs		Service Committee determines the goals, depth and detail required of a community assessment.	Service Committee and Rector to determine whether community assessment will be a staff position, or to accept recommendations for external consultants (e.g., Episcopal Health Foundation list)			
5.4 Mission trips in a progression		Service Committee makes recommendation (can be informed by other parishioners) regarding creating a progression for Mission trips to encourage more participation				
5.5 Sponsor "all hands" project each year		Service Committee brainstorms or collects input on alternatives for "all hands" projects Committee recruits Chair for 2019 "All Hands Project".	All Hands Project chair and Service Committee develop parameters for success of project, methods to recruit widest range of participants, and develops target date, communication, and execution plan			

Initiative	Q3 2018	Q4 2018	Q1 2019	Q2 2019	Q3 2019	Q4 2019
5.6 Method to assess and serve in-reach need		Service Committee brainstorms alternative methods to collect information on in-reach need (one-time vs on-going basis, categories of need, etc.)	Service Committee develops ways to communicate in-reach need to parishioners (website, bulletin board, bulletin, etc.)	Service Committee develops tracking system to assess number of participants, engagement, and need met. Committee sets targets for parishioner participation, engagement, and need met.		Service Committee assesses the success and opportunities for the in-reach program.
5.7 Volunteer checklist with expectations			Service Committee develops simple one-page guidelines for how to be a volunteer including safety and oversight. Consider different types of volunteering roles (one-off, youth, ongoing role, volunteer leader, etc.)	Service Committee ensures that volunteers at service events have access to the guidelines (website, handouts, etc.)		

Table: Implementation Roadmap (Annual for Years 1-5)

Initiative	2019	2020	2021	2022	2023
1.0 Revise the STMEC Mission Statement	Mission statement approved by Vestry. Included on website, bulletins, and other documents.				Revisit Mission statement acceptance in Parish Survey
1.1 Redefine role and responsibilities of Staff	Administrative lead to define job descriptions for all staff roles Expectations defined for volunteer and lay leader roles. Clarity of volunteer roles assessed through feedback after events.	Evaluations tied to job descriptions			
1.2 Create a centralized calendar and rules	Administrative lead to define user requirements. Select platform. Define posting guidelines and responsibilities	Review effectiveness of calendar. Adjust if needed.	Review effectiveness of calendar. Adjust if needed.	Review effectiveness of calendar. Adjust if needed.	Review effectiveness of calendar. Adjust if needed.
1.3 Communication across pillar committees	Create simple template for Committee leaders. Governance Committee to review effectiveness of connectedness across committees and present to Vestry		Review effectiveness of connectedness across committees and present to Governance Committee		Review effectiveness of connectedness across committees and present to Governance Committee
1.4 Vestry model reoriented	Rector to clarify expectations, assignments, meeting cadence etc. of vestry roles	Assess effectiveness of vestry model. Adjust if needed.		Assess effectiveness of vestry model. Adjust if needed.	
1.5 Reconfigure front office	Administrative lead to look for inexpensive moves to improve office efficiency		Consider rebuilding office space to improve efficiency		
2.0 Form the Worship Committee	Committee established in 2018				

Initiative	2019	2020	2021	2022	2023
2.1 Create the Worship Committee mission statement	The new Worship Committee drafts mission statement				
2.2 Develop talent pool of volunteers for Worship area.	Worship Committee to create list of volunteer roles and lay leadership for Worship Set targets for recruiting, training.	Review effectiveness of Worship recruiting, training (Engagement Committee)	Review effectiveness of Worship recruiting, training (Engagement Committee)	Review effectiveness of Worship recruiting, training (Engagement Committee)	Review effectiveness of Worship recruiting, training (Engagement Committee)
2.3 Bulletin review	Worship Committee to review effectiveness of church bulletin via focus groups, or other feedback process. Make improvements.		Worship Committee to review effectiveness of church bulletin		Worship Committee to review effectiveness of church bulletin
2.4 Record and post sermons	Worship Committee to further study proposal and determine whether to go forward				
2.5 Wednesday service expansion	Worship and Welcome committees to analyse and potentially recommend an approach Wednesday service expansion	Engagement Committee to evaluate success of Wednesday service expansion		Engagement Committee to evaluate success of Wednesday service expansion	
3.0 Develop Welcome Pillar Committee Statement	Welcome Committee to develop statement (Fall 2018) and approve (2019)				Welcome Committee to review statement
3.1 Newcomer welcome packet development	Welcome committee to develop timeline for development, costing, and launch		Welcome Committee to assess success/value of welcome packet. Improve.		Welcome Committee to assess success/value of welcome packet. Improve.
3.2 Establish a Welcome Committee and Ambassador Program	Welcome Committee to define roles, expectations, and coordinate welcome presence		Engagement Committee to review success of Ambassador program		Engagement Committee to review success of Ambassador program

Initiative	2019	2020	2021	2022	2023
3.3 Welcome "in bounds" guideline development	Welcome Committee to define guidelines for parishioners / Ambassadors regarding a 'welcoming' culture		Welcome Committee and Engagement review guidelines		Welcome Committee and Engagement review guidelines
3.4 Website navigability for newcomers, visitors	Ensure Welcome Committee has input into website specifications				
3.5 Water cooler in Margaret's Parlor					
3.6 Establish a task force to recommend newcomer and visitor strategies	Establish task force within 2019.				
4.0 Rename Formation to Learning Committee	Rector to make determination by Jan 1, 2019				
4.1 Develop Formation Pillar Committee Statement	Formation Committee to develop statement (Fall 2018) and approve (2019)				Formation Committee to review statement
4.2 Expand Children's Ministries, lay leaders, curriculum	Review which activities that can be led by lay personnel. Define roles. Develop training program.	Develop leadership pipeline.	Review effectiveness of lay leadership and program (Engagement Committee with Formation) Enhance leadership pipeline.	Enhance leadership pipeline.	Review effectiveness of lay leadership and program (Engagement Committee with Formation) Enhance leadership pipeline.
4.3 Make Kid Min curriculum more liturgical	Youth Minister with Rector make recommendation on curriculum Review and select curriculum. Set goals for curriculum.		Assess success of curriculum. Adjust if necessary.		Assess success of curriculum. Adjust if necessary.

Initiative	2019	2020	2021	2022	2023
4.4 Formal review of Formation events	Formation Committee to propose success goals for formation events including return on effort/cost Define mechanism for collecting data. Define Stop/Continue/Enhance criteria. Approved by Governance Committee.	Review events. Assess and refine review process.	Review events. Assess and refine review process.	Review events. Assess and refine review process.	Review events. Assess and refine review process.
4.5 Demographic analysis of events	Set targets for # of participants, participation for events Define mechanism for collecting demographic data		Review demographic data. Formation to make recommendations on improvement.		Review demographic data. Formation to make recommendations on improvement.
5.0 Review community partnerships	Design metrics and criteria to assess the success of community partnerships. Develop way for parishioners to nominate additional/replace partnerships	Assess community partnerships using designed process. Include community partnership question in parishioner survey	Assess community partnerships using designed process. Include community partnership question in parishioner survey	Assess community partnerships using designed process. Include community partnership question in parishioner survey	Assess community partnerships using designed process. Include community partnership question in parishioner survey
5.1 Create Service dashboard	Select metrics for Service dashboard and data collection mechanism.	Review Service dashboard in committee meetings Provide annual report	Review Service dashboard in committee meetings Provide annual report	Review Service dashboard in committee meetings Provide annual report	Review Service dashboard in committee meetings Provide annual report
5.2 Goal for volunteers/service	Service Committee to propose parish service goal and parameters. Committee to find easy ways to track contributions to service goal.	Review and improve program.	Review and improve program.	Review and improve program.	Review and improve program.
5.3 Method to assess community needs	Determine whether the resources exist through volunteers to do this work or need to hire staff	Conduct initial community assessment and make recommendations to Vestry			
5.4 Mission trips in a progression	Develop framework to connect mission trips to increase enthusiasm.				

Initiative	2019	2020	2021	2022	2023
5.5 Sponsor "all hands" project each year	Launch first "all hands" project. Assess what worked, make improvements each year.	Assess what worked, make improvements each year.	Assess what worked, make improvements each year.	Assess what worked, make improvements each year.	Assess what worked, make improvements each year.
5.6 Method to assess and serve in-reach need	Service Committee to develop the mechanisms to identify in-reach opportunities, communicate them, and provide follow-through. Develop metrics and targets.				
5.7 Volunteer checklist with expectations	Service Committee to develop responsibilities and expectations for volunteers.				

Appendix 4: Strategy Plan Dashboard

The Strategy Plan Dashboard is a summary of the data that would be discussed when reviewing progress against the plan. The review would be at least an annual process led by the Governance Committee, but not more frequent than quarterly (depending on the availability and volatility of the data).   This dashboard does not supplant the need for individual Pillar Committees to collect their own attendance data, for example, or progress against their own annual objectives.

Focus	Goal	2017 (baseline)	2018 (to be updated end of 2018)	2019	2020	2021	2022	2023
Congregation	Average Sunday Attendance (ASA)	272		287.6	303.2	318.8	334.4	350
	Attendance on Easter and Christmas	800		860	920	980	1040	1,100
	Newcomers and visitor (signed visitor book)							
	Traffic to main web page							
	# of followers on Facebook, IG or Twitter							
Committees	Performance against annual targets*							
	# of active members vs. target							
Lay Leadership	# of open positions							
	% of positions with a backup							
Volunteers	Total # of unique volunteers							
	Total # of volunteer hours							

Focus	Goal	2017 (baseline)	2018 (to be updated end of 2018)	2019	2020	2021	2022	2023
Pledges	Total pledges collected	$0.82M						$1.1M
	% of parishioners (families) pledging	42%						50%
	Total collected from pledges, per year (or % pledges collected)							
Budget	Performance against controllable expenses (non-salary, etc.)							

* will vary by year, by committee, but need to be set by a certain date each year.

Appendix 5: 2018 Parishioner Survey

Introduction:

As St. Mark's Episcopal Church continues to grow, we would like to know how our parishioners feel about our church today and about its future direction. This survey is designed to invite your input on our activities in each of the Pillars (Worship, Welcome, Formation, and Service) as well as some areas that touch all areas of activity. Whether you attend on a regular basis or not, your thoughts are most welcome.

Please note that this survey is designed to understand how you honestly feel, and is not intended to suggest how you should feel or spend your time. Please respond frankly and candidly as this is always most helpful in this work. You may choose to submit your responses anonymously by selecting the option at the end. Responses will only be reported in the aggregate and quotes will have names etc. removed so that individuals aren't identified.

If you have any questions about the purpose of this survey, please reach out to Patrick directly. If you have any issues with the links or technical issues, please reach out to our consultant for this Strategic Plan, Rodrigo Herrera at rodrigo@herreratalentstrategies.com.

General and demographic questions:
1. How many years have you been attending St. Mark's? (number)
2. How many members of your family attend St. Mark's with you? (If other members of your family have also received an invitation to complete this survey, you may each complete and submit it individually and we will integrate the data where needed)
3. What are the ages of the parishioners in your family who attend St. Mark's (number(s))
4. How many times a month do you attend a service at St. Mark's? (number)
5. How did you originally find out about St. Mark's?
    a. Friend/family member invited me
    b. Website
    c. Referred by another church
    d. Drove by
    e. Other _____
6. How do you feel about the size of St. Mark's congregation?
    a. We could be much larger
    b. We could be a little bigger
    c. It is about right
    d. We should be a bit smaller

    Worship
7. Which service do you attend most regularly?
    a. Sunday 7:15
    b. Sunday 9:00
    c. Sunday 11:00
    d. Sunday 5:00
    e. Wednesday 12:00
8. Why do you choose to attend this particular service? (rank top 3, or choose multiple)
    a. Convenience with family schedule

b. Homily, sermon given by a specific priest
c. The rite or service, atmosphere
d. Music
e. Friends also attend this service
f. Same time as Kid Min or other programs
g. Convenient time near Coffee Hour, Bible study, or other group activity
h. Other _____

Welcome
9. Have you invited anyone to attend with you as a visitor or guest within the last 12 months?
    a. If so,
        i. What did you expect your guest would like most? (Short text)
        ii. Did your guest return for future services? (Yes/No)

Formation
10. How often do you or members of your family attend any of the bible studies, classes, youth group, or Kid Min (times per month)?
11. What time during the week would be most convenient to have church learning and formation activities? (allow None or Skip)
12. What matters most to you when determining whether you attend a Bible study, study group, or reading group?
    a. Subject, topics
    b. Having something in common with those attending (age, gender, stage of life, professional, etc.)
    c. Who is teaching/leading the group
    d. Schedule convenience
    e. Other _____
13. What subject matter would most appeal to you for a bible study group? (Allow multiple)
    a. Scripture, historical, traditions
    b. Scripture for difficult times in one's life
    c. Great Christian writings / theological texts
    d. History, culture of the Episcopal Church
    e. Approaches to great theological questions
    f. Doesn't matter to me
    g. Other _____
14. What membership of the study group would make you most comfortable when selecting one? (allow multiple)
    a. Same gender as me
    b. Same stage of life as me
    c. Similar age to me
    d. Same professional background as me
    e. Doesn't matter to me
    f. Other _____
15. What matters most to you about the person leading the study group? (Allow multiple)
    a. Depth of knowledge, expertise, content mastery
    b. Ability to lead a study group
    c. Personality (openness, joy, connectedness to others, etc.)
    d. Other _____

Service

16. "St. Mark's should dedicate itself to a single "anchor project" that ties our work and community together" (agree... disagree)
    a. If you like the idea of an "anchor project", what community need should it address?
17. "St. Mark's should focus on a handful of different service areas (homeless, education, children, etc.) each year" (agree...disagree)
18. Within the last 12 months, have you volunteered your time to a church activity related to the following:
    a. Worship (acolytes, readings, clean up, etc.)
    b. Welcome (greeting, dinners, etc.)
    c. Formation (Bible study, reading or discussion group, Kid Min, Youth Group)
    d. Groups (Scout Troop, Women of St. Mark's, etc.)
    e. Service Community Partners –
        i. Christian Community Service Center
        ii. Hospitality Apartments
        iii. Kids' Meals
        iv. Lord of the Streets
    f. Harvey relief
    g. We volunteer, but not always through St. Mark's
19. How comfortable do you believe parishioners feel about sharing their needs with the church, including pastoral care (e.g., hard times, food, clothing, illness, hospital visits, etc.)?

Wrap up –

20. What suggestions would you make to the clergy and vestry during this Strategic Planning process? _____
21. If there is one thing the planning process should try NOT to change it is

    _____
22. Do you have any suggestions for how to better use the campus, the space or its buildings?
23. What is your reaction to a rewriting of the Mission Statement for St. Mark's Episcopal Church from:
    "An extraordinary Christian family joyfully loving, learning, serving" to
    "The mission of St. Mark's is to love, to learn, to worship and to serve in a joyful Christian family."
    (Resonates more, doesn't resonate as much, why? Or doesn't really matter to me)

    _____
24. I would like my responses to this survey to remain anonymous (yes/no)

Suggestions for next time:

a) Include optional questions about the age, gender of the respondent to allow different types of analysis
b) Allow parishioners to identify particular programs they would like more information on

Appendix 6: Pastoral and Program Churches

Introduction

The need to match the operating model to the size and goals of an institution or company is a well-established precept in organizational design. Research cited in the Congregational Series published by Episcopal Church Center vividly illustrates this principle in the context of different sizes of a church. The thesis is abstracted here:

> *"Who has not been seduced by the fantasy of a perfect program that will solve the problems of all churches everywhere? Our experience tells us that such an idea leads to frustration. … The purpose of this presentation is to demonstrate how one important factor, the size of congregations, prevents us from using one program and one style of leadership for all church situations.*
>
> *The size of a congregation acts as a key variable in those factors that determine the structure, functions, and style of relationships in its group life. For ease of analysis we will assign four categories of size to differentiate a pattern: small, medium, large, and extra large.*
>
> *There is no intent in this presentation to attach any stigma or respectability to size as such. On the contrary, it is assumed that any size church is the right size, and any size church can attract and assimilate new members. However, the basic hypothesis is that the most effective means of carrying out a new member ministry varies with the size of the congregation."*[4]

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[4] Congregational Vitality Series: Sizing Up a Congregation; Congregational Development Services; Episcopal Church Center, NY

Comparison of Pastoral and Program Church Organizational Characteristics

Characteristics	Pastoral Church	Program Church
Typical Size	50-150 active members	150-300 active members
Summarizing Statement	"The membership looks first to the central leader for direction inspiration, and pastoral care."	"Democratic organization and leadership by the laity are the keys to effective ministry in the program church."
Key Features	• 2-3 leadership circles, some dominant personalities • Rector leads and communicates with the congregation; delegates authority and responsibility. • Organization is usually low-key and very flexible	• Central leader can no longer maintain pastoral contact with the whole congregation. • Team leadership replaces centralized leadership – central pastor becomes pastor to the lay pastors. • The major decisions are made in representative governing bodies, such as the vestry and program councils. • Increased administration and coordination of many ministries, goal-setting, strategy planning, resourcing, training, and evaluation. • The whole congregation affirms a clear statement of the purpose of the parish, reflected in all goals and activities.
Characteristics of entry, Welcome	• Newcomers mainly look to central clergy for connection (limiting factor) • Members see themselves as friendly, but may be friendly mainly to each other. • Membership is easy, inclusion in fellowship circle or leadership is harder.	• Newcomers drawn by visibility and quality of programs. • Church increasingly reaches out to community "Find a hurt and heal it" • Church should have specific programs for building bridges of trust" – based on research and selection.
Needs of new members	• To find their group within the church and build new relationships • Multiple entry points for newcomers • A "hospitality minister" makes introductions to interest groups, who have the responsibility for integrating the new members.	• To find their interest group and programs, on their own ("road map") • Process for keeping newcomers from getting lost and leaving out the back door (watch for signs) • Recognition and respect for newcomers as individuals, not member counts

We found this model to be extremely helpful during our strategic planning conversations because it showed that some of the administrative and communication challenges observed by participants were "normal growing pains" and it allowed the group to think through solutions as opportunities to ameliorate any current irritations as well as prepare the church for growth.

One of the differences between the two models is the increase in transparency and traceability of communication and decision-making. During the transition from Pastoral to the Program church, it may feel like the new processes are excessively bureaucratic or parliamentary. At this point it is important to look for efficient ways to achieve these objectives rather than to revert to the informality which served during Pastoral model. In the end, the additional structure actually increases the flow of useful communication, accelerates collaborative decision making, and increases participation of others in the leadership of the church allowing it to expand its activities in service of the mission.

Appendix 7: Other Ideas Considered During Strategic Planning Brainstorming Sessions

Worship
- Adult choir committee
- Tri-fold –all-inclusive worship leaflets
- More robust use of the chapel
- Art in the narthex (maybe a year 2 idea)
- Professional boys and girls choir
- Choir retreat
- Compline – evensong
- Evensongs
- Chancel dramas (Godspell, J.C. Superstar)
- Better use of bells
- Rally Day – combined one service @ 10 am

Welcome
- Social media, mass communication blitz
- Targeted marketing campaign aimed at 20-30+ group for church and formation events
- Membership table (different than visitor)
- More social media presence
- Swag – pens, cozies, etc.
- Liaisons from Welcome represented at other pillars
- Engagement table (info + person to talk to)
- Nametags
- Identify key local community groups for partnerships
- Advertising $ for arts events and podcast
- Fun events for the community – just to bring folks together
- Inclusive activities welcome/open to the community
- Small groups
- More gatherings
- Build community and connection
- Member buddies
- Every member bring a friend (if they want)

Formation
- Have someone from Camp Allen come speak and register people
- 40+ focus group to develop formation programs
- Affinity groups (running, cooking, music, etc.)
- Daring Way groups
- Quarterly engagement opportunities outside of church
- Dinner groups
- Happy hours
- Youth functions
- Children's functions
- Fellowship outings
- All parish weekend
- More cross-generation opportunities
- Quarterly social activity for casual 20-30 somethings
- Program based trips (travel, mission trips) e.g. ski trips, etc.
- Weekly Kid Mid
- Weekly SMYG

- Monthly small group @10am for each age group
- "Tough question" and "Doubters class"
- Bible study groups
- Youth service on Sunday Morning
- Build potential college group / ministry
- Monthly dinner out after 5 pm service for 5 pm Welcome volunteers
- Welcome dinners for new-ish members / repeat visitors
- New Sunday engagement for children
- Extend children's chapel
- Sunday 10 am becomes about engagement
- Introduction class (4 week period vs. 2 day process)
- Family mid-week opportunity

Appendix 8: Discussion of the Welcome Pillar and the Parishioner Survey Data

In moving from the operating model of a Pastoral Church to that of a Program Church, one of the biggest differences is how visitors are brought into the membership of the church. From interviews with members of the Vestry, the Staff, and comments in the Parishioner survey, many of the characteristics of the Pastoral Church can be found in the "entry" or Welcome experience of a visitor to St. Mark's (see Appendix 6 for summary of Pastoral vs. Program newcomer features).

In the Pastoral Church, newcomers expect attention from the clergy. New member ministry can become limited to the central pastor. "Few visitors stay who cannot relate to the priest in charge.... If the rector is the key evangelist, who is working alone, then only 6 to 10 persons will be assimilated fully into the membership per year."[5]

The solution to this bottleneck issue according to the Congregational Development Services is a "hospitality minister." The hospitality minister ... "is more than a greeter although he or she will serve with the priest in the narthex and coffee hour. It is the task of the hospitality minister to learn about newcomers and assume responsibility for their being welcomed at the church during the first six months. Such duties are ... (1) to match the newcomer with suitable members and groups, (2) to make the appropriate introductions, and repeated introductions, at church gatherings, (3) to give the newcomer and group leader the necessary orientation and information in order to facilitate acomfortable entry.... The hospitality minister will host situations that provide one-to-one contact with the clergy, and help the clergy make home, or hospital, calls when the newcomer desires visitation.... It will be necessary for the hospitality minister and clergy to confer with each other regularly to provide in-service training and an exchange of information that is pertinent to the new member ministry."[6]

In our work with the Staff and Committees, we often referred to a Welcome Committee implying that the work would be organized within the Welcome Pillar. In the case of St. Francis' Church, in Memorial, Houston, newcomer responsibilities are managed by a part-time staff member who follows up with every new visitor via e-mail and then a phone call. Newcomers usually fill out a card during their first visit. "We are not shy about letting people know about us and inviting them to join.... It is a part of everyone's job here." They have a goal of adding 100 new members per year and they revisit their progress every week during their staff meeting.

In the case of St. Mark's church, we have focused on creating the infrastructure that would make Welcome a more intentional activity with goals, a Committee charged with overseeing the experience of newcomers and helping them navigate their way to deep roots within the church. As the Congregational Development Services notes about the Program Church, it "frequently draws persons by the visibility and quality of its programs. Consequently, every leader should be

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[5] Congregational Vitality Series: Sizing Up a Congregation; Congregational Development Services; Episcopal Church Center, NY

[6] Ibid.

aware of this potential in every area of programming."[7] For this reason, Engagement is one of the charges of the Welcome Pillar committee and it is measured by the quality of the experience of newcomers and their eventual membership in the church. (Of course, this does not mean the goal is that 100% of visitors become members.)

Parishioner Survey Question: "How did you first find out about St. Mark's church?"
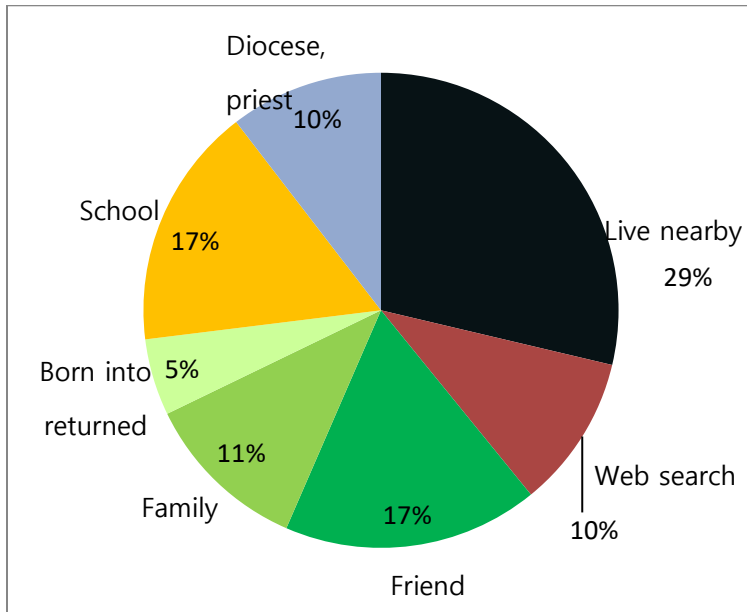
We observed in the data that personal referrals account for about 60% of the initial contact with St. Mark's, but not through the priests as we originally expected. Instead, it seems that people come to the church through an invitation from a family member or a friend, and then in part stay because of the clergy and the worship service. About 40% of the initial contacts don't involve a personal referral, and so the Welcome Pillar Committee should consider how to best help those in this group who have no natural personal contact to help them get connected to others and feel invited to return.

In the parishioner survey, we found that parishioners from different services had different rates of inviting friends.

Service	Number of respondents in parishioner survey	Invited a friend within past 12 months
7:45 am	7	43%
9:00 am	63	57%
11:00 am	25	36%
5:00 pm	18	67%

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[7] Congregational Vitality Series: Sizing Up a Congregation; Congregational Development Services; Episcopal Church Center, NY

The experience of newcomers was reportedly positive.   However, the need to be more intentional about connecting newcomers to others and to groups within the church was acknowledged during interviews and in comments in the survey.

Finally, it was expressed in some of the comments in the parishioner survey as well as during several of the interviews, that growth for the church should address diversity in some fashion. In follow up questions we found that diversity referred to not only cultural and racial diversity, but also to economic diversity. In other instances, it was observed that the diversity in the geographic community surrounding St. Mark's is not fully reflected in the current congregation.

The proposals in this section then are not at the level of specific activities or tactics to bring in newcomers, but are aimed at building a sustainable infrastructure that would support further growth for St. Mark's.