

# **St. Andrew's Episcopal Church**

## **2017-2022 Strategic Plan**

### **Detailed Report**



## **Introduction of Strategic Planning Process and Planning Members**

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- History of Church- understanding core values and traditions
- Demographics of internal and external church community
- St. Andrew’s Church Ministries and Outreach

### Part II –Who and what makes up St. Andrews? Appreciative Inquiry Outcomes

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- What did we learn?
- Best Experience (What was a memorable experience that you had with your church?)
- Your Church (what about your church do you value?)
- Core Value (what do you think is the core purpose of your church?)
- Three Wishes (if you had three wishes for your church, what would they be?)

### Part III-Putting It all Together

- Mission, Vision Statements and Core Values
- 5 Year Strategies
- Goals for the next 5 years

### Part IV- Strategic Tools and Operating Principles

- Create tools to assist working teams/committees to stay aligned with strategic initiatives
- Develop a status report for monitoring and tracking of committee progress

## Introduction of Strategic Planning Process and Members

### Strategic Planning Process

The strategic planning team of Scott Sally, Paul Isaacs, Sarah Larson, Kathy Coates, and Tammy Retalic worked together with Reverend Cynthia Hubbard from the Episcopal Diocese and Rev Julie Carson to develop a process that invited feedback and input from the St. Andrews Community. Reverend Cynthia Hubbard led an Appreciative Inquiry discussion during the sermon. This discussion led us to identify what we most appreciate about the St. Andrews community and encouraged dialogue around what we can build on as we consider our future as a worship community.

The entire strategic planning process took approximately 5 to 6 months and involved the following components:

**Data Collection-** understanding who we are as a community.

- Demographics-what surrounding towns does our congregation represent? Are there trends in age and economic groups, shifts in diversity that may shape the future?
- Current ministry – who is currently involved and what percentage of time and talent is dedicated to our community worship?
- Financial data- what is our current cash flow, what does the budget currently look like? What financial goals must be realized to do God’s work?

**Congregational Input/Feedback-** ensuring we hear the voices of our parishioners.

- Appreciative Inquiry- understanding what we are most proud of as a community and opening our minds to what may be possible. Understanding what is of primary importance.
- Ongoing sharing of information and communication- our planning team is committed to an inclusive process allowing for input/feedback and gathering more focused information throughout the process. We also plan to provide updates on the progress and opportunities for questions and answers.

**Mission and Vision Statements-** Revisions and development of statements as needed to reflect the feedback and discussions of our parishioners.

Exploring gaps- is what we say important clearly evident in the work we do? Do we need to be more intentional in identifying where we want to be?

Putting into words- what do we want to look like in the next 5 years and how can we capture this vision on paper as an ongoing reminder and blue print for our future decision making?

**Strategic Plan-** putting it all together. Creating a blue print for our future in serving God.

Create a global statement that incorporates feedback, revisions and/or changes to mission and vision statement. A written aspiration of where and who we want to be in the next 5 years.

Develop clear plan(s) that consider identified gaps in what we currently do and have and what we want to do and need. Plan will be developed from identified priorities and goals determined through this inclusive and comprehensive process. We anticipate the following information will be provided in the final summary report and recognize and are open to sharing plans that were initially unanticipated but clearly important as we complete the process.

We are looking forward to our future and how this strategic plan will align our resources, inform our decisions, and create a church that reflects our commitment to our community and to living God's words.

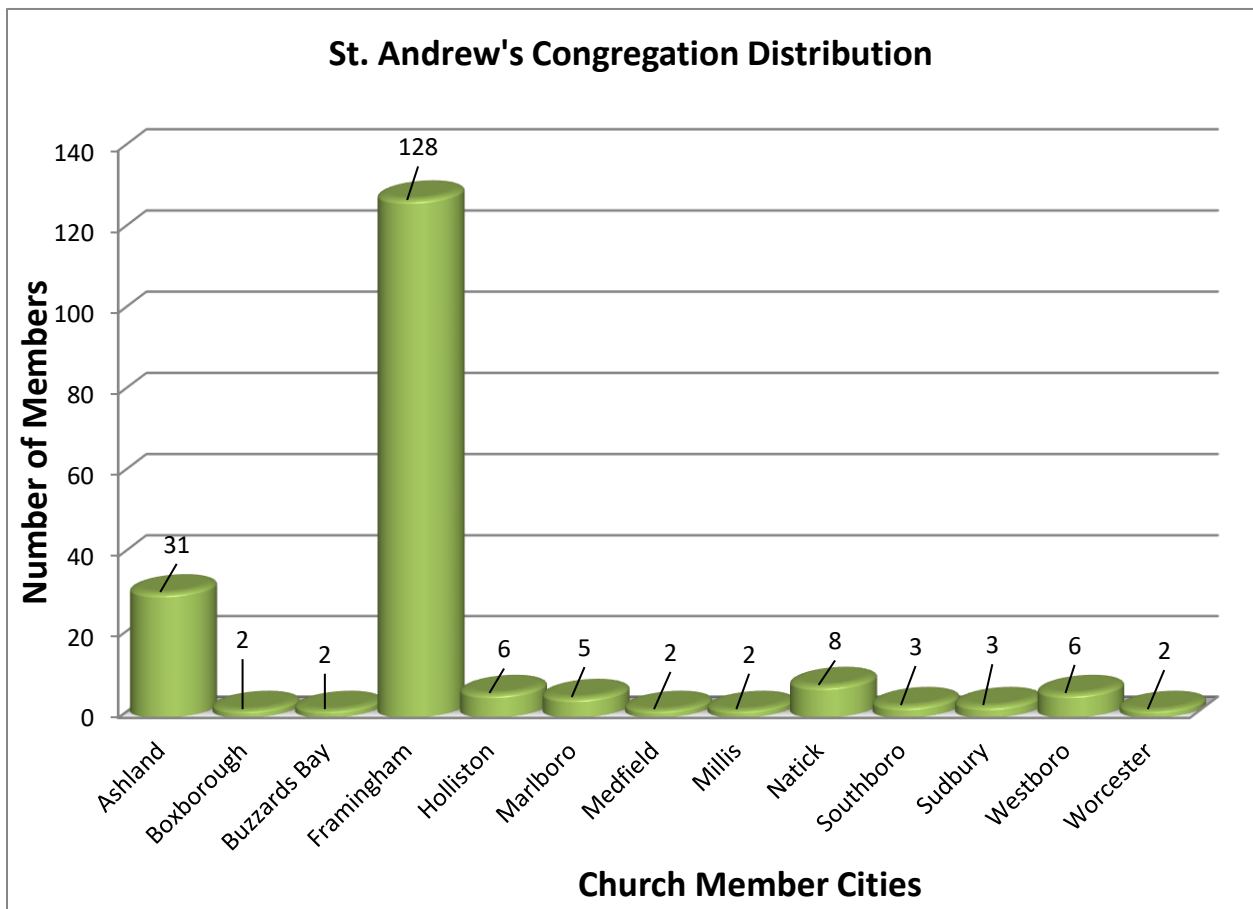
## Part I –Past and Current Information about St. Andrew’s

### Demographics of our Internal and External Community

#### St. Andrew’s Episcopal Church Demographics

St. Andrew’s Church draws a clear majority of its membership from towns within the Metro West region with over 90% of registered congregants being residents of Framingham.

To better inform the strategic planning process the planning team needs to further analyze the demographics, cultures and norms of the surrounding communities.

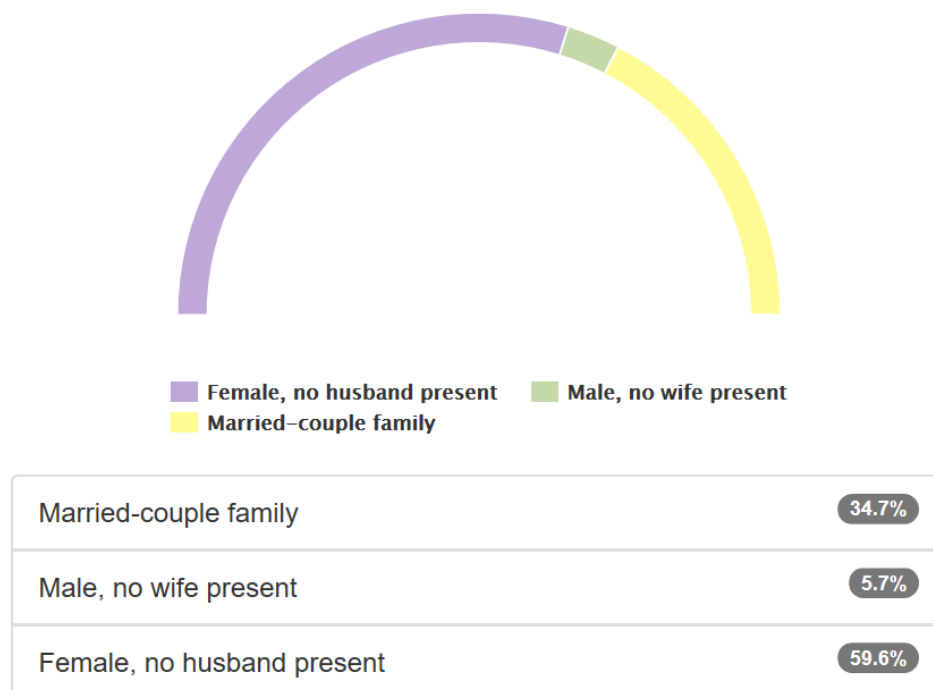


Framingham has a population of 71,209 in July 2015 (US Census), which represents an increase of 4% over the 5-year period from July 2010. It is the 14<sup>th</sup> most populous municipality in Massachusetts and consistently ranks as one of the best places to live in the United States.

## Framingham Demographics

- Framingham’s racial make-up consists of 65% White, 13% Hispanic, 6% Black, 6% Asian and 5% Mixed.
- Median household income (in 2014 dollars), 2010-2014 is \$68,881 which is 28% higher than the US median income of \$53,657 but lower than some surrounding communities such as Holliston (\$108,350), Southborough (\$149,350), Sudbury (\$169,505), Natick (\$98,000) and Westborough (\$100,000).
- Total retail sales per capita in 2012 were \$20,272 vs. \$13,980 Massachusetts as a state.
- Poverty rate is 11% of which the majority is single white mothers. Framingham is one of the few towns in Massachusetts that have met their legal requirement of 10% for Massachusetts Chapter 40B Affordable housing which mostly targets people with income levels in the 70% of median income. In addition to its 40B Affordable component, Framingham has a large percentage of rental units which target people in the 30% of median income bracket.
- 19,000 Framingham residents are foreign born (15.7% Latin America, 4.5% Asia, 2.9% Europe).

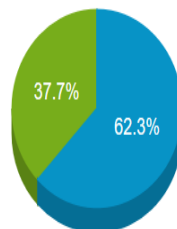
### *Poor Families by Family Type - Framingham*



## Number of Households in Framingham

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Total Households	26,649
Family Households	16,594
Non-family Households	10,055
Households With Children	8,299
Households Without Children	18,351
Average People Per Household	2.48

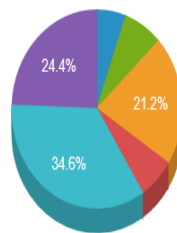


● Family Households  
● Non-family Households

## Framingham Education Statistics

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No High School	1,989
Some High School	2,627
Some College	7,565
Associate Degree	2,416
Bachelors Degree	12,306
Graduate Degree	8,703



● No High School  
● Some High School  
● Some College  
● Associate Degree  
● Bachelors Degree  
● Graduate Degree

## Religious Statistics

- 58% of adults in Massachusetts identify as Christians

Catholic	34%
Evangelical Protestant	9%
Mainline Protestant	10%
Historically Black Protestant	2%
Mormon	1%
Orthodox Christian	1%

## Part I –Past and Current Information about St. Andrew’s

### St. Andrew’s Church Ministries and Outreach

St. Andrew’s offers parishioners the opportunity to volunteer in a wide variety of roles. In order for the congregation to be engaged within our community, we feel that having a robust number of active participants is essential. For the purposes of our research, we counted the total number of active members in the following areas: Sunday School teachers, Jesus Rocks Association, Choir, EFM, Acolytes, Altar Guild, Readers, Lay Ministers, Eucharistic Visitors, the 20s & 30s group, Ushers and Fellowship.

#### Summary of findings:

Between these 12 offerings, we have a total of 65 people currently participating. Of those 65, 27 are engaged in multiple areas. The committee was very pleased with both the number of total participants, and the relatively low number of “super volunteers.” This points to a strong sense of responsibility for making St. Andrew’s what each member wants it to be, as well as a reliance on a large distribution of parishioners rather than a few who carry the brunt of the duties across all areas. While these numbers inspire confidence, an increase in total active members would speak to even deeper involvement, and a greater connection with individual ministries.



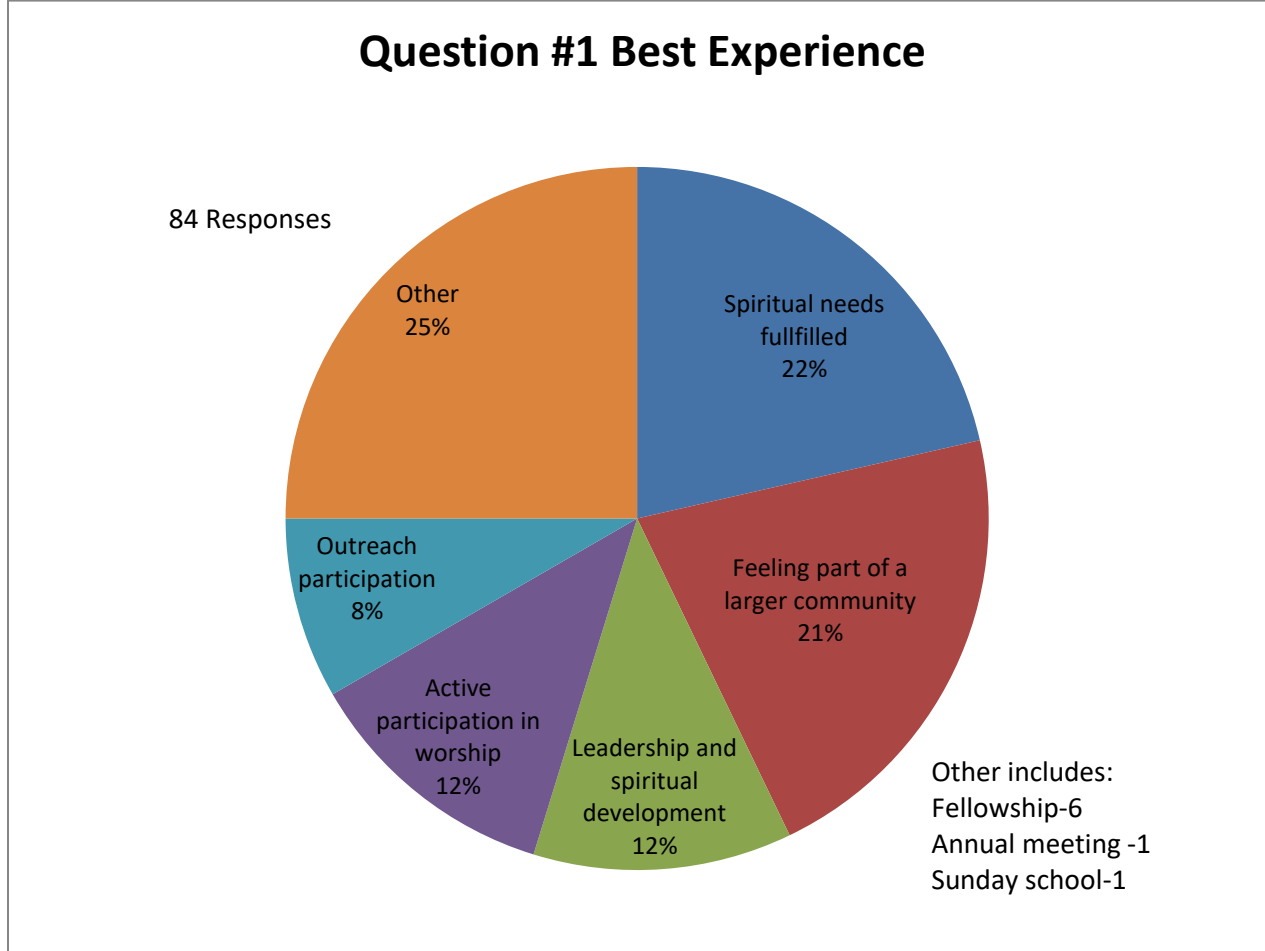


## Part II --Who and what makes up St. Andrews? Appreciative Inquiry Outcomes

- Purpose of Appreciative Inquiry exercise- Appreciative Inquiry- understanding what we are most proud of as a community and opening our minds to what may be possible. Understanding what is of primary importance and understanding what more we want from our church experience. We received 76 responses, which reflects the typical weekly church attendance.
- This exercise was completed as part of specially designed Sunday service that had a strong participation. Two additional “make up “sessions were provided, one during a week night evening and another session at 9am on a Sunday morning.
- There were 4 main questions that were asked of each person in attendance using an interview format and a group sharing of responses. The following information is a summary of the total sessions.
- All completed interview forms with the 4 questions were reviewed and grouped into categories that reflected the main intent of the statement or examples. Not every form completed had every question answered or in some cases additional statements were added. All of this data collection was categorized. The number of responses per question do not reflect the number of participants resulting in situations where there may be more or less questions than there were participants.

The four questions Best experience (most memorable church experience, Your church (what about St. Andrew’s do you value?), Core Value (what do you think the core values of St. Andrew’s are), and Three Wishes (if you had 3 wishes for St. Andrews what would you want more of or what would they be?)

1. Best Experience (What was a memorable experience that you had with your church?)

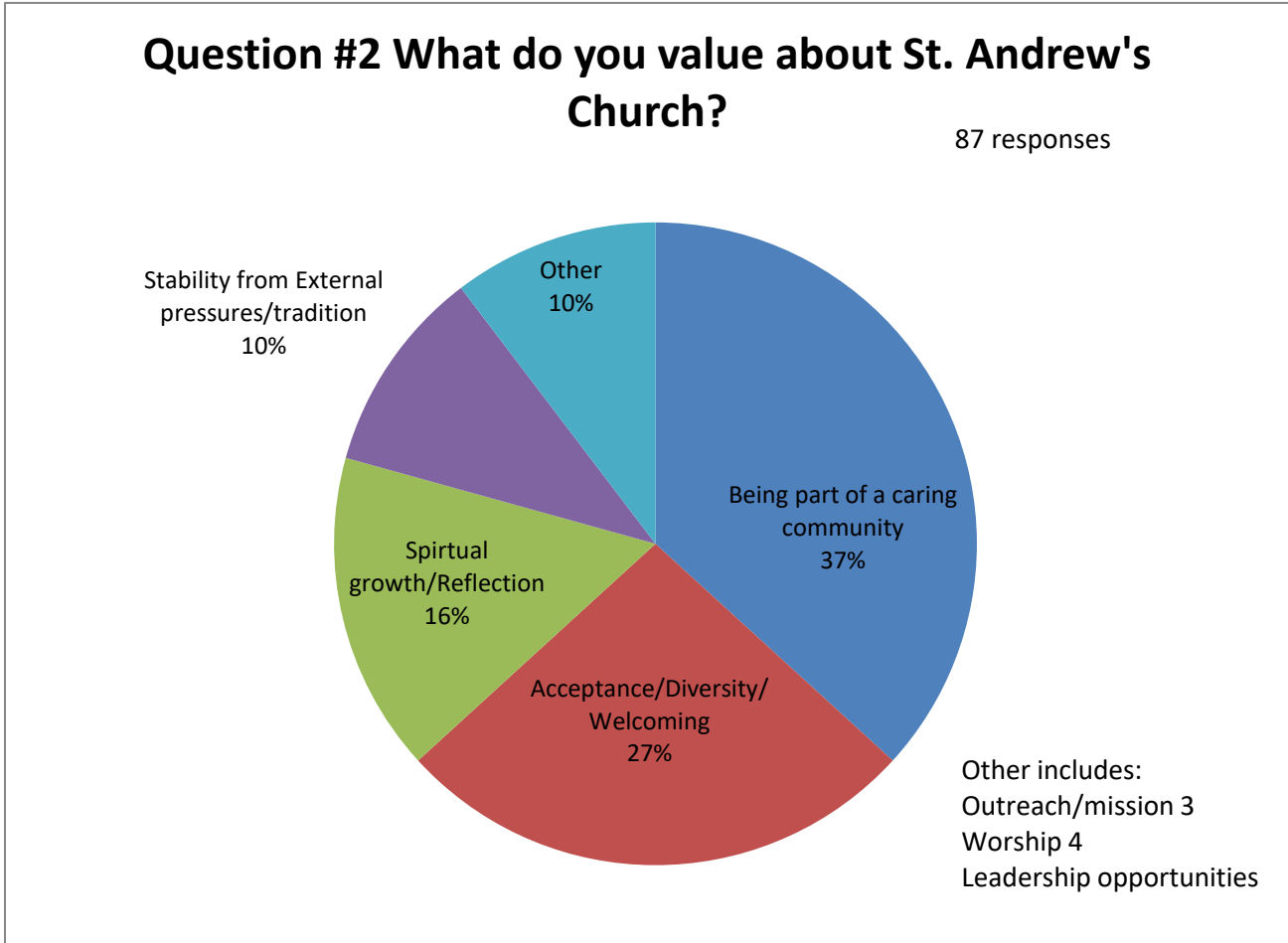


**Summary of findings: Question #1 What is your most memorable or best experience at St. Andrews?**

The top 3 best experiences were grouped under spiritual needs fulfilled (22%), feeling part of a larger community (21%), and a tie with opportunities for active participation in worship (12%) and the ability for parishioners to participate in leadership and spiritual development (12%). The following information provides examples of what falls under the graphic display categories.

- Spiritual needs fulfilled: examples include baptisms, weddings, holiday celebrations such as Mardis Gras, the Last supper reenactment, Easter and Christmas services.
- Feeling part of a larger community: examples include statements about feeling welcomed, the embracing of diversity, feeling included, and people being open minded.





**Summary of Findings: Question # 2: Your Church (what about St. Andrew’s do you value?)**

2. What do you value about St. Andrew. The top 3 responses for this question were in the following categories: Being part of a caring community (37%), Acceptance of diversity and welcoming to all (27%) and opportunities for Spiritual growth and reflection.

Examples of statements, responses that are grouped into these categories are:

- Being part of a caring community: some examples and remarks provided during the AI exercise include- being part a family and feeling part of a larger community, bringing children up in a caring community and the acknowledgement of people praying for people during times of crisis.
- Acceptance, diversity, welcoming to all: comments in this category include-open to all -knowing I can come here no matter what, acceptance by the church and a feeling of people being non judgmental.





## Question #4- 3 Wishes

Other includes:

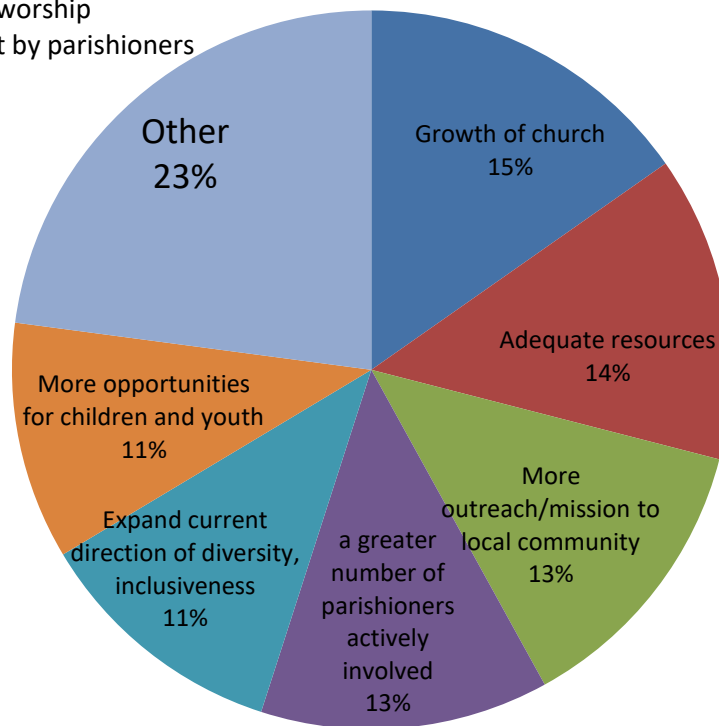
More focus on music

More pageantry with worship

More pastoral support by parishioners

Unify the 2 services

131 Responses



### Summary of findings: Question #4, What are your 3 Wishes for the church?

**What are your 3 wishes?** There were 6 categories of similar priority. They included- growth of the church (15%), adequate resources (14%), more outreach/mission to local community (13%), more active involvement of parishioners (13%), expand current direction of diversity and inclusiveness (11%) and more opportunities for children and youth (11%). The following categories are derived based upon the following comments and remarks.

Growth of the church- includes the following types of comments- more people in church, continued growth of the church, and would like more growth.

Adequate resources- includes-the following types of statements- financially at ease, financial stability, and continued pledge support.

Outreach and mission to local community-the following remarks fell into this category- increased community engagement, more activities around social justice, further develop how we can help others, and continue reaching out to others.

Expand current direction of diversity, inclusiveness- remarks include- continue to diversify, continue to welcome “recovering Catholics”, and continue acceptance of people including those with special needs.

More opportunities for children and youth- remarks include-provide assistance with transition from acolyte to chalice bearer etc, vibrant youth group, grow more opportunities for youth and young people, and more community service opportunities for youth and young adults.

## Three Wishes







**Opportunities:** There is a lot of consistency and agreement with what is working well and what needs improvement. This basic alignment gives us an opportunity to work with a core majority and therefore have successful implementation of a focused strategic plan. There is an open desire to try new things that encourage the generations to come together. There is a general sense that we have a solid foundation and that we are moving in the right direction with continued growth.



## **Part III-Putting It all Together**

### **Mission, Vision Statements and Core Values**

Mission Statement: “Embrace, Engage, Enhance the World Around Us” (tag line)

Empowered by the Grace of God, St. Andrew’s is a church that is an inviting, caring, loving community that welcomes all who enter our doors to use their time, talents, and treasures to create meaningful partnerships with our internal and external communities. Through reflective worship we renew our understanding and our commitment to do God’s work and embrace the collective wisdom of all generations.

Vision Statements:

1. To foster an environment that accepts all who wish to serve God, by encouraging and supporting ministries that have personal meaning.
2. To establish community outreach that meets the needs of our local and external communities, encourages multigenerational participation, and supports sustainable partnerships led by passionate and engaged parishioners.
3. To create an engaging, spiritual and reflective worship service that invites all to participate and supports the balance between the traditional and the new.
4. Through focused direction and alignment of resources, St. Andrews will thrive and be financially healthy.

### **5 Year Strategic Goals- 2022**

#### **Underlying assumptions and operating principles:**

- The below goals will be achieved by creating engaged work teams that represent multigenerational perspectives who work to gain perspective and understanding of likes and dislikes and who will create plans that balance the many viewpoints.
- All efforts will be made to consider which historical perspectives and rituals should be embraced while considering the needs of the newer generations.
- All plans and recommendations must include a budget and/or a plan to fundraise or apply for grant funding to support the recommendations. Vestry approval is needed prior to commitment to funds over and beyond budgeted amounts.
- Consider current trends and demographics, including external factors that the church may help meet an important need or fill a gap in the internal and external community. Keep in mind how current crisis those in the world affect those around us and consider ways for the church to be responsive. Reflect how St. Andrew’s may assist those around us to manage the pace of change and modern day stressors.

### **Measureable 2022 Results included the following.**

1. Active participation- Increase the active number of parishioners who participate in some type of internal/external community outreach and worship to 100 by 2022. (Current active participation as of 2016 is 65)
2. Community outreach- Increase the number of external community programs/partnerships hosted/supported at St. Andrew's by 10 by 2022. (This is new partnerships and does not include existing programs and these programs do not need to continue from one year to the next)
3. Enhance worship/spiritual services and programs- Improve and/or expand programming around religious education (children- adult) and worship (service and music) as identified by new specific plans and increased participation.
4. Financial Goal- Utilize 3% or less of endowment to balance yearly budget. (As of 2016 current use of endowment is 6%).

### **Key Concepts around 2022 Results:**

**Active participation**- In 2017 further work is needed to explain and define what active means. It should include internal and external partnerships and support of ministry. It may include a program that is supported by an individual or a group every year, or it could be active participation in worship ministry. St. Andrews needs to encourage individual and group passion that supports God's work and creates a sense of spiritual renewal and a feeling of giving.

**Community outreach**- This is specific to creating partnerships with businesses, and/or organizations that aligns with our member's passions and interests and fosters a sense of connectedness. Outreach should consider diverse interests and needs as well as opportunities to come together and bridge the generations. The idea of partnership helps St. Andrews be connected with the external community and provide an opportunity to do God's work beyond our doors.

**Enhance worship and spiritual services and programs**- Our current programs are meeting important spiritual needs of our parishioners. Yet there is a need to further expand how we can grow spiritually and how we might enhance spiritual renewal programming. Over the next 5 years, groups of interested parishioners, representing multi-generations, will explore ways to build and enhance three main components: music, religious education, and worship. It is important to evaluate and enhance so that St. Andrews can continue to grow and generate a passionate and engaged parish.

**Financial Health**- With alignment of goals we hope to make budget decisions around the strategic planning. Our financial health will build as we increase fund raising, identify grant opportunities, grow our numbers as a church community and through active partnerships.

## 5 year Strategic Plan 2017-2022

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p><b>Active participation</b></p> <p>Increase the active number of parishioners who participate in some type of internal/external community outreach and worship to <b>100 by 2022. (currently 65 active parishioners)</b></p>	<p>Increase active participation by 10 to a total of 75 active parishioners by Dec 31, 2018.</p> <p>Identify a work team (multigen representation) to determine a way to define and count the number of “active participants”.</p> <p>Determine frequency of reporting of numbers to vestry for status updates.</p> <p>Coordinate reporting metric to leads of committee and implement a process for a final yearly count for the annual meeting and achievement of set goals.</p> <p>Consider community needs and internal interest in supporting and coordinating programs that parishioners are “passionate” about. Remove programming that utilizes resources that others are not passionate about.</p> <p>Actively “actively encourage” others to assist with internal programming. “Many hands make light work” concept.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Increase active participation by 10 to a total of 85 active parishioners by Dec 31, 2019.</p> <p>Work teams continue to assess and understand needs of the community and the interests of the parishioners.</p> <p>Identify specific “target” programs and identify plans for outreach and recruitment.</p> <p>Expand and communicate the importance of being involved. Implement programming that speaks to the passion of the parishioners. Remove programming that does not so to balance the resources.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Increase active participation by 15 to a total of 100 active parishioners by Dec 31, 2021</p> <p>Complete a survey and/or focus group to understand what continues to involve people and what programs may no longer serve the internal and external community interests.</p> <p>Further develop the culture of involvement and reach out to those who may be reluctant.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p><b>Community outreach-</b> Increase the number of external community programs/partnerships hosted/supported at St. Andrew's <b>by 10 by 2022.</b> (these will be new programs in addition to our current partnerships and programs)</p>	<p>Identify working committee to include multigen representation</p> <p>Identify needs and like interests in local community and determine a partnership (short or long term).</p> <p>Implement at <b>least 2 newly identified</b> programs/partnerships.</p> <p>Report number of programs/partnerships to vestry on a predetermined frequency. Report at annual meeting, the number and type of programming and level of participation</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Complete a new assessment of local community and parish interests.</p> <p>Develop and implement a plan to participate in at <b>least 4 new</b> programs/partnerships.</p> <p>Provide routine updates to vestry and identify funding sources if needed.</p> <p>Determine fund raising or grant support to financially support newly considered programs.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>	<p>Develop and implement a plan to participate in at <b>least 4 new</b> programs/partnerships.</p> <p>Provide routine updates to vestry and identify funding sources if needed.</p> <p>Determine fund raising or grant support to financially support newly considered programs.</p> <p>Determine a way to communicate achievement of goal and celebrate success.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p><b>Enhance music, religious education and worship services and programs-</b></p> <p>Improve and/or expand programming around religious education (children- adult) and worship (service and music) as identified by new specific plans and increased participation.</p>	<p><b>Music Program</b> Complete a full assessment and provide recommendations for vestry approval related to the current state of the music program and potential enhancements to meet the diverse needs across generations.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) Dec 31, 2017.</p> <p>Implement plan and initiate key components of approved recommendations by May, 31, 2018.</p> <p>Complete full implementation of plan by Dec 31, 2019.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p><b>Religious Education</b> Complete a full assessment and provide recommendations for vestry approval related to the current state of the religious education for children through adults by May 31, 2019.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) by Dec 31, 2019.</p> <p>Implement plan and initiate key components of approved recommendations by May, 2020.</p> <p>Complete full implementation of plan by Dec 31, 2020.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p><b>Worship Service</b> In collaboration with Rev. Julie Carson, complete a full assessment and provide recommendations for vestry approval related to the current state of the worship service and it's ability to touch a wide generation of people and integrate traditional and new ways to worship by Dec 31, 2020.</p> <p>Complete assessment (survey, focus group) and recommendations (include budget considerations and resources if needed) by May 31, 2021.</p> <p>Implement plan and initiate key components of approved recommendations by Dec 31, 2021.</p> <p>Complete full implementation of plan by Dec 31, 2022.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>

Strategic Initiative	2017-2019 Goals	2019-2020	2020-2022
<p><b>Financial Goal-</b> Utilize 3% or less of endowment to balance yearly budget. Currently 6% of endowment being utilized.</p> <p>Funding sources should consider annual stewardship campaign, available grants through Diocese or with community partnerships, fundraising programs and funding campaigns.</p>	<p><b>No more than 5% of endowment to be used to offset budget for 2017 &amp; 2018.</b></p> <p>Create a document that includes current identified budget for each lead/chair person of program.</p> <p>Establish a process to ensure any additional funding requests are vetted and approved before committee implements programming.</p> <p>Collaborate with committee chair /lead to assist in identifying funding sources.</p> <p>Require financial updates from committees throughout the year to measure progress and support as needed.</p> <p>Establish a working group (multigen) to identify future funding sources and to increase grant opportunities and increase fundraising opportunities by May 2017.</p> <p>Establish 2 new fund sources by Dec , 31 2017.</p> <p>Implement one new funding source by May 31, 2018 and the second fundraising opportunity by Dec 31, 2018.</p> <p>Evaluate effectiveness of new fundraising sources- modify or change as needed for programming by May 31, 2019.</p>	<p><b>No more than 4% of endowment to be used to offset 2019 &amp; 2020 budgets.</b></p> <p>Continue with work group to identify funding source and identify one new fundraising opportunity by May 31, 2019.</p> <p>Identify a plan for additional funding sources to include considerations of education about estate planning and capital campaign by Dec, 31, 2019.</p> <p>Vestry approval of funding sources plan by May, 2020. Communicate and initiate initial components of plan by Dec 31, 2020.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>	<p><b>No more than 3% of endowment to be used to offset 2021 &amp; 2022 budgets.</b></p> <p>Communicate and initiate initial components of funding source plan by Dec 31, 2020.</p> <p>Complete funding source plan by Dec 31, 2021.</p> <p>Develop a plan to communicate progress and achievement of goals to the wider congregation.</p> <p>Celebrate achievement of goal.</p>



## Part IV- Strategic Tools and Operational Principles

Create committee template for assigned chair/co chair

Include:

- types of committee members to consider based upon our assumptions- (ie intergenerational- are most generations represented with the committees)
- resources needed to meet the desired outcome
- budget needs, consider grants, fundraising to support initiative
- consider if a community partnership is possible (either to make part of or support the initiative).

Create a “status report” for vestry to track quarterly progress and provide support as needed to ensure achievement of strategic goals.