

# **ST. BARTHOLOMEW'S STRATEGIC PLAN**

**April 2006**

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**MISSION STATEMENT:** "St. Bartholomew's Episcopal Church is an inviting and inclusive community. We celebrate our connections with one another and all of God's creation. We strive to be leaders in the stewardship of the earth and in social justice. Through creative liturgy, life-long education and spiritual inquiry, we seek to gain depth and energy for ourselves and for our service in the wider world."

**INVITING & INCLUSIVE COMMUNITY**

<b>GOALS</b>	<b>OBJECTIVES</b>	<b>NEAR TERM ACTION PLANS</b>	<b>MID TERM ACTON PLANS</b>	<b>LONG TERM ACTION PLANS</b>
1. Become an actively welcoming and inviting community	a. Increase St. Bart's visibility in the greater Portland area	<ul style="list-style-type: none"> <li>• Continue Clean Energy Fair</li> <li>• Expand content and use of web site (Joe M. &amp; others)</li> <li>• Develop short term PR plan (David P. &amp; others)</li> <li>• Develop 12 month events calendar</li> </ul>	<ul style="list-style-type: none"> <li>• Develop a community involvement plan identifying where we want to focus our efforts</li> <li>• Develop a longer term "marketing plan"</li> </ul>	<ul style="list-style-type: none"> <li>• Establish visible leadership position for environmental stewardship and social justice in greater Portland area</li> </ul>
	b. Improve accessibility & functionality of physical space	<ul style="list-style-type: none"> <li>• Deal with immediate issues:               <ul style="list-style-type: none"> <li>○ Sound system</li> <li>○ Arm chairs</li> <li>○ Wheel chair access</li> </ul> </li> <li>• Complete assessment of current physical space &amp; identify priorities</li> </ul>	<ul style="list-style-type: none"> <li>• Complete feasibility study for capital improvements (see Appendix 1 for list of suggestions offered at neighborhood gatherings)</li> <li>• Implement capital campaign</li> </ul>	<ul style="list-style-type: none"> <li>• Complete capital campaign</li> <li>• Implement capital improvements as prioritized and funded</li> </ul>
	c. Openly demonstrate that "all are welcome at our table"	<ul style="list-style-type: none"> <li>• Ensure in the interim that everyone understands this statement and we continue to "welcome all to our communion table"</li> <li>• Actively engage New Comers Committee in planning for the "interim" period</li> </ul>	<ul style="list-style-type: none"> <li>• Make worship accessible and understandable to those new to the Episcopalian service</li> <li>• Define ways to formally define, recognize, acknowledge "membership"</li> <li>• Involve new comers in community activity</li> </ul>	<ul style="list-style-type: none"> <li>• Explore the feasibility of creating a "complete Sunday bulletin" that includes the "entire service"</li> </ul>
	d. Anticipate a growing congregation as a result of implementing our strategic plan	<ul style="list-style-type: none"> <li>• As part of space assessment, analyze "physical constraints to growth"</li> </ul>	<ul style="list-style-type: none"> <li>• Analyze greater Portland community demographics and impact on growth</li> </ul>	<ul style="list-style-type: none"> <li>• Develop plans to deal with the expected level of growth (whatever that is projected to be)</li> </ul>

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2. Preserve & enhance intimacy and connectedness within the St. Bart's community	a. Create opportunities to connect and celebrate	<ul style="list-style-type: none"> <li>• Create a new "face book"</li> <li>• Put up on bulletin board the names and pictures of St. Bart's leadership (Vestry &amp; Committee chairs)</li> <li>• Schedule at least 2 adult study groups per year</li> <li>• Host 2-3 annual fellowship events to build community</li> <li>• Hold quarterly coffee hours between the 8 and 10 o'clock services (to include a vestry update)</li> </ul>	<ul style="list-style-type: none"> <li>• Restart "fellowship committee"</li> <li>• Develop a program to recognize and celebrate involvement</li> </ul>	
	b. Make it easy and satisfying to get involved	<ul style="list-style-type: none"> <li>• Communicate expectations that membership includes involvement</li> <li>• Hold an annual "committee fair" to promote committee and volunteer opportunities (also need to cover on the web site)</li> </ul>	<ul style="list-style-type: none"> <li>• Implement committee guidelines to clarify functional roles and ensure smooth leadership succession plans</li> </ul>	

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**WORSHIP**

<b>GOALS</b>	<b>OBJECTIVES</b>	<b>NEAR TERM ACTION PLANS</b>	<b>MID TERM ACTION PLANS</b>	<b>LONG TERM ACTION PLANS</b>
1. Support each other in our spiritual discovery	a. Support & encourage people in their personal journey to God	<ul style="list-style-type: none"> <li>Continue our tradition (preserve the quality) of creative liturgy and variety of services during the interim period (Worship Committee)</li> <li>Incorporate "instructional liturgy" periodically into the Sunday services</li> </ul>	<ul style="list-style-type: none"> <li>Offer additional and varied services throughout the year including opportunities to bring the 8 &amp; 10 o'clock groups together</li> </ul>	<ul style="list-style-type: none"> <li>Expand the role of the worship committee to support spiritual inquiry and reflection beyond regular services (e.g. retreats, study groups, meditation)</li> <li>Create a long term vision for creative liturgy ...</li> </ul>
	b. Reach out and help those in spiritual need	<ul style="list-style-type: none"> <li>Ensure that pastoral care committee has adequate resources to meet current needs during interim</li> </ul>	<ul style="list-style-type: none"> <li>Expand role of pastoral care (led by new rector)</li> <li>Improve communication on pastoral services and needs</li> </ul>	<ul style="list-style-type: none"> <li>Evaluate staffing requirements for expanded pastoral role</li> </ul>
	c. Inspire members to be an engaged congregation	<ul style="list-style-type: none"> <li>Encourage reflection and sharing of spiritual experiences (e.g. witnessing stewards)</li> <li>Proactively expand lay involvement in the services during the interim period as way to keep members engaged</li> </ul>	<ul style="list-style-type: none"> <li>Increase opportunities for lay people of all ages to participate in the services (led by new rector)</li> </ul>	

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**MUSIC**

<b>GOALS</b>	<b>OBJECTIVES</b>	<b>NEAR TERM ACTION PLANS</b>	<b>MID TERM ACTION PLANS</b>	<b>LONG TERM ACTION PLANS</b>
1. Celebrate and enhance the music program as an integral component of worship and community	a. Continue to align music with worship needs of the congregation	<ul style="list-style-type: none"> <li>Worship Committee and music director collaborate to assess music needs of congregation to best meet those needs</li> </ul>	<ul style="list-style-type: none"> <li>Create a process to regularly share input and feedback between the congregation, Worship Committee and music director</li> </ul>	
	b. Help build musical understanding and appreciation in those of us who are less familiar with the hymns and/or the Episcopal service	<ul style="list-style-type: none"> <li>Provide commentary on the music that is being played each Sunday</li> <li>Balance "easy to sing/familiar" and "challenging" hymns</li> </ul>	<ul style="list-style-type: none"> <li>Weave musical education into worship service and other educational opportunities</li> </ul>	
	c. Establish reputation for choral and instrumental excellence	<ul style="list-style-type: none"> <li>Support any music events to which the public is invited with adequate advertising and PR</li> </ul>	<ul style="list-style-type: none"> <li>Establish musical program advertised/marketed to broader community</li> <li>Increase use of guest musicians and vocalists</li> <li>Define expanded capital needs to support musical program: organ completion, piano acquisition, etc.</li> </ul>	<ul style="list-style-type: none"> <li>Actively pursue ways for St. Bart's to support community choral/music/art programs through the use of our facilities</li> </ul>
	d. Expand opportunities to participate	<ul style="list-style-type: none"> <li>Continue to encourage and promote members with musical talent to participate in Sunday services as well as other events</li> </ul>	<ul style="list-style-type: none"> <li>Reestablish youth choral group</li> </ul>	<ul style="list-style-type: none"> <li>Consider establishing a hand bell choir</li> </ul>

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**SERVICE**

<b>GOALS</b>	<b>OBJECTIVES</b>	<b>NEAR TERM ACTION PLANS</b>	<b>MID TERM ACTON PLANS</b>	<b>LONG TERM ACTION PLANS</b>
1. Create and support an environment that encourages us to use the gifts that God has given us to do the work God is asking us to do	a. Provide a welcoming place where parishioners can share their personal missions in promoting Christian principles of equality and justice	<ul style="list-style-type: none"> <li>• Provide opportunities for parishioners to share their personal missions</li> </ul>	<ul style="list-style-type: none"> <li>• Consider areas where St. Bart's should take a public stance on social issues</li> </ul>	
	b. Make St. Bart's a model of environmental stewardship	<ul style="list-style-type: none"> <li>• Continue to host the annual Clean Energy Fair</li> <li>• Environment Stewardship committee to complete a near, mid and long term plan to make St. Bart's a "green" (minimal environmental impact) church</li> <li>• Implement near term "green" plans</li> </ul>	<ul style="list-style-type: none"> <li>• Implement mid term "green" plans</li> </ul>	<ul style="list-style-type: none"> <li>• Implement long term "green" plans</li> </ul>
	c. Apply energy and resources to directly improving the lives of those in need	<ul style="list-style-type: none"> <li>• Continue to support existing service programs: food pantry; St. Elizabeth's Pantry; Christmas stockings; Thanksgiving bounty; school supplies; Friendship House, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Expand our community service programs</li> </ul>	
	d. Connect members in common action	<ul style="list-style-type: none"> <li>• Identify one community service opportunity per year</li> </ul>	<ul style="list-style-type: none"> <li>• Commit to two community service opportunities per year</li> </ul>	<ul style="list-style-type: none"> <li>• Explore possibilities of expanding community service to include missionary work</li> <li>• Explore opportunities for long term formal commitment and partnership with single organization</li> </ul>

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**EDUCATION**

<b>GOALS</b>	<b>OBJECTIVES</b>	<b>NEAR TERM ACTION PLANS</b>	<b>MID TERM ACTON PLANS</b>	<b>LONG TERM ACTION PLANS</b>
1. Create and sustain an integrated education program that encourages a life-long journey of spiritual inquiry	a. Attract and engage children and their families	<ul style="list-style-type: none"> <li>• Support Sunday School committee in their efforts to recruit volunteers and maintain vitality of curriculum</li> <li>• Explore education programs at comparable parishes in the area</li> </ul>	<ul style="list-style-type: none"> <li>• Survey congregation to assess wants and needs of a Sunday School program</li> <li>• Evaluate staffing requirements, curriculum and program structure</li> <li>• Evaluate physical space requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Implement any staffing additions or changes recommended from mid-term evaluation</li> <li>• Implement changes/additions to physical space as determined in mid-term evaluation</li> <li>• Develop and implement a plan to promote our comprehensive Christian education program to the greater Portland community</li> </ul>
	b. Support teens in their personal spiritual journey and honor them as full members of our community	<ul style="list-style-type: none"> <li>• Identify overall leadership during the interim period</li> <li>• Ask the Diocese to re-educate the congregation re: J2A program</li> <li>• Recruit leadership for Rite 13 that begins in Fall 2006</li> <li>• Support leadership training through the Diocese</li> <li>• Support leadership of current Rite 13 group</li> <li>• Create opportunities/invitations for the teens to get involved in the St. Bart's community</li> </ul>	<ul style="list-style-type: none"> <li>• Same action plans as above</li> <li>• Resolve issues around pilgrimage, fundraising and parish's financial commitment to the program</li> </ul>	<ul style="list-style-type: none"> <li>• Same action plans as above</li> </ul>

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	<p>c. Foster connections, community and spiritual growth for adults</p>	<ul style="list-style-type: none"> <li>• Offer at least 2 opportunities per year for adult study groups (focused on books or topics on spiritual themes)</li> </ul>	<ul style="list-style-type: none"> <li>• Assess leadership, program structure and resources</li> <li>• Develop an adult education calendar for the entire year</li> </ul>	<ul style="list-style-type: none"> <li>• Create and implement a formal adult education curriculum including a variety of programs: study groups, connected &amp; curious, spiritual retreats, etc.</li> </ul>
	<p>d. Ensure ongoing continuity and vitality of children, teen and adult Christian education programs</p>	<ul style="list-style-type: none"> <li>• Implement an overall education committee charged with maintaining and invigorating all our education programs during the interim period</li> </ul>	<ul style="list-style-type: none"> <li>• Assess overall leadership requirements</li> </ul>	<ul style="list-style-type: none"> <li>• Implement recommendations</li> </ul>

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**APPENDIX 1: LIST OF NEAR TERM ACTION PLANS**

**INVITING & INCLUSIVE COMMUNITY**

- Expand content and use of web site (Joe Michaud & others)
- Develop short term PR plan (David Puelle & others)
- Develop 12 month events calendar
- Deal with immediate issues: sound system, arm chairs, wheel chair access
- Complete assessment of current physical space & identify priorities
- Ensure in the interim that everyone understands the statement "all are welcome at our communion table"
- As part of space assessment, analyze "physical constraints to growth"
- Actively engage New Comers Committee in planning for the "interim" period
- Create a new "face book"
- Put up on bulletin board the names and pictures of St. Bart's leadership (Vestry & Committee chairs)
- Host 2-3 annual fellowship events to build community
- Hold quarterly coffee hours between the 8 and 10 o'clock services (to include a vestry update)
- Hold an annual "committee fair" to promote committee and volunteer opportunities (also need to cover on the web site)

**WORSHIP**

- Continue our tradition (preserve the quality) of creative liturgy and variety of services during the interim period (Worship Committee)
- Incorporate "instructional liturgy" periodically into the Sunday services
- Ensure that pastoral care committee has adequate resources to meet current needs during interim
- Encourage reflection and sharing of spiritual experiences (e.g. witnessing stewards)
- Proactively expand lay involvement in the services during the interim period as way to keep members engaged

**MUSIC**

- Worship Committee and music director collaborate to assess music needs of congregation to best meet those needs
- Provide commentary on the music that is being played each Sunday
- Balance "easy to sing/familiar" and "challenging" hymns
- Support any music events to which the public is invited with adequate advertising and PR
- Continue to encourage and promote members with musical talent to participate in Sunday services as well as other events

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**APPENDIX 1: LIST OF NEAR TERM ACTION PLANS continued ...**

**SERVICE**

- Provide opportunities for parishioners to share their personal missions
- Continue to host the annual Clean Energy Fair
- Environment Stewardship committee to complete a near, mid and long term plan to make St. Bart's a "green" (minimal environmental impact) church
- Implement near term "green" plans
- Continue to support existing service programs: food pantry; St. Elizabeth's Pantry; Christmas stockings; Thanksgiving Bounty; school supplies; Friendship House, etc.
- Identify one community service opportunity per year (for broad participation)

**EDUCATION**

- Support Sunday School committee in their efforts to recruit volunteers and maintain vitality of curriculum (during interim)
- Explore education programs at comparable parishes in the area
- Identify overall J2A leadership during the interim period
- Ask the Diocese to re-educate the congregation re: J2A program
- Recruit leadership for Rite 13 that begins in Fall 2006
- Support J2A leadership training through the Diocese
- Support leadership of current Rite 13 group
- Create opportunities/invitations for the teens to get involved in the St. Bart's community
- Offer at least 2 opportunities per year for adult study groups (focused on books or topics on spiritual themes)
- Implement an overall education committee charged with maintaining and invigorating all our education programs during the interim period

**APPENDIX 2: SUGGESTIONS FOR CAPITAL IMPROVEMENTS & ADDITIONS**

**Please Note:** These suggestions were collected at the neighborhood gatherings that were held in May 2005. Some items of more immediate need have already been or are being addressed by the Vestry. Other items on this list need to be reviewed holistically as part of an overall assessment of our physical space. And finally, all items need to be prioritized and assessed in terms of feasibility and timing. That process has been identified as part of the near-term and mid-term actions plans and will be carried out under the oversight and guidance of the Vestry.

- Installation of a sound system for the hearing impaired (completed)
- Purchase of chairs with arms for those needing some assistance in getting in and out of the chairs in the sanctuary (on the way)
- Improvements needed for better wheelchair accessibility
- Addition of terrace/patio for the Memorial Garden to allow and promote more use of this outdoor space
- Replacement of the Sunday School trailer with a more permanent education facility
- Addition of space for meetings (especially for small groups during weekdays when education wing is off limits due to daycare)
- Addition of space for larger functions and events
- Kitchen upgrade
- Addition of a library space
- Acquisition of a piano for the sanctuary
- Final completion of the organ (the 3 stops that were in the original plan that have not been purchased)
- Addition of a dedicated music room for rehearsals, music library, etc.
- Installation of solar energy panels to supply: power for the organ, heat, hot water and/or electricity
- Other improvements to make St. Bart's a "green" church

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**APPENDIX 2: STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS**

<p><b>STRENGTHS</b></p> <ul style="list-style-type: none"> <li>• Strategic plan to serve as a road map for our future direction</li> <li>• Committed lay leadership (Vestry, committees, strategic planning) to guide Church</li> <li>• Distinctive mission to motivate and direct us.</li> <li>• Period of transition which can strengthen us all (stepping up to the plate as members did during last Sabbatical, etc.)</li> <li>• Energy created from strategic planning process that was very inclusive and that broad participation should carry forward with the implementation of plan</li> <li>• Strategic plan is a great tool for search committee and discernment process</li> </ul>	<p><b>OPPORTUNITIES</b></p> <ul style="list-style-type: none"> <li>• High probability of attracting new members to St. Bart's via promotional/marketing program</li> <li>• Opportunity during interim period to gather information (from Diocese, other Churches, etc.) to help "inform the process" of moving forward</li> <li>• Great opportunity to increase stewardship with the energy created by strategic planning process and new leadership</li> <li>• Planning process that has worked and should be "renewable" as we move forward</li> <li>• Sharing the plan and vision with the congregation and the broader community</li> </ul>
<p><b>WEAKNESSES</b></p> <ul style="list-style-type: none"> <li>• Financial situation: recent annual income has not been sufficient to cover current expenses much less fund additional programs</li> <li>• Period of transition which has potential to weaken us all (energy drain, etc.)</li> <li>• Committee structure, leadership succession and clarity of committee missions are in various levels of strain and over extension</li> <li>• Critical that vestry and discernment committee find the right leader to guide us and inspire us forward</li> </ul>	<p><b>THREATS</b></p> <ul style="list-style-type: none"> <li>• Growing list of Sunday &amp; seasonal activities that "compete" with church time</li> <li>• Other Churches in area (Foreside Community, St. Mary's, etc.) that may appeal to similar demographic constituency as St. Bart's</li> <li>• Danger of being labeled in general community as too "ultra-liberal", etc., or "insular" type of "Church in the woods"</li> <li>• Strategic plans have a tendency of being put away on a shelf and not being implemented ... challenge will be how to keep the plan alive</li> </ul>