

STRATEGIC PLAN FOR MISSION & MINISTRY
St. Barnabas Episcopal Church
Portland, Oregon

Document Completed and Presented to the Parish October 25, 2009

Adopted by the Vestry November 17, 2009

Introduction

Following the 2009 Parish Annual Meeting in January, the Vestry of St. Barnabas Episcopal Church established a committee to address strategic planning for mission and ministry.

The task of the committee was to review the vision and mission of the parish, to address parish goals and objectives, and to develop tasks and courses of action to achieve the goals and objectives. The committee eventually became known as the Strategic Planning for Mission and Ministry Task Force. It was affectionately referred to by its acronym initials of SPMMTF.

The SPMMTF met regularly over a seven month period from March through October. The SPMMTF first addressed the parish vision and then developed goals and objectives that support that vision. Eventually the task force would break into individual teams with each team addressing a specific goal.

The SPMMTF used a strategic planning process in its work. After several weeks of meetings and discussion, the SPMMTF articulated the following Vocation Statement:

As followers of Jesus Christ, the people of St. Barnabas Episcopal Church are called to learn, serve, welcome and celebrate.

The SPMMTF developed the following four goals:

1. Enhance the Sunday Experience.
2. Develop a Signature Ministry.
3. Foster Spiritual Growth.
4. Achieve Financial Sustainability.

Once the goals were adopted by the Vestry, the SPMMTF broke into individual teams that developed objectives and course of action. Based on SPMMTF's recommendations, the Vestry presents these objectives and courses of action. Once ample opportunity has been given for parishioners' feedback, a final version of the Strategic Plan shall be submitted to the Vestry for approval in November or December.

Apologizing in advance to anyone we have inadvertently omitted, we give hearty thanks to everyone who participated in the SPMMTF process: Lisa Begley, Eva Calcagno (task group leader), Leslie Coefield, Betty Dauntless, Sheila Dougherty, Cathie Dainton Piacente, Julie Egan, Anita Galloway, Janet Hummel, Sandy Hunnicutt, Emile Lemoine, Elsa Lemoine, Mary Lou McClenaghan, Carolyn Nelson (task group leader), Barbara Peters, Ken Ross (task group leader), Janet Stephens, Elizabeth Wood-Hull, and L. D. Wood-Hull (task group leader).

Careful and prayerful thought has been given to the topics in this report and the vestry is pleased to render it for your consideration.

The Vestry of St. Barnabas
October 25, 2009

After this document was presented in draft form to the parish on October 25, 2009, the Vestry actively sought feedback from parishioners. After much discussion and ample opportunities for communication, the Vestry concluded that a healthy majority of parishioners was in alignment with the plan. The Vestry adopted the plan by unanimous vote, without amendment, on November 17, 2009.

*The Rev. L. D. Wood-Hull, Rector
November 17, 2009*

Goal 1: Enhance the Sunday Experience

Utilizing extensive interviews and grounded in their own broad experience in the Church, the task group that worked on this goal proposed an array of enhancements. From their wide-ranging work the rector and vestry have identified the following priorities.

I. Sunday Program & Liturgical Enhancements

1. Accessible, “User friendly” Services. Strive to make St. Barnabas’s liturgy fully accessible to all, including people with limited mobility and hearing impairments. Clear and “user friendly” bulletins, service booklets, and inserts would also increase accessibility, especially for visitors and newcomers unfamiliar with Episcopal liturgy.
2. Musical Variety & Participation: Under the direction of the rector and collaborating with the director of music and the organist, continue the expansion of music ministries that has already begun. This may include, among other enhancements, increasing the total number of singers and musicians participating in liturgies; expanding the variety of musical styles; and experimenting with singing parts of the liturgy.
3. Nursery Care. Evaluate the possibility of resuming nursery care, provided by volunteers if necessary.
4. Greeting Visitors, Incorporating Newcomers. Train additional greeters and instruct all parish members in welcoming techniques. Develop a detailed program for welcoming visitors and incorporating new members.

II. Facility Enhancements

1. Reconfigure Worship Space. Reconfigure the nave for accessibility and to increase fellowship and interaction. Reduce the feeling of emptiness and distance between participants.
2. Curb Appeal. Pay special attention to caring for entryways and the portions of the buildings and grounds that are visible from Vermont Street in order to attract newcomers and graciously welcome visitors.
3. Signage. Update external signage with attention to appearance, visibility, and accuracy. Update internal (on campus) signage, inside and out, to guide visitors and newcomers.
4. Campus Accessibility. Make as much of the campus as possible accessible to everyone, including people who use walkers and wheelchairs.

III. Communications Enhancements

1. Local Press. Create press releases to announce special events and programs. Update our advertising in neighborhood newspapers.
2. Targeted Mailings. Explore the utility of targeted mailings to attract visitors and newcomers.
3. Newsletter. Restart the newsletter ministry; consider making it primarily electronic, while printing and mailing it as necessary so that no one is excluded.
4. The Website and Other Internet-based Communications. Support the continued growth of the website, finding ways to utilize it more fully. Explore new ways to utilize email, the website, and social networking technology to enhance and simplify communication in the parish and reduce mailing costs, while taking care not to marginalize parishioners who do not use internet technology.

Goal 2: Develop a Signature Ministry

I. A Signature Ministry “Theme”: *Food and Hunger*

After a summer’s worth of research, analysis, and discussion, the Signature Ministry task group proposed and the vestry approved a signature ministry theme of *Food and Hunger*. As some current St. Barnabas ministries already address issues of food and hunger—our Sunday food donations and the SW Hope Food Drive, for example—it is clear that the parish has already shown an interest in this area.

Food and Hunger was the only potential theme that met all of the criteria set by the vestry.

It was felt that a “theme,” which by nature is broad, inclusive, and flexible, was a more appropriate choice than a single, concrete program, especially in light of the fact that some important St. Barnabas outreach ministries already fall into the *Food and Hunger* category. The *Food and Hunger* theme allows us to build on the foundation of current ministries as needs arise and parish resources are identified.

II. The First New Initiative Under the *Food and Hunger* Theme: Monthly Community Meals

The first new ministry initiative under the *Food and Hunger* theme is a monthly meal for people in need. A joint effort by parishioners from St. Barnabas and St. John the Baptist, Portland, all meals shall be served at St. Barnabas, with costs shared by the two parishes. This program begins in November, 2009, and already many parishioners have volunteered to participate.

III. Future Possibilities Under the *Food and Hunger* Theme

Future potential ministries around the *Food and Hunger* theme include developing an on-site urban farm to grow food for the food bank; becoming an Oregon Food Bank pantry site; and offering cooking, nutrition, and gardening classes to low-income recipients of Neighborhood House services. Some or all of these possible ministries, as well as others yet undreamt, may be implemented as parishioner interest determines and parish resources allow.

Goal 3: Foster Spiritual Growth

The Spiritual Growth task group identified four broad areas of spiritual needs, and created lists of programs, ministries, and other elements of parish life—both extant and future possibilities—that might assist us in meeting each need. From a large list, the vestry and rector chose some of the highest priorities; they are listed below, according to the corresponding spiritual need.

I. COMMUNION WITH GOD: *We need opportunities to experience and renew our connectedness with God.*

1. “Big Tent” Worship. Fully include everyone—of all ages and physical abilities—in the main Sunday Eucharist, while also providing more specialized worship and prayer experiences (e.g., contemplative prayer; periods of silence) at other times and places.

2. Connection with Homebound Parishioners. Reinvigorate and expand the Lay Eucharistic Visitors program. Arrange rides to church for those who no longer drive.

II. COMMUNION WITH ONE ANOTHER: *We need opportunities to experience and renew our connectedness with one another as fellow children of God and fellow members of the Body of Christ.*

1. Informal All-Parish Social Opportunities. Continue offering informal social opportunities, including “coffee hour” after the main Sunday Eucharist. Support occasional social opportunities, both current and new (e.g., first-Friday potlucks, third-Sunday “men’s breakfast”; Shrove Tuesday pancake supper; “Dinners for 8” or similar program; others), according to interest and need.

2. Small Communities Within the Parish. Create opportunities for each interested parishioner to be a member of a smaller community within the parish (“house group,” “small group,” or “cell group”), taking care to keep these groups coordinated with and integrated into the larger parish.

3. Newcomer Incorporation. Establish regular (perhaps quarterly) dinners or receptions for newcomers, attended by vestry members and other parish leaders. Find appropriate (non-threatening) ways to recognize and welcome new members in the context of the Sunday liturgy.

III. THEOLOGICAL REFLECTION: *We need opportunities to reflect on how God is present and at work in our lives and in the world around us; we need opportunities to reflect on how and where God is leading us as individuals and as a Christian community; and we need resources to assist us in doing so.*

1. Christian Education for All Ages, Year-Round. Offer regular, age-appropriate Bible study and other basic Christian education for all. This could include some or all of the following: Sunday school for children and adults; newcomers classes; confirmation/reception/baptism classes; mid-week Bible studies or special interest classes or groups (e.g., methods of prayer; book groups; Via Media or other video-based programs); Lenten evening suppers with classes. Cultivation of lay leadership shall be essential.

2. Theological Reflection in Liturgy & Preaching. Assist the rector in developing spiritually- and theologically-rich liturgies; support the ministry of preaching (through providing study and reflection time for the rector and supporting his continuing education; through training and supporting lay preachers; and through continued experimentation with alternatives to the traditional sermon).

IV. SERVICE: *We need opportunities to serve others (both within and outside the parish) in God's name; and we need resources to assist us in doing so.*

1. Service to Others Coordinated by the Outreach Group. Support and encourage the various voluntary service projects and ministries coordinated by the parish's outreach group.

2. Signature Ministry Theme. (*Please see also the "Signature Ministry" section of this Strategic Plan.*) Incorporate the signature ministry theme (*Food and Hunger*) into many ministries and programs of the parish.

Goal 4: Achieve Financial Sustainability

I. Discussion

Our parish's operating posture is not financially sustainable in its present form. Parish income from pledges, offerings, contributions and facilities-use reimbursements is too small as a percentage of the total operating budget and we rely too heavily on withdrawals from investment funds.

For the year ended December 31, 2008, income from pledges constituted only 34.4% (\$85,014) of our \$247,000 operating budget. Meanwhile, withdrawals from investment funds were \$70,121 (28.4 %) of our operating budget. Our operating budget also benefited from fees received from Portland Cooperative School for the use of parish premises. Our investment fund balances have declined from \$451,000 at the beginning of 2008 to the current balance of approximately \$250,000 due both to withdrawals and to the decline in general market conditions. Since January 1, 2009, we've drawn \$48,436 (a rate of over \$5,000 per month) from our investment accounts. As a result of the rapidly declining investments fund balances, in September 2008 the parish suspended making its Diocesan Program Assessment (DPA) payments. To be financially viable, revenue from pledges and offerings should be 75% or more of our overall operating budget and withdrawals from investment funds should be 10% or less.

There are really only two ways to change the imbalance between too little pledge income and too much investment withdrawal – increase pledge income or reduce expenses. Our preference is to achieve financial sustainability through increased giving without cutting expenditures (that would most likely involve further reductions in staff and possibly having only a part-time rector).

We believe also that selling property is not the answer to altering the financial imbalance. If property is to be sold, it should be done because a sale meets the needs of the parish as articulated in the strategic plan. To sell property without correcting the imbalance serves only to delay an inevitable end.

The key to increasing pledge revenues is to increase the average amount given by pledging families and individuals who are current members of the parish. (An increase in the number of pledging families and individuals is also, of course, desirable.) One way of looking at our pledging posture is to look at how our pledging experience compares with others. At St. Barnabas, for example, our average pledge for 2009 is \$1,479 per year. This amount compares with a 2007 Diocesan average of \$1,685 per year and a 2007 national church average of \$2,191 per pledging unit per year. The attached scatter diagram shows pictorially our 2009 experience in which 10 families or individuals account for approximately \$42,000 in pledge revenue and 50 families account for approximately \$45,000 in pledge revenue.

II. Objectives

1. Increase pledges as a percentage of the operating budget to 50% by July 2010.
2. Increase pledges as a percentage of the operating budget to 65% by July 2011.
3. Increase pledges as a percentage of the operating budget to 75% by July 2012.
4. Increase endowment/investment funds from \$240,000 in 2009 to \$500,000 in 2015.
5. Resume Diocesan Program Assessment (DPA) payments in full on a timely basis in 2010.

III. Courses of Action

1. Increase pledges and offerings.
 - a. If, for example, parishioners whose pledge is above the national average increased their pledge by 50%, such increase would yield an additional \$21,000 in pledge revenue (approximately 8.75% of the operating budget).
 - b. If parishioners whose pledge is within 50% of the national average increased their pledge to the average amount, such increase would yield approximately \$13,000 in additional pledge revenue (5.4% of the operating budget).
 - c. If parishioners whose pledge is below 50% of the national average increased their giving by \$10 or \$20 per week, such increase could yield \$14,000 to \$28,000 per year. [A gift of \$10/week, for example, is \$520/year; a gift of \$20/week is \$1,040/year.]
 - d. A means to facilitate ease of giving is to provide for automatic withdrawal from checking accounts and for automatic charge to credit card accounts.
2. Increase giving to endowment/investment funds.
 - a. Provide education materials and events on planned giving concepts such as including St. Barnabas in one's estate plans, gift annuities, transfers from IRAs, etc.

b. Establish a planned giving program with recognition given to parishioner's who contribute (either now or deferred) and who remember St. Barnabas in their estate plans.

3. Evaluate selling all or a portion of the St. Barnabas campus in order to reduce footprint, consolidate facilities, reduce related operating expense, and to facilitate the accomplishment of other strategic goals.

4. Develop a plan to pay DPA in arrears.

5. Re-evaluate investment policies and establish sustainable policies for making withdrawals from endowment/investment funds.

6. Develop plans for overall restructuring and for substantially reducing expenses if pledge revenue thresholds cannot be met. These actions would almost certainly involve further reductions in paid staff and likely result in only a part-time rector. If such reductions have to be made, such reductions will fundamentally alter the way in which the parish operates and if a satisfactory balance in operations still cannot be achieved, the parish may have to dissolve and transfer its property to the Diocese.

Exhibits

- A. Financial Model
- B. Pledge Scatter-Diagram

St. Barnabas Episcopal Church**Financial Model**

	2009	2010	2011
Pledging Units	60	70	80
Average Pledge	\$1,479	\$1,800	\$2,100
Pledge Revenue	\$88,740	\$126,000	\$168,000
	38.5%	54.6%	72.8%
<u>Revenue:</u>			
Pledges and Offerings	\$101,700	\$135,000	\$176,000
Portland Cooperative School	8,500	-	-
AT&T Antenna	11,500	11,500	11,500
Facility Use Fees	7,000	7,000	7,000
Outreach	3,500	3,500	3,500
Transfer from Endowment	98,475	73,675	32,675
	<u>230,675</u>	<u>230,675</u>	<u>230,675</u>
<u>Expenses:</u>			
Diocesan Program Assessment	30,000	30,000	30,000
Programs	7,600	7,600	7,600
Clergy Compensation:	98,475	98,475	98,475
Salary & Housing: 61,419			
Health/Life Insurance: 26,000			
Pension Contribution: 11,056			
Childcare Services			
Staff Compensation	36,500	36,500	36,500
Payroll Taxes	5,200	5,200	5,200
Insurance	8,000	8,000	8,000
Office/Admin	12,000	12,000	12,000
Plant	30,900	30,900	30,900
Temporary Clergy	2,000	2,000	2,000
	<u>230,675</u>	<u>230,675</u>	<u>230,675</u>
Difference	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

Investment Fund Balances:

Balance at beginning of year	\$256,174	218,719	180,044
Contributions	1,020		
Earnings	10,000	10,000	10,000
Change in value of funds	50,000	25,000	25,000
Withdrawals	<u>(98,475)</u>	<u>(73,675)</u>	<u>(32,675)</u>
Balance at end of year	\$218,719	\$180,044	\$182,369

2009 Giving Chart
St. Barnabas

