

# STRATEGIC PLAN **UPDATE**

## What is St. Bart's Strategic Plan?

A Strategic Plan is a long-range planning tool to help guide the overall direction of an organization, set and achieve goals and bring focus to our mutual mission.

St. Bart's Strategic Plan was developed to strengthen its existing ministries while preparing the church for ministry in the 21st Century.

The Plan was created over the course of eleven months with the input of more than 200 parishioners, staff and clergy. The Plan was adopted in January 2016 and focuses on 4 key areas of our life known as the "Pillars."

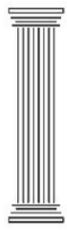
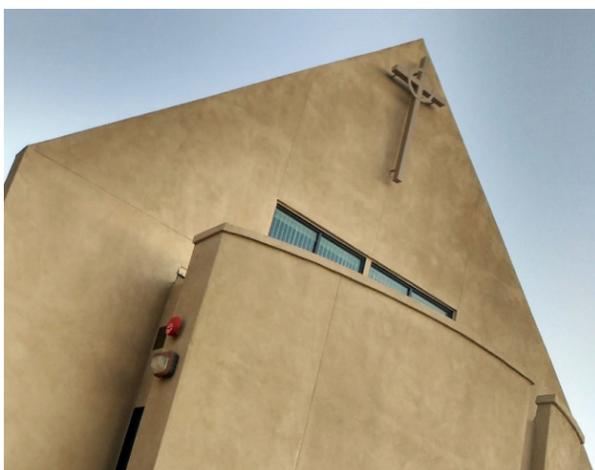
The good news is that 11 months into our Strategic Plan, we have a LOT of progress to celebrate! Over the next couple of months, we will be sharing that good news by focusing on one of our pillars each week.

## Want to get involved?

Contact Beth Dean, [bdean@stbartschurch.org](mailto:bdean@stbartschurch.org) or 858-487-2159, if you want to learn more about our strategic planning process or if you would like to offer your gifts to our work.

**MISSION:** We are called to be disciples of Christ, revealing His Life, Love and Light to the World.

**VISION:** St. Bartholomew's Episcopal Church is a radically welcoming, inclusive faith family – sharing and teaching the love of Jesus Christ through our worship, actions and outreach – transforming ourselves and the world.



## Resource Management

**Fulfilling current obligations and anticipating emerging needs, the Resource Management team provides guidance, leadership, consultation and solutions – enhancing effective stewardship of parish resources and maintaining a culture of fiduciary stability, while planning and developing facilities to realize God's vision for St. Bartholomew's.**

### GOAL:

#### **Modernize Parish Database and Financial Management Systems**

"ShelbyNext" has become a vital tool for coordinating pastoral care, ministry support, and newcomer connection as well as all parish accounting, investment and financial analysis functions. The new database has satisfied the first strategic goal: *"Institute and employ a parish-wide data base to identify and catalogue the relative skills and talents of members and staff."*



### GOAL:

#### **Fill Staffing Gaps in 2016**

The arrivals of Rev. Harris, Rev. Coulson, Nathan Costa and John Prust (among others) have effectively eliminated all staffing gaps, to help ensure pastoral care and program needs are met, while positioning us for continued growth.

### GOAL:

#### **Identify and Pursue Additional Revenue Opportunities**

Investment in the goals of the Strategic Plan have rightly resulted a moderate short-term budget gap as we prepare the foundation for growth. The **RM** team continues to work with the finance committee to identify opportunities to bridge the gap until our growth catches up with our investments in the Strategic Plan. For example, we are happy to announce that we have extended the lease of our campus to the SamMul Korean Church through fiscal 2017.

### GOAL:

#### **Reinvigorated the Legacy Society and Planned Giving Ministry**

The **RM** team is thrilled to announce that our fourth strategic goal has been fulfilled and the **Legacy Society** held its rededication with Bishop Mathes and celebrated more than 25 members!



**RM** is currently working on the creation of a comprehensive inventory of all physical plant assets and creation of the corresponding *life-cycle schedule*. Once completed, RM will provide this data to *Finance* for the creation of a sinking fund within the **General Operating Budget** to address and fund all campus/facilities future needs. Completion of which will satisfy our fifth strategic goal.

Finally, **RM** leaders are busy forming a subcommittee to develop and launch a formal *facilities marketing plan* to capitalize on rental market opportunities. Staffing is in progress. As we continue to press forward with the essential resourcing efforts before us, we are motivated by the advancements made.