# 2024 STRATEGIC PLAN

Loving Jesus by Serving Others!

APRIL 15, 2024
EPIPHANY LUTHERAN CHURCH
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# Epiphany's 2024 Strategic Plan

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I.    Introduction to Process - On August 15, 2023, Epiphany Lutheran Church's (Epiphany) Congregational Council (CC) launched a strategic planning process (see Attachment #1) and formed the Strategic Planning Team (SPT) to facilitate its completion.

Members of this intergenerational team charged with implementing the process included Kendall Bierman, convener and editor retired Pastor Jim Bosse, CC President Landon Henderson, Lisa Miller, incoming CC President Candy Norman, Sienna Pearson, Pastor Julie Reuning-Scherer, Katrina Young and ex officio members Ed Wasser and Kathy Whited.

Epiphany's CC affirmed Phase One of the plan on December 19, 2023, and 2024 Strategic Plan draft on April 23, 2024. Epiphany's 2024 Strategic Plan's adoption is anticipated at the congregational annual meeting on May 19, 2024. The process had three phases described below:

    A.    Strategic Clarification (Phase One) uncovered the important organizational and strategic issues facing Epiphany, and reviewed, updated and affirmed Epiphany's Values, and Mission and Values statements.

    B.    Strategy Development (Phase Two) considered and identified perspectives to give balance to Epiphany's organizational focus (strategic voices), driving factors necessary for future organizational success (strategic themes), and strategic objectives that are Specific, Measurable, Action-oriented, Realistic, and Time-bound ("SMART"). These strategic objectives, arranged with respect to their cause-and-effect interrelationships and the strategic voices, forms a Strategy Map that depicts the strategy on one page.

    C.    Strategy Deployment (Phase Three) described the implementation of the strategy through a Balanced Scorecard that tracks strategic measures that monitor progress with the strategic objectives and the effectiveness of the strategic initiatives that move the objectives toward their success targets. Staff and volunteers will form deployment teams to manage execution of these initiatives. The CC will provide oversight of the Strategic Plan's implementation and performance.

II.    Statement of Direction – evolved from the completion of the strategic clarification process and conversations among congregation members, staff, CC and SPT. Congregation members took part in a Strengths, Weaknesses, Opportunities and Threat ("SWOT") exercise in February and March of 2023 and multiple community and group conversations in 2023. Epiphany created a Ministry Site Profile in anticipation of calling a second pastor. The CC held a retreat dedicated to strategic clarification. The SPT compiled the results, drafted 2023-11-28 Strategic Planning Team Report and the CC affirmed the following outcomes on December 19, 2023.

    A.    Values Statements – Epiphany's enduring principles, character and behaviors

        1.    Love – Epiphany exists in response to God's grace demonstrated in Jesus Christ and as an extension of Christ's ministry in the world. It is a love that is self-giving, unconditional, generous and centered in worship and prayer.

        2.    Service – Epiphany's response to God's grace helps address the needs of its members and the broader community by calling members to act with compassion for the poor and forgotten, care for the hurting, and walk alongside others in times of trouble.

3.      Growth – Epiphany seeks to increase its presence as a community of faith and its positive impact on the faith lives of its members and visitors, and the world.

4.      Welcome – Epiphany strives to have a culture that is inviting and hospitable, accepting and inclusive of all people.

5.      Intergenerational – Epiphany recognizes the value of each generation and nurtures mutual appreciation through programs that build interrelationships and offer opportunities for people of all ages to share their resources of time and talent with each other.

6.      Integrity – Epiphany is a community of faith that is authentic, transparent with intention, and trustworthy.

B.      Mission Statement – Epiphany constitutional purpose is to be a "people created by God in Christ, empowered by the Holy Spirit, called and sent to bear witness to God's creative, redeeming, and sanctifying activity in the world." Epiphany shall worship God, proclaim the saving Gospel of justification by grace, reach out and bring people to faith, respond to human needs, nurture members in faith and vocation, and make known the unity of the people of God.

In addition, the following mission statement gives program focus and direction for this time and place. Epiphany exists to …

- Grow in faith, build thriving community, and transform lives through Christ's love.

"Love Jesus by serving others" continues to be a useful tag line that also summarizes Epiphany's overall mission.

C.      Vision Statement – imagines what Epiphany will look like in three to five years after successful 2024 Strategic Plan deployment and mission accomplishment.

Epiphany will be a …

- welcoming and an intergenerational congregation dedicated to faith formation, service and worship, fostering spiritual growth and witnessing Christ in the world.

D.      Strategic Issues – are the opportunities that Epiphany must address to be successful in the future. They include the following and became the themes for strategy development.

1.      Communication

2.      Faith Formation

3.      Membership Growth

4.      Outreach

5.      Ministry Context

6.      Financial Viability

III.      Strategic Focus describes the outcome of strategy development, Phase Two of the process. It involved the SPT proposing strategic voices and a Strategy Map, the CC holding a retreat on February 10, 2024, and the congregation having a Community Conversation on March 10, 2024, to

consider each theme and actions to address their accomplishment as well as metrics to track their success.

The SPT charged a Video Communications Team led by Katrina Young and Sienna Pearson to create a series of videos to be played before Sunday worship services to explain progress in strategic planning and invite congregational participation at the March 10, 2024, Community Conversation. Corresponding written information was also available in bulletins and newsletters. Epiphany members had the opportunity to submit their ideas for theme actions and measures online. All of which informed the strategy, its focus, the creation of the Strategy Map, and its deployment.

A.   Voices – provided a variety of perspectives to give the strategy balance. They include:

1.   Witness – customers, members, nonmembers, community, and world.

2.   Process – systems, procedures, action, and present and emerging technologies.

3.   Stewardship – faithful management and development of time, talent, and resources.

4.   Learning and Growth – educate, invite, engage, and sustain.

B.   Themes – are the driving factors necessary for future organizational success. The strategic clarification process identified the following themes to be addressed through the achievement of strategic goals and objectives.

1.   Communication – Epiphany must leverage technology and its resources to enhance in-person and virtual worship experiences, inform members of ministries and activities, build relationships and community, and support transparency.

2.   Faith Formation – Epiphany must provide opportunities for people of all ages and abilities to grow in faith through experiences of education, worship, small groups, and service.

3.   Membership Growth – Epiphany must grow as a community of faith by inviting new members as well as caring for, engaging and sustaining its members.

4.   Outreach – Epiphany must evaluate its mission, resources and strengths and community need to offer effective ministries to help people.

5.   Ministry Context – Epiphany must understand its ministry and the societal landscape to adapt its programs to meet peoples' needs.

6.   Financial Viability – Epiphany must exercise faithful stewardship of its assets and talents to optimize human and physical resources, encourage generous giving and operate with a margin allowing for ministry growth.

C.   Goals and objectives – goals are aspirational while objectives are characterized by greater detail (Specific, Measurable, Action-oriented, Realistic, Time-bound). The following goals and objectives emerged from the strategy development process.

1.   Grow in faith, build thriving community and transform lives through Christ's love (Mission Statement).

2.   Nurture faith lives and meaningful relationships through activities of worship, education, service and fellowship.

3. Create welcoming culture, community life and facility.

4. Increase presence in community.

5. Understand ministry context.

6. Deliver effective communications and programs.

7. Manage resources effectively.

8. Align, recruit and deploy staff (employees and volunteers).

9. Encourage faithful stewardship of gifts and talents.

10. Engage in inspirational worship.

11. Participate in meaningful education and small groups.

12. Join in productive service opportunities.

13. Invite and encourage discipleship and fullness of congregational involvement.

D. Strategy Map – visualizes the cause-and-effect relationships among strategic goals and objectives that comprise the strategy (see Attachment #2).

IV. Strategic Plan Deployment describes implementation of the 2024 Strategic Plan. It includes management principles for a strategy-focused organization, strategic teams and assignments, strategic measures, a one-page Balanced Scorecard to track progress, strategic initiatives to move measures and a schedule for 2024 deployment. The SPT provided the CC a draft of the 2024 Strategic Plan for discussion on April 23, 2024, and the congregation will consider its adoption on May 19, 2024.

A. Management Principles

1. Mobilize change through executive leadership.

2. Translate strategy into operational terms.

3. Align organization to strategy.

4. Motivate staff to make strategy everyone's job.

5. Govern to make strategy a continual process.

B. Teams and Assignments

8. Congregational Council – members elected by congregation

a. Leads the charge.

b. Charters, recruits and launches Implementation Team.

c. Integrates scorecard into annual budget.

d. Monitors progress and expects change.

e. Removes barriers and constraints.

f. Provide tools and templates.

g. Spends time looking backward (25%), at present (35%), and forward (40%).

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9. Implementation Team – comprised by representatives from CC, Theme Teams and assigned staff (employees and volunteers).

   a. Integrates the scorecard into the management system.

   b. Charters, recruits and launches Theme Teams.

   c. Develops measures to support strategic objectives.

   d. Creatively gathers, analyzes, and displays data.

   e. Facilitates linkage of the balanced scorecard to the rest of the organization.

   f. Coaches Theme Team members.

   g. Spends time looking backward (10%), at present (65%), and forward (25%).

10. Theme Teams –comprised of assigned employees with accountability for the theme area and interested volunteers.

    a. Delivers assigned projects on time and on target.

    b. Collaborates and works together.

    c. Follows the plans.

    d. Builds toward high quality performance.

    e. Grows disciples' spiritually.

    f. Manages congregational risk.

    g. Uses creativity.

    h. Provides feedback.

    i. Spends time to complete projects.

C. Strategic Measures - each goal or objective will have one to three measures with associated targets. The following are proposed measures to be revised for 2025 after feedback from Theme Teams at the end of 2024. Measure is considered "Green," if outcome is on target or better, "Yellow," if outcome is 90% or more on target, and "Red," if outcome is less than 89.5% on target. Remember the Balanced Scorecard is not a "report card;" it is an objective performance tracking tool.

   1. Grow in faith, build thriving community and transform lives through Christ's love.

      • Epiphany Balanced Scorecard percentage of strategic measures on target (#). Target is 14 of the 21 remaining metrics being on target or better.

   2. Nurture faith lives and meaningful relationships through activities of worship, education, service and fellowship.

      • Spiritual Assessment Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of member spiritual assessment scores (#). For example, a statement on Epiphany's periodic member survey could be, "I am

happy with my spiritual life." The member response would be a number from one to five. The target will be set after the first assessment period ends.

3. Create welcoming culture, community life and facility.

   - Welcoming Assessment Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of member and nonmember responses to the statement, "I feel welcomed at Epiphany." The target will be set after the first assessment period ends.

4. Increase presence in community.

   a. Outreach Service Hours is the number of member service hours given to outreach (#). The target will be set after the first assessment period ends.

   b. Client Impact Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of client responses to the statement, "My life was positively affected by Epiphany's ministry." The target will be set after the first assessment period ends.

5. Understand ministry context.

   - Project accomplishing stakeholder conversations and surveys that include periodic membership assessment. Targets are assigned percentage of project completion.

6. Deliver effective communications and programs.

   a. Communication Satisfaction Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating recipient satisfaction with communication vehicles (#) including bulletins, newsletter, video announcements, social media, and so forth.

   b. Website Hits represents the number of communication hits on social media (#).

7. Manage resources effectively.

   - Financial Performance indicates income minus expenses for the quarter ($).

8. Align, recruit and deploy staff (employees and volunteers).

   a. Staff Satisfaction Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of staff responses to the statement "I am satisfied with my Epiphany employment." The target will be set after the first assessment period ends.

   b. Volunteer Satisfaction Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of volunteer responses to the statement "I am

satisfied with my Epiphany volunteer service." The target will be set after the first assessment period ends.

9. Encourage faithful stewardship of gifts and talents.

   a. Annual Member Giving is the average dollar amount of congregational giving per member ($).

   b. Annual Member Volunteer Service is the average number of hours of Epiphany-related volunteer service per member (#).

10. Engage in inspirational worship.

    a. Average Worship Attendance is the average weekly attendance at in-person and virtual worship services (#).

    b. Worship Appreciation Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of member responses to the statement, "I find my worship experiences at Epiphany to be inspiring." The target will be set after the first assessment period ends.

11. Participate in meaningful education and small groups.

    a. Average Member Learning is the average number of hours members spent in learning activities (#).

    b. Learning Appreciation Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of member responses to the statement, "My learning experiences at Epiphany were meaningful." The target will be set after the first assessment period ends.

    c. Relationship Building is the number of people participating in a small group activity (#).

12. Join in productive service opportunities.

    a. Average Member Serving is the number of members participating in service projects (#).

    b. Service Appreciation Score is a number from one to five (one is strongly disagree, two is disagree, three is neutral, four is agree and five is strongly agree) indicating an average of member responses to the statement, "My service experiences at Epiphany were productive." The target will be set after the first assessment period ends.

13. Invite and encourage discipleship and fullness of congregational involvement.

    a. Epiphany Membership is a number representing Epiphany membership (#).

    b. First-Time Visitors is the number of first-time visitors to Epiphany's ministries (#).

D. Balanced Scorecard –tracks strategic measures, organizational performance and strategy deployment (see Attachment #3).

E.     Initiatives (Annual Work Plan) – the document 2024 Strategy Development - Compilation: Theme Actions and Measures (Attachment #4) provides a number of potential theme actions and measures gathered from the 2024-02-10 CC Retreat, 2024-03-10 Community Conversation and online submissions from Epiphany's membership. The chartered theme teams will use this information to create Epiphany's 2025 Work Plan and Balanced Scorecard.

F.     Deployment Schedule

1.     May 2024: Congregation adopts Epiphany's 2024 Strategic Plan.

2.     June – September 2024: Strategic Teams chartered, recruited and launched. Teams deliver initial reports with introduction, findings, conclusions and recommendations for 2025 Work Plan and Budget.

3.     October – December 2025: Teams propose 2025 work plan initiatives and success measures. CC approves 2025 Work Plan and Balanced Scorecard and congregation adopts 2025 Budget. Teams prepare to act and accomplish goals for 2025.

V.     Supporting Resources

A.     Strategic Planning Inputs

1.     2024 Strategy Development – Retreat Outcomes: Theme Actions and Measures

2.     2023-11-28 Strategic Planning Team Report

3.     2023-11-14 Strategic Clarification Input

4.     Epiphany 2024 Strategic Planning Process and Outcomes

5.     2023 Epiphany's Strengths, Weaknesses, Opportunities, and Threats Analysis (SWOT)

6.     2023 Ministry Site Profile

7.     2025 Vision – Epiphany Lutheran Church

8.     2019-20 Guidebook & Directory

9.     A 10 Year Vision for Epiphany Lutheran Church: 2011-2021

10.     2009 Capital Campaign

11.     2024 Strategy Development – Compilation: Theme Actions and Measures (Attachment #4)

12.     2024 Implementation Team Charter Packet (Attachment #5)

13.     2024 Theme Team Charter Packet (Attachment #6)

B.     Other Resources

1.     Statement of Operations – 2023 Ministry Site Profile

    a.     Description

    b.     History

c.     Location and Facilities

   d.     Description of Services

   e.     Financial Statement

   f.     Management and Staffing

2. Situational Analysis (useful for ministry context consideration)

   a.     Strengths, Weaknesses, Opportunities and Threats (SWOT)

   b.     Churchwide Strategic Plan

   c.     Synodical

   d.     Community Demographics

   e.     Competitive Analysis

   f.     Regulatory Issues

   g.     Marketing and Brand Analysis

C. Attachments

1. Epiphany 2024 Strategic Planning Process and Outcomes

2. Strategy Map

3. Balanced Scorecard

4. 2024 Strategy Development – Compilation: Theme Actions and Measures

5. 2024 Implementation Team Charter Packet

6. 2024 Theme Team Charter Packet

7. Sample Membership Assessment

## Epiphany's 2024 Strategic Planning Process and Outcomes

1. <u>Strategic Clarification</u> – uncover important organizational and strategic issues and affirm Mission, Values, and Vision statement.

2. <u>Strategy Development</u> – identify strategic themes (driving factors necessary for future organizational success), and direction through strategic voices, and objectives. Create Strategy Map and Strategic Plan.

3. <u>Strategy Deployment</u> – define strategic measures and create Balanced Scorecard to track Strategic Plan deployment. Identify strategic initiatives to move measures and assign initiatives to staff or teams. Congregation informs strategic clarification and strategy development. Congregational Council (CC) deploys Strategic Plan and monitors its performance.
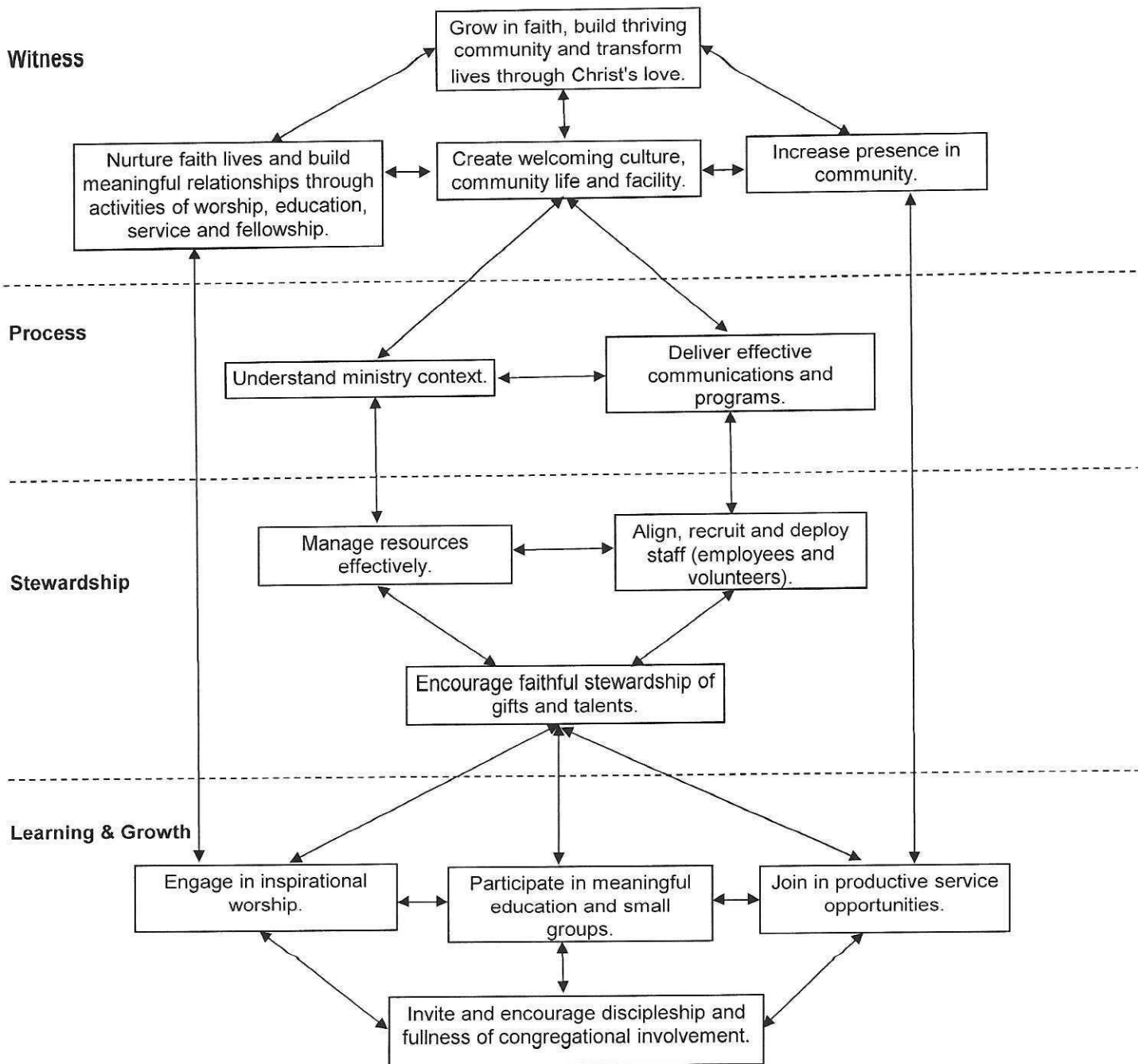
| Date | Group | Activity | Outcome |
|---|---|---|---|
| 8/15/2023 | CC | Consider, inform, and adopt 2024 Strategic Planning Process and Outcomes; Appoint Strategic Planning Team (SPT). | Reviewed process and appointed SPT. |
| 8/28/2023 | SPT | Launch Team. Introduce process. Draft agenda for October CC Retreat that clarifies organizational mission, values, and vision. | Launched Team. Introduced process. Set Calendar. |
| 9/5/2023 | Staff | Introduce staff to strategic planning process. Engage in strategic clarification exercise. | Introduced process and exercise. |
| 9/5/2023 | SPT | Complete Strategic Clarification exercise. Draft agenda for October CC Retreat. Discuss congregation communications plan. | Completed exercise and draft agenda. |
| 9/17/2023 | Community Conversation | Introduce team, process and opportunity for congregational engagement. | Introduced team, process and opportunities. |
| 9/19/2023 | Staff | Complete strategic planning exercise and discuss next steps. | Completed exercise. |
| 9/26/2023 | CC | Review strategic planning process and progress. Discuss and adopt agenda for October CC retreat. | Adopted agenda for October CC retreat. |
| 10/14/2023 | CC Retreat | Engage CC in identifying key organizational and strategic issues, and clarifying organizational mission, values, and vision. | Completed exercise. |
| 10/23/2023 | SPT | Review CC Retreat experience and outcomes including list of issues. Discuss next Community Conversation agenda and prepare supporting documents. | Reviewed Community Conversation agenda and supporting documents. Narrowed down options. |

| Date | Group | Activity | Outcome |
|---|---|---|---|
| 11/5/2023 | Community Conversation | Provide update on strategic planning process and invite feedback to work product to date. | Engaged members and generated feedback to work product (35 Tally sheets). |
| 11/5/2023 | Youth Conversation | Engaged young people and parents in strategic planning process. | Identified expectations of and connections with church. |
| 11/07/2023 | Staff | Provide update on strategic planning process and invite feedback to work product to date. | Engaged staff and generated feedback to work product (10 Tally Sheets). |
| 11/13/2023 | SPT | Compile input from engagement opportunities and draft Mission, Values and Vision statements as needed. | Drafted Strategic Clarification Input compilation document for CC review. |
| 11/28/2023 | CC | Consider 2023-11-28 Strategic Planning Team Report and Strategic Clarification Input from community conversation, youth and staff and provide response for SPT. | Generated feedback for SPT drafting of values, mission, values and vision statements. |
| 12/4/2023 | SPT | Discuss and recommend draft of 2024 Strategic Plan (Phase One) document for CC affirmation. Review next steps addressing strategy development. | Drafted and recommended 2024 Strategic Plan (Phase One) document. |
| 12/19/2023 | CC | Consider and affirm 2024 Strategic Plan (Phase One) document. Review next steps in process. | **Affirmed 2024 Strategic Plan (Phase One) document.** |
| 1/8/2024 | SPT | Affirm voices. Consider goals and objectives and draft Strategy Map. Create agenda for February CC Retreat to engage CC members in process. Discuss Community Conversation agenda and congregation communication plan. | Drafted Strategy Map, Retreat agenda and congregational communication plan. |
| 1/23/2024 | CC | Consider, inform, and adopt agenda for February CC retreat. | Adopted agenda for February CC retreat. |
| 2/10/2024 | CC Retreat | Engage Council in strategy development process that will inform Epiphany's 2024 strategy. Form teams to address themes and generate strategic initiatives and measures. | Generated strategic actions and measures. |
| 2/12/2024 | SPT | Review CC retreat experience and outcomes. Generate list of initiatives and measures that inform Strategy Map. Discuss communications and next process steps. | Identified strategic initiatives and measures. Refine Strategy Map. |

| Date | Group | Activity | Outcome |
|---|---|---|---|
| 2/27/2024 | CC | Discuss CC Retreat experience and receive plan draft. Discuss agenda for Community Conversation and other communications. | Created Community Conversation agenda and communications. |
| 3/4/2024 | SPT | Support Community Conversation and other communications as planned. Update Strategy Map and plan draft. | Affirmed Community Conversation agenda and support materials. |
| 3/10/2024 | Community Conversation | Provide strategic planning process update and engage in strategy development (strategic initiatives and measures). | Generated strategic actions and measures. |
| 3/19/2024 | CC | Discuss feedback and experience from Community Conversation and strategic plan | Received strategic plan input. |
| 4/15/2024 | SPT | Update Strategy Map and Strategic Plan. | Produced Strategic Plan draft. |
| 4/23/2024 | CC | Discuss, inform, and adopt Epiphany's 2024 Strategic Plan for congregational consideration at 5/19/2024 Annual Meeting. Plan Annual Meeting agenda and presentation. | Adopted 2024 Strategic Plan draft. Planned Annual meeting agenda and presentation. |
| 5/6/2024 | SPT | Support Annual Meeting as needed. Begin work on strategy deployment as envisioned in Strategic Plan. | Supported Annual Meeting agenda and associated materials. |
| 5/19/2024 | Annual Meeting | Receive and approve Epiphany's 2024 Strategic Plan. | **Approved Epiphany's 2024 Strategic Plan.** |

## Now the fun of strategy deployment begins!

# Epiphany's 2024 Strategy Map

**Witness**

Grow in faith, build thriving community and transform lives through Christ's love.

Nurture faith lives and build meaningful relationships through activities of worship, education, service and fellowship.

Create welcoming culture, community life and facility.

Increase presence in community.

**Process**

Understand ministry context.

Deliver effective communications and programs.

**Stewardship**

Manage resources effectively.

Align, recruit and deploy staff (employees and volunteers).

Encourage faithful stewardship of gifts and talents.

**Learning & Growth**

Engage in inspirational worship.

Participate in meaningful education and small groups.

Join in productive service opportunities.

Invite and encourage discipleship and fullness of congregational involvement.

Strategic Themes (Driving factors for success)
Communication
Faith Formation
Membership Growth
Outreach
Ministry Context
Financial Viability

# Epiphany's Balanced Scorecard - 2024

| # | Theme* | Goal/Objective | Measure | Target | 1st Q (YTD) | 2nd Q (YTD) | 3rd Q (YTD) | 4th Q (YTD) |
|---|---|---|---|---|---|---|---|---|
| **Witness** | | | | | | | | |
| 1.1 | All | Grow in faith, build thriving community and transform lives through Christ's love. | Epiphany Balanced Scorecard (#) - percentage of strategic measures on target. Target is 14 or more of 21 metrics. | ≥ 14 | | | | |
| 2.1 | FF, MG | Nurture faith lives and meaningful relationships through activities of worship, education, service and fellowship. | Spiritual Assessment Score (#) - number from one to five indicating an average of annual member spiritual assessment. | | | | | |
| 3.1 | MG | Create welcoming culture, community life and facility. | Welcoming Assessment Score (#) - number from one to five communicating average member and nonmember assessment of welcoming culture. | | | | | |
| 4.1 | O | Increase presence in community. | Outreach Service Hours (#) - the number of member service hours given to outreach. | | | | | |
| 4.2 | O | Increase presence in community. | Client Impact Score(#) - showing average client assessment of Epiphany's outreach impact. | | | | | |
| **Process** | | | | | | | | |
| 5.1 | MC | Understand ministry context. | Project accomplishing stakeholder conversations and surveys that include periodic membership assessment. Targets are % of project completion. | | | | | |
| 6.1 | C, MC | Deliver effective communications and programs. | Communication Satisfaction Score (#) - number showing average recipient satisfaction with communication vehicles. | | | | | |
| 6.2 | C, MC | Deliver effective communications and programs. | Website Hits (#) - number of communication hits on website. | | | | | |
| **Stewardship** | | | | | | | | |
| 7.1 | FV | Manage resources effectively. | Financial Performance ($) - income minus expenses for the quarter. | | | | | |
| 8.1 | C, FV | Align, recruit and deploy staff (employees and volunteers). | Staff Satisfaction Score (#) - number indicating average of staff satisfaction with employment. | | | | | |
| 8.2 | C, FV | Align, recruit and deploy staff (employees and volunteers). | Volunteer Satisfaction Score (#) - number communicating average volunteer satisfaction with service. | | | | | |
| 9.1 | C, FV | Encourage faithful stewardship of gifts and talents. | Annual Member Giving ($) - average dollar amount of congregational giving per member. | | | | | |
| 9.2 | C, FV | Encourage faithful stewardship of gifts and talents. | Annual Member Volunteer Service (#) - average number of hours of Epiphany-related volunteer service per member. | | | | | |
| **Learning and Growth** | | | | | | | | |
| 10.1 | FF | Engage in inspirational worship. | Average Worship Attendance (#) - average weekly attendance at in-person and virtual worship services. | | | | | |
| 10.2 | FF | Engage in inspirational worship. | Worship Appreciation Score (#) - number representing member appreciation with worship experience. | | | | | |
| 11.1 | FF | Participate in meaningful education and small groups. | Average Member Learning (#) - average number of hours members spent in learning activities. | | | | | |
| 11.2 | FF | Participate in meaningful education and small groups. | Learning Appreciation Score (#) - number indicating participant satisfaction with learning activity. | | | | | |
| 11.3 | FF | Participate in meaningful education and small groups. | Relationship Building (#) - number of people participating in a small group ministry. | | | | | |
| 12.1 | O | Join in productive service opportunities. | Average Member Serving (%) - number of members participating in service projects. | | | | | |
| 12.2 | O | Join in productive service opportunities. | Service Appreciation Score (#) - number showing participant satisfaction with service opportunity | | | | | |
| 13.1 | MG, O | Invite and encourage discipleship and fullness of congregational involvement. | Epiphany Membership (#) - number indicating Epiphany membership. | | | | | |
| 13.2 | MG, O | Invite and encourage discipleship and fullness of congregational involvement. | First-Time Visitors (#) - number of first-time visitors to Epiphany's ministries. | | | | | |

*Themes: Communication (C), Faith Formation (FF), Membership Growth (MG), Outreach (O), Ministry Context (MC) and Financial Viability (FV)

## 2024 Strategy Development – Compilation: Theme Actions and Measures

I.  Communication - Epiphany must leverage technology and its resources to enhance in-person and virtual worship experiences, inform members of ministries and activities, build relationships and community, and support transparency.

   A.  Actions
      1.  Evaluate current programs and structure for effectiveness and outcomes. Create written report with findings and recommendations.
      2.  Improve website with more information and secure area for members.
      3.  Increase presence on You Tube, marketing ministry opportunities and outcomes.
      4.  Add more virtual/Zoom events including educational offerings, church meetings, and other presentations in addition to worship.
      5.  Expand stream team and offerings to all worship services.
      6.  Use narthex television to focus on ministry advertisements in addition to current events.
      7.  Consider having a ministry fair on web and in the bulletin.
      8.  Create a virtual bulletin with ministry advertisements.
      9.  Keep outdoor signs running with more information.
      10. Improve sound system clarity in Far Hills sanctuary.
      11. Assign marketing coordination of social media engagement and posts with a strategy for driving traffic to website.
      12. Need to systematically post information about all of our great ministries on multiple platforms.
      13. Use consultant to develop strategy for members only social media pages.
      14. Accommodate hearing impaired members.
      15. Update website to be more accessible.
      16. More summarized weekly newsletter.
      17. Have a photo directory, perhaps old school – hard copy.
      18. Have greeters after the service.
      19. See if more people know people.
      20. Create weekly newsletter with highlights and focus on week. Have monthly or biweekly newsletter with additional information.
      21. Make sure everyone gets the communication (Push or pull?)
      22. Involve more people on Sunday and at events – one on one Facetime volunteers, greeters, nametags, etc.
      23. Create demographic database and use for time and talents, small group tracking

24. Identify extroverts/leaders to serve in networking, making human connections in getter strong points and other messages out.

25. Provide new address directory and eventually a picture directory.

26. Provide members with a line-item budget with more financial information.

27. Have a job fair with volunteer, activity and service opportunities with group representatives at each table to recruit and receive suggestions.

28. Optimize use of Shelby's MinistryOne mobile app for members. Develop process to integrate delivery of events, worship service livestreams, and volunteer sign-us via the app in addition to existing communication platforms. Need to add communication channels where they are, primarily smartphones.

29. Create online directory that allows members to update their profiles. Directory should prompt for data on talents and types of events and activities they enjoy.

B. Measures

1. Number of hits on website, You Tube and streaming (#)

2. Increased participation in activities (#)

3. Increased member feedback – surveys, email, and community conversations (#)

4. Number of posts and website engagements (#)

5. Number of people attending events (#)

6. Produced directory

7. Held job fair

8. Increased ministry participation (#)

9. Engagement with MinistryOne platform. Number of logins, events posted, streams viewed (#). Set target for 25% of membership usage and plan to grow number quarterly or annually by adding features, getting feedback and evaluating analytics data and feature usage.

II. <u>Faith Formation</u> - Epiphany must provide opportunities for people of all ages and abilities to grow in faith through experiences of education, worship, small groups, and service.

A. Actions

1. Evaluate current programs and structure for effectiveness and outcomes. Create written report with findings and recommendations. See Caitlin's analysis and recommendations.

2. Survey membership for interests and needs and identify community resources as well as needs. Understand ministry context and design programs to address findings. Create written report with findings and recommendations.

3. Engage younger children and all age groups.

4. Recognize relationship-building is an important component of faith formation and include fellowship opportunities in offerings.

5. Leverage assets of both campuses and virtual environment, recognizing more and more people like to stay home.

6. Create framework for recruiting, training and deploying volunteers.

7. Leverage technology and communications through initiatives like "Did you know" or "Ask a Pastor" and podcasts or online daily devotions. Communicate programs and stories of outcomes.

8. Offer Sunday School for all ages versus after thought mentality of squeezing it in.

9. More Zoom Bible Studies to leverage flexibility.

10. Better advertisement of current education opportunities (virtual, multiple men's ministries).

11. Lay leader led dedicated Sunday School hour from 9:15-10:15 a.m. Worship services 8:00 a.m. and 10:30 a.m.

12. Provide faith formation activity for parents while waiting for kids Sunday morning and also during other children activities. Perhaps discussion of one topic weekly.

13. Scope and Sequence – Birth – Death

14. Create parent groups – bible study during Sunday School, Confirmation, High School Ministry.

15. Define curriculum for small groups.

16. Milestones/Faith Stepping Stories.

17. Update safety policies for building and programs.

18. Create small groups of people with like demographics.

19. Make signups for service opportunities more available.

20. Consider use of commercial curricula (grief, dementia, Stephen Ministry, etc.).

21. Put windows in Sunday School doors.

22. Add parents to all teen communications under 16 or 14.

23. Worship at both campuses at 9 a.m. and 11 a.m. Sunday School at 10 a.m. for all ages including adults.

24. Set up small groups for new members. Survey membership for interest and form new groups. New members should be offered a small group if they are interested.

25. Move contemporary service back to Celebration Center – better fit, more casual, which could draw more/different people to attend.

26. Summertime popsicles and play time at Austin on Sundays.

27. Return Bunny Hop 5K/10K as a spring outreach to members and nonmembers.

28. Consider adding different "flavors" of education for kids, teens, young adults, and adults that would serve as "entry points" that many are seeking. Seekers are looking for meaning in their lives and may be less intimidated by a lay person led contemporary study such as one on Mary and Martha on how anxiety can obscure our connection with our Essence. Lessons do not have to be real-time, but could be pre-recorded. Does not always have to be pastor or outside educator led. Lay

leaders could be equipped with ELCA sanctioned materials or a learning path approved by an education committee or workgroup.

B.     Measures

1.     Attendance (#)
2.     Member participation rate (%)
3.     Survey course learning, before and after (#)
4.     Survey participant feedback, satisfaction and growth (Average #)
5.     Seek feedback from current education opportunity participants
6.     Participant growth in existing groups
7.     Attendance at faith formation activities (#)
8.     Published Scope 2 Sequence with input from staff, parents, congregation members
9.     Engagement in small group opportunities available at times that work (#)
10.     Established Library of Resources available for families
11.     Participation in service projects (#)
12.     Sunday School attendance (#)
13.     Small group participation (#)
14.     Worship attendance (#) at 9:00 a.m. service
15.     Number or course offered (#)
16.     Number of educators added/developed (#)
17.     Number of attendees (#)

III.     <u>Membership Growth</u> - Epiphany must grow as a community of faith by inviting new members as well as caring for, engaging and sustaining its members.

A.     Actions

1.     Audit membership per constitution to determine number of active and inactive members. Create written report with findings and recommendations.
2.     Evaluate current programs and structure for new member recruitment and member retention for effectiveness and outcomes. Create written report with findings and recommendations.
3.     Increase presence at community events like July 4th parade.
4.     Implement "Unbinding the Gospel" program.
5.     Offer social events, bible studies, and retreats that address spiritual needs and are welcoming to nonmembers.
6.     Offer social groups and events that address spiritual needs and are welcoming to nonmembers.
7.     Survey community leaders for unmet needs, members for ministry needs and neighbors for service opportunities. Create report with recommendations.

8.     Have kids invite friends to youth activities.

9.     Engage youth in inviting and welcoming visitors.

10.     Consider small dinner groups; stay in same groups or mix them up.

11.     Provide activities for singles.

12.     Create mentorship or sponsorship program for visitors and new members.

13.     Create Welcome Committee to identify visitors and engage them personally.

14.     Reenergize greeter program.

15.     Share stories of how people were invited and welcomed into Epiphany community.

16.     Consider intergenerational engagement to build authentic community.

17.     Review new member orientation program and ways to engage new members.

18.     Use name tags to increase familiarity among members and visitors.

19.     Consider nighttime program offerings for people working during the day.

20.     Use social media to communicate with millennials and gen Z.

21.     Leverage virtual campus – promote interactions and increase members on stream team.

22.     Consider Zoom break out rooms for virtual input in real time.

23.     Promote outdoor chapel worship.

24.     Offer program for members and nonmembers on "How do I pay for college and not go into debt."

25.     Develop a more "diverse" membership as part of our membership goal (ethnicity, color, gender, age, etc.) possibly through our music, theatre and other fine arts resources. Use them to draw and minister to the community through special performances outside the worship service.

B.     Measures

1.     Membership (#)

2.     Leadership Training Participation (#) – Unbinding the Gospel, journaling

3.     Completed report on findings and recommendations

4.     Membership (#)

5.     New members growth (#)

6.     Attendance at evening offerings (#)

7.     Evening offerings (#)

8.     Event participation (#)

9.     Size of stream team (#)

10.     Outdoor worship attendance (#) – compare with previous years

11.     Attendee feedback from college debt program

12.     Survey/report/monitor our diversity/inclusiveness statistics annually

IV.     <u>Outreach</u> - Epiphany must evaluate its mission, resources and strengths and community need to offer effective ministries to help people.

    A.     Actions

        1.     Identify community needs and assess Epiphany's resources. Evaluate current programs (Pantry, Adopt a Family, Storybook, Family Promise, Silent loss) and structure for effectiveness and outcomes. Create written report with findings and recommendations.

        2.     Develop tools to inventory membership's time and talents and community needs and resources, and create opportunities for volunteer service.

        3.     Consider benefits and costs of programs of ecumenical dialogue, honoring public servants, service auctions, show up events, and care team and transportation ministries.

        4.     Use communication vehicles to help membership understand outreach opportunities and experience the benefits of volunteer service. Tell stories of ministry success with outreach, gospel witness and faith formation. Testimonials can be powerful.

        5.     Show video clips of existing ministries in the church to market outreach.

        6.     Update directory of all ministries including leaders of the groups.

        7.     Have ministry leaders provide temple talks at worship services.

        8.     Have ministry fair or open house.

        9.     Explore project with Catholics or Graceworks.

        10.     Expand support for Family Promise.

    B.     Measures

        1.     Completed project to identify community needs, inventory Epiphany's resources, evaluate Epiphany's programs and develop community benefit report.

        2.     Nonduplicate members participating rate in outreach experience (%)

        3.     Hours of volunteer service in outreach (#)

        4.     Member satisfaction with outreach experience (#)

        5.     Members engage in ministries (#)

        6.     People served by ministries (#)

        7.     Letters of support from recipients

        8.     Produce videos of each ministry

V.    Ministry Context - Epiphany must understand its ministry and the societal landscape to adapt its programs to meet peoples' needs.

A.    Actions

1.    Study best practices for multi-campus and virtual ministries. Compare to organizational practices. Create written report with findings and recommendations to determine best ministry model.

2.    Research unmet community needs by interviewing community leaders in neighborhoods and government service, education and social services, and survey membership for unmet ministry needs. Create written report with findings and recommendations.

3.    Examine effects of cultural change and its impact on church and people's spiritual needs and worship habits. Create written report with findings and recommendations.

4.    Conduct regular community conversations to process research findings and determine what it means to be one church.

5.    Identify generational spiritual needs and address them with prayer. Make individual prayer accessible around worship and with prayer room. Staff with members comfortable with prayer.

6.    Consider benefits of meditation. Provide education and opportunities for drop-in prayer.

7.    Recognize the presence of loss in community and provide supports.

8.    Explore care team ministry.

9.    Study context around our facilities is changing. Who are the people who are coming? Study neighborhood. Who lives here? Who drives by? Who visits the library?

10.    Provide different cohorts for service (under 30, non-committal, non-member, etc.)

11.    Take a fresh look at aging or aged ministry – more than just young at heart.

B.    Measures

1.    Complete reports of findings and recommendations

2.    Recommendations of best practices for church organizations and multi-site ministries

3.    Survey responses (#)

4.    Interviews (#)

5.    Number of program participants (#)

6.    Number of care team members (#)

7.    Number of new leaders (#)

VI.    Financial Viability - Epiphany must exercise faithful stewardship of its assets and talents to optimize human and physical resources, encourage generous giving and operate with a margin allowing for ministry growth.

A.    Actions

1.    Grow deferred giving by raising awareness and membership in the Apple Tree Society through marketing information about mutual benefits and appreciation events.

2.    Create mission funding plan with a margin by reducing expenses through eliminating mortgage, leveraging technology, managing other fixed and variables costs and increasing revenue through conducting annual stewardship program, leasing assets, and offering fundraising activities.

3.    Evaluate ministries with a view toward funding, desired outcomes, effectiveness and mission accomplishment. Create written report with findings and recommendations.

4.    Identify and apply for grants that align with organizational mission, values and goals.

5.    Improve communication of financial condition.

6.    Review budget presentation and include options if additional giving is received.

7.    Pass offering plate down each row at worship services.

8.    Include a QR code next to offering in the bulletin.

9.    Consider ways for people who give online to participate in putting something in offering plate. Promote connect cards for people to express their need for pastoral care or visit.

10.   Have special offerings for specific infrastructure needs.

11.   Emphasize benefits of required minimal distributions as giving option. Add designation on card to specify online contribution application.

12.   Grow membership.

13.   Focus on what we are good at doing. Analyze programs for uniqueness. Eliminate non-critical and redundant programs.

14.   Rent out space at Far Hills and Austin to compatible ministries. Perhaps daycare at Austin or after school programs.

15.   Encourage giving in worship with direct appeals and storytelling.

16.   Consider contracting ministry to one campus. Ministry has changed. No need for Austin. Still need second pastor to staff worship and programs. Far Hills campus has plenty of capacity for ministry to membership and beyond.

17.   Manage operations to level of giving.

18.   Use statistical data on ministry growth or decline to determine long-term trend and plan accordingly.

19.   Eliminate debt with sale of acreage at Austin. If that does not do it, then analyze giving at Austin and Far Hills. May be helpful to look back at time when there was a pastor at Austin. If partial acreage sale does not eliminate debt, then consider selling Austin. Need to reduce debt load to institute new programs and ministries.

20.   Re-establish separate budgets and financial statements of two campuses.

21. Recognize the failure of the Auston campus, the change in times, the decreasing pledges and revenues and sell the entire Auston campus.

B. Measures

1. Operational Budget and Financial Performance ($)
2. Membership Giving Participation (%) – intent forms, commitment levels?
3. Organizational Debt ($)
4. Organizational Income ($)
5. Grant applications (#)
6. Operational Budget and Financial Performance ($)
7. Membership Giving Participation (%) – intent forms, commitment levels?
8. Operational Budget and Financial Performance ($)
9. Membership Giving Participation (%) – intent forms, commitment levels?

# Charter

## Implementation Team (IT)

A. Purpose: The IT charge is to deploy Epiphany's strategy as defined by Epiphany's 2024 Strategic Plan, Balanced Scorecard, initiatives, and budget. The Implementation Team accomplishes this charge by monitoring organizational performance through Epiphany's Balanced Scorecard, deploying transitional initiatives planned for 2024, developing initiatives for 2025 and beyond, and achieving scorecard success.

B. Norms: The Implementation Team will consider and establish group norms to address the following.
1. Group Leadership
2. Internal and External Communication
3. Work Style
4. Work Schedule
5. Decision-making
6. Team Member Behaviors
   a. Assume positive intent
   b. Demonstrate proactive orientation
   c. Manage risk
   d. Manage conflict
   e. Practice confidentiality
   f. Build rapport with other strategic teams

C. Deliverables
1. Manage 2024 Strategic Plan deployment transition to 2025 and beyond.
2. Recruit, charter and launch Theme Teams and manage their performance.
3. Work with Congregation Council (CC) to create annual work plan and define scorecard measures.
4. Deliver 2025 Balanced Scorecard results by the fifteenth of January, April, July, and October

D. Boundaries
1. Understand that CC defines boundaries including budget and staffing.
2. Look forward and do what is best.
3. Keep CC informed.

E. Quality Expectations
1. Deliver work products on time with substance and form
2. Manage time, meetings, and other organizational resources productively
3. Operate within budget

# Strategic Teams
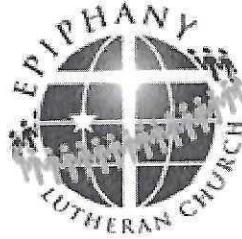
## Roles and Responsibilities

1. Congregational Council (CC):
   A. Leads the charge
   B. Integrates scorecard into annual budget
   C. Monitors progress and expects change
   D. Removes barriers and constraints
   E. Provide tools and templates.
   F. Spends time looking backward (25%), at present (35%), and forward (40%)

2. Implementation Team (IT):
   A. Integrates the scorecard into the management system
   B. Acquires and utilizes measurement expertise
   C. Develops measures to support strategic objectives
   D. Creatively gathers, analyzes, and displays data
   E. Facilitates linkage of the balanced scorecard to the rest of the organization
   F. Coaches ministry team members
   G. Spends time looking backward (10%), at present (65%), and forward (25%)

3. Theme Team (TT):
   A. Delivers assigned project on time and on target
   B. Collaborates and works together
   C. Follows the plans
   D. Builds toward high quality performance
   E. Grows disciples' spiritually
   F. Manages congregational risk
   G. Uses creativity
   H. Provides feedback
   I. Spends time to complete project

4. IT Theme Team Sponsor: serves as TT coach and consultant, and participates on the team to the extent necessary to ensure that the team is progressing in a manner consistent with the strategic objective.

5. CC Theme Team Sponsor: does not participate on deployment team, but assists team as needed by providing direction or removing administrative roadblocks.
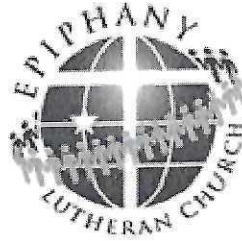
# Charter

**Theme Team (TT)**

I.  Team Purpose: The Team Team charge is to deploy strategic initiates related to a particular strategic theme and contribute to Epiphany's mission accomplishment through its Balanced Scorecard success.

II.  Norms (defined in early meetings)
   A.  Leadership
   B.  Communication
   C.  Work Style
   D.  Work Schedule
   E.  Decision-making
   F.  Other norms
      1.  Assume positive intent.
      2.  Be proactive.
      3.  Use pilot approach if risk is high.
      4.  Manage conflict/handle dissenting opinions.
      5.  Practice confidentiality.
      6.  Build rapport with Congregational Council (CC) and Implementation Team (IT) sponsors.

III.  What does success look like?
   A.  Understand and validate Epiphany's strategy and balanced scorecard.
   B.  Complete assigned project on time.
   C.  Demonstrate rapport with CC and IT.
   D.  Achieve scorecard success.
   E.  Accomplish TT member satisfaction and growth.

IV.  Understand ministry team boundaries
   A.  CC defines (Budget, staffing, etc.).
   B.  Exercise judgment and do what is best.
   C.  Keep IT and team member management informed.

V.  Expectations
   A.  Quality - work products have substance and form.
   B.  Productivity - be good stewards of time, meetings and resources.
   C.  Financial - operate within budget.

VI.  Deliverables - are the projects identified in the team agenda your team will accomplish.

# Agenda

## Theme Team Launch

I. Team Introductions

II. Review Charter Packet
   A. Team Roles/Responsibilities
   B. Team Member Contact Information
   C. Strategy Map
   D. Balanced Scorecard and Measures Definitions
   E. Initiative or Project Definition

III. Team Building/Logistics
   A. How do we want to be led?
   B. How do we communicate with each other?
   C. How do we work on assignments, gather input, post work and document progress?
   D. When will we meet? How often will we meet?
   E. How will decisions be made?
   F. How will we stay on track?

IV. Team Building/Ground Rules
   A. Conflict Resolution
   B. Dissenting opinions
   C. Confidentiality
   D. Member Participation and evaluation process

V. Projects
   A. Initial – deadline August 31, 2024 – submit initial theme report with following components.
      1. Introduction: theme and process steps taken to complete report.
      2. Findings: identify programs and activities addressing theme.
      3. Conclusion: assess program effectiveness
      4. Recommendations: direction and budget for 2025
   B. Year end – deadline November 30, 2024
      1. Proposed success measures for Balanced Scorecard and Theme Scorecard
      2. Annual Work Plan initiatives to move those measures
      3. Team member assessments and recommendations for 2025 team success

# Theme Team

## Member Roles and Responsibilities

<u>Member</u>: A Theme Team (TT) member is chosen because of his or her role in the congregation and ability to contribute to the success of the initiative. Additional individuals may be called upon, as needed, to contribute their expertise.

- Collect data and continually study elements of the initiative in order to deepen knowledge and understanding of the process and team expectations
- In meetings, share information and data; participate in making decisions and developing plans
- Contribute to the content of a meeting; be aware of the meeting process and share responsibility for the effectiveness of the team
- Set priorities so that team participation, both in meetings and in completion of assignments, is not compromised (attendance at meetings is the expectation).

<u>Leader</u>: A leader is a member of the TT who is given a coordinating role for the work of the team.

- Set meeting dates, schedule conference rooms, send out notices
- Set the agenda and guide the team through the agenda to achieve the objectives
- Provide direction, initiates activities, encourages members, and manages process
- Contributes ideas, interprets data and participates in decisions
- Provides communication between the TT and the Implementation Team sponsor

<u>Recorder</u>: The recorder is a member of the TT assigned to maintain a record of its work.

- Keeps team records, correspondence, minutes, agendas, charts, data, etc.
- Documents decisions, actions and assignments of each TT meeting

<u>Implementation Team (IT) Sponsor</u>: An IT sponsor serves as a coach and consultant and participates to the extent necessary to ensure that the team is progressing consistent with the strategic objective.

- Work with the team to focus on the meeting process, intervene if variations move the team off task
- Provide advice or assist in the use of facilitation tools
- Provide coaching, training and feedback to the team
- Serves as liaison between the IT and TT

<u>Congregational Council (CC) Sponsor</u>: The CC sponsor is not a member of the TT, but a person who may be called upon to intervene to provide direction and/or remove administrative roadblocks as necessary.

# Theme Team

**Team Member Contact Information**

| Member | Contact Information | Comments |
|---|---|---|

# Member Assessment

Name: _____
Email Address: _____
Phone #: _____

I. Please enter your response to the following statements by check the appropriate box. Please leave it blank if not applicable.

| Statement | Strongly Disagree | Disagree | Neutral | Agree | Strongly Agree |
|---|---|---|---|---|---|
| 1. I am happy with my spiritual life. | | | | | |
| 2. I feel welcomed at Epiphany. | | | | | |
| 3. I am satisfied with my volunteer service at Epiphany. | | | | | |
| 4. I find my worship experiences at Epiphany to be inspiriting. | | | | | |
| 5. My learning experiences at Epiphany have been meaningful. | | | | | |
| 6. My service experiences at Epiphany have been productive. | | | | | |
| 7. I am satisfied with Epiphany communications. | | | | | |

II. My communications preferences (one to seven with one being the highest) are the following:

_____ Verbal announcements at worship and special events

_____ Periodic printed newsletter

_____ Periodic emailed newsletter

_____ Social media videos

_____ Enhanced members only website

_____ Mobile phone notifications

_____ Other (please name): _____

III. Please share any other comments or suggestions you would like with staff. Thank you.