

saintJames

seeking | serving | learning | praying

2024 Long-Range Plan

As presented by the Saint James Vesty

A. Charge to the Committee

The charge of the long-range planning (LRP) committee is to align the practical needs of our spiritual community with the way of Christ. The plan that has been developed by the committee lays out a set of practical and strategic guidelines for Saint James to follow in the next three years. The committee focused on the importance of increasing the spiritual engagement of a wide and diverse congregation, while seeking financial sustainability as an act of holy stewardship. The plan calls for a set of intentional actions and guidelines that will expand Saint James's special character and mission. In our planning, the committee was mindful of our leadership among Episcopal churches, our historic position as a leading institution in the City of Lancaster, and our dedication to the enriching and dynamic relationship between learning and faith, prayer and action.

B. Letters from Fr. David and Bernadette

I am delighted to join with our wardens and the whole vestry in thanking all those who worked to produce a new long-range plan for Saint James. This plan energizes and challenges us to grow at Saint James by renewing our commitment to share the good news of God in Christ. We must increase our own direct experience of God in our lives and the discipleship that flows from it. By doing so Saint James will continue to grow not only in faith, hope and love, but in vitality, membership, impact and sustainability.

Saint James is now one of the largest Episcopal churches in the country. Our reputation for innovation and growth is well known. So too is our contemplative spirituality and our commitment to inclusion and unity within the body of Christ.

How we increase these commitments to spiritual and numerical growth is the purpose and vision that informs every page of this long-range plan. The increase in the number of people discovering renewal of their mind, body, and spirit at Saint James will lead to their generous giving of time, talent, and treasure that makes our ministry possible.

—Fr. David Peck

To secure the long-term sustainability of Saint James, the vestry and long-range planning committee have created a plan to balance the budget while maintaining our commitment to God's call to us to be disciples and servants in our community. This long-range plan is the result of years of study. Vestry conducted interviews with dozens of members from every demographic group in the parish in addition to speaking with all staff and clergy. The committee studied economic trends and demographic forecasts. Capitalizing on the strength of our parish, the decision was made to close the funding gap through growth as detailed in the LRP, ensuring the sustainability and impact of the mission of Saint James for years to come.

—Bernadette Gardner, Senior Warden

C. Mission and Vision

PRAYER & DISCIPLESHIP

As people of faith, we are called by the Triune God to do God's work in the world.

Our worship is the origin and fruit of our desire to seek and know God. So, it must be accessible, inclusive, and inspiring.

Our worship must be stimulated through a school of prayer that leads to a deeper contemplative spirituality and meaningful social action.

Saint James is committed to this path of sacramental worship, contemplative spirituality, and social action.

In belonging, we possess a profound, compassionate, and generous faith. Through faith, we experience a meaningful life and connection to Jesus Christ.

MISSION

With our history, membership, and campus, Saint James must be a center for theologically informed mission and evangelism that is relevant, intergenerational, and transformative for us and for those we serve both locally and globally.

Our mission compels us to partner with the church beyond our congregation. In this sense, our mission must also be outward.

But mission and evangelism are not only outward facing. Just as we reach outward to invite and add member/disciples to our community, we also must continue to do the transformative work of supporting current member/disciples, whether currently active or lapsed in their congregational engagement. As such, both large-scale and smaller and focused initiatives will add to the sense of engagement, purpose, and reach of ministry at and from Saint James.

GROWTH & SUSTAINABILITY

Only by deepening our connection to Christ through prayer and mission will Saint James experience long term growth with reasonable expectations of increased time, talent and treasure given from a greater number of committed member/disciples.

Beginning in prayer and faith, yet mindful of the need to sustain our mission, we will focus on being meaningful and dynamic stewards—with outstanding clergy, lay leadership and administration of campus resources—to create growing, sustainable and impactful ministries in our community, both locally and throughout God's creation.

D. Grateful and Active Stewards

As a community of faith, we are called to be good stewards. With gratitude to God, our work is to strive for responsible planning and management of resources, not to enrich ourselves but to ensure that we can do God's work in the world.

Saint James has a long history of visionary leadership, a history that is evidenced by over 275 years as a cornerstone of the greater Lancaster community. In honoring this legacy, we must embrace responsible planning and management of resources. It is our call as stewards of God's gifts to continue and build upon this history by being good stewards and visionary leaders for our parish family, our community and our world.

We know that giving is an expression of our gratitude to God, and as such we have outlined the following benchmarks for fully expressing that gratitude.

1. We will promote and design for generosity to support the budget through annual gifts, special gifts and planned gifts.
2. We will implement a plan to care for our historic campus with sound environmental stewardship and fiscal management.
3. We will actively support diversity, equity and inclusion through our hiring practices, programmatic design and by investing in accessibility support.
4. We will financially support ministries that serve our greater community, as we have faith that through alignment to God's mission, we will likewise grow as a congregation and spiritual community.

E. Time and Planning Horizon

To design for both mission-aligned vision and financial stability, we have outlined two separate time and planning horizons. Our immediate objectives and guidelines are to be completed within 12 months. Our three-year guidelines and recommendations are designed to be accomplished by the year, 2026.

1. Immediate Objectives and Guidelines

In the short-term, it is the primary concern of the LRP committee to focus on organizational development and accountability. By creating effective systems of collaboration and coordination, we will ensure that all our work is aligned.

In support of this, we have adopted a flywheel (Figure 1) that represents the active vision of the congregation, our accountability to that vision, and the structural relationships between the various organs of the congregational body.

As the wheel turns, there is a shift from first-person language on the right side of the wheel to third-person language on the left. This is a core aspect of the design of the flywheel itself. At its core, mission-aligned evangelism seeks to make new member/disciples, not purely for the purpose of growing the membership of the church, but to increase the capacity of the church to continue to do the will of God in the world. In this sense, just as “we” turn the flywheel in order to reach “them,” ultimately it is so that “they” become “we.”

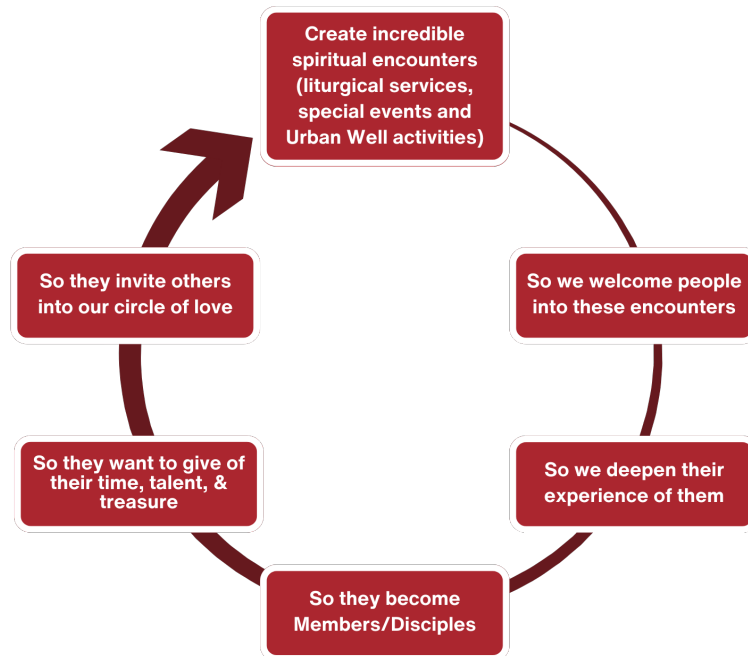


Figure 1

In addition to the flywheel, we have outlined short-term goals that we will implement this year.

- a. We will incorporate the flywheel in our organizational planning, administrative operations, vestry oversight, and outcomes tracking. As a committee we are particularly focused on rotating the wheel in terms of growing membership and early engagement.
- b. We will actively assess the current organizational alignment between priorities, planning, budget and staffing. Moreover, we will use this assessment to develop recommended adjustments as needed for future planning.
- c. We will develop clear, useful and effective Key Performance Indicators (KPIs) to increase organizational focus, assess programmatic outcomes and guide future planning, staffing and budgeting.
- d. We will ensure that programs developed through the Urban Well and World & Early Music are sustainable in ways that ensure their success and excellence, and that serves the mission and vision of the congregation.

2. Three-Year Guidelines and Recommendations

In honor of our history as a cornerstone of the Lancaster community and in faithfulness to God's call to us as God's church, we have outlined mid-range guidelines and recommendations that align to four core themes: **strength in worship, growth in membership, leadership in ministry and generous giving.**

Strength in Worship

As Episcopalians, we not only acknowledge but also celebrate that we are bound together not through perfect unity of belief but through the power of corporate worship as expressed through our liturgy. As such, we are committed to the following:

- a. We will preserve and strengthen the comprehensive, immersive experiences of worship throughout the week.
- b. We will engage in meticulous care and routine assessment of all aspects of the worship service. Such engagement will be wide ranging, including but not limited to the assessment of the efficacy of the liturgy in accordance with the Episcopal and Anglican tradition; the aesthetic and dramaturgical power of worship; the innovative implementation of digital technology; the rich musical offerings that both center and inspire us; the warmth of our ministries of welcome; the accessibility of our property for all worshippers; and the offering of hospitality and fellowship prior to or following services.

Growth in Membership

It is through corporate worship that we as a community come together. However, this is but a foundation for the growth and full participation of that community. We have outlined the following to support the continued growth of our membership within a community of faith:

- a. We will communicate clearly and inspirationally the definition and benefits of membership at Saint James.
- b. Will implement the use of personas (Appendix 3) to better focus our design and outreach. In so doing, we will standardize the personas format so that each one can illustrate a degree of involvement, a key question about membership, a need that is being met, an obstacle or barrier that is overcome, or a success that can be replicated.
- c. We will form a member/disciple committee to carry out multiple initiatives that range from membership services to outreach efforts that attract new members.
- d. We will produce a portfolio of membership materials designed using the personas as a structural guide.
- e. We will assemble a welcome packet of information for those interested in and inquiring about Saint James. Our diverse community will be reached by paying careful attention to differing levels of comfort with various communication mediums.
- f. We will develop outreach strategies that are designed to specifically reach various aspects of the Lancaster community, such as new apartment and neighborhood developments, those who engage with our ministry online, as well as Lancaster's vibrant retirement communities.
- g. We will continue to encourage ushers, regular attendees, and church members to wear a name tag at services, events, and programs as an act of welcome and evangelism. We will likewise continue to assess the efficacy of this encouragement to ensure that this welcoming practice increases.
- h. We will continue in the assessment of the accessibility of our campus and community presences. As such we will appoint a vestry task force to produce a report and recommendations.

Leadership in Ministry

Effective ministry requires not only faith but also assessment, reflection and powerful design to account for the realities and contingencies of the communities we serve. As such, we propose the following:

- a. We will expand our use of Realm as a means of managing and tracking the participation of our ministries.
- b. We will increase our planning times for Urban Well programming to ensure that it effectively supports the mission of the congregation while also being accessible to the wider Lancaster community.
- c. We will further strengthen the promotion and branding campaigns for both the Urban Well and World & Early Music.
- d. We will align ministry design to the developed personas so as to ensure that promotional materials are effective and demographically appropriate.
- e. We will pilot variations of Urban Well and World & Early Music programming both for those who do not have access to discretionary time as well as youth audiences to increase the reach of these ministries.

Path to Financial Sustainability

The financial sustainability of Saint James depends on increased giving in three distinct types of gifts to the church:

- a. Regular, annual contributions of its members to support the operating costs of basic services of the church and routine maintenance of the campus.
- b. Special gifts for projects or purposes that are given by individuals to assist the church in special programs or capital projects.
- c. Gifts included in estate plans that add to the endowment of Saint James and allow the church to make long-range plans and secure its future.

As such, we have outlined the following:

- a. We will communicate clearly and faithfully the spiritual and practical need for regular and increased financial support.
- b. We will form a member/disciple committee to implement an expanded role for philanthropy. The philanthropy committee will work with the buildings & grounds committee to develop an expanded set of options for special (non-annual) gift support.
- c. We will expand education about planned giving that encourages individuals to make meaningful gifts within and beyond their lifetimes to strengthen the financial future of Saint James.

- d. We will develop and design effective and welcoming educational and marketing materials around planned giving.

In addition to these commitments, we have also developed two detailed plans to address the particular financial needs of our congregations. Specifically, these plans, included as appendices, address the specific needs required for the care and renewal of our historic campus (Appendix 1a, 1b, 1c, 1d) and a financial plan to balance the budget (Appendix 2). Regarding the latter, we have outlined the following as core objectives for implementing the financial plan:

- a. We will develop a straightforward presentation showing the current budget revenue and expenses as well as assumptions that will lead to a balanced budget going forward.
- b. We will build a budget in the knowledge that while new members will not necessarily mean new pledges and offerings, neither do new members add new expenses. Long-term growth will depend on programs that attract new members with young families and those who are returning to or seeking a church.
- c. We will work to increase contributions from existing members, new contributing members and special gifts for capital purposes.
- d. We will develop a specific capital budget that is funded on an ongoing basis without drawing directly from endowment.

3. Sustainably Maintaining our Historic Campus

As noted above, balancing our commitment to the maintenance of our historic campus and our call to financial responsibility presents challenges. These challenges are perhaps most clearly exemplified in the maintenance of our historic churchyard. Our churchyard is a testament to our enduring faith in the Resurrection of Christ, a visible record of our history and an asset beloved not only by our congregation but the wider Lancaster community. Caring for it also requires significant resources and therefore requires careful planning.

Specifically, the current endowment allocation for building and grounds support is set at \$150,000 annually. However, this allocation will not cover the immediate costs of maintenance within even the three-year planning window. Furthermore, as a significant community asset, it is the opinion of the committee that the churchyard should receive additional investment, especially in regard to future planning for improvement. As such, budget shortfalls should be addressed through special gifts.

While maintaining and improving the churchyard is a particular challenge, it is compounded by other significant buildings and grounds maintenance needs that also draw on the annual endowment allocation. In particular, the aging parish house will also require significant investment

in the coming years. Likewise, the church building itself, in particular its masonry and historic stained glass require careful and expert maintenance, adding yet another strain to the budget.

Our historic buildings and grounds, located for over 250 years in the heart of the city of Lancaster, are a gift, not a burden. However, just as following God is simultaneously a source a joy but not without challenges, we must likewise balance the celebration of our commitment to the preservation, revitalization and growth of our campus with God’s call to be generous and sustainable stewards of God’s gifts.

Additionally, as a historic and vital component of the downtown Lancaster cityscape, our LRP for our buildings and grounds should be aligned whenever possible to Lancaster City’s newly released comprehensive plan, Planning for our Future Lancaster. Specifically, our church can be a valuable asset for four of Lancaster’s City’s own goals: “Strengthening Neighborhoods,” “Connecting People and Places,” “Growing Greener” and “Building Community and Capacity.” While the needs of our congregation and those of the city will not necessarily always align perfectly, considering the need for city approval for many buildings and grounds improvements, it would be wise to find and emphasize opportunities for alignment.

F. Committee Members

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G. Appendices

1. Appendix 1a, b, c, d: Building & Ground Capital Expenditures
2. Appendix 2: Financial Plan
3. Appendix 3: Personas