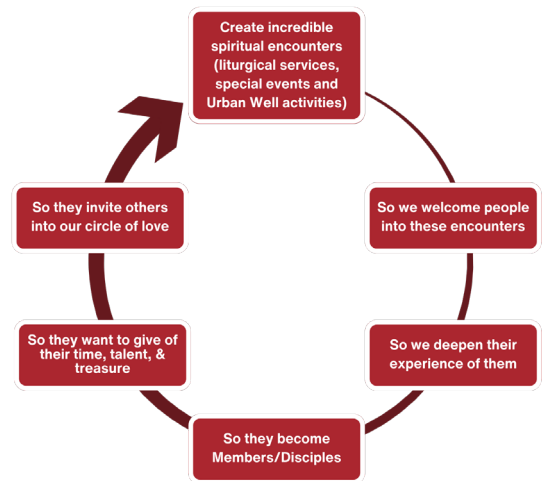


Appendix 3: Personas

Saint James is a vibrant, growing congregation in Lancaster PA that is creating a strategic plan to support our mission and offer radical hospitality and incredible spiritual encounters. The Long-Range Planning Committee has met twice monthly since April 2023 to draft a plan for community review. We used two tools to help us understand peoples’ needs:

The flywheel: The rector and vestry developed a flywheel to identify areas of focus: create incredible spiritual encounters, welcome people into them, deepen their experience so they become disciples and invite others.

Personas: By developing fictional personas, we take the perspective of the people we seek to serve. In 2022, the Membership Committee interviewed over 45 active and perspective members, and community members, to understand needs, motivations, and challenges to **participating in the Saint James community. We used those insights, and the Ministry report, to develop personas.**



What is a persona?

Personas are a fictional archetype, representing a key audience segment. Most personas include some combination of the following details:

- Demographics (age, gender, location)
- Where do they spend their time (family, job, volunteer work)
- Faith journey (previous or current faith/churchgoing status)
- Goals (why they go to church/what they hope to get out of a church)
- Philanthropic priorities
- Pain points (challenges in life that lead them to see value in joining)
- Triggers (why they might join a church for the first time or start to look for a new congregation)
- Dispositions (tech-savvy vs. old-fashioned, active vs. sedentary, natural leader vs. quiet participant)

Why develop personas?

- To grow, it’s important for Saint James to understand and align with our members and prospective members.
- Crafting personas is a central part of a strong marketing strategy, as they help growing churches establish a clear picture of their people.

- Personas help us take the perspective of the people we seek to serve.
- By building and maintaining them over time, we can focus our outreach, make deeper, more personal connections, and ultimately, know and serve our people in a more meaningful way.

Areas of focus

Based on demographic data and 2022 interviews from the Membership committee, we identified key audience segments in Lancaster County:

- Families with children – straight and LGBTQ
- Active retirees
- Retirees 80+
- People of color

There are other audience segments we should consider over time:

- Prospective families
- Teens
- Virtual attendees
- People in recovery

Personas/Flywheel at a Glance

	Persona	Attraction/Motivation	Challenges
Donna	Young family	<ul style="list-style-type: none"> • Opportunity to pause and reflect • Ritual, music, thought provoking homily • Christian education for children 	<ul style="list-style-type: none"> • Scarcity of time – balancing family and work • Don't know many other members
Dean	City professional	<ul style="list-style-type: none"> • Welcoming environment for his family • Contemplative prayer practices • Beauty of Saint James' indoor and outdoor sanctuary 	<ul style="list-style-type: none"> • Scarcity of time – balancing family and work • Not sure how to connect for volunteer opportunities
Stephen	Retiree	<ul style="list-style-type: none"> • See their lives in a meaningful context • "Real time" homily that speaks to issues of the day 	<ul style="list-style-type: none"> • Scarcity of time – travel and other activities
Laura	Retiree 80+	<ul style="list-style-type: none"> • Vibrant music program • Philanthropic opportunities 	<ul style="list-style-type: none"> • Mobility issues
Barb & David	Empty nesters	<ul style="list-style-type: none"> • Community • Impactful volunteer opportunities 	<ul style="list-style-type: none"> • Less connected/don't know as many people at Saint James as they used to • Many other volunteer and philanthropic opportunities to choose from



Donna, Young family

Donna is 34 years old with two small children. She is a physical therapist at a large hospital. Donna grew up in the Lancaster area.

Typical day: Her husband Rob travels regularly, so Donna takes care of getting her first grader on the bus, drives her youngest to day care, then she goes to work at the hospital. She finds the work rewarding but intense. Her mom picks up her youngest from day care in the afternoons and meets the first grader at the bus. After work Donna makes dinner, does laundry, and spends time with her kids.

Faith journey: Donna grew up going to church, but only started going as an adult after her first child was born. She wants her kids to have a strong moral foundation, and to understand their religious heritage. Donna and her husband visited several churches and started attending Saint James recently because of its traditional services and strong children, families and youth program. They see a few people with small kids regularly at Saint James, but they aren't sure how to get to know people from Saint James more deeply.

Effective communications: Donna enjoys reading the CYF and Headlines & Happenings emails and would like to see more about Saint James on social media, so she can share with her friends.

Philanthropic priorities: Donna feels strongly about environmental stewardship, and she and her family volunteer for outdoor projects occasionally with Lancaster Conservancy. She contributes to Saint James through ACH donation. She might consider volunteering for a one-off Saint James program, if it were on the weekend and her kids could participate.

Flywheel - Donna's Experience

Create Incredible Spiritual Encounters and Welcome People into Them

Donna and her husband are extremely busy professionals. They have a very young family, and like most families in their life stage, they live through and for their children. Their friends and activities are largely a result of their children's interests.

Donna and her husband find the environment at Saint James to be welcoming and appreciate the many activities Saint James offers throughout the year. But this appreciation collides heavily with their scarcity of time. For this couple, Saint James is a Sunday-only option, and nursery care is required for their youngest child. What's more, they both feel educating their children in a Christian tradition is of the utmost importance, so for them, attending Sunday service while their older child participates in "Children's Chapel" is a weekly occurrence.

Some of the other events at Saint James in which they regularly immerse themselves include the Christmas pageant and the annual Easter egg hunt. They would love an option for a traditional Sunday School so that they could both participate in something adult-focused and intellectually stimulating, like the Sunday Forum. But at present, it's simply not an option for them due to childcare needs. Donna and her husband look forward to the time when their children are old enough to participate in youth activities.

Deepen Their Experience

Given the couple's lifecycle stage and scarcity of time, Donna and her husband are thrilled with the 30-minute respite they get from their children every Sunday morning as the kids attend Children's Chapel and nursery. For them, Sunday morning worship is a weekly spiritual encounter. It is Sunday morning at Saint James, the ritual of the liturgy, the beauty of the music, and the thought-provoking message of the weekly homily that Donna and her husband experience Christ in their lives. They leave Sunday service pleased that their children not only had fun but continued in their Christian education. Most importantly, they leave refreshed, joyous and ready to tackle the busy week ahead.

So They Become Member Disciples

For Donna and her husband, discipleship means following the Christian path. On the way back from church every Sunday morning, they discuss what their daughter learned or did or talked about in Children's Chapel. Discipleship for this family means daily prayer – said at each meal, with the kids taking turns offering grace. It means bedtime prayers with the kids, and personally for Donna and her husband, it means personal prayer every evening prior to closing their eyes for what hopefully will prove to be a deep sleep. Donna likes to chronicle her prayers. Each morning she writes down what she's prayed for or what she needs to remind herself to pray for. She likes to periodically review her daily memos to see how Christ has indeed answered her prayers.

Giving More Time, Talent and Treasure

Donna and her husband feel the love of Saint James in their daily lives. The church family is so very important to them that they regularly include Saint James in their annual giving. They not only pledge, but every single week, they give through the online portal.

Donna regularly volunteers at Children's Chapel, although she found that the requisite certification for Safe Church along with the required background check consumed time she could ill afford. While she recognizes the need to ensure the safety of the church's most vulnerable congregants, she sees this certification process as a real bottleneck in finding volunteers for children's programming. Donna also regularly volunteers to help with the children's Christmas pageant.

Looking ahead, Donna sees a place to offer her talents and abilities in strategic thinking by serving on the church's governing body (vestry). But this is something that will simply have to wait until the kids are older. She just can't devote even one Tuesday evening per month for a meeting, let alone any additional committee work.

And Invite Others to Find Love

In their own small way, Donna and her husband practice discipleship simply by professing all of the good things happening at Saint James. "Their" church seems to somehow find its way into nearly every conversation throughout their social circles. They have invited friends to join them at both Sunday service and Children's Chapel. What's more, they have recruited two new families within the last year who now also regularly attend Sunday worship at Saint James.



Dean, City Professional

Dean is a forty-two-year-old social studies teacher who lives in the west end of Lancaster with his partner, Joe, and their two children. He grew up and went to university in Scranton.

Typical day: Dean leaves for school early. Joe is a real estate agent, and has a more flexible schedule, so he walks their fourth and seventh grader to school. In the summer, the family visits their cottage in Chincoteague, and enjoys boating.

Faith journey: Dean grew up in the Catholic church but left as soon as he went to college. He goes to church as an adult to feel closer to God, and to be a better person. He and Joe are looking for a strong and welcoming faith community, for themselves, and for their two children who are adopted and identify as Black and Hispanic.

Philanthropic/volunteer priorities: Dean is engaged with the alumni council at his university and feels that is his philanthropic priority right now (in addition to paying back his student loans). He also gives at church in the collection basket. He would like to become an usher but is not sure who to contact.

Effective communications: Dean appreciates Saint James' mostly digital approach to communications and checks the website and emails for updates and activities.

Flywheel - Dean's Experience

Create Incredible Spiritual Encounters and Welcome People into Them

Dean initially found Saint James when he was on an evening walk with his family, and they noticed a Pride Vigil announcement placed on the N. Duke Street sidewalk. He and his husband Joe had admired Saint James' campus, but they had not stepped inside any of its buildings, fearing that they might be similar to the homophobic, patriarchal places where they had worshiped in their youth. As the father of two children of color, Dean was glad to see many other people of color, LGBTQ+, and straight advocates participating in that initial Pride Vigil service.

Deepen Their Experience

As an educator and as someone who remains very engaged in his own alma mater, the 'School of Prayer' concept fully resonated with him. He renewed his own contemplative prayer practices and soon thereafter sought to deepen them through greater engagement in church life - initially as an on-line service participant and later as an in-person attendee with his family.

So They Become Member Disciples

Dean feels closest to God when he is immersed in nature. This was a key factor in his family's Chincoteague summer rental home search. At Saint James, Dean is drawn to the beauty of the church's indoor sanctuary, but he also values its outdoor churchyard sanctuary.

As folks were ordering commemorative Easter flowers this past spring, Dean wished that there had been a more sustainable option that permitted parishioners to give toward the purchase of native, pollinator-friendly plants that could later enhance Saint James' outdoor sanctuary. He and Joe want their children to live, play, learn and worship in ways that are more environmentally sustainable.

Giving More Time, Talent and Treasure

Dean plans to eventually serve as an usher. He hopes that his children will also form a spiritual foundation for their own lives and engage with other parish children from various local school districts. An active and engaging children, youth and families program is essential, and Dean is willing to help, but not lead, such efforts. A weekend, family-friendly, Lancaster City Habitat for Humanity restoration project is viewed as one possible opportunity to serve the local community while creating connections with other young Saint James families.



Stephen, Active Retiree

Stephen had a very successful career in business in New York and retired with his wife, Trish, to a retirement community after their daughter moved to Lancaster.

Typical day: Stephen and his wife are very involved at their retirement community, often mentoring new residents and helping them adjust to this new way of life. They help manage the community garden, and enjoy activities like yoga, regular group tours to interesting locations, and trips to visit their son and his family in Arizona.

Faith journey: Stephen is a cradle Episcopalian and was very active at an Episcopal church in New York. He enjoys a “real time” homily that speaks to issues of the day. He sees value in the men’s group, particularly to emphasize the importance to Christian men to lead by example, whether within church, business or family. He also enjoys opportunities for quiet contemplation and meditation.

Philanthropic priorities: Stephen gives via ACH, and he and Trish supported the Capital Campaign. He and Trish have included Saint James in their will. He also served on the board of several non-profits and remains connected to those organizations.

Effective communications: Stephen and Trish have a busy social calendar, planning trips several months in advance, so they appreciate the printed version of the Saint James calendar.

Flywheel – Stephen’s Experience

Create Incredible Spiritual Encounters and Welcome People into Them

All of Stephen’s activity could be nothing more than recreation unless there is something that makes it meaningful. He and Trish depend on their church —Saint James— to provide multiple opportunities for

them to see their lives in a meaningful context such as Mass on Sundays and the feeling of being closer to God, sermons that engage our faith in the workings of the world, Urban Well programs that involve study and learning, and volunteer activities that have an impact on others, such as Church World Services. Probably the most meaningful aspect of Saint James for Stephen is the opportunity to have interactions with the clergy.

Stephen heard about Saint James from someone in his retirement community. Before they moved to their new home, they traveled to Lancaster to look at the Episcopal churches in the city and found the historic churchyard and campus appealing.

It took a while for Stephen and Trish to “get noticed” at Saint James, which they experienced as a pain point. In comparison, their new retirement community invested a good deal of thought into making sure they were introduced to others and to the programs and resources available to them.

Deepen Their Experience

Stephen has lived and worked in the New York City metro area, so he appreciates both the urban amenities of Lancaster and the planned tranquility of in their new community. The urban location is an asset for Stephen because it connects him to the world and to the city. He and Trish would attend a Saint James program or worship service at their retirement community, and they also like the richness of city life and diversity of peoples by age, color, ethnicity, language, etc.

So They Become Member Disciples

Energetic, Creative Energy: Stephen and Trish are energetic themselves and attracted to the energy of a community or activity. They do not want to be bored or idle. It is likely that their new retirement community provides many options for them because local retirement communities seek to attract this type resident. Saint James will appeal to Stephen only if it has activities, such as a well-organized Men’s Group, or Urban Well, or service mission program that is stimulating. When children or grandchildren visit, Stephen would like to include them in Saint James events and activities.

Giving More Time, Talent and Treasure

Stephen and Trish plan their travel at least 9 months ahead of time, often more than a year. They are interested in the travel/spiritual journeys sponsored by Saint James, particularly as it would give them time with clergy and fellow congregants.

Stephen is highly scheduled. Time is more valuable to him than money since he has enough money but never enough time. Although the commute from their retirement community is only 30 minutes door-to-door, it has to be worth it. A system of digital calendar reminders for activities and programs would benefit Stephen. A digest of programs that have taken place with links to recordings may also be beneficial so that he can participate asynchronously. The option of a Saturday evening service followed by dinner in Lancaster is appealing for Stephen and Trish.

And Invite Others to Find Love

Culture: Stephen and Trish like the music program at Saint James. They like that others in the congregation are cultured. Sponsorship of world music programs and other visiting artists makes them feel they are part of a larger community and a more impactful part of Lancaster.



Laura - 80+ Retiree

Laura lives in a high-rise condo in Lancaster. She is an eighty-year-old black woman who moved to Lancaster eight years ago, after her husband passed away. She lived for many years in Washington, DC raising a family and working as an attorney for the US Department of Housing & Urban Development.

Typical day: She starts her day with an online yoga class, then visits neighbors for coffee and socialization. A physical therapist visits to help her with mobility issues after a recent fall.

Faith journey: Laura was raised Episcopalian. She came to Saint James on the recommendation of friends and is attracted by the progressive message and social justice initiatives. Her involvement in her faith community is important to her for spiritual values and for learning and being involved with parishioners and the opportunities the church provides. Hearing Mother Shayna preach, the vibrant music and meaningful worship are the reasons Laura is exploring joining Saint James. She also embraces the Diversity and Inclusion Statement she read on the website. Laura has not yet joined Saint James.

Philanthropic/volunteer priorities: Laura is an active member of the Downtowners and has helped other members with errands and visits. Now she is relying on Downtowners to help her as she manages mobility and hearing challenges.

Effective communications: Laura is very grateful that Saint James can enable her to participate in services and programs via Zoom and livestream, and she depends weekly Headlines & Happenings more and more.

Flywheel – Laura’s Experience

Create Incredible Spiritual Encounters and Welcome People into Them

Laura attends the 10:30 Sunday Service. On days she is struggling with her mobility issues she watches the service via livestream. She also attends yoga via Zoom. She read in Headlines & Happenings that yoga is offered at Saint James on Wednesday and Friday mornings. She decided to attend one of the sessions but realized the yoga studio is in the lower level of the Parish House. Without an elevator she is not able to access the studio. She continues yoga via Zoom.

Laura is very interested in the vibrant music program at Saint James. Laura attends both the World & Early Music Programs at Saint James and the Saturday Night Masses. With the hearing devices in the church, ramps and handicap parking, she attends these events with her Downtowner friends.

As a Lancaster Downtowner, Laura is a part of a network of people who share a common passion for downtown Lancaster as the community of choice for their senior years. Downtowners include individuals who have already retired and are living in the city, others who anticipate living downtown for their senior years and younger people supportive of the Downtowners' initiative. Several Downtowners are members at Saint James, and they live very close to one another. They arrange to attend worship together.

Deepen Their Experience

Laura read about volunteer opportunities at Carter MacRae Elementary School in Headlines & Happenings. With her commitment to downtown, she contacted Saint James about volunteering. She was introduced to a Saint James parishioner who has volunteered for many years at Carter MacRae. She guides Laura through the requirements of Safe Church and explains her responsibilities as a classroom volunteer.

So They Become Member Disciples

Laura is considering membership at Saint James, but she does not see a clear path to membership. Laura feels like a member since she regularly worships at Saint James and has started to volunteer at Carter MacRae as a Saint James parishioner. Laura had talked with Father David about membership, and she saw a group of new members welcomed from the altar at a recent service. Laura eventually contacted Saint James and completed the process to become a member.

Giving More Time, Talent and Treasure

Laura's health is limiting her volunteer time to one morning a week. She would like to do more for Saint James. She is required to take a distribution from her IRA on an annual basis and read about the Tower Society on the website. She called Nicolette to discuss her philanthropic goals. Laura prayerfully decided to make an annual contribution from her IRA, name Saint James as one of the beneficiaries of her IRA and join The Tower Society. She was recently invited to a gathering for The Tower Society that deepened her commitment to Saint James.

And Invite Others to Find Love

Laura no longer drives, but one of the benefits of being a Downtowner is helping each other with rides. Laura enjoys her weekly volunteer role at Carter MacRae and has told several other Downtowners about her meaningful time with a group of third graders who are benefiting from her weekly reading sessions. One of the Downtowners has attended Saint James and offers to drive Laura and another woman. At the end of the school year there are three reading volunteers at Carter MacRae and they regularly attend Saint James together.

Laura spoke with the Downtowners newsletter editor to feature an article about Carter MacRae volunteer opportunities and the World & Early Music Concerts at Saint James.



Barb and David – Empty Nesters

Barb and David reared two children who are now in their twenties and living in a different community. When their kids were young, they were very involved in the youth activities at Saint James.

Typical day: They are both very comfortable in their mature professional careers working a typical workweek, but still about 10 years from retirement. Ever since their youngest left home, they often enjoy meeting after work to attend a social event and have dinner before going home for the evening.

Faith journey: Barb grew up in Catholic and attended parochial school, David grew up in the Jewish faith. Once their children were born, they decided to rear their children in the Episcopal faith at Saint James. Although David remained faithful to his Jewish faith, as a parent, he was fully supportive of the children and their involvement at Saint James. But since their children are grown, Barb and David have not made their own faith connections and find they do not know as many people in the pews as they once did and have not found reasons to engage.

Effective communications: Barb and David have an active social life and use regularly check the Events page on saintjameslanaster.org to plan their weekly activities.

Philanthropic/volunteer priorities: They have begun to fill their valuable spare time. The valuable time, talents and monies once given primarily to their children is now available to share with their community, but they want to make sure they are selecting the right purpose. There are several opportunities to volunteer and serve on Boards related to their professional careers.

They are still young and in good health, their kids' college education is paid, their children have begun their own careers and their mortgage is paid. They're at a very comfortable point financially.

Flywheel – Barb's and David's Experience

Create Incredible Spiritual Encounters and Welcome People into Them

A few weeks ago, a couple they were friends with through their children's youth activities at Saint James invited them to join them at a Saturday night mass and dinner afterward. To Barb's surprise, she felt very much at home in the pew, immediately related to sermon and felt good to be re-engaged at Saint James.

Deepen Their Experience

Barb and David have frequent conversations about the shape of their lives in retirement/semi-retirement and feel that spiritual fulfillment can be an important component and often observe other people who have successfully transitioned from 9-5 work lives.

Giving More Time, Talent and Treasure

Barb and David are interested in serving in the community. They are looking for organizations with a strong, well-articulated vision and decisive leadership, because they want to choose opportunities to have a measurable impact.

And Invite Others to Find Love

Their friends brought up an opportunity to join them on a mission trip to repair homes in Appalachia and Barb and David are giving thought to joining Father David on his next trip to Israel.