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.”

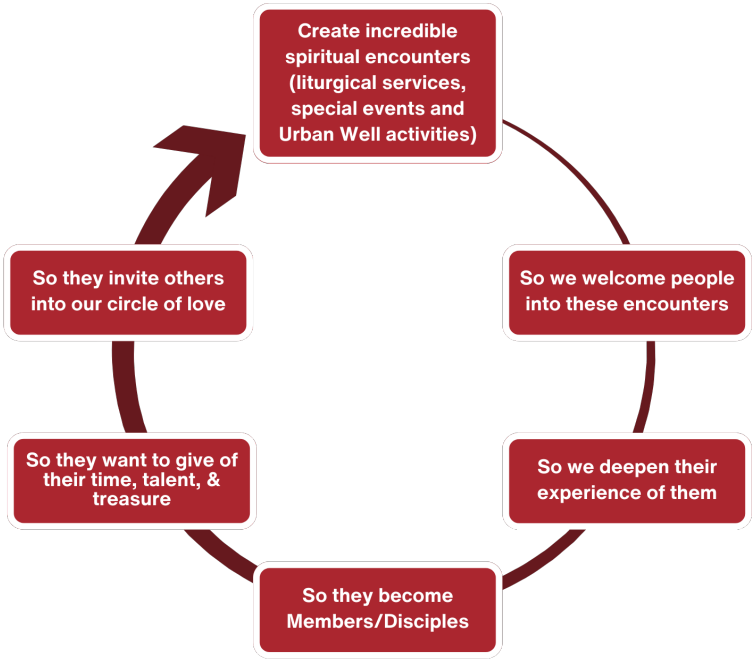


Figure 1

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

Carrie Bolton
Gene Clark
Bernadette Gardner, Senior Warden
John Hershey
Maryann Marotta
Nicolette Norris, Parish Executive
Fr. David Peck, Rector
Virginia Robinson
Michael Schmid
Kit Slaugh
Lewis Thayne, Chair

Writing Credits: Andrew Dyrli Hermeling
Digital Design and Editing: Nancy LeVasseur

G. Appendices

1. Appendix 1a, b, c, d: Building & Ground Capital Expenditures
2. Appendix 2: Financial Plan
3. Appendix 3: Personas
4. Appendix 4: August 1, 2023 John Hershey Presentation: Implications of Lancaster City Planning on Saint James

Appendix 1b

LRP Building & Ground Budget With HIG

Key Focus Areas

Preservation of our Building Envelopes & Churchyard
Safety on site and in our buildings
Mitigation of storm water
Technology to support programming and staff efficiency
Upgrades to building systems with focus on energy conservation

Highest / Immediate Need
Medium / 3-5 year Need
Lowest Need

	2023 Budget	2024 Budget	2025 Budget	2026 Budget	2027 Budget	Remaining	
Annual Budget Allowance	150,000	150,000	150,000	150,000	150,000		
Carry-over allowance from prior year(s)	96,273						
Proposed Gifts	117,846						
Gifting - (while alive)							
Gifting - (estate)							
Capital Campaign, Phase 3 Churchyard Improvements		250,000					
Total Budget	**364,119**	**400,000**	**150,000**	**150,000**	**150,000**		
Needs to be Addressed		**4% Annual Escalation results in Diminishing Funding**					**Recommendations for Special Gifts**
Capital Funds - Annual B&G Budget	150,000	150,000	150,000	150,000	150,000		
Major Studies:							
ADA accessibility (Campus wide)			2,000				
Campus Wide - Masonry repairs			1,000				
Campus Wide - Roofing repairs			2,500				
Campus Wide - Painting schedule			2,000				
Campus Wide - Standardized signage			1,500				
Churchyard:							
Tree Trimming		3,600			3,600	3,600	
Signage (Wayfinding)			3,000				3,000
Signage (Educational - Include w Churchyard Plan)							
Water Mitigation	12,000						12,000
Repair/Replace Stormwater Piping			5,000	5,000			10,000
Monument Care & Conservation						250,000	250,000
Install screening at HVAC Equipment			8,000				8,000
Implementation of Churchyard Planning		250,000			100,000	150,000	500,000
Concrete:							
Masonry (Bricks & Mortar Repairs):							
Buildings:							
Cherry Street						134,500	
Church (Lime Mortar re-pointing)	108,853	24,000	12,000		12,000	204,000	360,853
Cloister (clean efflorescence)	2,500						
Parish House	7,069					471,500	478,569
Rectory (completed under 275th Capital Campaign)							
Rector's Garage	2,869					20,000	
Warehouse (hold for CWS project)						0	
Cemetery Walls:						28,500	
Relay Walks (Include w Churchyard Plan):				1,000		1,000	2,000
Metal:							
Metal Railings (Fall Protection):	12,790						
Carpentry:							
Secure AV Controls Cabinet in Sancturary	12,000						
Thermal Envelope:							
Moisture Barrier							
Church: Boiler Room			12,000				
Parish House:							
Boiler Room					6,000		
Archives						6,000	
Roofing (including gutters & downspouts)							
Cherry Street						7,500	
Church	25,890		13,000			145,610	
Parish House	1,500					97,000	
Rectory	3,840						
Rector's Garage						7,000	
Warehouse(hold for CWS project)					0	0	
Doors & Windows:							
Stained Glass Repairs & Replacement: Church	30,000	45,000	15,000	15,000	15,000	44,817	164,817
General Door & Windows							
Cherry Street	4,600						
Church	11,285					12,000	
Parish House							
Rectory (Storm windows)	28,000						
Hardware				8,000		8,000	

	2023 Budget	2024 Budget	2025 Budget	2026 Budget	2027 Budget	Remaining	
Interior Finishes:							
General Improvements							
Parish House (16,800 sf)						392,800	392,800
Ground Floor (corridor flooring, ceiling, lighting)				117,216			117,216
First Floor (corridor flooring, ceiling, lighting)			27,584				27,584
Second Floor							
Third Floor							
Flooring							
Church							
Stain Chancel steps to match original						2,500	
Ceilings							
Chapel							
Chapel sound deadening panels			5,000				
Church							
Restore ceiling artwork in Aspe						120,000	
Patch & Paint							
Interior: Church Nave		60,090					60,090
Exterior: Church (high reach wood trim)	25,000						
Furnishings:							
Chancel Furnishings			20,000				20,000
Replace Pew Cushions						20,000	
AV Mobile Carts	5,744						
Kitchen Equipment:							
Elevators (in each Building):							
Parish House						160,000	160,000
Rectory						110,000	
Warehouse (hold for CWS Project)							
Special Equipment:							
Bell Wheel							
Organ							
Plumbing:							
Infrastructure							
Fixtures	3,000					52,500	
Sprinkler System Repairs:	2,500					12,500	
HVAC Improvements/Repairs:							
Boilers						30,000	
Chillers	8,500						
Air Handlers	7,675						
Steam Valves							
Fireplace Flues	275						
Temperature Controls	1,500						
Air Quality	4,500						
Replace Coolant							
Electrical Improvements/Repairs:							
Power:	4,000					25,000	
Lighting:							
Interior: Chapel Lighting			15,000				
Exterior:						15,000	15,000
Safe Exterior: Church (high reach wood trim)							
Alarm Systems						2,000	
Keypads	1,500						
Cameras	12,000						
Technology:							
IT Infrastructure / Servers	7,500	2,500	2,500	2,500	2,500	15,000	
AV							
Voice							
Contingency:	17,229	14,810	2,916	1,284	10,900		
Total Expenses	**364,119**	**400,000**	**150,000**	**150,000**	**150,000**	**2,548,327**	**2,581,929**
*** Escalated through 2026 for Special Gifts Budget**							**3,020,492**

Reference:		
Gross SF Areas of Each Building:		
Cherry Street Cottage		
Basement		GSF
1st Floor	711	GSF
2nd Floor	711	GSF
Church		
Ground Floor (Occupied)	1,640	GSF
Ground Floor (Unoccupied)	2,714	GSF
Ground Floor (Crawl Space)	434	GSF
1st Floor	7,794	GSF
Parish House		
Ground Floor (Occupied)	3,663	GSF
Ground Floor (Unoccupied)	563	GSF
1st Floor	7,260	GSF
2nd Floor	3,800	GSF
3rd Floor	2,164	GSF
Rectory		
Basement	1,545	GSF
Basement (Crawl Space)		
1st Floor	2,063	GSF
2nd Floor	1,810	GSF
Porch	253	GSF
Attic (Unoccupied)	552	GSF
Rector's Garage	470	GSF
Warehouse		
Basement	95	GSF
1st Floor	2,970	GSF
2nd Floor	2,970	GSF

Site:		
Main Campus	54,180	GSF
Warehouse Site	7,720	GSF

Appendix 1a

LRP Building & Grounds Budget

Key Focus Areas

Preservation of our Building Envelopes & Churchyard
Safety on site and in our buildings
Mitigation of storm water
Technology to support programming and staff efficiency
Upgrades to building systems with focus on energy conservation

Thermometer Rating on Needs

	Highest / Immediate Need
	Medium / 3-5 year Need
	Lowest Need

	2023 Budget	2024 Budget	2025 Budget	2026 Budget	2027 Budget	2028 Budget	2033 Budget
Annual Budget Allowance	150,000	150,000	150,000	150,000	150,000	150,000	750,000
Carry-over allowance from prior year(s)	96,273						
Proposed Gifts	117,846						
Gifting - (while alive)							
Gifting - (estate)							
Capital Campaign, Phase 3 Churchyard Improvements		250,000					
Total Budget	**364,119**	**400,000**	**150,000**	**150,000**	**150,000**	**150,000**	**750,000**
Needs to be Addressed		**allow 4% Annual Escalation?**					
Capital Funds - Annual B&G Budget	150,000	150,000	150,000	150,000	150,000	150,000	750,000
Major Studies:							
ADA accessibility (Campus wide)			2,000				
Campus Wide - Masonry repairs			1,000				
Campus Wide - Roofing repairs			2,500				
Campus Wide - Painting schedule			2,000				
Campus Wide - Standardized signage			1,500				
Churchyard:							
Tree Trimming		3,600			3,600		3,600
Signage (Wayfinding)			3,000				
Signage (Educational - Include w Churchyard Plan)							
Water Mitigation	12,000						
Repair/Replace Stormwater Piping			5,000	5,000			
Monument Care & Conservation						250,000	
Install screening at HVAC Equipment			8,000				
Implementation of Churchyard Planning		250,000			100,000	150,000	
Concrete:							
Masonry (Bricks & Mortar Repairs):							
Buildings:							
Cherry Street						134,500	
Church (Lime)	108,853	24,000	12,000	12,000	12,000	192,000	
Cloister (clean efflorescence)	2,500						
Parish House	7,069					471,500	
Rectory (completed under 275th Capital Campaign)							
Rector's Garage	2,869					20,000	
Warehouse (hold for CWS project)						0	
Cemetery Walls:						28,500	
Relay Walks (Include w Churchyard Plan):				1,000			1,000
Metal:							
Metal Railings (Fall Protection):	12,790						
Carpentry:							
Secure AV Controls Cabinet in Sancturary	12,000						
Thermal Envelope:							
Moisture Barrier							
Church: Boiler Room			12,000				
Parish House:							
Boiler Room					6,000		
Archives				6,000			
Roofing (including gutters & downspouts)							
Cherry Street						7,500	
Church	25,890		13,000			145,610	
Parish House	1,500					97,000	
Rectory	3,840						
Rector's Garage						7,000	
Warehouse(hold for CWS project)					0	0	
Doors & Windows:							
Stained Glass Repairs & Replacement: Church	30,000	45,000	15,000	15,000	15,000	44,817	
General Door & Windows							
Cherry Street	4,600						
Church	11,285					12,000	
Parish House							?
Rectory (Storm windows)	28,000						
Hardware				8,000		8,000	

	2023 Budget	2024 Budget	2025 Budget	2026 Budget	2027 Budget	2028 Budget	2033 Budget
Interior Finishes:							
General Improvements							
Parish House (16,800 sf)						467,139	
Ground Floor				54,945			
First Floor (corridor flooring, ceiling, lighting)			15,516				
Second Floor							
Third Floor							
Flooring							
Church							
Stain Chancel steps to match original						2,500	
Ceilings							
Chapel							
Chapel sound deadening panels			5,000				
Church							
Restore ceiling artwork in Aspe						120,000	
Patch & Paint							
Interior: Church Nave		60,090					
Exterior: Church (high reach wood trim)	25,000						
Furnishings:							
Chancel Furnishings			20,000				
Replace Pew Cushions						20,000	?
AV Mobile Carts	5,744						
Kitchen Equipment:							?
Elevators (in each Building):							
Parish House						160,000	
Rectory						110,000	
Warehouse (hold for CWS Project)							
Special Equipment:							
Bell Wheel							?
Organ							?
Plumbing:							
Infrastructure							?
Fixtures	3,000						52,500
Sprinkler System Repairs:	2,500					12,500	
HVAC Improvements/Repairs:							
Boilers				15,000		15,000	
Chillers	8,500						
Air Handlers	7,675						
Steam Valves							?
Fireplace Flues	275						
Temperature Controls	1,500						
Air Quality	4,500						
Replace Coolant							?
Electrical Improvements/Repairs:							
Power:	4,000					25,000	
Lighting:							
Interior: Chapel Lighting			15,000				
Exterior:				15,000			
Safe Exterior: Church (high reach wood trim)							
Alarm Systems							2,000
Keypads	1,500						
Cameras	12,000						
Technology:							
IT Infrastructure / Servers	7,500	2,500	2,500	2,500	2,500	2,500	12,500
AV							?
Voice							?
Contingency:	17,229	14,810	14,984	15,555	10,900		
Total Expenses	**364,119**	**400,000**	**150,000**	**150,000**	**150,000**	**2,503,066**	

Reference:		
Gross Square Foot Areas of Each Building:		
Cherry Street Cottage		
Basement		GSF
1st Floor	711	GSF
2nd Floor	711	GSF
Church		
Ground Floor (Occupied)	1,640	GSF
Ground Floor (Unoccupied)	2,714	GSF
Ground Floor (Crawl Space)	434	GSF
1st Floor	7,794	GSF
Parish House		
Ground Floor (Occupied)	3,663	GSF
Ground Floor (Unoccupied)	563	GSF
1st Floor	7,260	GSF
2nd Floor	3,800	GSF
3rd Floor	2,164	GSF
Rectory		
Basement	1,545	GSF
Basement (Crawl Space)		
1st Floor	2,063	GSF
2nd Floor	1,810	GSF
Porch	253	GSF
Attic (Unoccupied)	552	GSF
Rector's Garage	470	GSF
Warehouse		
Basement	95	GSF
1st Floor	2,970	GSF
2nd Floor	2,970	GSF

Site:		
Main Campus	54,180	GSF
Warehouse Site	7,720	GSF

Appendix 1c

Saint James Episcopal Church
Buildings & Grounds Committee
Multi Year Priorities List
Update: 02/13/2023

Yellow: changes since previous report
Orange: work completed
Gray: Suggested for Year 2023 PPE Budget

Priorities Codes: A = plan in budget year B = consider in next 2-3 budget years C = consider in future years D = activity and date uncertain

	Project	Entry Date	Target Date	Estimates cost	Estimates source	Funding Source	Approved V; R; B&G	Bid cost	Vendor	St James Contact	Completion Date	Notes	Links to Proposals
	MISC. / GENERAL COMMENTS												
	Headlines & Happenings: create suggestion lists	12/1/2016		?	?	?							
	Historical guide: create for smart phones (church yard and sanctuary and chapel)	3/10/2014											
	Insurances:												
	Artifacts & Collections:												
	current inventories: assemble and update	6/6/2019	2020-22	?	?	?	V, B&G						
	current inventories: decided what appraisals needed	6/6/2019	2020-22	?	?	?	V, B&G					Does Leo Shelly have inventory?	
00	**ANNUAL MAINTENANCE**												
00.01	Create annual maintenance plan: calendar & documents:	1/29/2015	Annual	?	Burton	Oper Budg			Burton				
00.02	Benches: linseed oil teak	8/8/2016	Annual			Oper Budg							
00.03	Brick walkways: assess, clean, repair & raise	3/10/2014	Annual			Oper Budg							Churchyard
00.04	Shrubs: Inspect, treat, trim	6/9/2016	Annual	?	?	Oper Budg						Investigate grant opportunies (15-40K): Chesapeake Interfaith Group, Main E-Church, Lancaster County Conservancy	
00.05	Trees: Inspect, treat, trim	1/29/2015	Annual	?	?	Oper Budg			Bartlett	Burton			
00.06	Roofing Inspection: Sanctuary, Warehouse, Rectory	12/1/2021	2021	2,500.00	Delta Slate	PPE			Delta Slate	Burton		Annual allowance for critical repairs	Delta Slate Company Corespondence Church Roof 12 2021
	Structural Assessment: Church Roof	12/1/2021	2022						JBA	Burton			
00.07	Address all leaks as they occur	6/9/2016	Annual	?	Burton	Oper Budg			Sykes				
00.08	Window cleaning	5/30/2019	Annual	?	?	Oper Budg							
00.09	Key/FOB List: update annually	7/6/2018	Annual	?	?	Oper Budg							
	Locks: change every 8-10 years	4/15/2019	2021-24	?	?	PPE							
00.10	Kitchen Hood: maintanence - schedule cleaning	9/18/2018	Annual	0.00	Burton	Oper Budg							
00.11	fire marshall - annual inspection	10/15/2018	Annual	0.00	Burton	Oper Budg			Marvin Kelley	Burton			
00.12	Elevator: Conduct annual inspections	6/1/2020	Annual		Kencor & Apex	Oper Budg				Burton			
00.13	Pest control inspections:	3/10/2014	Annual			Oper Budg	B&G	90/yr.	Kirchner	Burton	Annually	All properties to receive Annual Termite Inspection	
	Cherry Street House					Oper Budg						Termite Inspection	
	Church building	5/10/2021	2021	3,500.00	Burton	PPE	B&G	3,500.00	Kirchner	Burton		Termite Treatment	
	Parish House					Oper Budg						Termite Inspection	
	Rectory	5/10/2021	2021			Oper Budg				Burton		Termite Inspection	
	Warehouse	5/10/2021	2021			Oper Budg				Burton		Termite Inspection	
00.14	Testing of Fire Extinguishers		Annual						BFPE				
00.15	Check batteries and contacts for emergency lighting												
00.16	Filter Changing, etc		Annual										
00.17	Clean dryer venting (Rectory, Cherry Street Cottage)		Annual										
	Closet cleaning		Annual										
	Kitchen Appliance testing		Annual						BFPE				
01	**STUDIES / ASSESSMENTS / SURVEYS**												
	Master Plan: Total Campus	3/8/2021, updated 5/10/2021										Visual and/or physical connection of Sanctuary, Rectory, Parish House, planning to begin 2022	
01.02	Campus Master Plan: include defined concept corridors	12/7/2017	2019-21	?	?	?							
	Campus Wide - Masonry repairs												
	Campus Wide - Roofing repairs												
	Campus Wide - Painting Schedule												
01.03	Church Sanctuary: Total renovations: create plan	12/7/2017		?	?	?							
01.04	Parish House renovations: create future use plan/program	12/7/2017	2020-22	?	?	?							
01.05	Main entrances: consider 1 or 2	12/7/2017											
01.06	Kitchen Appliances: assess condition	12/2/2016											
01.07	Warehouse: Include assessment of future use	6/9/2017	2019-22	?	?	?							
01.08	Program: Contemplative Prayer Center: design and locate	1/28/2017	2020-22	?	?	MMD							
01.09	**Church Yard Strategic Plan:**											**planning to begin 2022**	
	Historic conservation & renewal: study	8/17/2015	2020-22	?	?	Oper Budg							
	Guidelines for church & community use: create	8/20/2017	2020-22	?	?	Oper Budg				Rector			
	City rain garden plan: conservation planning	8/20/2017	2020-22	?	?	Oper Budg							
	Environmental Stewardship Grant	3/8/2021	2021-22							Harris		$15K-40K Grant available through Main E-Church funds	
	Vegetation master plan: create	8/17/2015	2020-22	?	?	Oper Budg							
	Planting schedule: Lancaster Conservancy Grant	3/1/2021	2021-22	0.00						Harris		up to 15 trees and shrubs available through grant opportunity, a planting schedule would be needed	
01.10	**Campus Security:**												
	Total campus plan: create multi-year	4/15/2016	2019-22	5,000.00	?	PPE			Choice				
	Major plans: for police, and for fire	4/15/2016	2019-22	?	?	?							
	Cameras: study and design campus wide system	8/23/2018	2019-22	?	?	PPE			?			Determine highest priorities: 1) Parish House level on hallway, 2-5) Churchyard, 6-7) Church basement hallway, 8) Rectory backyard, 9) Church Duke Street door, 10) Church Orange Street door, 11) Parish House rear door, 12) Parish House side door, 13) Parish House Forum Room	
	Campus ADA Report:												
	Total campus plan: create multi-year	9/13/2021											
01.11	**Campus Signage:**												
	Total campus plan: create multi-year	4/15/2019	2020-22	5,000.00	?	PPE			MM Archt			emergency, directions, deterant, ADA, expected behaviors?	
	Signage: standardize, update & replace	3/10/2014	2019-22	15,000.00	?	PPE			MM Archt				
	Signage: post all emergency information	4/15/2019	2019-22	?	?	PPE						fire alarms, exit lights, fire extinguishers, gathering stations; update inventory of existing information	
	Signage: decide computer and physical	4/15/2019	2019-22	?	?	PPE			MM Archt				
01.12	Web site floor plan: create	5/6/2016	2019-22	?	?	PPE				?		assist visitors to church grounds and buildings; show history changes; downfall to plan on web brings security concerns	
	Monuments:												
01.14	Assessment list: update conditions	1/5/2017	2020-22	?	?	All Saints			Grave Concerns			Paul Hoffer and Leo Shelly involved in prior assessments	
01.15	Brick base: repair selected one	12/1/2016	2020-22	?		All Saints							
01.16	Inventory list: create electronically	1/5/2017	2020-22	?		All Saints							
	Update grave records	7/6/2018	2020-22	?	?	Oper Budg							
01.17	Stored Monuments/Tombstones: decide	11/10/2014	2020-22	?	?	?							
	Communications & worship: analyze future needs:	5/23/2020	2021	?	?	?							
01.18	create vetting process similar to Sacristy and Rectory												
01.19	assess current equipment and software; needs for future												
01.20	future technology uses: lpads to shut-ins, use of photography												
	Misc. Planning Documents												
01.21	ADA plan: create for each building in future projects	3/10/2014	Monitor	?	?	?							
01.22	Air quality: monitor for mold, allergies	6/22/2017	2020-22	?	?	Oper Budg							

		Date	Date	cost	source	Source	V; R; B&G	cost		Contact	Date		
01.23	Amortization schedule: create for campus	2/8/2018				Oper Budg							
01.24	Lighting plan: create & upgrade	3/10/2014	2020-22	50,000.00	Claire Solutions	PPE						Multi-year spending plan	
01.25	Extract record data from Studies, Assessment & Surveys	7/24/2017	2020-22			0							
02	**SITE / CHURCHYARD**												
	Stormwater Management:												
02.01	Grading: change to direct water away from Chapel wall	8/23/2018	2021	?	?	PPE				Burton		Roof leaks to be investigated first, site survey will be needed. Possible tie-into Rectory storm line? Upon review it appears that the d.s. boots may have allowed debris to build and block the water from draining .	
02.02	Cherry Street House: Drain pipe: repair terra cotta	12/2/2016											
	Trees, Plantings, Landscape:												
	Pavement, sidewalks:												
02.08	Rector's Garage: Repair / replace broken concrete	3/8/2021		?	Warfel?	PPE						Concrete is broken	
	Monuments:												
02.09	Clean	7/6/2018	2020-22	?	?	Oper Budg						Effort must be coordinated with Rector's vision for Church Yard.	
02.10	Maintenance & repair	3/10/2014	2020-22	?	Grave Concerns	All Saints				Burton		Roth Cemetery Serv	
02.11	Tombstones stored following Cloister construction	1/29/2015	2020-22	?		All Saints							
	Screening, Fencing, Protection:												
02.12	Screen to hide HVAC equipment: design	8/17/2015		?	?	PPE							
02.13	Utility room underground: consider	12/7/2017										possible housing of HVAC equipment for Chapel and Rectory	
02.14	Repair / replace fencing along Cherry Street	3/8/2021				PPE							
	Signage:												
02.16	Install Historical Display along Orange Street	3/8/2021	2021	?	?	PPE				R. Harris		$3000 Grant for Historical Marker, 275th display installation planned	
02.17	Orange Street History Sign: create 4 @ $2,000 each	6/15/2019	2021	8,000.00	?	PPE	R		?	Peck			
02.18	Children's garden: install a sign	8/17/2015	2020-22	?	?	Oper Budg							
03	**CONCRETE**												
03.01	Warehouse Parking lot wall: make safety repairs to end	2/10/2020	2021	?	?	Oper Budg	B&G						
04	**MASONRY**												
	Cemetery Walls:												
04.04	North (both sides and cap)	4/5/2016		28,500.00	D. Sykes 3/16							Best condition of all walls, not cleaned, mortar doesn't match other walls	
	Sub-Total Cemetary Walls:			28,500.00									
	Cloister:	4/5/2016		0.00	D. Sykes 3/16								
04.06	Possible scaling on pillars: assess	9/18/2018		price?	D. Sykes	?						Some repair done to masonry joints, chemical damage due to snow removal. Maintenance issue, multiple application process. (Outside chapel wall)	
	Cherry Street house:												
04.07	East	4/5/2016		25,000.00	D. Sykes 3/16								
04.08	West	4/5/2016		10,000.00	D. Sykes 3/16								
04.09	North	4/5/2016		48,000.00	D. Sykes 3/16								
04.10	South	4/5/2016		51,500.00	D. Sykes 3/16								
04.11	Gap between House and Rector's Garage	3/4/2021										Build apron up with tar, brings water in off the alley	
	Sub-Total Cherry Street House:			134,500.00									
	Church:												
04.12	Interior Brickwork: remove efflorescence	3/10/2014	2020-22	?	?	?							
	Tint grout at Chancel Floor												
04.13	East wall (with chimney from intersect w Apse)	1/27/2022	2021-22	7,274.00	Witmer Restoration	PPE, Gift		7,274.00	Witmer Restoration				St. James Masonry Repairs - Whitmer Restoration.pdf
	North wall above Narthex roof	1/27/2022	2021-22	3,423.00	Witmer Restoration	PPE, Gift		3,423.00	Witmer Restoration				
	Duke Street Stairs			5,150.00	Witmer Restoration	Gift					2023		
*	West wall (allow for $20,000)	1/27/2022	2021-22	4,928.00	Witmer Restoration	PPE, Gift		4,928.00	Witmer Restoration			Previously completed the bell tower (first 20' height of the wall), orange street entrance, steps)	
	South Elevation	1/27/2022	2021-22	26,508.00	Witmer Restoration	PPE, Gift		26,508.00	Witmer Restoration				
	Orange Street Stairs			5,104.00	Witmer Restoration	Gift		5,104.00	Witmer Restoration		2023		
	Repair base of masonry pier in basement	9/13/2021							In-house		2021		
	Aspe:												
	Sub-Total Church:			52,387.00									
	Bell Tower:												
04.17	Upper portions of Bell Tower exterior	1/27/2022	2021-22		Witmer Restoration	PPE, Gift		0.00	Witmer Restoration				St. James Masonry Repairs - Whitmer Restoration.pdf
	North and West elevations up to belt			98,599.00	Witmer Restoration 7/22	Gift		98,599.00	Witmer Restoration		2023		
	South and East elevations, all work above belt			210,000.00	Witmer Restoration 6/23	PPE							
	Sub-Total Bell Tower:			308,599.00									
	Parish House, Original												
04.18	East wall	4/5/2016		38,000.00	D. Sykes 3/16								
04.19	West wall--brick	4/5/2016		123,000.00	D. Sykes 3/16								
04.20	West wall--limestone	4/5/2016		7,069.00	Witmer Restoration 5/23	PPE						mortar joints open on limestone, caulking coming out and needs attention, including adjacent area where window was infilled.	
04.22	South wall	4/5/2016		217,500.00	D. Sykes 3/16								
	Sub-Total Parish House, Original			642,000.00									
	Parish House, Addition												
04.23	East addition (Portland cement)	4/5/2016		93,000.00	D. Sykes 3/16								
	Sub-Total Parish House, Addition			93,000.00									
	Rectory Yard												
	Relay step, tripping hazard	9/13/2021											
04.30	**Garage (Portland cement):**	4/5/2016		22,500.00	D. Sykes 3/16								
	East face repairs			2,869.00	Witmer Restoration 5/23	PPE							
	Sub-Total Rectory Outbuildings:			22,500.00									
	Warehouse: (all Portland cement)												
04.32	East	4/5/2016		114,000.00	D. Sykes 3/16								
04.33	West	4/5/2016		115,000.00	D. Sykes 3/16								
04.34	North	4/5/2016		46,000.00	D. Sykes 3/16								
04.35	South	4/5/2016		50,000.00	D. Sykes 3/16								
	Sub-Total Warehouse:			325,000.00									
	Grand Total Bricks & Mortar:			1,606,486.00								Color of mortar: decide for each building; replace original mortar same color	
05	**METALS**												
	Church:												
	Church Yard												
06	**WOOD & PLASTICS**												
	Church:												
06.01	Secure AV Controls Cabinet: tech & volunteer use	8/27/2015	2021	8,000.00		PPE							
	Rector's Garage:												
	Warehouse:												
	Stairs: replace	11/1/2014											
07	**THERMAL & MOISTURE PROTECTION**												

			Date	Date	cost	source	Source	V; R; B&G	cost		Contact	Date		
		Campus:												
	07.01	Insulation: identify inadequate locations	1/29/2017	2020-22	?		?							
	07.02	Gutter guards: install as needed	9/14/2015											
		Moisture Barrier:												
		Church:												
		Boiler Room: Monitor water intrusion	9/13/2021											
		Parish House:												
	07.03	Boiler room: monitor water instrusion	6/1/2020	2020	?	?	Oper Budg				Burton		Investigate possible cause(s) of infiltration	
	07.04	Old kitchen: potential mold: monitor	3/10/2014	Monitor	?	?	Oper Budg							
		EPDM Roofing:												
		Cherry Street House:												
	07.05	Lower main	4/5/2016		1,500.00	D. Sykes 3/16								
	07.06	Lower kitchen	4/5/2016		2,000.00	D. Sykes 3/16								
		Sub-Total Cherry Street House			3,500.00									
		Church:												
	07.09	Narthex	4/5/2016		13,000.00	D. Sykes 3/16								
		Sub-Total Church:			13,000.00									
		Parish House:												
	07.10	Upper roof	4/5/2016		31,000.00	D. Sykes 3/16								
	07.11	Middle roof	4/5/2016		16,000.00	D. Sykes 3/16								
	07.12	Lower 1st floor roof	4/5/2016		50,000.00	D. Sykes 3/16								
		Sub-Total Parish House:			97,000.00									
		Rectory:												
	07.14	Garage	4/5/2016		7,000.00	D. Sykes 3/16								
	07.15	**Warehouse:**	4/5/2016		30,000.00	D. Sykes 3/16								
		Sub-Total EPDM Roofing:			150,500.00									
		Slate and Asphalt Roofing:												
	07.16	**Cemetery Gazebo:**	4/5/2016		10,500.00	D. Sykes 3/16								
	07.17	**Cherry Street House:**	4/5/2016		4,000.00	D. Sykes 3/16								
		Church:												
	07.19	Chapel main roof	4/5/2016		52,500.00	D. Sykes 3/16								
	07.20	Chapel front hall	4/5/2016		12,500.00	D. Sykes 3/16								
	07.21	Meeting Room	4/5/2016		29,500.00	D. Sykes 3/16								
	07.22	Chapel-church hall	4/5/2016		4,000.00	D. Sykes 3/16								
	07.23	Narthex	4/5/2016		8,500.00	D. Sykes 3/16								
	07.24	Courtyard	4/5/2016		32,500.00	D. Sykes 3/16								
		Sub-Total Church:			#REF!									
		Sub-Total Church:			139,500.00									
		Sub Total Slate and Asphalt Roofing			154,000.00									
		Cooper Roofing:												
	07.30	Apse raised seam	4/5/2016		32,000.00	D. Sykes 3/16								
	07.31	Stair turret flat seam	4/5/2016		6,000.00	D. Sykes 3/16								
	07.32	Interior belfry floor flat seam	4/5/2016		12,500.00	D. Sykes 3/16								
		Sub-Total Copper Roofing:			50,500.00									
		Grand Total Roofing			355,000.00									
	08	**OPENINGS**												
		Doors												
		Church												
?	08.01	Duke Street exterior doors: add glass doors	5/6/2016										match the wood and glass of Orange Street exterior doors	
		Windows / Stained Glass:												
		Church:												
	08.02	Historic Restoration & Protective Coverings	4/4/2017	2020-22	74,540.00	Willett Hauser	?						7 windows	C:\Users\Marya\OneDrive - Marotta Main Architects Inc\Desktop\Boards & Committees\SJEC B&G\Budget\Proposals + Receipts\Stained Glass Windows
	08.03	Protective covering :	4/4/2017	2020-22	60,277.00	Willett Hauser	?	134,817.00					covering on all that remain, apart from lower Duke Street	C:\Users\Marya\OneDrive - Marotta Main Architects Inc\Desktop\Boards & Committees\SJEC B&G\Budget\Proposals + Receipts\Stained Glass Windows
		Narthex to Sanctuary:												
		Bottoms of #1 & #3 darker than #2: change	2/27/2015											
		Stained glass glazing: repair panel	3/10/2014											
		Sanctuary:												
	08.04	West Wall: create three new windows: create	8/17/2015											
	08.05	Tiffany Nauman window-north side: monitor small crack	6/18/2015	Monitor	0.00	0	Oper Budg						Willett-Hauser report 8/15: recommended no work	
		Chapel:												
	08.06	Leadlight windows: change	8/17/2015										change north wall to clear; add faux to south wall	
		Hardware												
		Bell Tower:												
	09	**FINISHES**												
		Cherry Street:												
		Chapel:												
price acoustician	09.02	Sound deadening panels: create plan	6/13/2016										panels currently stored, should they be hung?	
		Church:												
	09.03	Chancel steps: color differentials	10/15/2017											

		Date	Date	cost	source	Source	V; R; B&G	cost		Contact	Date		
09.04	Ceiling art work: assess and repair	1/29/2015											
09.05	Paint: touch up throughout	3/10/2014	2020-22	?	?	?							
	Narthex:												
09.06	Mercer tiles: hang sample board?	11/9/2015											
09.07	Sound deadening panels: create plan	3/10/2014											
09.08	Tapestries: add to brick wall	3/10/2014											
	Parish House:												
09.09	Karen's office: redesign & equip	3/28/2019	2021-23	?	?	PPE			MM Archt				
09.10	1st Floor: replace Floor tiles	3/10/2014	2020-22	?	?	Oper Budg							
09.11	Corridor: repair/replace ceiling tiles	3/10/2014	2020-22	?		?							
09.12	Kitchen: paint/refurbish cabinets & closets	3/10/2014											
09.13	Ceiling: replace tiles & clean grid	3/10/2014											
	Exterior Painting:												
09.15	Campus estimates:	1/29/2015	2021-23	?	B&G	?	B&G		S. Chambers				
10	**SPECIALTIES**												
	Signage:												
	Church:												
10.01	ADA signage for door openers: install	4/5/2016											
	Plaques:												
	Church Interior:												
10.02	Bishop Bowman plaque: decide location	3/10/2014											
10.03	Old rectors' plaque: decide location	3/10/2014											
10.04	Donor existing plaques: decide the future	3/10/2014											
11	**EQUIPMENT**												
	Parish House:												
11.01	Kitchen Appliances: assess condition	12/2/2016											
12	**FURNISHINGS**												
	Church:												
12.01	Chancel: prepare 21st century design	12/1/2016		5,000.00								altar table-$2,000, chairs-$3,000	
12.02	Donation stations: consider	9/9/2016										manual boxes and electronic machine	
12.03	Pew seat pads: clean/replace	3/10/2014											
12.05	Prayer stations: consider	9/9/2016										candles to buy and light; posting board of prayers	
12.06	Youth program furnishings	10/7/2016											
13	**SPECIAL CONSTRUCTION**												
	Church:												
	Bell Tower:												
13.01	Bell wheel: monitor & maintain	3/10/2014	Monitor			Oper Budg							
14	**CONVEYING EQUIPMENT / ELEVATORS**												
	Parish House:												
14.01	Elevator: get pricing	6/13/2016											
	Warehouse:												
14.02	Freight elevator: certification test--FAILED	3/10/2014										Repairs on hold pending campus assessment	
15	**SPRINKLER, PLUMBING, HVAC**												
	Sprinkler System												
	Campus:												
15.01	Update locations & operations	4/15/2019	2019-22	?	?	Oper Budg						not in Rectory, Cherry Str house, Parish House or Warehouse	
	Church:												
	Plumbing:												
	Cherry Street House												
	Parish House Basement:												
15.04	Create useable Restrooms	3/10/2014										sewer ejection system, new fixtures	
	HVAC controls & boiler:												
	Church:												
15.08	Air Purification in the Parish House 2nd Floor			4,174.00	JSA	PPE		4,174.00	JSA	Burton			
16	**ELECTRICAL, SPECIAL EQUIPMENT**												
	Lighting												
	Church:												
	Parish House:												
16.04	Lighting for rear staircase: get pricing	2/10/2020	2021-22	1,000.00	?	PPE							
	Electrical Equipment:												
	Campus: Assess & upgrade/repair	3/16/2014	2020-22										
16.06	**Smart Thermostats (multi-year process)**		2021-24	1,000.00		PPE				Burton		YR 2, yearly budget	
16.08	Energy saving repairs: fix	1/12/2016	2020-22	3,000.00	B&G	PPE	V, B&G		?			conversion plan to LED lights on campus inside and out	
	Electronics (Livestream: audio and visual):												
	Cameras in Church:												
16.10	Apse: install camera high near angels	12/1/2016											
16.11	Sanctuary: Overhead projector	6/9/2016	2021-23	25,000.00	Ankney 6/11	?						mount on north side for east wall; research newer technology: plasma?	
	AV												
	Church Apse:												
16.13	Repair audio wires to speaker at Verger's Chair	8/8/2016	2020-22	?	Smucker	?							
	Sanctuary:												
16.16	AV mike over center aisle: camouflage	1/4/2017	2021-23	?		?			Claire Solutions			matt black, gray or beige? Wrap with felt or paint? Bill Simmons?	
16.17	AV station electronics: update/replace	1/4/2017	2021-23						Claire Solutions			hearing units, controls, connections	
	Hide exposed wiring throughout sanctuary (tripping hazard)	9/13/2021											
	Hearing Assist:												
16.19	Hearing aids box: solve issues	3/10/2014	2020-22	?	?	PPE						storage at console, why hear aid wires over ears? Why not singing and music in H.A.? Why not hear congragation sounds? How to get output sound same for all inputs? Need feedback from consumers.	
	Narthex:												
16.21	Clergy mikes: install longer arms	5/20/2019		?	?	?							
16.22	Backup unit: price	5/20/2019		?	?	?							
	TV												
	Chapel:												
	Controls:	3/1/2018											
	Security:												

	Campus:												
16.24	Security Cameras:	3/8/2021	2021	12,000.00		PPE	B&G		Choice	Burton		8 strategically placed cameras, to be expanded yearly	Telecom Camera Quote 2022.pdf
	Sanctuary: 11 IP IR Cameras	2/1/2022		13,117.94	eleCom Business Solution	PPE		13,117.94	eleCom Business Solutic	Burton			
	Parish House												

Appendix 1d

Budget Scenarios	2024 Budget	2025 Budget	2026 Budget
Pledge & Offering	8%	7%	7%
Endowment Errosion	2%	2%	2%
Personnel	4%	4%	4%
Other Expenses	1%	1%	1%

Income	2023 Budget	2024 Budget	2025 Budget	2026 Budget
Pledge and Offering	998,800	1,078,704	1,154,213	1,235,008
Urban Well Income	74,133	74,133	74,133	74,133
Prepaid Pledges	54,193	54,193	54,193	54,193
Early Music Income	26,264	26,264	26,264	26,264
Prior Year Pledges	11,208	11,208	11,208	11,208
Plate Offering	10,560	10,560	10,560	10,560
Livestream Donations	4,000	4,000	4,000	4,000
Easter/Christmas	3,900	3,900	3,900	3,900
Total Offerings	**1,183,058**	**1,262,962**	**1,338,471**	**1,419,266**
Rental Income	19,000	19,000	19,000	19,000
Miscellaneous Income	15,000	15,000	15,000	15,000
Investment Income	250	250	250	250
Total Miscellaneous	**34,250**	**34,250**	**34,250**	**34,250**
Endowment Transfers In	317,696	311,342	305,116	299,013
Total Income	**1,535,004**	**1,608,554**	**1,677,837**	**1,752,530**
EXPENSES				
Personnel	959,388	997,764	1,037,674	1,079,181
Diocesan Fair Share	158,204	159,786	161,384	162,998
Operations	110,923	112,032	113,153	114,284
Building & Grounds	87,809	88,687	89,574	90,469
Worship	55,834	56,393	56,956	57,526
Taxes & Insurance	48,983	49,472	49,967	50,467
Utilities	46,514	46,980	47,449	47,924
Urban Well	45,692	46,149	46,610	47,077
Education	33,750	34,088	34,429	34,773
Early Music Expenses	20,792	21,000	21,210	21,422
Scholarships	19,450	19,645	19,841	20,039
Communications	10,000	10,100	10,201	10,303
Congregational Care	5,260	5,313	5,366	5,420
Discipleship	1,150	1,162	1,173	1,185
Total Expenses	**1,603,749**	**1,648,569**	**1,694,987**	**1,743,067**
Surplus/Loss	**(68,745)**	**(40,014)**	**(17,150)**	**9,462**

Appendix 2

Saint James 2024 - 2026 Budget

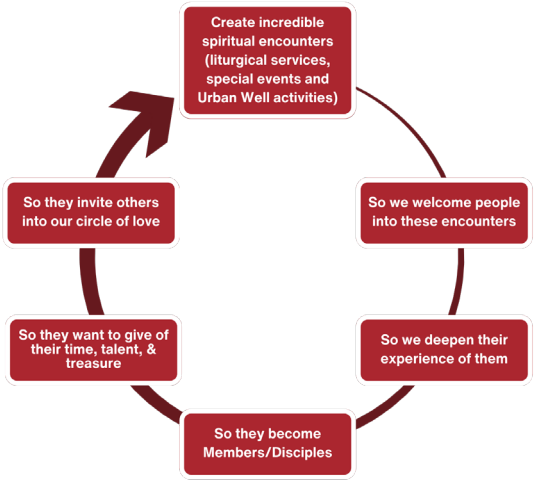
Income	2020 Actual	2021 Actual	2022 Actual	YTD 2023 Actual (July)	2023 Budget	2024 Budget	2025 Budget	2026 Budget
Total Offerings	**936,597**	**1,049,004**	**1,064,918**	**596,944**	**1,183,058**	**1,284,421**	**1,385,365**	**1,489,253**
Total Miscellaneous	**37,974**	**186,893**	**42,315**	**26,147**	**34,250**	**34,250**	**34,421**	**34,593**
Endowment Transfers In	333,258	326,740	322,560	163,281	317,696	319,205	312,821	306,564
Total Income	**1,307,829**	**1,562,637**	**1,429,793**	**786,373**	**1,535,004**	**1,637,876**	**1,732,607**	**1,830,411**
EXPENSES								
TOTAL Personnel	**846,170**	**871,505**	**879,337**	**537,413**	**959,388**	**965,113**	**1,003,718**	**1,043,866**
TOTAL Diocesan Assessment	**160,000**	**146,667**	**149,509**	**92,286**	**158,204**	**155,630**	**173,522**	**184,243**
TOTAL Operations	**97,834**	**72,957**	**110,349**	**48,241**	**110,923**	**114,251**	**117,678**	**120,620**
TOTAL Building & Grounds	**65,814**	**71,140**	**127,663**	**68,582**	**87,809**	**82,905**	**85,807**	**88,381**
TOTAL Worship	**37,785**	**47,343**	**76,024**	**57,668**	**55,834**	**69,830**	**71,227**	**72,295**
TOTAL Taxes & Insurance	**45,168**	**45,596**	**48,977**	**22,626**	**48,983**	**49,962**	**50,961**	**51,726**
TOTAL Utilities	**31,694**	**38,762**	**50,045**	**38,372**	**46,514**	**47,445**	**48,394**	**49,119**
TOTAL Urban Well	**29,555**	**45,263**	**42,349**	**18,699**	**45,692**	**46,606**	**47,538**	**48,251**
TOTAL Education	**5,948**	**16,104**	**23,617**	**27,649**	**33,750**	**79,426**	**81,014**	**82,229**
TOTAL Early Music Expenses	**3,373**	**8,406**	**21,087**	**12,543**	**20,792**	**21,208**	**21,632**	**21,956**
TOTAL Scholarships	**17,192**	**13,396**	**17,703**	**1,650**	**19,450**	**19,839**	**20,236**	**20,539**
TOTAL Communications	**13,728**	**8,412**	**18,153**	**9,336**	**10,000**	**10,200**	**10,404**	**10,560**
TOTAL Congregational Care	**3,000**	**13,707**	**14,500**	**2,794**	**5,260**	**5,365**	**5,473**	**5,555**
TOTAL Discipleship	**564**	**639**	**2,265**	**7,520**	**1,150**	**1,138**	**1,160**	**1,178**
TOTAL Expenses	**1,357,826**	**1,399,897**	**1,582,825**	**945,379**	**1,603,749**	**1,668,917**	**1,738,763**	**1,800,519**
Surplus/Loss	**(49,997)**	**162,740**	**(153,032)**	**(159,006)**	**(68,745)**	**(31,041)**	**(6,157)**	**29,892**

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	• Opportunity to pause and reflect • Ritual, music, thought provoking homily • Christian education for children	• Scarcity of time – balancing family and work • Don't know many other members
Dean	City professional	• Welcoming environment for his family • Contemplative prayer practices • Beauty of Saint James' indoor and outdoor sanctuary	• Scarcity of time – balancing family and work • Not sure how to connect for volunteer opportunities
Stephen	Retiree	• See their lives in a meaningful context • "Real time" homily that speaks to issues of the day	• Scarcity of time – travel and other activities
Laura	Retiree 80+	• Vibrant music program • Philanthropic opportunities	• Mobility issues
Barb & David	Empty nesters	• Community • Impactful volunteer opportunities	• 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 saintjameslancaster.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.

Appendix 4: Long-range Planning Goals for the Saint James Campus

Many Saint James campus enhancements have been proposed via the 2021 'Countless Gifts of Love' capital campaign, the Building & Grounds Committee's list of future projects, and the Churchyard Committee's 2022 conceptual planning efforts. It is these proposed site improvements that are addressed within this report section, and they have been organized in accordance with relevant components of Lancaster City's new comprehensive plan, ***Planning for our Future Lancaster.*** This is the City's first comprehensive plan update in thirty years, and its formal adoption is anticipated in October 2023. While not all Saint James campus improvements will require City of Lancaster approval, many others will. It is therefore beneficial to align our prioritized campus strategies, wherever possible, with the City's planning goals.

The former Lancaster Library site and the Saint James warehouse site will be addressed as appendices to this Long-range Plan, and details regarding their adaptive reuse are currently unavailable. Ideally, planning for the library site would occur in tandem with planning for Saint James campus enhancements, given the library site's adjacency. There are some challenges such as secured campus gateways, accessible parking, and stormwater management that require a more comprehensive evaluation of both properties. Due to presently unknown warehouse and library site strategies, this Long-range Planning Report section pertains primarily to campus areas defined by N. Cherry Street to the east, W. Orange Street to the south, N. Duke Street to the west, and the Parish House/Cherry Street House to the north.

The first section of the City's new comprehensive plan that relates to a Saint James campus goal is ***Policy SN (Strengthening Neighborhoods) – 4.5: Lighting.*** Its focus is to "ensure that pedestrian and vehicular ways are well-lit for safety and security, while maintaining visibility of the night sky to the greatest extent possible". This policy challenges us to "eliminate nuisance lighting and expand the use of energy efficient and smart lighting technology". While churchyard lighting was targeted as a campus improvement in Saint James' 275th Anniversary Capital Campaign, a conceptual lighting plan has not yet been prepared, and site lighting was omitted from the 2022 Request for Proposals' work scope sent to prospective design consultants. To address issues of safety and security while honoring campaign gifts given specifically for this purpose, creative and efficient lighting solutions are still needed. One possible solution is to illuminate the interior faces of perimeter churchyard walls so that folks using the churchyard after sundown can at least see silhouettes of others who might be within this same outdoor space. Combined with security cameras, secured gateways, selective shrub removal, and potential elimination of other churchyard hiding places, site lighting will make our campus safer and more welcoming.

The second relevant component of the City's plan is ***Policy CPP (Connecting People and Places) – 3.4: Streetscape***. It obviously pertains to our campus borders at N. Cherry, W. Orange, and N. Duke Streets but, depending upon the forthcoming warehouse initiatives, this same policy could also be applied to E. Marion Street – a key connector between our campus, Musser Park, and its surrounding neighborhoods. We might work with City staff to ensure that N. Cherry and E. Marion streetscapes include paving demarcations and signage that promote these corridors as spaces to be safely shared by motorists, bicyclists, and pedestrians. The City's nearby Christian Street initiatives could serve as model for such enhancements at our eastern campus edges.

Saint James keeps the W. Orange and N. Duke streetscapes in excellent condition by maintaining sidewalk paving and street trees. Given that some former parishioners have cited the lack of accessible parking as a reason for leaving our congregation, Saint James might want to petition the Lancaster City Traffic Commission to relocate some accessible on-street parking spaces from the former library's N. Duke frontage to an area closer to our accessible building entrances. The southeast section of the library site should also be considered for accessible, ***off-street*** parking use, as accessibility was one of six key themes identified in 2022 by the Membership & Engagement Working Group. Our campus should also include bicycle parking for those who either do not have cars or wish to leave them at home when attending church events.

The City's comprehensive plan includes a section titled ***Growing Greener***, and it addresses many items that are aligned with goals explored in 2022 by Saint James' Churchyard Committee. Such goals address climate change – an important issue for parishioners of all ages, but of special concern to our youngest members and prospective members. Together, the following campus improvements could work in concert to limit greenhouse gas emissions, reduce waste, improve urban sustainability, and demonstrate to responsible stewardship of our campus resources.

Policy GG (Growing Greener) – 1.3: Biophilic City and Habitat Creation calls for the creation of "larger and more continuous habitat corridors that extend from beyond the city into Lancaster neighborhoods" via urban forests, streetscapes, rooftops, backyards, plazas, and other public places. Our churchyard could be a key component of such network if we made our landscape more welcoming to birds, beneficial insects, and other animals that have adapted to the urban environment. In place of some unneeded lawn areas and our barren beds of mulch, we could establish a more bio-diverse, pollinator-friendly layer of herbaceous plantings beneath our existing tree canopy. A visit to nearby Mt.

Cuba Center our other places focusing on lower-maintenance, native plant use could provide design inspiration. At Easter and Christmas, we could offer a native plant alternative to those who give flowers in memory of their loved ones. At present, their only option is to select non-native plants typically grown in heated greenhouses, plastic pots, and non-renewable peat-based growing medium. Maintenance of a more complex but sustainable landscape does, however, require the care of a skilled gardener rather than the 'mow, blow, and go' strategies of conventional landscape contractors.

Beginning in 2012, Saint James' cloister annually captured more than 100,000 gallons of surrounding roof runoff beneath its brick paving. Beneath this brick paving (some of which was recycled), stormwater is then filtered before it slowly reaches the city's combined storm sewer and the Conestoga River. With its thoughtfully layered environmental, social, and spiritual initiatives, this courtyard was quickly touted as an innovative design model. Many environmentally minded folks came to see it and to learn from it. In sharp contrast, the more recent Rectory project produced problematic stormwater runoff following the compaction of that campus area's soils and the removal of vegetation that once helped with runoff mitigation. This problem that must be addressed if an outdoor extension of the Forum Room's indoor gathering space is pursued. Some Churchyard Committee members have advocated for continuation of a very limited approach to stormwater management – as they did with the Rectory project. Others have instead advocated for replicating the cloister model and ensuring that our environmental stewardship message is shared with others.

The City's ***Policy GG – 2.3: Interconnected Parks and Trail System*** calls for the establishment of "connections between parks, recreational facilities, open spaces, and the communities they serve. Connectivity may be achieved through trails, enhanced streetscapes and public rights-of- way, improved wayfinding signage, land acquisition and easements, and other means". This policy might present an opportunity to work with City staff for an improved E. Marion Street that connects our campus to Binns Park, Ewell Plaza, and the new library site to the west, and to Musser Park and its surrounding neighborhoods to the east. Depending upon forthcoming objectives for the former library site, greater campus connectivity could be achieved by restoring pedestrian passage between the Parish House's north wall and the former library's earliest building section. In 2022, the Ministries Committee highlighted our campus' centralized, urban location as a key Saint James attribute that distinguishes it from other places of worship. We can improve upon this by creating additional connectivity with surrounding neighborhoods.

Policy GG – 3.3: Solid Waste Reduction asks that we "support municipal and communitywide programs that reduce solid waste and convert waste streams to valuable resources". This includes salvaging materials from construction and demolition projects in addition to diverting organic waste for composting. Perhaps a small area near the Childrens Garden could include a space for composting alter flowers, kitchen waste, and churchyard leaves.

In 2022, the Churchyard Committee outlined a future audio campus tour that utilizes QR codes and visitor cell phones to welcome our guests, share our history, offer a meditative campus walk, and explain our environmental focus. This latter component supports the City's ***Policy GG – 3.4: Environmental Literacy*** which calls us to lead by example, further environmental literacy, and empower people to create a more sustainable city. Combined with landscaping and lighting, the audio tour was a key component of our 275th Anniversary Capital Campaign. Once implemented, it would enable Saint James to tell its story of faith and ministry across three centuries to those who might later seek a deeper connection to our congregation.

The City's ***Policy GG – 3.5: Tree Protection and Urban Forestry*** requires that we "protect, maintain, and expand Lancaster's urban tree canopy. Trees create shade, reduce energy costs, support wildlife, provide natural beauty, and absorb stormwater and carbon". Saint James is fortunate to have many trees on its leafy campus, but there are now fewer trees than existed just a decade ago. One of the Churchyard Committee's 2022 plans called for the removal of a mature Sourwood tree – a rarity in Lancaster County – along with substantial root disturbance to another tree in order to reposition some existing churchyard stairs. Fortunately, we do have an alternative plan that protects trees remaining in good health and proposes a successive tree generation for future shade, stormwater runoff reduction, and enhanced habitat.

The comprehensive plan's final section is titled ***Building Community & Capacity***. Specifically, ***Policy BCC – 4.3: Inclusive Involvement*** states that city staff should "partner with community-based organizations to engage populations whose voices have been under-represented in public processes because of language, mobility, age, citizenship, economic, and other barriers. Use creative and community-driven methods for reaching these groups, such as markets, churches, home visits, school events, cultural activities, and informal social networks". Demonstrating that we share the goal of engaging "those who are under-represented in public processes, such as immigrant communities, people of color, youth, and younger families", Saint James and its prospective warehouse project partners should purposefully link this policy to any needed requests of zoning and land development plan approvals.

Lastly, comprehensive plan ***Policy BCC – 5.3.: Space for the Arts*** is relevant to Saint James' music program and, potentially, to redevelopment of the former library site. This policy encourages "the development of affordable spaces for artists to live, learn, practice, teach, and present their work. These spaces are important for maintaining the arts as an integral part of the city's vibrant culture and economy". Perhaps our music events could be more widely promoted through collaboration with city staff, and perhaps we could coordinate resources to address the educational, training, and production needs of the arts community.

In addition to these previously noted campus improvements, there are others that are not as closely linked to the City's comprehensive plan, but they are no less important. These include churchyard monument and perimeter wall restoration, improved seating with unobstructed, adjoining spaces to accommodate wheelchairs and strollers, an interment furrow for ashes near the eastern churchyard wall, future burial markers, and clearly identified accessible routes connecting each of these destinations. Before a reliable cost estimate can be prepared for such campus improvements, a conceptual plan must first be prepared to depict enhancements prioritized by the Rector on December 5, 2022. Such plan would then enable the quantification of needed walkway paving, light fixtures, and plantings, for example. In April, churchyard planning was temporarily halted due to this long-range planning effort. At that time, Saint James' planning consultant (hired in Autumn 2022) had not yet prepared a conceptual plan. Such plan is now anticipated following the current Long-range Planning work.

As identified in the Ministries Committee's 2022 report, the first three components of our School of Prayer's flywheel are as follows:

- Create incredible spiritual encounters;
- Welcome people into them; and
- Deepen their experience of them.

For many newcomers, the first impressions of Saint James are formed before they cross the threshold of any campus building and before they engage with our talented church leadership team. These first impressions come from our campus – the connective tissue that links Saint James' many indoor destinations. Is our campus as welcoming as it could be? Is it fully accessible? Is the churchyard a key opportunity for the flywheel's "incredible spiritual encounters" to those who feel closest to God while emersed in nature? Does it fully honor those who are buried there, and is it a contemplative, healing place for those who mourn?

While the Long-range Committee has the difficult task of prioritizing many significant goals pertaining to ministries, membership, finance, and future building improvements, we must also remember our commitment to those who participated in the 275th Anniversary Capital Campaign due to its promise of a renewed churchyard. We must consider that, to many, our outdoor spaces are as significant as our indoor spaces. Daily, they serve as a vital, contemplative green spaces for "the curious, the careless, and the faithless". As Father David has noted in ***A Vision: Saint James as a School of Prayer***, "we must create intentionally accessible spaces for younger, as well as black and brown people to find curriculum and community that engages them in our school of prayer. This will ideally involve changes to our buildings and grounds, and how we perceive and use our campus as an urban space and center". Let's prioritize and then gradually implement the changes noted within this report section.

John D. Hershey
August 1, 2023