

3 YEAR STRATEGIC PLAN

Expectations

- Every goal will be assigned to a vestry member
- Each vestry member will report on their assigned goal(s) at each vestry meeting
- Each goal is written to align with the SMART guidelines
 - Specific
 - Measurable
 - Assigned
 - Realistic
 - Time Specific
 - Start
 - Finish

Objectives

- [A] Grow membership
- [B] Grow financial resources necessary to support church maintenance, programs, and paid staff - including a rector
- [C] Provide programs and community services to encourage fellowship of both parishioners and the community by aligning St. Edward's passion with neighborhood needs based on MapDash data and communication with neighborhood leaders

YEAR ONE

June 1st, 2022 to June 1st, 2023

- Goal: St. Edward's will fully implement the Invite Welcome Connect program as outlined on invitewelcomeconnect.com. The program will be designed to accommodate both in-person and remote participants.
 - Objective [A]: Grow membership
 - Start: June 1st, 2022
 - Finish: June 1st, 2023
 - Responsible Vestry Persons: Ted, Lucy
- Goal: Establish a Restricted Endowment Fund that will use investment earnings to fund designated church expenses while the principal is held in perpetuity. The endowment will be documented and will include, at a minimum, an Investment Policy, a Withdrawal Policy, and a Usage Policy.
 - Objective [B]: Grow financial resources
 - Start: June 1st, 2022
 - Finish documentation: September 1st, 2022
 - Finish account creation: November 1st, 2022
 - Responsible Vestry Persons: Klade, Erica
- Goal: Establish a Planned Giving Program based on recommendations from the Episcopal Community Foundation (ECF) with proceeds going toward the principal of our Restricted Endowment Fund. The program is to include a plan to effectively promote the program to the congregation.
 - Objective [B]: Grow financial resources
 - Resources:
 - ECF Site: <https://episcopalcommunityfoundation.org/legacy-giving/get-your-parish-involved/>
 - ECF Presentation: https://www.episcopalatlanta.org/wp-content/uploads/2018/07/ECF_Planned_Giving_Presentation.pptx
 - Start: November 1st, 2022
 - Finish: March 1st, 2023
 - Responsible Vestry Persons: Bernadette, Mike
- Goal: Encourage better connections between all St. Edward's members by implementing a "Parishioner Highlight of the Week" program where, each week, a different parishioner is interviewed and their story is shared with all other parishioners. The program is to include what format is used for the interviews and how the interviews will be shared with the congregation each week, including virtually.
 - Objective [C]: Provide programs and community services
 - Start program plan: July 1st, 2022
 - Finish and implement program plan: October 1st, 2022
 - Responsible Vestry Persons: Marlaina, Marck

YEAR TWO

June 1st, 2023 to June 1st, 2024

- Goal: Conduct a Fixed Asset Review that will be updated as new assets are added and reviewed annually.
 - Objective [B]: Grow financial resources
 - Start: June 1st, 2023
 - Finish: December 1st, 2023
 - Responsible Vestry Persons: Marver, Kevin
- Goal: Establish a team to develop and maintain effective, bilingual, content on the major social media platforms including our website, Facebook, YouTube, Twitter and Instagram. Effectiveness will be determined by monitoring month to month and year to year traffic on each platform as well as by tracking each platform's role in attracting new members. The team will establish and follow a schedule to review and update all online content.
 - Objective [A]: Grow membership
 - Start: June 1st, 2023
 - Finish tracking, monitoring, and updating schedule: December 1st, 2023
 - Tracking, monitoring, and updating: Ongoing
 - Responsible Vestry Persons: Lucy, Ted
- Goal: Speak with St. Edward's church leaders, ministry heads, and parishioners to identify a single passion that we will use to align programs with community needs. After identifying our passion, consult with Sally Ulrey and use MapDash data to identify community needs that align with that passion
 - Objective [C]: Provide programs and community services
 - Identify Passion
 - Start: June 1st, 2023
 - Finish: December 1st, 2023
 - Identify and align with community needs
 - Start: December 1st, 2023
 - Finish: June 1st, 2024
 - Responsible Vestry Persons: Valerie, Manuel

YEAR THREE

June 1st, 2024 to June 1st, 2025

- Goal: Develop and implement a program that serves the need of our community and aligns with our passion
 - Objective [C]: Provide programs and community services
 - Start: June 1st, 2024
 - Finish: March 1st, 2024
 - Responsible Vestry Person: TBD
- Goal: Develop, implement, and promote a "Signature Event" that St. Edward's becomes known for in the community as measured by a 20% increase in participation from event to event
 - Objective [C]: Provide programs and community services
 - Start: March 1st, 2024
 - Finish: September 1st, 2024
 - Responsible Vestry Person: TBD
- Goal: Develop and implement programs that encourage members of every St. Edward's service to participate together in activities, including services, as measured by the number of individuals from each service participating. Target is a 10% increase of participation from each congregation per year.
 - Objective [C]: Provide programs and community services
 - Start establishing measurement system: October 1st, 2024
 - Finish establishing measurement system: December 1st, 2024
 - Start developing programs: December 1st, 2024
 - Finish implementing programs: June 1st, 2025
 - Responsible Vestry Person: TBD
- Goal: Petition Bishop to call a rector
 - Objective [B]: Grow financial resources
 - Start: December 1st, 2024
 - Finish: June 1st, 2025
 - Responsible Vestry Person: TBD