



**Christ & Holy Trinity**

EPISCOPAL CHURCH

# STRATEGIC REVIEW 2005

Presented to The Vestry June 21st 2005



# Introduction

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- The Committee has involved 54 members of the Church
- Includes 10 detailed Sub-Group reports
- Many surveys, interviews and contacts with other organizations have been made
- Has met 10 times since November to report within our deadline of June 30<sup>th</sup> 2005



# Guide to the Review

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- The Methodology initially focused on individual ministries and activities and then on feasibility
- Has worked closely with The Vestry, Warden responsible and the Rector
- All reports conform to a standard outline to provide consistency and make comparisons easier
- The review does not attempt to make future decisions – it is intended to help set out the choices that need to be made



# Contents

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- Current Situation – strengths and weaknesses
- Assessment & Findings – fact gathering
- Dependencies – between the various ministries and activities
- Property & Finance
- Vision
- Recommendations



# Outline Recommendations

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Have been grouped into the following phases:

- Easy to Action Points
- Need detailed consideration
- Utilization of space and property
- Recommendations of the Communications Steering Committee

The Sub-Groups are in order of priority



# Stewardship - Current Situation

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- \$90k deficit plus annualization effect
- Mechanical exercise with 1 person coordinating a 4 week campaign
- Burn out of Chair persons
- Budget depends on a narrow base of generous givers
- Education around stewardship is nil
- Current program lacks fun and inspiration



# Stewardship - Findings

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- Programs work best as year-round ministries and with a significant number of people invested
- Need to develop an appropriate model
- Many churches have a Director of Stewardship
- No correlation between wealth or demographics to giving habits
- There is a correlation between involvement and giving habits
- Church database needs cleaning up to distinguish 'active' members from 'occasionals'



# Stewardship - Recommendations

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- Must be a ministry not just an administrative task
- Form a 12-15 member team (diverse to represent all members)
- Consider hiring a Director of Stewardship
- Provide training for all stewardship speakers and callers
- Use available tool kits and planning resources
- Make the process fun and spirited
- Year round Educational Campaign



# Church School – Background

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- Offer 9 classes – Pre-K to 6<sup>th</sup> grade
- 193 registered students of which 75 regularly attend
- 34 – 36 volunteer teachers
- Lectionary based curriculum
- Other Children's activities include; Choir, Acolyting, Christmas Pageant, Vacation Bible School, and three inter generational events



# Church School – Current Situation

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- A strong, committed base of enthusiastic teachers
- Core group of regular attendees
- 78 (61%) Church School families pledge out of 127 families registered (not attending) families
- Weak parental commitment and connection
- Challenging classroom space at Seabury and in Mackenzie
- Coordination issues with the 9:15am Service
- Some discipline concerns



# Church School - Dependencies

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- Seabury – Preschool places significant limits on use, also noisy, limited storage and many distractions
- Mackenzie – Rooms are over crowded and generally too small, limiting scope and flexibility
- 9:15 Service issues – theme of service
- Parental Commitment – need parents to be more involved with Christian education process
- Expansion of Adult Education activities and curriculum will favorably impact attendance and success



# Church School – Recommendations

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## Short-term

- Resolve issues around 9:15 am service - monthly child oriented service, alternative services, periodic longer classes
- Modify Seabury limitations, if possible? Install 'white- noise' system?
- Address some Mackenzie limitations through modest investments (furniture, walls)
- Adopt parental participation initiatives
- Adopt more formal discipline management approach



# Church School – Recommendations

## Medium & Long Term

### Medium Term

- Better leverage current curriculum; examine alternative curricula and supplemental materials
- Build stronger connections with Adult Education
- Add staff (paid or dedicated volunteers) and increase budget

### Long-term / Full Vision

- Implement new curriculum, **if** indicated
- Build new facility with some portion dedicated to house entire Church School
- Put all Children's Ministries activities under one, full-time leader, with appropriate staff



# Music -Background

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- 90 participants in 4 choirs up from 45 in 1999 (children up from 30 to over 70)
- Music & Arts program (in-reach & outreach) is self funding)
- Budget of \$141k or 12% of total: choir families pledge \$230K or 29% of total pledges



# Music – Current Situation

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- Music plays a huge role within the Church
- Choir development program is quite different to Anglican tradition and broadens the musical education of the public school system
- Rehearsal space is cramped – limiting expansion
- No linkage with Preschool program
- No fund for organ overhaul
- Constrained by availability of part-time assistant
- Discipline issues need parental involvement



# Music - Recommendations

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- Improve quality by restructuring choirs
- Integrate Preschool music under Director of Music
- Tour to England for senior Choristers and Parish Choir in 2006
- Establish an active, enthusiastic Choir Parent Guild
- Expand rehearsal space
- Improve acoustics in the church
- Library – appoint volunteer librarian
- Personnel – make assistant in music full time



# Preschool - Background

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- Has existed as a ministry of C&HT for more than 20 years
- Enrolls 75 children (2004 /05) maximum of 78 allowed
- 12 members of staff including the Director
- Has an early drop-off (very popular)
- Has an extended day (except Tuesdays) but there are no afternoon classes
- The Rector is Chairman of the Board of Director's
- The Board comprises of 9 members including the Rector and Director



# Preschool – Current Situation

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- Strengths include:
  - The Five's program
  - The school's dedication and teaching of Christian principles
  - Central location
- Weaknesses include:
  - Physical space is in need of repair and updating
  - No waiting list (carries financial risk is also a form of measurement)
  - The governance relationship between the Vestry and School Board
  - Financial Relationship between Vestry and Board is unclear and a source of frustration to both
  - Bylaws need rewriting – many years since they were revised
  - Could use more resources of the Church



# Preschool - Financials

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- Preschool operates in the black
- It can (and should) contribute more
- Has substantial assets built up over years of fundraising – a portion can be used to fund renovations
- Financial risk if numbers continue to decline
- Growth to come from market share not demographics
- Preschool should operate against a budget
- Over the last 3 years 119 families have attended of which 39 (32.7%) are members and of those 23 (59%) pledge



# Preschool - Recommendations

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- Resolve 3 issues of relationship between Vestry and Board; develop a decisive financial relationship; enhance the Episcopalian identity of the school.
- Use more resources of the Church: Give school Chaplain (Assistant Rector) a greater role; coordinate the music programs; make Preschool activities more visible to Parishioners
- Build a waiting list
- Rewrite the Bylaws
- Renovate space at Seabury
- Work with the Property Group to justify new building based on existing and increased numbers



# Youth - Background

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- Two group – Middle School (grades 6-8) and High school (grades 9-12)
- Meetings primarily fellowship, food and fun
- Direct focus provided by local outreach, national and global missions, retreats, community service, and involvement in parish life
- Provide ways for college students to connect with parish life
- In our diocese of CT we are 1 of 6 parishes that have a full-time youth minister



# Youth – Current Situation

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- 100 Youth (70 middle school; 30 high school)
- Further 100 considered members of the parish
- Per Westport School District – middle and high school numbers will increase through 2014-15
- 82% of families who have one or more youth active in the ministry pledge
- Annual operating expenses approximately \$80k
- Need to raise estimated \$15k-\$25k for mission trip per year



# Youth - Dependencies

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- Church School – provides solid Biblical foundation; children who participate are more likely to join youth activities
  - Church school finishes after 6<sup>th</sup> grade leaving 7<sup>th</sup> -12<sup>th</sup> graders with no Sunday education option
  - Lead to a ‘graduation from church’ mentality
- Adult – when adult activities are planned in conjunction families are more likely to attend
  - Parents drive on youth trips but this leaves shortage of transport and reduction in activities
- Children’s Choirs – prepare children for musical participation and leadership in youth ministry
- Space – Only one small room for Sunday education and limited suitable activity room in Parish Hall



# Youth - Recommendations

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- Needs growth in space
  - indoor basketball court, outdoor volleyball court
  - Storage for supplies and materials
  - For media equipment – video, TV/DVD player, CD players and speakers
  - Project workroom
  - Large and small group gathering space
- Multi-passenger (15) vehicle passenger van for activities; also available to other groups
- Youth Chapel to accommodate for 100-125 people would be ideal



# Adult - Background

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- Currently there are 6 programs
- 84 (of 538) or 16% of member families are involved
- Programs have evolved from direct involvement of the Clergy
- Apart from Mothers and Others program at (40%) pledging %s were between 88% and 100%.
- Current budget \$5,500 for speakers and supplies
- Questionnaire completed by 110 families



# Adult – Findings

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**This group provides one of the biggest opportunities to increase involvement and therefore pledges.**

- Expand Sunday Forums – need more space
- Offer more than 1 program
- Have assigned topics
- Offer Lenten mini courses
- Saturday morning Bible Study for commuters and others
- More social activities –pot luck suppers, theater outings, square dancing, etc.
- Activities with other ministries – e.g. Music & Arts



# Adult - Recommendations

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## **To grow Adult activities into a vibrant body by: Option 1**

- Restructure under directorship of the Assistant Rector
- Provide child care – pre-registration required
- Improve information in Church database
- Free up clergy on Sundays to lead Forums

## • **Option 2**

- Appoint Assistant Rector as Adult Minister
- Form Lay Committee
- Create an educational and social calendar for the year
- Coordinate with other Church ministries



# In-reach/Outreach/Worship

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## Background

- 22 activities exist excluding music and education
- Nearly all have been in place for sometime
- Some are now on an ad hoc basis only



# In-reach/Outreach/Worship

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## Findings

- Vitality depends on quality of leadership and willingness to invite and organize other parishioners
- New leaders need to be identified
- Broaden base of 'volunteerism'
- 35% of parish families have at least 1 member in a ministry / activity
- New volunteers are channeled from Newcomer efforts, Clergy and intra-Parish communications
- Program areas are high return and low cost



# In-reach/Outreach/Worship

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## Recommendations

- Broaden base of volunteers
- Reinforce culture that espouses volunteering
- In every way possible coordinate the ways new arrivals are engaged
- Reinforce knowledge (talents, potential interests, etc.) of parishioners amongst clergy and leaders
- Maximize ministry / activity visibility
- Periodically re-evaluate ministries, activities, 'ways to engage'



# Parish Administration

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## Current Situation

- In June 2001 Sue Ryan was appointed Director of Church Administration responsible for:
  - All HR and personnel policies with particulate supervisory responsibilities for the secretaries and sextons
  - All facility usage, calendar scheduling, events coordination (65% of time); ceremonial sacraments and communications coordination and many other tasks
- 14 current staff costing in total \$425k
- It costs \$180k to run facilities
  - \$33k was generated from 100 plus users of facilities in 2004-05 (\$6k in 1998-99)
  - Some space is donated to charitable works of our neighbors
- Management of Church Funds is handled by volunteers and a newly hired part-time assistant
- Audits completed to 2003



# Parish Administration

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## Recommendations

- Form a Personnel Committee
- Contact a consultant from the Alban Institute to help identify ‘trigger points’ – when to move from volunteers to professionals
- Review need for additional support staff
- Finance – re-evaluate charges and requested donations for facility management
- Property – refer to separate report for current property needs and future considerations
- Cemetery – Update records, validate archives and purchase appropriate software



# Communications - Mission

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C&HT Communications Group initiated in fall of 2004

*Mission – To provide the administrative tools to allow church staff and parish lay readers to utilize our communications system directly with support and expertise provided by the committee as needed*



# Communications Recommendations

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- Develop a consistent and cohesive communications platform. This includes:
  - Revitalized design style guide
  - Review of all print communications
  - Develop new Web site
  - Develop and activate an electronic database for use in targeted and general communication



# Property- Current Needs

21 items are reviewed weekly covering:

- Painting, repairs, replacing carpets / gutters / back doors, re-pointing masonry, re-modeling kitchen, landscaping, repairing kneelers, replacing Seabury boiler



# Property – Future Considerations

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- Option 1: Renovation of existing structures - including modernizing Preschool area at Seabury
- Option 2: Seabury Expansion – build a small addition to allow Preschool functions on 2<sup>nd</sup> floor to relocate to 1<sup>st</sup> floor
- Option 2A: Courtyard and Church Green – eliminate parking lot along Church Lane and enlarge existing lot.



# Property – Future

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## Considerations /Cont'd

- Option 3: Multipurpose Room – expand on 2 & 2A and build a new 300 sq. ft room
- Option 4: Expanded Church School – build an addition to accommodate entire Preschool
- Option 5: Dual Expansion – build an addition onto the church expand the Church hall and carry out Option 1 or 2 or 2A



# Summary - Findings

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- Pledging - Correlation between involvement and giving
  - Need to expand activities and ministries where involvement is comparatively low or where it can be improved
- Dependencies – All areas are (or should be) mutually supporting
  - Church School, Preschool and Adult Education can be improved
- Property – Lack of adequate space is a significant factor inhibiting growth
  - Church School, Ministry, Music, & Preschool
- Worship – 9:15am service, its impact on Church School and Focus Groups needs to be reviewed
- Administration – HR policies and ‘trigger points’ need outside support and advice



# Summary –

## Recommendations

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- Please review summary and detailed reports
- Advise '*easy to action*' items are immediately acted on (some are under way)
- Committees from the Vestry are formed to decide on courses of action
- Property Review Committee is formed to further develop plans
- Finance Group is formed to plan a capital campaign



# Summary - Vision

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- The report contains a range of options – standing still is not one
- All growth is relatively gradual giving time to allow confirmation of trends
- Stretching for the ‘just attainable’ is a stimulus and its achievement or not is our Legacy for the Future



THANK YOU

