



# ALL SOULS' EPISCOPAL CHURCH

Compass Plan  
March 2016

## VISION

To be a vibrant and joy-filled congregation that serves as the community hub for Christ's transformative love

## MISSION

We invite all to grow in faith with us as we embody and courageously share God's love in the world.

## **Section I – Prologue or Introduction**

We are a people on a mission. We are called by God to participate in the building of God’s kingdom. We have been given the Great Commission, which encourages us to go out into the world to make disciples, to share the love of Christ, and to welcome travelers, strangers, and friends – fellow pilgrims on the journey – to take our place in the Body of Christ for the sake of God’s creation.

Over the past few years, All Souls’ Episcopal Church has been in transition. Together, we have grown and discerned our desire and our call to be the church in the community, a church for the community. We are no longer interested in being a church for the select few who might know about the wonderful community that resides within those blue doors but rather a church which is willing to fling those doors open, inviting all to join us and, more importantly, going into the community to share God’s love. Our long-range plan will give us direction and purpose as we continue to live into our call.

At the very onset of our long-range planning process, the Vestry and committee (which is made up of a representative sample of All Souls’ parishioners) discerned that referring to this plan as a “strategic plan” felt too clinical or industrial. Together, we adopted the name “Compass Plan” and referred to ourselves as the Compass Committee. The image of the Compass was our companion on this journey. Our intent was to remain prayerful and seek God’s call for us rather than simply decide our own destination. Thus, the compass is illustrative of seeking God’s guidance, looking for our “true north.”

Through prayerful discernment, conversation with parishioners, and our work together, the Compass Committee developed the following long-range plan. Our Compass Plan clearly identifies the values, vision, and mission of our parish, articulates goals, and lays out strategic actions that will help us achieve our objectives. The purpose of the Compass Plan is not to bind us or constrain our purpose in the world but rather to keep us sailing in the right direction. God is providing the direction, and our Compass Plan acts as the rudder to keep us on course.

You will find that the Compass Plan maintains some of our traditional ministry areas but also expands our ministries into some uncharted waters. The Compass Plan clearly identifies an evangelism component. We feel called, as a parish, to become more present in our local community. Through our presence, we will share the incredible power of God’s transformative love. Our plan also emphasizes both outreach and social justice. There is a deep yearning to embrace advocacy in addition to our traditional outreach activities. Advocacy is our call to be the voice of those who have no voice, to take a stand against the injustices of the world, and to support the truth that all people are beloved children of God and co-heirs with Christ of God’s kingdom. Our plan also contains significant objectives to care for our people, community, and resources, while continuing to offer wonderful, life-giving worship experiences.

Living out this plan will require each one of us to participate. It will require our best efforts. It will result in a transformation of our campus and buildings. It will include expanding and adding ministries. It will require us to take some risks, to leave our comfort zone, as we purposefully engage in the mission to which God has called us, the people and parish of All Souls’ Episcopal Church.

In all this, may we work together for God's glory. May we offer our God-given gifts and talents for the sake of God's kingdom, and may God bless us with the strength and courage to live out God's plan for us.

The Rev. Joseph J. Dirbas, Rector, All Souls' Episcopal Church

## **Section II – The Compass Planning Process**

The Compass planning process started in February 2015 at the vestry retreat. Vestry members participated in visioning exercises that laid groundwork for the process that followed. The Vestry also decided to rename the strategic planning committee to the Compass Committee, inspired by the aforementioned reasons and in keeping with the All Souls' Episcopal Church nautical motif. Soon after the vestry retreat, the Compass Committee was formed with an effort to obtain a representative cross-section of the parish. Under the able guidance of Allan Dorsey (a consultant who has led numerous strategic planning efforts of nonprofits, churches, and corporations) with the assistance of the late Suzanne Foucault, the committee began their work and introduced the process to the parish at a St. Patrick's Day dinner in March 2015.

The first major milestone was to identify the values, vision, and mission of All Souls' Episcopal Church. These elements provided the underpinnings for the entire Compass Plan. Once drafted, the Compass Committee shared the values, vision, and mission with the congregation at a Sunday Forum in May 2015 in order to receive input and suggestions. This congregational feedback was then incorporated, as appropriate, before completion of this first phase.

After discerning and determining the values, vision, and mission, the committee performed a current state analysis, which involved examining the demographics of the neighborhood and church, church trends, the programs and ministries of other churches, the buildings and grounds of All Souls' Episcopal Church, and the church's financial resources. As part of this effort we conducted a parish survey, which provided valuable information for the SWOT analysis to identify the parish's Strengths and Weaknesses, and Opportunities and Threats that exist outside the parish. This milestone was completed in August 2015, and the results were shared with the congregation in September 2015 at the Mission Sunday celebration.

Our next step was to use all these different elements to formulate five goal areas and corresponding strategic objectives. Five town hall meetings were held during Advent to share these with the parish and ask for ideas on how to achieve them. The goal areas are:

- Worship and Music
- Outreach and Social Justice
- Evangelism and Community Presence
- Care and Nurture of Our Community
- Value and Care for God's Gifts

This milestone was completed after the committee incorporated the town hall feedback to refine and expand objectives and action plans, wrote a final planning document, and submitted the plan to the new vestry for adoption. After the Vestry blessed the Compass Plan at the February 2016 vestry meeting, we celebrated the completion of this effort with a parish-wide party on St.

Patrick's Day, March 2016, complete with corned beef and cabbage. At that time, the Compass work transitioned to the implementation phase, and the Vestry assumed responsibility for the Compass Plan implementation over the next five years.

### **Section III – Compass Plan Foundation: Values, Vision, and Mission**

The goal of the Compass Committee's effort was to generate a long-range plan that provides direction for the programs and ministries of All Souls' Episcopal Church for the next five years. The first major step was to identify the values, vision, and mission of All Souls' Episcopal Church. Once drafted, the committee presented these to the congregation and received helpful feedback that was subsequently discussed in committee and used to refine the values and their respective descriptions, as well as the vision and mission statements.

The values are the foundation upon which all subsequent work is built. Any vision, goals, or actions should be aligned with core values in order to be authentic. The Compass Committee spent significant time and effort to discern and verbalize the core values of All Souls' Episcopal Church, distilling these beliefs into five overarching values:

- **Love** - We are in loving relationship with God, each other, and our community, embracing all individuals and families wherever they are in their journeys.
- **Christ-Centered** - We are guided by the Holy Spirit and the example of Jesus Christ in our prayer, worship, discipleship, and service to others, as we share the Good News.
- **Respect** - We honor the dignity of every person, valuing our differences, as we grow in Christ and learn from each other.
- **Stewardship** - We recognize that all we have comes from God, and with gratitude we generously share these abundant gifts, caring for all of God's creation.
- **Creativity** - We celebrate God's gifts of liturgy, music, and art as a window to experiencing the Divine.

The vision statement captures what we want All Souls' Episcopal Church to become and the mission statement then provides direction as to how we live out these values as we move from where we are today into our future. Our vision and mission will continue to guide all our church life endeavors.

#### **VISION**

To be a vibrant and joy-filled congregation that serves as the community hub for Christ's transformative love

#### **MISSION**

We invite all to grow in faith with us as we embody and courageously share God's love in the world.

## **Section IV – Goals, Strategic Objectives, Actions, and Resources Needed**

Based on the established values, value statements, vision, and mission, the Compass Committee discerned the long-term goals of All Souls' Episcopal Church and then generated objectives that would allow us to achieve those goals over the next five years. Each objective was crafted using the SMART guideline. That is, the objectives are Specific, Measurable, Attainable, Results-oriented, and Time-bound. By meeting these criteria, we can measure progress against our objectives. The goal areas are:

**Worship and Music:** to create an environment that enables everyone to experience the gift of God's love

**Outreach and Social Justice:** to love and serve those in need, and proclaiming our shared humanity, to advocate for the right of equitable treatment

**Evangelism and Community Presence:** to share by word and action the Good News of Jesus Christ with compassion, understanding, and love, and to invite involvement in the life, ministries, and programs at All Souls' Episcopal Church

**Care and Nurture of Our Community:** to attend to the spiritual, intellectual, and emotional needs of children, youth, and adults

**Value and Care for God's Gifts:** to value, care for, and strengthen our human, physical, financial, and cultural resources in gratitude for God's abundance

Once the objectives were crafted and the Compass Committee worked together discerning the shape of those objectives, the committee identified strategic actions that would allow us to meet those objectives. The strategic objectives are high-level and provide a direction to the ministries involved in executing those objectives but allow the ministries and responsible entities the freedom to determine tactical actions. That is, the ministry teams, their leaders, and staff are empowered and will determine how the action will be completed.

The following pages include the details of the Compass Plan. Each goal area has several objectives. Strategic actions supporting those objectives are identified and presented in the tables that follow. Those tables also identify the vestry liaison, the staff or volunteer leaders, the ministries involved, and budgetary impact. Budgetary impact is color-coded as follows:

- No Color - no expected impact;
- Green - within expected budget;
- Yellow - minor budget implications;
- Red - potentially large budget implications.

We believe the content on the next few pages will allow us to live into the vision of being the community hub for Christ's transformative love as we courageously share God's love with the world.

<b>GOAL STATEMENT:</b> <b>Worship and Music</b>	To create an environment that enables everyone to experience the gift of God's love		
<b>OBJECTIVE NO. 1</b>	To develop a 4-year talent management plan (lay, clergy, volunteer) by December 2016 that meets the changing needs of the congregation and community and implement that plan by December 2020.		
<b>VESTRY LIAISON:</b>	Worship Committee Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Rector, Wardens		
<b>MINISTRIES INVOLVED:</b>	Worship, Personnel, Evangelism		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Identify needs of the congregation and local community (to include a trend analysis of the parish and community)	June 2016	Worship, Evangelism, Clergy	Possible Budget Implications
Determine whether existing staff and skill sets meet the congregation's needs	October 2016	Rector, Personnel Committee	None
Assess fiscal and human resources needed in light of the operating budget and funding sources	Dec 2016	Rector, Personnel, Vestry	Expected Budget Implications
Develop Worship and Prayer Service(s) outside of regular Sunday morning worship in styles and format that allows access to Christ's transformative love	Oct 2017	Rector, Worship, Formation	May have large budgetary impact

<b>GOAL STATEMENT:</b> <b>Worship and Music</b>	To create an environment that enables everyone to experience the gift of God's love		
<b>OBJECTIVE NO. 2</b>	Increase the number of individuals participating in lay worship ministries by 50% of current level by December 2020. (Note: Choir is not included in the lay worship ministries for this objective.)		
<b>VESTRY LIAISON:</b>	Worship Committee Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Worship Committee Chair		
<b>MINISTRIES INVOLVED:</b>	Worship, Formation, Fellowship		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Conduct a needs assessment to include determining the number and percent of lay leaders and congregants who are active in worship ( <i>e.g.</i> , acolytes, readers, intercessors, greeters, ushers, altar guild, tellers, etc.)	Dec 2016	Worship Committee	None
Familiarize people with the different roles (Educate)	October 2017	Formation, Worship, Clergy	None
Build fellowship among the Worship and Music groups to strengthen the sense of belonging.	October 2017	Worship	Possible Budget Implications

<b>GOAL STATEMENT:</b> <b>Worship and Music</b>	To create an environment that enables everyone to experience the gift of God's love		
<b>OBJECTIVE NO. 3</b>	By December 2020, increase the number of youth and adults participating in music programs at All Souls' Episcopal Church by 100% as compared to December 2015 levels.		
<b>VESTRY LIAISON:</b>	Worship Committee Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Music Director		
<b>MINISTRIES INVOLVED:</b>	Worship, Music, Fellowship, Evangelism, Formation		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Expand music program offerings (to include music appreciation and education)	Dec 2020	Music Director	Expected Budget Implications
Develop and grow adult and children choirs	Dec 2020	Music Director	Possible Budget Implications



<b>GOAL STATEMENT: Outreach and Social Justice</b>	To strive to love and serve those in need, and proclaiming our shared humanity, advocate for the right of equitable treatment.		
<b>OBJECTIVE NO. 1</b>	By December 2020 we will double the participation in homeless ministries at the Episcopal Church Center (ECC), Ocean Beach.		
<b>VESTRY LIAISON:</b>	Outreach Committee Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Outreach Chair, Rector		
<b>MINISTRIES INVOLVED:</b>	Outreach		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Determine the existing and potential outreach ministries and needs at the ECC	Dec 2016	Outreach	None
Identify our current involvement with the ECC and determine those areas of need where our skills and gifts can assist the ministries of the ECC	May 2017	Outreach	None
Implement new ways to assist homeless ministries at the ECC in accordance with our gifts.	May 2019	Outreach	Possible Budget implications based upon needs at ECC

<b>GOAL STATEMENT: Outreach and Social Justice</b>	To strive to love and serve those in need, and proclaiming our shared humanity, advocate for the right of equitable treatment.		
<b>OBJECTIVE NO. 2</b>	Increase our financial support of outreach and social justice programs to 10% and our Common Life Share to 15% of operating revenue by Dec. 2020		
<b>VESTRY LIAISON:</b>	Outreach, Finance, Stewardship		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Stewardship Chair, Treasurer, Rector		
<b>MINISTRIES INVOLVED:</b>	Outreach, Finance, Stewardship		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Communicate the current outreach activities of All Souls' Episcopal Church and discuss outreach on a regular basis – Outreach Sunday	Dec 2016	Outreach	Expected to be within Budget
Identify areas of financial waste or areas where we can save money and divert savings to outreach	Dec 2016	Finance, Treasurer, Rector	None
Work with Stewardship to increase pledge revenue	Dec 2016	Stewardship	Possible Budget implications

<b>GOAL STATEMENT: Outreach and Social Justice</b>	To strive to love and serve those in need, and proclaiming our shared humanity, advocate for the right of equitable treatment.		
<b>OBJECTIVE NO. 3</b>	Increase our personal involvement in outreach programs (local, national, global) by 100% as compared to the number of people involved in outreach efforts in December 2015.		
<b>VESTRY LIAISON:</b>	Outreach		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Outreach Chair, Rector		
<b>MINISTRIES INVOLVED:</b>	Outreach, Evangelism, Communications, Fellowship		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Identify and Communicate the current outreach activities of All Souls' Episcopal Church and the number of people involved	Dec 2016	Outreach Committee	None
Communicate outreach activities with the local community and determine needs in our area and possibilities of partnering with other organizations.	October 2017	Outreach, Rector, Communications	Possible Budget requirements for communication
Continue discernment of outreach activities and recruit members for outreach committee and ministry teams.	Dec 2017 – on-going	Outreach	See Objective 2

<b>GOAL STATEMENT: Outreach and Social Justice</b>	To strive to love and serve those in need, and proclaiming our shared humanity, advocate for the right of equitable treatment.		
<b>OBJECTIVE NO. 4</b>	Develop a Social Justice and Human Rights program that addresses at least three areas of advocacy per year over the next 5 years.		
<b>VESTRY LIAISON:</b>	Advocacy Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Rector, Advocacy Ministry Lead		
<b>MINISTRIES INVOLVED:</b>	Outreach, Advocacy, Evangelism, Fellowship		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Establish an advocacy team to identify social justice issues and determine means to address (to include letter writing campaign team and pro-bono legal services).	October 2017	Outreach, Rector	Possible budget needs
Identify ways to participate with organizations that provide housing for transitionally, temporarily, or chronically homeless.	December 2017	Outreach, Advocacy	Possible budget needs
Provide social justice and advocacy awareness training for the congregation and neighborhood and identify advocacy issues	June 2017 and thereafter	Outreach, Evangelism	Expected budget needs

<b>GOAL STATEMENT:</b> <b>Evangelism and Community Presence</b>	To share by word and action the Good News of Jesus Christ with compassion, understanding, and love, and to invite involvement in the life, ministries, and programs at All Souls' Episcopal Church		
<b>OBJECTIVE NO. 1</b>	Offer at least 3 opportunities per year for engagement or education with the local community by 2020.		
<b>VESTRY LIAISON:</b>	Evangelism Committee		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Evangelism Lead and Parish Administrator		
<b>MINISTRIES INVOLVED:</b>	Evangelism, Formation, Stewardship, Communications		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Determine community interest and develop a quarterly public lecture series on Christian thought and society starting in fall 2016.	October 2016	Formation and Evangelism	Possible Budget Needs
Host annual church music and movie festivals	October 2017	Formation, Communications, and Evangelism	Possible Budget Needs
Advertise to the wider community (in secular language) events that we regularly or periodically hold.	Beginning October 2016	Evangelism, Communication, Parish Admin	Requires budget for advertising
Offer classes and workshops / learning opportunities for specific skills	Sep 2017	Evangelism	Requires budget

<b>GOAL STATEMENT:</b> <b>Evangelism and Community Presence</b>	To share by word and action the Good News of Jesus Christ with compassion, understanding, and love, and to invite involvement in the life, ministries, and programs at All Souls' Episcopal Church		
<b>OBJECTIVE NO. 2</b>	Increase All Souls' Episcopal Church level of engagement with those in the community by 15% each year		
<b>VESTRY LIAISON:</b>	Evangelism		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Evangelism Chair, Rector, Outreach Chair		
<b>MINISTRIES INVOLVED:</b>	Evangelism, Outreach, Worship, Communications		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Develop survey to measure engagement and set baseline for progress.	Dec 2016	Evangelism	Expected to be within budget
Identify alternative worship services, in addition to current offerings, to reach the wider community.	July 2017	Evangelism, Worship, Rector	Possible budget Implications
Offer and promote to the larger neighborhood family oriented activities and adult social events	Dec 2017	Evangelism, Communications	Expected Budget Implications
Provide opportunities for volunteering and giving in/by the community	Dec 2017	Outreach, Evangelism	Possible Budget Implications

<b>GOAL STATEMENT:</b> <b>Evangelism and Community Presence</b>	To share by word and action the Good News of Jesus Christ with compassion, understanding, and love, and to invite involvement in the life, ministries, and programs at All Souls' Episcopal Church		
<b>OBJECTIVE NO. 3</b>	(Communication and marketing objective) Increase the number of communication channels/ event announcements to the community and parish by 15% per year.		
<b>VESTRY LIAISON:</b>	Evangelism		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Parish Administrator, Rector		
<b>MINISTRIES INVOLVED:</b>	Evangelism, Communications		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Expand our social media presence	Dec 2016	Communication, Office Admin	Possible implications
Write articles, with photos, for local newspapers	Oct 2017	Evangelism, Communications	None
Regular involvement in community events ( <i>e.g.</i> , Farmer's market, Summer Concert Series, OB Christmas parade)	Oct 2017 - ongoing	Evangelism, Communications	Expected Budget Implications

<b>GOAL STATEMENT:</b> <b>Care and Nurture of Our Community</b>	To attend to the spiritual, intellectual, and emotional needs of children, youth, and adults		
<b>OBJECTIVE NO. 1</b>	By Sept. 30, 2020, double our enrollment in Sunday School (Godly Play through Middle School) as compared to our enrollment in Sept. 30, 2015 (years 3 through 13).		
<b>VESTRY LIAISON:</b>	Formation and Youth Ministry		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Youth Ministry Lead		
<b>MINISTRIES INVOLVED:</b>	Family, Youth, and Children, Formation, Worship, Fellowship, Communications		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Identify and implement ways to attract young families, e.g. annual VBS	October 2019	Clergy, Staff, Youth Ministry Volunteers	Potentially large depending upon actions identified
Leverage existing and implement new activities targeted to teens and middle schoolers	October 2017	Clergy, Staff, Youth Ministry Volunteers	Potentially large depending upon actions identified



<b>GOAL STATEMENT:</b> <b>Care and Nurture of Our Community</b>	To attend to the spiritual, intellectual, and emotional needs of children, youth, and adults		
<b>OBJECTIVE NO. 2</b>	To increase contact hours (# hours x # participants) by 50% with high school students in three years		
<b>VESTRY LIAISON:</b>	Formation, Youth Ministry		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Youth Ministry Lead, Rector		
<b>MINISTRIES INVOLVED:</b>	Youth, Families, Fellowship, Outreach, Worship		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Enhance the youth ministry programs by offering at least 3 external field trips each year to engage more high school students ( <i>e.g.</i> youth retreats)	Yearly, beginning 2017	Youth Ministry Team	Possibly HIGH
Create intergenerational programs	Dec 2020	Fellowship, Formation, Youth Ministry Team, Clergy	
Offer opportunities for youth to serve in the community	Dec 2016	Youth Ministry, Outreach, Clergy	

<b>GOAL STATEMENT:</b> <b>Care and Nurture of Our Community</b>	To attend to the spiritual, intellectual, and emotional needs of children, youth, and adults		
<b>OBJECTIVE NO. 3</b>	By September 2018 offer adult parishioners a different spiritual growth opportunity on a quarterly basis		
<b>VESTRY LIAISON:</b>	Formation		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Formation Committee Chair, Rector		
<b>MINISTRIES INVOLVED:</b>	Formation, Worship, Fellowship, Communications		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Survey members for topics and programs of interest annually	Dec 2016	Adult Formation	None or within scope
Develop/foster small group ministries to promote fellowship, education, and spiritual growth	Oct 2017	Formation, Fellowship	Expected to be within operating budget
Implement quarterly lecture series on a host of topics ( <i>Collaborate with Evangelism</i> )	Oct 2017	Formation	Expected to be within operating budget

<b>GOAL STATEMENT:</b> <b>Care and Nurture of Our Community</b>	To attend to the spiritual, intellectual, and emotional needs of children, youth, and adults		
<b>OBJECTIVE NO. 4</b>	By December 2018 we will expand our pastoral care ministries available by 50% based on current ministries		
<b>VESTRY LIAISON:</b>	Pastoral Care		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Pastoral Care Committee Chair, Pastoral Associate		
<b>MINISTRIES INVOLVED:</b>	Pastoral Care		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Assess the pastoral care needs of parishioners and how well current programs are addressing them.	October 2016	Pastoral Care	None
Develop new programs to address the needs	Oct 2017 - Dec 2020	Pastoral Care, Pastoral Associate	Possible Budget Implications
Add the lay and clergy ministers to support them ( <i>ties back to Talent Management Plan</i> )	Oct 2017	Rector, Pastoral Care	Possibly Large Budget Implications

<b>GOAL STATEMENT: Value and Care for God's Gifts</b>	To value, care for, and strengthen our human, physical, financial, and cultural resources in gratitude for God's abundance.		
<b>OBJECTIVE NO. 1</b>	Increase total income from all sources to All Souls' Episcopal Church by at least 30% from 12/31/15 to 12/31/20 (for instance, operating income from \$550k to \$715k)		
<b>VESTRY LIAISON:</b>	Endowment Rep, Stewardship Rep, Property Rep		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Facility Manager, Rector, Endowment Committee Chair, Home Tour Chair, Music Director		
<b>MINISTRIES INVOLVED:</b>	Finance, Stewardship, Home Tour, Property		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Develop a plan to optimize use of our facilities and increase rental income	Aug 2016	Facility Manager	Within Scope
Plan and implement a capital campaign to enhance facilities for potential income (see objective 3 of this Goal Area)	Oct 2017	Stewardship, Finance, Vestry, Rector	Cost of campaign to be determined for 2017 budget
Institute a planned giving program	October 2016	Vestry, Endowment, Stewardship	Not currently budgeted
Evaluate our stewardship campaign and its spiritual underpinnings	Yearly	Rector, Steward, Vestry	
Develop innovative ideas for new and existing fund-raising events	Yearly	Home Tour, Finance, Music and worship	

<b>GOAL STATEMENT: Value and Care for God's Gifts</b>	To value, care for, and strengthen our human, physical, financial, and cultural resources in gratitude for God's abundance.		
<b>OBJECTIVE NO. 2</b>	Increase the number of lay people involved in the life and leadership of the parish (outside the context of worship) by 50 by 12/31/20, of which 30 have not been previously involved		
<b>VESTRY LIAISON:</b>	Formation Committee Representative, All others		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Rector, Ministry Leads		
<b>MINISTRIES INVOLVED:</b>	Fellowship, Outreach, Advocacy, Formation, Evangelism, Stewardship, Finance		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Define ministry areas and measure the current number of people involved in lay ministry in 2016	Oct 2016	Vestry, Ministry Leads	None
Help people identify their spiritual gifts and connect them with opportunities to exercise them	Dec 2016, Dec 2018	Formation Committee, Stewardship	Within Operating Budget
Have clergy, vestry, and ministry leads identify potential leaders and personally invite them to participate	On-Going	Clergy, Vestry, Ministry Leads	None

<b>GOAL STATEMENT: Value and Care for God's Gifts</b>	To value, care for, and strengthen our human, physical, financial, and cultural resources in gratitude for God's abundance.		
<b>OBJECTIVE NO. 3</b>	Continue the transformation of our facilities by creating an environment that supports the needs of the parish and the community and complete the facilities development plan by December 2020		
<b>VESTRY LIAISON:</b>	Property Committee Representative and Facility Development Committee Representative		
<b>ACCOUNTABLE STAFF OR VOLUNTEER LEADER(S):</b>	Property Chair, Facility Development Chair, Rector		
<b>MINISTRIES INVOLVED:</b>	Properties, Stewardship, Finance, Fellowship, Formation		
<b>STRATEGIC ACTIONS</b>	<b>COMPLETION DATE</b>	<b>RESPONSIBLE ENTITY</b>	<b>BUDGETARY IMPLICATIONS</b>
Assess urgent facility needs and address those determined most urgent	Dec 2016	Property Committee	Within scope of operating budget with fundraising
Develop a Facility Development Plan with budget and prioritize the components of the needs assessment	Dec 2016	Facility Development Committee (FDC)	Not Currently Budgeted
Conduct a capital campaign	Oct 2017	Stewardship, Finance, Vestry, Rector	Cost of campaign to be determined for 2017 budget
Execute Facility Development Plan	Dec 202	Vestry, FDC	Extra-budget-Capital Campaign

## **Section V – Implementation and Monitoring**

Without implementation and monitoring, the Compass Plan becomes a document that simply takes up space and accumulates dust. Surely, that is not what the parish, in supporting this effort, or the Compass Committee intended over twelve months of its work. A dynamic path lies ahead with bold implementation and accountability for ensuring the specific strategic actions outlined in the plan are met. As Lewis Carroll's Alice asked the Cheshire Cat, "Would you please tell me which way to go from here?" The cat responded, "That depends on where you want to go." The Compass Committee has prepared a blueprint, a way to 'go,' and presents the following plan for adoption to those who will have key roles in assuring the plan is put into action and monitored to evaluate its success.

### Parishioner Participation

The parish family shares ownership of the Compass Plan and is invited and encouraged to actively participate and provide constructive input and support in the five-year process of plan implementation. The key role for implementation and ultimate responsibility for achieving plan objectives, however, resides with the Vestry in coordination with the liaisons, ministries, clergy, and staff identified in the preceding tables.

### Monitoring, Review, and Adaptation

To ensure the Compass Plan remains a high priority for the Vestry, the Vestry will review goals and strategic actions at regular vestry meetings. The Vestry must be cognizant of the completion dates for each strategic action and plan accordingly for implementation.

The Senior Warden and Junior Warden are tasked with monitoring the plan throughout the five-year period of implementation. The wardens will request and closely follow quarterly and monthly, if deemed necessary, reports on progress against the plan presented to the Vestry. At the annual vestry retreat, the wardens will lead the Vestry in a thorough review of the Compass Plan by examining whether goals for that year were timely met, explaining how changes/modifications to the plan may have come about, and discussing goals scheduled for the coming year. Further discussion will identify any impediments to achieving strategic action completion dates.

Periodic reports will be shared with the congregation in a manner that reaches all members of the parish (e.g., announcements in church, e-blasts, e-Rubric, and parish mailings). Important events and progress milestones of the plan will be reported to the congregation when they occur. In addition, the congregation will receive a report by the wardens at the annual meeting of the parish.

### Budget

Budgeting for the implementation of the Compass Plan will be integrated into the annual budget process each year. Implementation of the plan may require a new approach to funding the many strategic actions adopted. Some transformative strategic actions, as described in the plan, require

committed financial support. While some strategic actions may require little additional funding, others will necessitate creative and meaningful change to the annual budget dynamic. The Vestry, which is charged with financial accountability, will review all costs related to larger investments in plan implementation as they occur.

### The Holy Spirit

The Compass Plan serves as a living and dynamic document. While the values, vision, mission, and goals identified in the plan are not expected to change, we welcome and celebrate the Holy Spirit's presence in our community, understanding it may bring opportunities for adaptation, change, and re-prioritization of strategic actions.

## **Section VI – Places to Begin and Other Great Ideas**

As the Compass Committee continued its work on developing the long-range plan for All Souls' Episcopal Church, we had ample opportunity for conversation with parishioners and ministry leaders. These conversations resulted in some actions seen as steps we could take, here and now, to begin supporting the plan objectives while we continue to implement the Compass Plan. The following lists places to begin and some of the "great ideas" that came out of our community conversations.

### **Worship and Music**

- Ask new members if and how they would like to be involved in Lay Ministry
- Encourage existing lay ministers to recruit directly from the congregation
- Have lay people make announcements in the parish or write articles for the e-Rubric about the importance of lay ministry in their lives
- Develop a hand bell choir
- Continue developing relationship with Point Loma Nazarene University (PLNU)
- Develop a "Shepherd" program for new members
- Encourage our music director to share our Musical Offerings with local universities
- Bach's Lunch – Free noon concerts on the Fritts Richards Opus V

### **Outreach and Social Justice**

- Increase involvement with Peninsula Shepherd Center
- Offer education on advocacy
- Make contact with The Refugee Network to determine how we can be involved
- Meal and conversation with families from other faiths

### **Evangelism and Community Presence**

- Provide a worship service or musical presentation to a local nursing home
- Hold a community Spaghetti dinner
- Host a food truck event in the parking lot or along Catalina
- Silent Movie night in Church with live organ accompaniment
- Provide local hotels with a list of our worship services and information about our church
- Invite local church leaders to a luncheon at All Souls' Episcopal Church



- Bring a friend to dinner (St. Patrick's and Pentecost BBQ)
- Offer CPR training on campus
- Offer a thank you to local schools and inquire how we can best support them
- Develop a care-giver's support group

### **Care and Nurture**

- Begin offering Education for Ministry (EfM) classes
- Organize parish day at Camp Stevens
- Develop a Youth and Families ministry team
- Create a Homework Haven afterschool and tutoring program
- Teach kids a skill (bake, sew, sports, other interest)

### **Value and Care for God's Gifts**

- Car donations to All Souls' Episcopal Church
- Silent auctions at dinner functions
- Develop a legacy society for planned giving
- Research how All Souls' Episcopal Church can be a "disaster response center"
- Use our church as a venue to display art from local artists
- Encourage existing volunteers in the church to recruit directly from the congregation
- Have volunteers make announcements in the parish or write articles for the e-Rubric about the personal value and importance of volunteering

## **Section VII – Recognitions and Acknowledgements**

The strategic planning process involved many people who dedicated countless hours to this endeavor. The Compass Committee included the following All Souls' Episcopal Church parishioners and staff:

Ward Fleri (Co-chair)  
 Marlene Herndon (Co-chair)  
 Rosemary Barnes  
 Ann Evans  
 Kirsten Hanson Garcia  
 Hilliard Harper  
 Myrtle Livingstone  
 Valerie Lynne  
 Neil Malmquist  
 Darla Mercer  
 Maria Piña  
 Tom Sparrow  
 Eric Spore  
 Peggy Strand  
 Jayne Ricker (staff)  
 Ruben Valenzuela (staff)  
 The Rev. Joseph Dirbas (Rector)

Allan Dorsey ably facilitated the process, with assistance from the late Suzanne Foucault. In addition to her active participation in the process, Jayne Ricker provided important logistical support during the entire process.

There were three subcommittees established to assist in the process. The Values, Vision, and Mission subcommittee was chaired by Marlene Herndon. The Current State Analysis subcommittee was chaired by Ward Fleri. The Communication and Engagement subcommittee was chaired by Kirsten Hanson Garcia.

The Compass Committee is indebted to those parishioners who took the time to provide comments and feedback by filling out the SWOT survey, attending the Sunday forum where the values, vision, and mission were first presented, engaging in the Mission Sunday event to learn about the current state analysis findings, or participating in the Advent town hall meetings. Parishioner input was invaluable in shaping the final product.

Most of all, we are grateful for God's inspiration and guidance throughout this meaningful journey.

#### **Appendix – References and Additional Readings**

Community profile and information on All Souls' Episcopal Church giving and attendance (along with such information for other Episcopal churches) are available from The Episcopal Church: <http://www.episcopalchurch.org/page/studying-your-congregation-and-community>

The document "New Facts on Episcopal Church Growth and Decline" is available at [http://www.episcopalchurch.org/files/new\\_facts\\_on\\_growth\\_2014\\_final.pdf](http://www.episcopalchurch.org/files/new_facts_on_growth_2014_final.pdf).

Other materials, including Compass Committee presentations, can be found at [www.allsoulspointloma.org](http://www.allsoulspointloma.org) under "Grow and Learn" / "Compass Plan."