

# THE CHURCH OF ST. PAUL IN THE DESERT

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Pentecost 2022

# 2022 STRATEGIC PLAN PROPOSAL

Prepared by  
Strategic Planning Ad Hoc Committee  
Patrick Von Bargen, Wayne Soucy, Rick Tinsley,  
Craig Ewing, Bob Richter, George Holliday, Ed Walsh,  
Roger Allen, Rev. Canon Tom Clarke, Rev. Lorenzo Lebrija,  
Rev. Jessie Thompson, and Rev. Dan Kline



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# INTRODUCTION

What is a strategic plan? Strategic planning is an organization's process of defining its strategy or direction, and making decisions on allocating its resources to pursue this strategy. This approach to thinking about the future and measuring organizational progress developed in the 1960s with corporations and remains important in the business sector today. The concept is easily transferable to non-profit strategic management [1].

Initiating a strategic plan is a common practice, especially when new leadership comes to an organization. Case in point—our own Diocese undertook a strategic plan when Bishop Susan started her tenure [2]. St. Margaret's, our daughter parish in Palm Desert, also underwent a strategic planning process after calling a new rector [3]. We are in good company as we consider this process. It provides intentional space to continue discerning the specifics of where God might be leading us over the next three years.

Over the last few months, at the initiation of the Co-Rectors and with the blessing of the Wardens, an ad hoc group was formed. This group was made of persons who checked their interest on the ministry forms handed out at the 2022 Parish Annual Meeting. Many came with strategic planning experience in their respective fields. We brought to this brain trust a simple question: what might a strategic planning process look like at the Church of St. Paul in the Desert? How do we continue building on the planning that was started during the discernment process when searching for a new (Co-)Rector(s)? How do we integrate those initial discoveries with our new priests' on-the-ground perspective and the larger parish's perception as we get closer to finishing the main cycle of the liturgical year? How do we "go deep" and focus on our strengths so that we can maximize our resources so that we can be the best stewards possible of the abundant life that God has given us?

Grounded in the Eucharist, we ate, prayed, and processed together what steps we would need to take in order to discern how to listen together about our future and what God is calling us to as a community who dares to follow Jesus Christ in his life of courageous love for the world. The following proposal is the fruit of these efforts.

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[1] [https://en.wikipedia.org/wiki/Strategic\\_planning](https://en.wikipedia.org/wiki/Strategic_planning)

[2] <https://edsd.org/wp-content/uploads/2021/10/Strategic-Plan-2020.pdf>

[3] <https://stmargarets.org/WHO%20WE%20ARE/strategicplan.html>

# PROPOSED MISSION & VALUES FOR THE STRATEGIC PLANNING TEAM

We would recommend that the Strategic Planning Team (SPT) consider the following approach to the SPT's mission, values, goals, and objectives.

One way to frame the **MISSION** for the SPT could be: "The Strategic Planning Team of St Paul in the Desert is dedicated to producing a Christ-centered strategic plan that projects an innovative future for St Paul's through process that respects all voices of the parish."

The **VALUES** by which the SPT would conduct their work would thus include:

- Producing a plan that would be Christ-centered – spiritually grounded, drawing from both the Jesuit and Quaker traditions, and explicitly calling on the Holy Spirit to help shape the plan;
- Projecting an innovative future – envisioning results that require openness, creativity, and nourishing change;
- Conducting a process that respects all voices in the parish – acting with overt inclusiveness, energetically reaching out to everyone in our parish, treating everyone with the highest respect, maintaining transparency of the SPT's process, collaborating enthusiastically with the communities within our parish, and welcoming different and new perspectives.



# PROPOSED GOALS & OBJECTIVES FOR THE STRATEGIC PLANNING TEAM

The GOALS and OBJECTIVES of the SPT would include producing a strategic plan:

- That, if fully implemented, produces results that are different from what we do today and that add palpable value to life at St. Paul's and to the communities that St. Paul's serves;
- That includes a relatively small set of five to seven goals that are easy to envision, clear, and simply stated;
- That includes measurable objectives (under each goal) against which progress can be assessed on an annual basis during the term of the plan;
- That explicitly addresses the language of the current mission of the church and offers amendments as appropriate;
- That proposes to achieve its goals and objectives by the end of three years, unless the SPT decides to extend the term of the plan – or specific goals of the plan – to four or five years.
- That is ready in some draft form by the church's annual meeting in January 2023.



# A NOTE ON DIVERSITY, EQUITY, AND INCLUSION

One of our most basic human needs is having a sense of belonging. We all want to be included, loved and respected. We all want to feel like our contributions are important. In the church, in our congregation, we have the power to do our part to fulfill that need. When we make the effort to learn about others' points of view, to include and welcome others who are different from ourselves, we are better for it [4].

We would miss vitally important insights, experiences, and ideas if we neglect making diversity, equity, and inclusion a driving principle in developing our parish strategic plan. For this reason, we need to gain a clear picture of our demographics and the demographics of our surrounding communities. Then we need to do everything we can to make sure that the demographics are properly represented in the makeup of our Strategic Planning Team.

Demographics, include more than gender, age, and race. Other criteria needed include: Cis/Trans, generation (Boomer, X, Millennial, etc.), liturgical spectrum, religious background, cultural background, sexual orientation, disabilities, socioeconomic status/background, theological background, political background and perhaps others.

It may be easier/simpler to operate under a system which assumes that the largest demographic group makes the decisions (Gay, middle-aged and older, professional males, for example). Think how limiting that would be for the rest of the congregation. How sad it would be if we only ate meatloaf and fried chicken—without knowing how wonderful the myriad ethnic foods and the amazing varieties of fruit and vegetables there are out there!

There are several tools available which measure our communities' make-up. Once we have that information we will not only need to include representatives appropriately, but work to make sure that all voices are heard. We need to encourage inclusion, equity, and diversity, not only because it is "the right thing to do," but because we have a need and a desire to gain insights, ideas, and strategies we would otherwise miss entirely if we don't.

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[4] [www.goodthingsgoingaround.com](http://www.goodthingsgoingaround.com) - paraphrased from Lisa Desatnik.

# PROPOSAL FOR GATHERING DATA

Introduction: The purpose of this aspect of the recommended process for strategic planning is to cast a wide net to gather information and data from external and internal sources.

External: To determine if our initiatives are in sync with information from the larger community of Palm Springs and the Church.

- Seek data from the City of Palm Springs regarding demographics and business opportunities as well as the recent strategic plan of the city to understand our immediate surrounding community and its roadmap.
- Review data from Coachella Valley Business Association and Chamber of Commerce to consider resources from larger community.
- Seek resources from diocese and seminaries of the Episcopal Church for planning purposes. For example, Lifelong Learning at VTS is sponsoring a seminar: Soulful approach to planning.
- Review recent survey and documentation from Episcopal Church entitled “Jesus in America” which presents statistics from a variety of faith traditions conducted by Ipsos released March 2022.
- Review recent strategic plans of Episcopal seminaries to be aware of various approaches to formation that the schools are using in their preparation of candidates for ordination.
- Review the strategic plans of other faith communities in our community.
- Review the work of Try Tank to discern trends from their work which is innovative and its application to St. Paul’s.



## PROPOSAL FOR GATHERING DATA (CONT.)

Internal: When it is determined what the major initiatives might be, it is time to field test with a broad audience to listen and get buy-in and to determine what people are seeking.

- Review data from recent parish profile work in rector search.
- Review data of parish from parochial reports for 5 years to determine trends.
- Develop a program to seek response from the parish and its leadership to listen through guided conversations reacting to major initiatives which might be the direction of the plan.
- Using an agreed upon format of standard questions organize Personal interviews with each vestry member.
- Personal interviews with each chair of parish ministries.
- Small group meetings with parishioners to seek feedback to potential major initiatives to build buy-in.
- Plan Town Hall meetings with small groups to respond to major initiatives.
- To catch anyone not involved in the various personal gatherings, consider a parish survey to gather reactions to major initiatives.



# PROPOSAL FOR FOCUS AREAS

In order for St Paul’s upcoming Strategic Plan to be a complete and successful path forward, it must address the multiple elements and initiatives that embody our parish – now and in the future. We can call these Focus Areas. A look at recent work such as the Parish Profile can provide a list of our current efforts, but we also wish to be open to new opportunities and programs that may not presently exist. In this way, the planning process can explore the full range of Focus Areas that we hope to engage during the Plan’s timeline.

One way to establish a list of Focus Areas is to inventory all current elements of the parish and leave room for a few ‘blank spaces’ which can be filled in with new initiatives that are discerned through the planning process. Based on our recent Parish Profile, a list of Focus Areas could look something like this:

|   |   |   |
|---|---|---|
| <b>Worship/Music</b>                      | <b>Finance/<br/>Stewardship</b>                                 | <b>Christian Formation<br/>(Youth &amp; Adult)</b>  |
| <b>Evangelism</b>                         | <b>Membership &amp; Volunteers<br/>(Leadership Development)</b> | <b>Mission Outreach<br/>(Feeding &amp; Helping)</b> |
| <b>Facilities/<br/>Campus Development</b> | <b>Innovation</b>   | <b>Blank Space</b>                                  |
| <b>Blank Space</b>                        | <b>Blank Space</b>  | <b>Blank Space</b>                                  |

## PROPOSAL FOR FOCUS AREAS (CONT.)

Another approach would be to identify and explore underlying drives or ‘motives’ behind all our work and see what existing and new initiatives are revealed. Such a ‘performance-based’ list might look like this [5]:

|                          |             |                 |
|--------------------------|-------------|-----------------|
| <b>Trust</b>             | <b>Care</b> | <b>Proclaim</b> |
| <b>Prophecy/Envision</b> | <b>Love</b> | <b>Serve</b>    |

The advantage of this second approach is that it allows for a more open discussion of what’s possible in the future. It is a discussion that starts with a clean slate where existing and new programs are considered afresh. A disadvantage is that it can be too esoteric for some and will require additional training and orientation for those more comfortable with a list of specific and tangible programs.

It might be possible to develop a hybrid approach here: Start with the ‘laundry list’ of existing programs and then, in looking for new possibilities, create a dialogue around the second list to inspire creative and innovative thinking about future options. This approach preserves the security of the familiar for those who prefer that yet allows for safely stepping out on to thinner ice in search of the new. One caveat with both the laundry list and hybrid approaches is that they tend to accept existing programs as a given going forward. In any case, consideration for dropping any existing program will likely be a difficult, if important, conversation.

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[5] [https://www.youtube.com/watch?v=nDt\\_\\_8cXpKY&list=PLJjCSeK9woSQCc5tBI7kc1n9WFNFbp064](https://www.youtube.com/watch?v=nDt__8cXpKY&list=PLJjCSeK9woSQCc5tBI7kc1n9WFNFbp064) - See the Bishop's sermon from the Co-Rector Installation for these values.

## A NOTE ON ACCOUNTABILITY

In order to ensure timeline and goals are being met, each member of the group must have a clear understanding of the task that group member is to perform and when it must be completed either in part or in whole. One way to do this is to hire a consultant who can establish goals and deadlines. Using a consultant prevents one committee member from having to supervise another committee member (e.g. neutral party). This also frees up the Co-Rectors from having to manage the day-to-day work of the SPT.

Another way to provide accountability is to make one member of the group or two members of the group the Chair(s) who would supervise and follow up with the other committee members regarding the status of completion of their assignments.

Co-rector and Vestry involvement should be grassroots in nature as the strategic plan is being developed and implemented as a result of a consensus between the group members, Vestry, and the Co-rectors. Regardless of how we go about ensuring accountability, it is paramount that each group member understand that accountability is everyone's personal responsibility.

After the Plan has been approved by the Co-Rectors/Vestry and presented at the Annual Meeting, there will need to be further accountability from the Co-Rectors, Vestry, and parish to completing the goals outlined in the strategic plan, There needs to be a clear plan around how to do that. A consultant will help with setting up a follow-up plan for staying on track after the initial heavy lifting of drafting a plan with parish wide-buy-in is accomplished.



# PROPOSED SAMPLE TIMELINE

| <b>Activity</b>      | <b>Start</b>    | <b>End</b>      | <b>Notes</b>  |
|----------------------|-----------------|-----------------|---|
| <b>Project Start</b> | <b>5/18/22</b>  |                 | <b>Present Strategic Planning Proposal to Vestry for Approval</b>   |
| <b>Milestone 1</b>   | <b>5/20/22</b>  | <b>6/10/22</b>  | <b>Seek proposals from strategic planning consultants.</b>  |
| <b>Milestone 2</b>   | <b>6/11/22</b>  | <b>6/15/22</b>  | <b>Review consultant proposals and select one to present to Vestry.</b>   |
| <b>Milestone 3</b>   | <b>6/22/22</b>  |                 | <b>Vestry review and approve consultant engagement details.</b>   |
| <b>Milestone 4</b>   | <b>9/6/22</b>   | <b>12/16/22</b> | <b>Period of consultant engagement on project.</b>  |
| <b>Milestone 5</b>   | <b>9/6/22</b>   | <b>9/30/22</b>  | <b>Research demographic &amp; community data, as well as other diocesan &amp; church community strategic plans.</b> |
| <b>Milestone 6</b>   | <b>10/3/22</b>  | <b>11/18/22</b> | <b>Focus groups, patio gatherings, and/or surveys for input.</b>  |
| <b>Milestone 7</b>   | <b>11/21/22</b> | <b>12/2/22</b>  | <b>Review all input and write a draft plan.</b>   |
| <b>Milestone 8</b>   | <b>12/5/22</b>  | <b>12/12/22</b> | <b>Seek full SRT and Vestry comments and make suggested revisions.</b>  |
| <b>Milestone 9</b>   | <b>1/18/23</b>  |                 | <b>Vestry review and approval of 3 year plan.</b>   |
| <b>Milestone 10</b>  | <b>1/29/23</b>  |                 | <b>Presentation of 3 year plan at Annual Meeting.</b>   |
| <b>Project End</b>   | <b>2/1/23</b>   |                 | <b>Implement plan following approved milestones.</b>  |

# PROPOSED BUDGET

|                |          |
|----------------|----------|
| Consultant     | \$10K    |
| Events         | \$1K     |
| Graphic Design | \$1K     |
| Research       | \$0      |
| Staff & Office | \$0      |
| Diocesan Grant | \$5-12K? |
| Total Cost     | \$0-7K?  |



# PROPOSED BUDGET BREAKDOWN

## CONSULTANT

From a few conversations, including St. Margaret's, the cost will be about \$10,000.

## EVENTS

Assuming that the steering committee wants to have a few events to gather more information or to share it, then we should budget for it. Let us plan that the committee has five events over the course of the year leading to the annual meeting. For each event there will be a \$200 budget for refreshments and some snacks. The total is \$1,000.

## GRAPHIC DESIGN

The final plan should be well designed to be attractive and compelling. This is similar to a corporate report. A graphic designer can do this in about 20 hours at \$50 an hour, or a total of \$1,000.

## RESEARCH

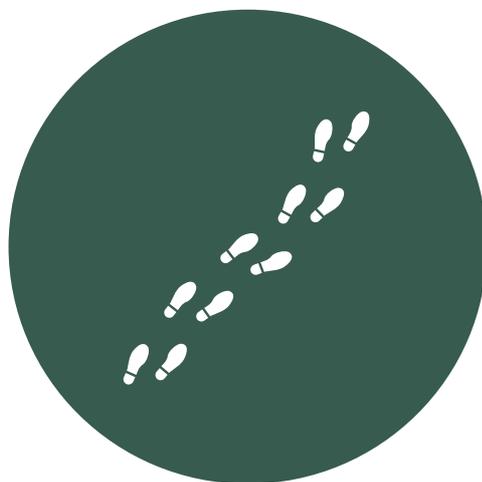
No money needs to be allocated toward acquiring research since so much is freely available from open sources, the diocese, and the church-wide offices of the church. Likewise for gathering data from the congregation we already have the recent reports prepared for the rector search and there are free tools for new surveys, if needed. Cost \$0.

## STAFF TIME AND OFFICE EXPENSES

Same as above, this budget does not cover any of the office staff time needed (including that of the rectors) or office supplies (copying, etc). Cost \$0.

## NEXT STEPS

- Approve a budget for the SPT. [6]
- Nominate at least 2 Vestry members to work with the Ad Hoc Group on vetting consultants. [7]
- Think about folks who would be a good fit for the SPT.
- Pray for this vital work of discernment in the life of our parish.



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[6] The Vestry approved the budget at the May 18th, 2022 meeting.

[7] Wayne Soucy, Vestry Liaison to the Finance Committee, and Bob Richter, Vestry Liaison to the Stewardship Committee were nominated to help the Ad Hoc Group recommend a consultant for the Vestry and Co-Rectors to select.