

TAKE OUR FAITH FORWARD

Three-Year Strategic Plan Proposal for the United Methodist Church of Whitefish Bay

A Journey of Personal Faith and Church Growth

Introduction and Summary

This Strategic Plan is a document that sets forth the mission, vision, and goals of our church and the actions needed to achieve them. It will set a direction for the church and guide our decisions and priorities. The Strategic Plan identifies and focuses on seven discipleship objectives that are critical to the future of our church.

Why develop a Strategic Plan?

This Strategic Plan will help our church **Take Our Faith Forward**. To energize our church and grow as a congregation, we must build a strong foundation of faith in God and a clear identity as disciples of Jesus Christ. To build this foundation and identity, we must periodically evaluate how we are living our Mission and Vision and plan for the future. This Strategic Plan is our plan for the future.

The foundational principles for this Strategic Plan are our church's Mission and Vision.

The **Mission of UMC-WFB** is to **assist people to become committed followers of Jesus Christ** who

- Love God
- Care for Each Other
- Serve in the World

The **Vision of UMC-WFB** is that all members grow in their Christian discipleship by

- regularly attending worship
- having an active prayer life
- becoming involved in caring fellowship groups
- participating in meaningful missions and ministries, and
- financially supporting the Mission of the church by working towards a tithe

The Strategic Plan is also informed by the **Welcoming Statement of the UMC-WFB**. It states:

“God’s grace is available to all, and all persons are individuals of sacred worth. The congregants of the United Methodist Church of Whitefish Bay seek to live in Christian community, welcoming all Christian seekers and believers regardless of age, gender, marital status, race, sexual orientation, social or economic status, gender identity, and physical or mental ability.”

Recent events have increased the need for strategic planning:

- The Methodist denomination is facing a split over the issue of same-sex marriage and the ordination of gay pastors. If and when a split occurs, the United Methodist denomination will change in ways that may impact our local church.
- In January of 2020 the COVID-19 virus became a world-wide pandemic. In March the church shut down for almost one year. In-person worship and meetings were replaced with livestream worship and Zoom meetings. Certain ministries slowed or stopped while others began. Our

members also changed in ways we may not fully understand. The strategic plan was put on hold while pastors, staff and congregants searched for the new normal. As the church gradually reopens, it appears that we will be operating in a hybrid environment – virtual and in-person – for some time. This will require reimagining our ministries and Strategic Plan. The following document reflects that reimagining.

- The retirements of Pastor Janet Hartzell and Steve Lirely, assimilation of a new hire and possible realignment of duties of other staff may impact certain objectives of the plan as well.

Overview of Strategic Plan

The Strategic Planning Team represent staff, ALB and the congregation:

- Staff: Pastor Matt Hadley (chair), Pastor Andrew Jones, Neil Bubke, Joelle Karth
- ALB: Kathy Schluter, Mike Stoehr, Craig Walker
- Congregation: Don Behrens, Betsy Hoylman, Georgia Lindfors

The team adopted a strategic planning process that asks four questions in relation to our church’s Mission and Vision:

- *Where are we now? (understand today)*
- *Where do we want to go? (envision tomorrow)*
- *How do we get there? (plan for success)*
- *How will we know we have arrived? (track our progress)*

The team conducted a congregational survey in May of 2018. The survey asked what the congregation hoped would stay the same and change if they moved away and returned five years later. The team also developed a chart of key metrics to serve as a baseline for monitoring future growth.

Pastor Matt provided his macro-vision for the church – to reach the unchurched, provide care in the community, equip members as disciples and send them out to serve in the world. Within the church, he envisioned a culture of “worship plus two (mission/ministry and fellowship) with a tithe.”

The team then participated in a half-day session led by an outside facilitator to identify key objectives for the Strategic Plan. The objectives and goals identified by the team described an all-inclusive discipleship plan for the church that aligned with and expanded upon Pastor Matt’s vision.

The team developed a proposed plan and gathered congregational feedback during listening sessions in the summer of 2019. The team and ALB then revised the Plan based on that feedback.

With the changes caused by the COVID-19 pandemic, the team has revised the Plan again and expects additional revisions will be required in the future.

Where are we now - Understand today

The congregational survey identified three current features of the church that the congregation wanted to keep the same and three areas it wanted to change.

The congregation wanted to keep:

- Dynamic worship

- Sense of community
- Emphasis on mission

The congregation wanted the following changes:

- Stronger Children and Youth Ministries
- More fellowship opportunities
- Clearer philosophy of mission

The team will develop a baseline metric using the pre-COVID 12/31/19 year to measure progress on goals, understanding that the church may be below the baseline metric in some areas in 2021.

Where do we want to go - Envision tomorrow

The Strategic Plan is a 3-year discipleship plan for the church and defines a journey of personal faith and church growth. It will now run from 2021 – 2023. The Plan has four Top-Level Goals:

- Membership** - increase total church membership by 5%
- Faith Formation** - increase worship and class attendance by 10%
- Financial Stewardship** - increase giving units and pledges by 7% (in working toward a tithe)
- Mission** - increase participation in mission that reaches beyond our walls to 80%

These goals are more than numbers. They are established measures of spiritual and church growth. Spiritual and church growth reflect successful discipleship, which is our ultimate goal.

The Strategic Plan contains seven Discipleship Objectives which support the Top-Level Goals.

- **Diversity and Inclusion** – value and promote diversity and inclusion in all we do
- **Invitation** – reach out to our community and invite people without a church home into our fellowship (Great Commission – Matt. 28:19-20)
- **Hospitality** – welcome all who enter our doors with radical hospitality
- **Ministry** – connect our congregation with ministries that best fit their spiritual gifts
- **Faith Formation** – inspire and empower our congregation to grow as followers of Jesus Christ and to worship God through their time, talent and resources
- **Mission** – serve the needy and marginalized and support justice for all (Great Commandment – Matt. 22:36-40)
- **Fellowship** – invite each member of our congregation into one or more caring fellowships (the tie that binds our faith community together)



How do we get there - Plan for success

There are three steps that we as a church must take to successfully execute the Strategic Plan.

Establish Prioritized Initiatives on rolling 6-month basis

The goals of the Strategic Plan must be reflected in the day-to-day operations of the church. However, additional all-church priorities that are outside the day-to-day operations must also be established.

- a. The Strategic Planning Team in conjunction with the ALB, staff and teams, will identify church-wide initiatives from our 7 Discipleship Objectives
- b. Each ministry area will identify one action that will advance a Discipleship Objective

These initiatives will be prioritized by need, impact on our goals, and resource availability and executed over six months. Many initiatives are interrelated and will require collaboration and transparency between and hand offs among teams. Each team will be responsible for helping other teams succeed.

Mentor and Support

The ALB, Strategic Planning Team and Pastor Matt will mentor and provide support to staff and teams as and where needed.

Assure Accountability

The ALB and Pastor Matt are responsible for:

- a. holding staff and teams accountable for executing their initiatives

b. realizing our Top Level Goals and the goals of the Discipleship Objectives

We each must support and hold ourselves and one another accountable to execute the initiatives in our Strategic Plan in a way that advances our Mission and Vision.

It is important to remember that the Discipleship Objectives and Initiatives are not linear but interrelated and interdependent. There is no one path of discipleship. A person may come to God and grow in his or her faith through a combination of outreach, ministry, worship, classes, fellowship and/or mission. Therefore, each team must see itself as part of the larger discipleship plan and collaborate with other teams to fulfill its goals and the Top-Level Goals of the Plan.

How will we know we have arrived - Track our progress

The ALB is responsible for monitoring the progress of the Strategic Plan and communicating that to the congregation. The ALB will:

- Record Baseline Measures (YE 2019) for
 - Top-Level Goals
 - Goals for each Discipleship Objective
- Track Progress of each Discipleship Objective Initiative
- Record Approaches and Results
- Track Quarterly Data for
 - Top-Level Goals
 - Each Discipleship Objective
- Publicize Quarterly Results
- Adjust Goals as Needed

This Plan should be executed over the next three years
It should be re-visited beginning in the second half of Year 2

Discipleship Objectives, Measurable Goals and Key Levers

The Strategic Planning Team includes a detailed list of key levers and measurable goals for each Discipleship Objective that will serve as a guide for future initiatives. These are set forth in a Strategic Plan Chart that is available on request. The following is a summary of the measurable goals, key levers and stakeholders for each Discipleship Objective.

Diversity and Inclusion

- Measurable Goal
 - Increase the diversity of the congregation as defined in the Welcoming Statement to reflect the demographics of the community
- Key Levers
 - Establish a justice ministry focused on race, LBGTQ, climate and other social issues
 - Increase understanding of and involvement in diversity and inclusion issues
 - Incorporate a sensitivity to diversity and inclusion in all aspects of the discipleship plan
- Stakeholders– Pastor Matt, ALB, Church & Society, Racial Diversity Team

Invitation

- Measurable Goal
 - Increase guest identified personal invitations by 50%
- Key Levers
 - Recruit a member of staff or laity to lead this objectives
 - Upgrade and maintain social media sites to be more invitational and accessible
 - Leverage connections in the community to raise profile of church
 - Create a culture of invitation around special events
- Stakeholders – Pastor Matt, Joelle, ALB, Outreach Team, Welcome Team, Connections Team, and all program teams

Hospitality

- Measurable Goal
 - Increase second visits by guests by 50%
- Key Levers
 - Develop various means, e.g., in church, virtual, outdoor, to provide hospitality on Sunday mornings and at church events
 - Improve the guest follow-up process
 - Provide a more welcoming physical environment
- Teams – Pastor Matt, Joelle, ALB, Hospitality Team, Welcome Team, Connections Team, Trustees

Ministry Engagement

- Measurable Goal
 - Increase the ministry engagement of congregation members by 50%
- Key Levers
 - Help the congregation identify their spiritual gifts
 - Develop a mentor program for guests and new members
 - Connect congregants with one or more ministries that best fit their spiritual gifts and life stage, e.g., church membership, marriage, birth of child, retirement
 - Develop a process to track ministry involvement
 - Create a culture of engagement
- Stakeholders – Pastor Matt, Joelle, Nell, ALB, Connections Team, Welcome Team, Ministry Teams

Faith Formation – Worship and Growth

- Measurable Goals
 - Increase worship attendance by 10%
 - Increase stability and vitality of children, youth and adult education
- Key Levers
 - Develop hybrid in-person/virtual worship, classes and spaces
 - Revitalize and strengthen our children and youth ministries
 - Diversify and expand Christian education offerings for adults
 - Focus all programming on making and growing followers of Jesus
- Stakeholders – Pastor Matt, Pastor Andrew, Neil, Nell, Joelle, ALB, Children and Family Ministry Team, Youth Council

Faith Formation – Stewardship

- Measurable Goal
 - Increase giving units and pledges by 7%
- Key Levers
 - Form a Generosity Team and develop and implement a year-round generosity strategy
 - Assess and adjust as necessary the stewardship of our resources, including our staff, existing programs and properties
- Stakeholders – Pastor Matt, ALB, Finance Team, Generosity Team, Trustees, Staff Parish Relations Team

Mission

- Measurable Goals
 - Increase the congregation's involvement in missions to 80%
 - Increase the impact of our missions on those being served and those serving
- Key Levers
 - Increase the awareness and accessibility of our missions to the congregation
 - Create a team to review our current mission strategy and develop a robust and generally accepted philosophy and approach to mission that builds on our existing strengths
 - Define criteria to measure the impact of each mission on those being served and those serving
- Stakeholders – Pastor Matt, ALB, Mission Team, Mission groups

Fellowship

- Measurable Goals
 - Increase the congregation's participation in fellowship groups to 50%
 - Increase the congregation's awareness of fellowship opportunities to 80%
- Key Levers
 - Facilitate and encourage personal interactions between members
 - Grow the number of fellowship groups with promotions, invitations and special events
 - Identify new group interests and styles of fellowship, including virtual
 - Develop a process to track involvement in fellowship groups
- Stakeholders – Pastor Matt, Joelle, ALB, Fellowship Team, Fellowship groups

Conclusion

In this time of change, strategic planning is vital to the ministry and growth of the church. But this Strategic Plan is just a document. It alone does not guarantee success – it must be executed. The success of the Strategic Plan will require the commitment of and collaborative effort by the congregation, pastors and staff around our shared mission and vision-based goals. At times, it will require placing the good of the people and Mission of the church above individual interests and desires.

Most of all, it will require faith in and guidance from God. We must always remember that the true leader of this church is God through His Son, Jesus Christ. The church can do nothing through its own power but can do anything through His. Therefore, we must continually pray for faith, strength and wisdom as we seek to ***Take Our Faith Forward***.

Respectfully submitted by the Strategic Planning Team June, 2021

Church-wide Initiatives for Q3 and Q4 2021

DISCIPLESHIP OBJECTIVE: INVITATION

Upgrade social media - *Craig Walker, John Frunceck, Anne, Technology Team*

Q3/4 - Redesign and upgrade website, social media, wordmark and content to be more invitational, accessible and interactive and develop a process to monitor and maintain them

DISCIPLESHIP OBJECTIVE: MINISTRY ENGAGEMENT

Increase Congregational Connections – *Joelle, Nell, and Pastor Matt*

Q3/4 - Create hard and digital church directory and accessible church membership data base
Launch congregational survey as part of process to identify ministry, mission and fellowship interests

DISCIPLESHIP OBJECTIVE: FAITH FORMATION

Increase stability and vitality of Sunday School and Youth Programs – *Pastor Andrew & Children and Youth Councils*

Q3 - Develop and publicize plan with specific action steps
Q4 - Implement action steps

DISCIPLESHIP OBJECTIVE: FAITH FORMATION

Create Hybrid Classroom – *Trustees and Technology Team*

Q3/4 - Develop and bid project to redesign Chapel into multi-use hybrid room

Other possible initiatives for ministry areas

DISCIPLESHIP OBJECTIVE: FAITH FORMATION

Establish Generosity Team and Develop Generosity Plan– *ALB & Pastor Matt*

Q3 - Recruit team members, identify team goals, roles & responsibilities
Q4 - Using best practices, develop a year-round plan to encourage financial generosity

DISCIPLESHIP OBJECTIVE: DIVERSITY AND INCLUSION

Create partnership with one minority church – *Church & Society, Racial Diversity Team, Neil*

Q3 – Plan and implement one activity with sister church
Q4 - Plan further activities with sister church

DISCIPLESHIP OBJECTIVE: MISSION

Increase Congregational Connections to Mission Opportunities – *Missions Team*

Q3/4 – Add/improve one method to connect members to hands-on mission opportunities
Q3/4 - Develop and document a process for making and tracking these connections

DISCIPLESHIP OBJECTIVE: FELLOWSHIP

Increase Fellowship Groups - *Joelle*

Q3 - Develop a database of existing fellowship groups
Q3/4 - Establish at least one new self-sustaining fellowship group