



**BETHESDA 2015 PLAN**



## 1. Bethesda's Strategy

The Rector and Vestry of Bethesda approved a new strategy in December 2012; a Mission Statement, Core Objective, Values, Core Ministries, High Priority Aims, and an initial implementation plan. This was first presented at the Annual Meeting on January 27, 2013.

Bethesda's Mission is to “*experience the clear and strong presence of God and to understand and spread Christ's teachings through collective worship, learning, and service*”.

Central to our identity as a community of faith is our collective sacramental worship. We live out that mission through our values:

- Loving God
- Loving Your Neighbor
- Thinking Critically
- Practicing Stewardship
- Supporting Personal Ministry
- Serving Community
- Practicing Fellowship
- Nurturing Family

Bethesda defined four core ministries to provide focus to the Christian ministries of Bethesda:

- Worship



- Christian Education/Learning
- Service (both outreach and inreach)
- Stewardship

The achievement of the Bethesda mission is to be measured against eight high priority aims:

1. Affirm existing members, encourage new membership and integrate all members
2. Strive for a complete and vibrant ministry for children and youth
3. Make the Bethesda Mission and Values a high priority in the lives of all Bethesda members
4. Maintain and enhance facilities (buildings, content, gardens, and grounds)
5. Share our resources (financial, time, and talent) with those in need
6. Embrace differences in our community, and improve communications
7. Achieve financial stability and legal compliance, in the short-term and long-term
8. Strive to be an exemplary Episcopal Church



An annual implementation plan for the strategy has been developed each year since 2013, with defined three year strategic objectives for each of the six Rector's committees, consistent with the high-priority aims. The 2015 Plan is listed in the next section (a hardcopy of the plan may be requested from the Bethesda office).

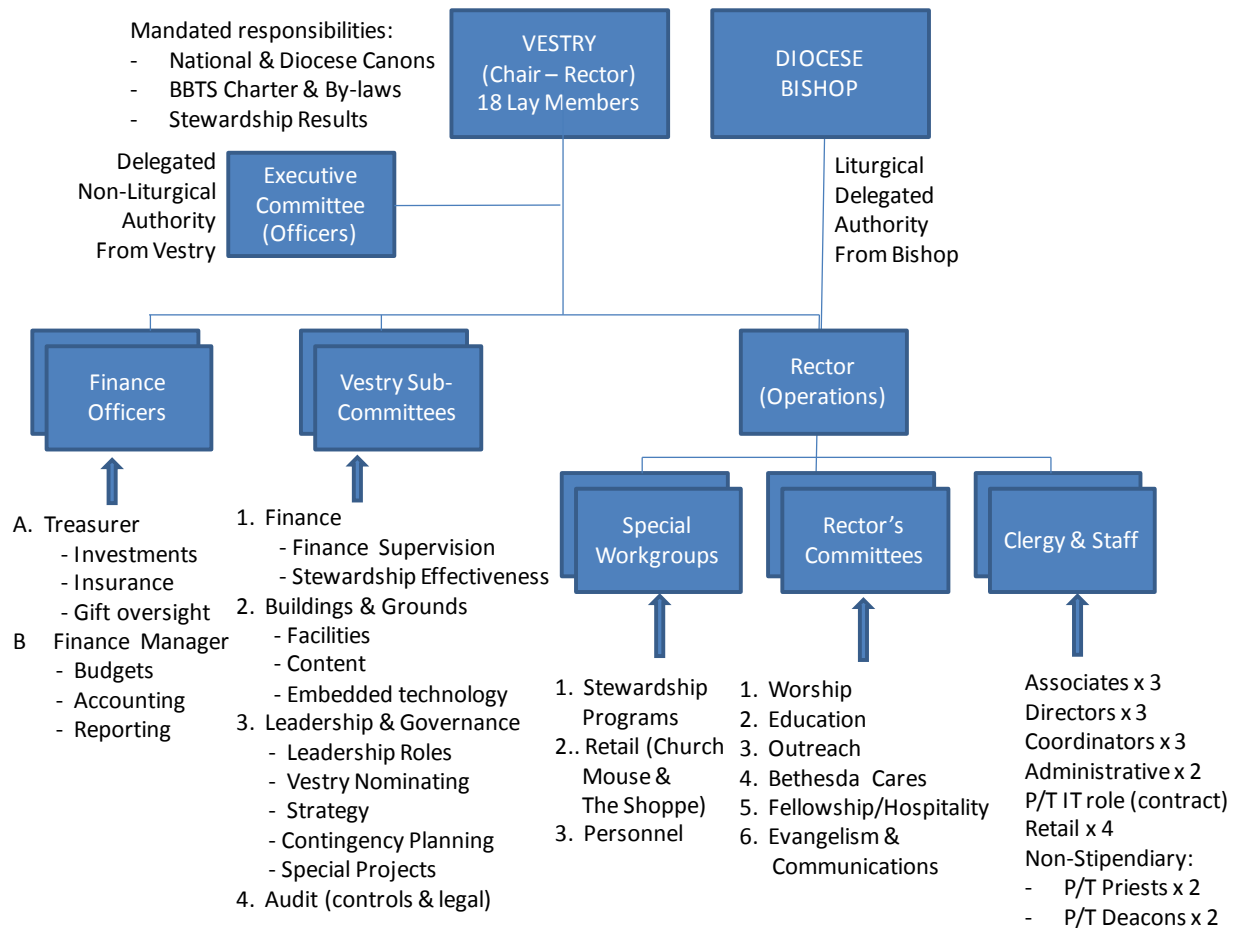
In 2014 a new "logo" for Bethesda was designed and approved including a "tag line" of *Love & Serve*. It shows the Columbarium cross laid across the ocean waves and the rising sun. This is shown at the top of each page of this document and is included on all Bethesda documents and materials. The Bethesda mission is also to be included on all major documents.

## 2. Bethesda's 2015 Plan

The 2015 plan is presented in five parts:

- Organization
- Vestry and Officers
- Rector's committees
- 2015 priorities
- 2015 budget

The Bethesda organization structure is illustrated below:



The 2015 Vestry chaired by the Rector with 18 lay members:

- Executive Committee:
  - Rev. James Harlan (chair)
  - Bobbie Leek (Senior Warden)
  - Wendy Victor (Junior Warden)
  - Bill Atterbury III (Chancellor, not a member of the Vestry)
  - Matt Lorentzen (chair of Finance sub-committee)
  - Don McKenna (member at large & chair of Personnel)
  - Gail Knisely (Clerk)



- Vestry members whose terms end in January 2016:
  - Bud Broda (chair of Audit sub-committee)
  - Bill Gee
  - Don McKenna
  - Pat Reichenbacher (chair of Outreach, and Retail)
  - Wendy Victor (chair of Buildings & Grounds sub-committee)
  - Frank Young
- Vestry members whose terms end in January 2017:
  - Susan Keenan
  - Gail Knisely
  - Bobbie Leek (chair of Bethesda Cares)
  - Matt Lorentzen
  - Tanner Rose
  - Zach Shipley
- Vestry members whose terms end in January 2018:
  - Barbara Callahan
  - Frances Fisher
  - David Paulson
  - B.B. Sory
  - Sandra Stern
  - Chuck Zettler
- Bill Atterbury (Chancellor) and Jim Myers (Treasurer) are officers but not members of the Vestry.



The plan for the six Rector's committees is summarized in the following charts and it is bound by: the rubrics of the Book of Common Prayer, Canons of the Episcopal Church and the Diocese of South-East Florida, plus the Bethesda Charter and By-Laws:

BBTS STRATEGY: 2015 PLAN HIGHLIGHTS	RECTOR'S COMMITTEES		
	WORSHIP	EDUCATION	BETHESDA CARES
<b>PURPOSE</b>	To provide loving, supportive, and uplifting worship for members and visitors where all can understand and experience the word of God taught through liturgy, instruction, music, and prayer.	To provide educational and formational opportunities to every member of BBTS, to strengthen our relationship with God and our community.	To provide an umbrella of care for the BBTS members' diverse pastoral needs shared through ministry of clergy and laity who are empowered to exercise their God-given talents.
<b>COMMITTEE LEADERS</b>	<b>Chair</b> Daniel Koinis	TBA	Bobbie Leek (* 2017)
<b>* = Vestry member</b>	<b>Co-Chair</b> Gary Sullivan (* 2015)	Debra Hale-Hagy	Jodie Payne
	<b>Rector</b> Rector (*)	Rector (*)	Rector (*)
	<b>Associate</b> Min. Dev./Music & Liturgy	Ministry Development	Ministry Development
	<b>Staff</b> n/a	Director of Children & Youth	n/a
<b>SCOPE (Groups &amp; roles)</b>	Regular & special worship services	Sunday Forums	Shepherds (yellow ribbon)
	Regular & special collections	Adult Bible study groups	Eucharistic Visitors
	Baptisms, Weddings & Funerals	EFM (Education for Ministry)	Flower Delivery Ministry
	Pre-Evensong & other concerts	Smaltz (Education Endowment)	Meal Ministry
	Boar's Head & Yule Log	Children's worship	Homebound Visitation
	Organist & external musicians	Sunday school	Widows Group
	Adult & Youth Choirs	Confirmation class	Card Ministry
	Acolytes & Eucharistic Ministers	Vacation bible school	Stephen Ministry
	Altar Guild & Flower Guild	Women at the Well	Good Samaritan Ministry (2015)
	Lay Readers & Ushers	Youth Group	Cancer Companion (2015)
	Verger Guild	Stewardship Education	Intercessory Prayer
	Guest Preachers & Speakers		
	Congregation (including visitors)		
<b>STRATEGIC PRIORITIES</b>			
	2015 to complete the work to achieve an exemplary level in all areas and to plan and design an expansion of the range and type of services offered at BBTS	to develop a more faithful community at BBTS while encouraging members to be communicants in good standing.	integrate the network of all related ministries and in so doing support the Shepherds and ministry leaders
<b>GOALS</b>			
- Lead High Priority Aim	8 - Strive to be exemplary	2 - Youth & Children's Ministry	6 - Embrace differences in our community (first part of Aim)
- Exemplary by start of Advent	2014	2016	2016

BBTS STRATEGY: 2015 PLAN HIGHLIGHTS	RECTOR'S COMMITTEES		
	OUTREACH	FELLOWSHIP & HOSPITALITY	EVANGELISM & COMMUNICATIONS
<b>PURPOSE</b>	To embrace, engage and transform individuals and communities through effective sharing and coordination of BBTS T3 - this is a caring initiative for physical needs and striving for justice for all.	To foster Christian fellowship among all members, guests and visitors, to embrace individual differences, and provide opportunities to experience the strong presence of God.	To express the BBTS Mission: "to experience the clear and strong presence of God and to understand and spread Christ's teachings through collective worship, learning and service".
<b>COMMITTEE LEADERS</b>	<b>Chair</b> Pat Reichenbacher (* 2016)	Carol Stewart	Becky Myers
<b>* = Vestry member</b>	<b>Co-Chair</b> Susan Barnhart	Phyllis Goodner	TBA
	<b>Rector</b> Rector (*)	Rector (*)	Rector (*)
	<b>Associate</b> Ministry Development	Ministry Development	Admin. & Min. Development
	<b>Staff</b>	Membership coordinator	Communications coordinator
<b>SCOPE (Groups &amp; roles)</b>	Allocation of T3 resources 1) Education 2) Shelter inc. <i>My Little Roses</i> 3) Food inc. <i>Feeding in February</i> 4) Port Ministry	Ambassadors (blue ribbon) Bethesda Life Bethesda Anchors Episcopal Christian Women (ECW) Cursillos in Christianity Daughters of the King (2015) St. Mary's Guild Men of Bethesda (MOB) College Ministry (2015) Regular hospitality events Special hospitality events	Docents & Tours History & Art BBTS Historian BBTS Archivist Archives Project Religious partners inc. <i>C&amp;J's "Visitor Experience"</i>
<b>STRATEGIC PRIORITIES</b>			
	to expand Outreach education activities to allocate 50% of outreach T3 (time, talent & treasure) resources <b>2015</b>	enable all core ministries to work together more closely with combined leadership in a community of christian fellowship	to ensure that Christ's teachings are spread throughout all BBTS ministries, and to enhance the experience for visitors to Bethesda
<b>GOALS</b>			
- Lead High Priority Aim	5 - Share our resources (treasure, time and talent) with those in need	1 - Affirm existing members, encourage new membership and integrate all members	3 - Make the BBTS Purpose a high priority in the lives of all BBTS members
- Exemplary by start of Advent	2016	2015	2015

Extended plans for each of the six committees include strategic priorities for 2016 and 2017. The six committees have term limits of three years for each of their members, but there are no term limits for the associated ministries. In addition, there are three Rector's special working groups; Personnel, Retail (Church Mouse





and The Shoppe), and Stewardship where the chairs and co-chairs are appointed annually by the Rector.

The 2015 priorities (agreed at a working session of the Vestry and committee chairs on October 22, 2014) for Bethesda are:

- Worship:
  - Continue the process of achieving (and maintaining) an exemplary level (the 2014 target) to understand and spread Christ's teachings through collective worship.
  - Define and plan a future expansion of services provided at Bethesda (rather than other locations, and implement in 2016).
- Education:
  - Build on the improvements achieved with Children's and Youth education and formation, including 21<sup>st</sup> century influences on faith and quality of life.
  - Seek greater input from external speakers for adult education while also considering cross-generational and community-wide activities.
- Service:
  - Adopt a proactive approach to evangelism for members.
  - Identify and implement a means (or role) of supporting existing members more effectively while integrating it with

the Bethesda Life program for new members (it is open to all).

- Expand the range of cross-ministry fellowship events.
- Complete the changes to the Bethesda Life program to be more pro-active and communicate more clearly the ongoing role of the clergy in pastoral matters.
- Continue the process of aligning all Outreach activities and resources around: Education, Shelter, Food, and the Port Ministry, while sharing more information on the positive results achieved.
- Stewardship:
  - Complete the “2015 Ask & Inform” process to provide practical input to future plans and initiatives from all.
  - Integrate activities with other core ministries (*e.g.* Worship – sermons on the Bethesda Mission and Values; Education – focus on the responsibilities of being a Communicant in Good Standing; Service – Stewardship is an all embracing commitment to “Working, Praying, and Giving for the spread of the Kingdom of God”).
  - Meet/exceed the 2015 annual stewardship estimates while also strengthening the long term of position of Bethesda through: strengthening the Preservation Endowment and encouraging all members to consider Planned Giving.

- Organization & Leadership:
  - Continue to use the exemplary objectives (*i.e.* year targets for each committee and special working group) to focus resources on improving all the Bethesda ministries (*i.e.* the strategic High Priority Aim 8).
  - Increase the visibility and awareness of the Bethesda Mission and Values by and for all members (*i.e.* the strategic High Priority Aim 3).
  - Improve internal communications related to any changes/improvements by announcing the changes prior to their implementation and by providing a context and explanation of the reasoning behind the improvements.
  - Improve the “visitor experience” at a practical level.
  - Complete the ongoing Restoration Project of the buildings, subject to available funds.

The Bethesda 2015 budget (listed on the next page):

- Shows an almost balanced budget (less than \$2.5k deficit) reflecting the level of actual income achieved in 2014. Additions to the planned level of support for the ministries based on the 2015 priorities have been identified but will not be added to the plan unless 2015 commitments are greater than the estimates.
- Assumes all staff positions will be filled fully throughout the year (the vacant Sexton position to be filled within one month, and the vacant Director of Development position to be filled in Q2 2015 with temporary administrative support already in place).
- The other major change (reduction) to revenue is the \$90k drop in net income from Retail (Church Mouse and The Shoppe), as new competitors to the Church Mouse have reduced the number and quality of donations. This reduces the funds available for Outreach by the same amount.
- The major changes to expenses are: a \$93k reduction in staff costs and benefits partially offset by a \$17k increase in administrative expenses (*i.e.* using external contractors for some staff activities); a \$24k increase in the Diocesan Assessment reflecting the improved financial position of Bethesda over the last three years and Bethesda's growing capacity to support



Diocesan outreach activities; and a \$15.7k reduction in building and grounds costs.

<b>BETHESDA 2015 BUDGET</b>	<b>2015 Vestry Approved Budget</b>
<b>REVENUE</b>	
Annual Budget - Unrestricted	1,944,370
Plate Offerings	82,419
Gifts from Charitable Trusts	30,000
<b>Sub-Total Contributions</b>	<b>2,056,789</b>
Endowment Draw	228,000
R & P Endowment Draws	100,000
Receipts for Special Flowers	35,000
Retail Operations (Net)	350,000
Weddings & Funerals (Net)	20,000
Room Use	14,000
Hospitality	6,000
Christian Education	2,000
Bethesda Cares	400
Music Program & Special Events	45,500
Other Revenue	71,778
<b>Sub-Total Other Revenue</b>	<b>872,678</b>
<b>TOTAL REVENUE</b>	<b>\$2,929,467</b>
<b>EXPENSES</b>	
Payroll & Benefits	1,486,498
Administrative	107,200
Insurance	148,787
Communications	79,800
Diocesan Assessment	311,907
Stewardship	25,350
Buildings & Grounds	193,603
<b>Total Support Services</b>	<b>2,353,145</b>
Music & Special Events	172,850
Hospitality	20,000
Christian Education	17,000
Bethesda Cares	18,950
Outreach	350,000
<b>Total Parish Life</b>	<b>578,800</b>
<b>TOTAL EXPENSES</b>	<b>\$2,931,945</b>
<b>NET OPERATING SURPLUS (DEFICIT)</b>	<b>(\$2,478)</b>