



BETHESDA 2016 PLAN
(Updated April 1, 2016)

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 lived out through our values, as shown below:



The core objective of Bethesda is collective sacramental worship as represented by the host and chalice in the figure above.



Bethesda defined four core ministries to provide focus to the Christian ministries of Bethesda: Worship, Christian Education, Service (both outreach and inreach), and Stewardship.

The achievement of the Bethesda mission is being 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 approved annual strategic objectives for each of the five Rector's committees and the four Rector's special working groups, consistent with the high-priority aims. In 2014 a new "logo" for Bethesda was designed and approved. It shows the Columbarium cross laid across the ocean waves and the rising sun. This is shown at the top of this page and is included on all Bethesda documents and materials. The Bethesda mission is included as appropriate.



2. Bethesda's Family

Bethesda is blessed to be home to over 1,000 households with about 1,500 people of all ages, all are members as defined in the Constitution and Canons of the Episcopal Church:

- Members: All persons who have received the Sacrament of Holy Baptism with water in the Name of the Father, and of the Son, and of the Holy Spirit, whether in this Church or in another Christian Church, and whose Baptisms have been duly recorded in this Church;
- Communicants: Those members who have been to church and received communion at least three times in the past year;
- Communicants in good standing:
 - All communicants of this Church who for the previous year have been faithful in corporate worship, unless for good cause prevented, (this means participating in worship regularly—not just when having some other reason to be there, such as being scheduled to serve in a worship ministry)
 - and have been faithful in working, (this means being involved in our mission and ministry beyond just attending services)
 - praying, (this means making our common life a focus of daily, personal prayer for God's guidance and strength and for our personal capacity to serve God and the parish with charity, love, courage, and vision)
 - and giving (this means financial giving toward a written pledge or a regular, consistent pattern of giving, not just giving on the occasions when in church) for the spread of the Kingdom of God, are to be considered communicants in good standing.

3. Bethesda's 2015 Major Achievements

Bethesda achieved many things in 2015, including the creation of a new and wonderful Garden Chapel, as shown below:

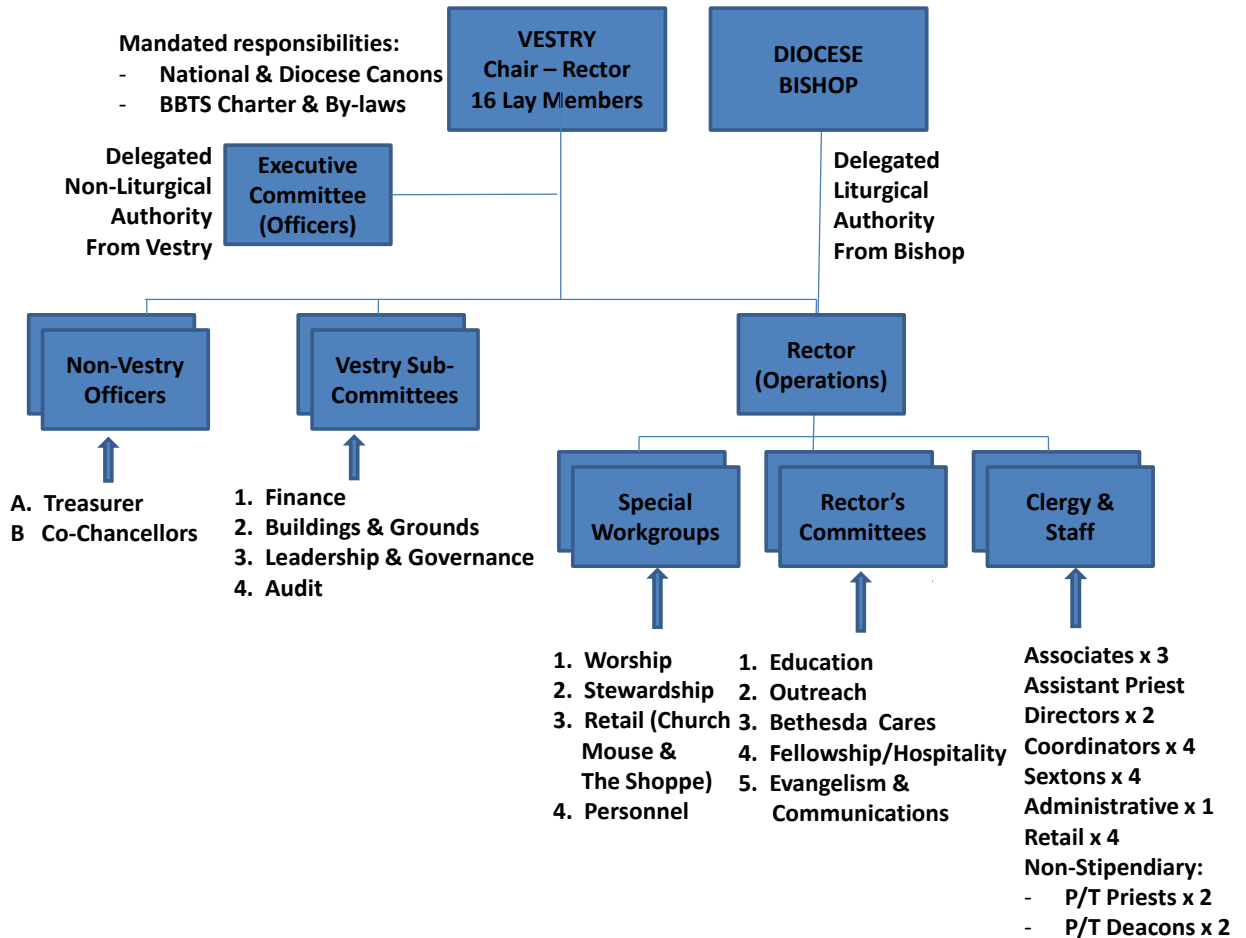


Despite continuing to face major financial challenges (i.e. there are insufficient funds both for our needs in 2016 and to guarantee the long-term future of Bethesda), we have been blessed with:

- The high quality of our Liturgy & Music has been maintained;
- Membership is strong with over 1,000 households;
- Ministries developing and improving (now over 65);
- Outward giving over \$430k (plus \$314k for Dioceses);
- New Bethesda Catalog of events and forums;
- The fully funded restoration of our buildings nears completion;
- Children & Youth ministries are thriving with over 100 active participants, and the number of teachers is up from 10 to 40;
- Adult and family educational offerings increased;
- Growing Feeding in February events plus St. Georges Dinner;
- Fellowship at International Pot Luck & Wine under the Stars.

4. Bethesda's 2016 Plan

The Bethesda organization structure is illustrated below:



A decision was taken by the Vestry in December 2015 to gradually (over three years) reduce the size of the Vestry from 19 members to 13 members, consistent with best practices across the Episcopal Church. This is one part of a process to enable the operations of the Vestry to become more effective, and for the Vestry to become more responsive to the needs of the members.



The 2016 Vestry is chaired by the Rector with 16 lay members:

- Vestry members whose terms end in January 2017:
 - Paul Coombs (chair of stewardship)
 - Susan Keenan
 - Bobbie Leek (chair of leadership & governance)
 - Matt Lorentzen (chair of finance)
 - Tanner Rose (chair of buildings & grounds)
 - Zach Shipley (vice-chair of audit)
- Vestry members whose terms end in January 2018:
 - Barbara Callahan
 - Frances Fisher
 - David Paulson (vice-chair of finance)
 - B.B. Sory
 - Sandra Stern (vice-chair of buildings & grounds)
 - Chuck Zettler (co-chair of worship)
- Vestry members whose terms end in January 2019:
 - Beth Cole (vice-chair of leadership & governance)
 - Kitty Lanier
 - Charles McGill (chair of audit)
 - Jodie Payne (chair of Bethesda Cares)

The co-chancellors (Michelle & Bob Diffenderfer) and treasurer (Jim Myers) are officers of Bethesda but not members of the Vestry.

We wish to thank the following Vestry 2015 members for their service to Bethesda: Bud Broda, Bill Gee, Don McKenna, Pat Reichenbacher, Wendy Victor, and Frank Young. We also thank Gail Knisely, who had to step down in 2015 for family reasons, and Bill Atterbury who has served as Chancellor for the last two years.



The Executive Committee members are:

- Rev. James Harlan (Chair):
- Bobbie Leek (Senior Warden)
- Tanner Rose (Junior Warden)
- Michelle & Bob Diffenderfer (Co-Chancellors)
- Matt Lorentzen (chair of finance sub-committee)
- Jodie Payne (member at large)
- Zach Shipley (Clerk)

The four Vestry sub-committees are led by Vestry members although they also include Bethesda members:

	<u>Chair</u>	<u>Vice-chair</u>
• Leadership & Governance:	Bobbie Leek	Beth Cole
• Buildings & Grounds:	Tanner Rose	Sandra Stern
• Finance:	Matt Lorentzen	David Paulson
• Audit:	Charles McGill	Zach Shipley

The 2016 priorities for the Vestry are:

- To improve the effectiveness of the operations of the Vestry and its sub-committees, including communications within Bethesda related to decisions made and changes to be implemented;
- To identify and seek to implement a solution for the parking needs of Bethesda;
- Achieve financial stability and legal compliance, in the short-term and long-term (strategy high priority aim 7). The current level of financial commitment is insufficient for all the needs;
- Strive to be an exemplary Episcopal Church (strategy high priority aim 8).




The Bethesda staff, including the non-stipendiary priests and part-time employees, is as shown below:



Staff	Non-Stipendiary	Part-Time	Titles
The Rev. James Harlan			Rector
The Rev. Kimberly Still			Associate for Stewardship and Outreach
The Rev. Burl Salmon			Assistant for Christian Education and Pastoral Care
Harold Pysher			Associate for Music and Liturgy, Organist and Choirmaster
Fred Staley			Associate for Administration
The Rev. Jeffrey S. Beebe	Yes		Assisting Priest
The Rev. Susan R. Beebe	Yes		Assisting Priest
The Rev. Dr. Cecily J. Titcomb	Yes		Deacon for Spiritual Direction & Pastoral Care
The Rev. Clayton B. Waddell	Yes		Deacon of Port Ministry
Greg Knight			Director of Children and Youth Ministries
Jessica Reed		Yes	Youth Choir Director & Youth Ministries Coordinator
Renee Boger Cheifet			Communications Coordinator
April Lawrence			Stewardship and Membership Coordinator
Sharon Lawrence McGee			Financial Coordinator
Regine Reimann			Worship and Pastoral Care Coordinator
Ayana Pineiro			Assistant to the Rector
Victor Maisonet			Sexton for Hospitality
Bob Mancuso			Sexton for Liturgical Support
Keith Risley			Grounds Supervisor
William (J.R.) Thompson			Building Preservation
Daisy Alvarez			General Manager for Retail Operations of The Church Mouse and The Shoppe
Evaristo (Coy) Riestra			Manager of The Church Mouse and The Shoppe
Jonathan Goodine			Church Mouse
Rick Manuel			Church Mouse
Rosie Cartagena			Church Mouse
Jose Cartagena		Yes	Church Mouse

One vacant position for most of 2015 has been filled, and one part-time position has become vacant and will not be filled; there are no other changes to staff position numbers or individuals.

The plan for the Rector’s committees and special working groups is summarized in the following three 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 2016 PLAN	RECTOR'S COMMITTEES & WORKING GROUPS		
	WORSHIP WORKING GROUP	EDUCATION COMMITTEE	BETHESDA CARES COMMITTEE
 PURPOSE	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.
COMMITTEE LEADERS	Chair Daniel Koinis/Chuck Zetler (*2018)	Bill Eckberg	Jodie Payne (*2019)
* = Vestry member	Co-Chair(s) Gary Sullivan	Debra Hale-Hagy	Chuck Zetler (*2018)
	Rector Rector (*)	Rector (*)	Rector (*)
	Lead Associate / Assistant Music & Liturgy	Education & Pastoral Care	Education & Pastoral Care
	Staff Director of Children's Choir	Director of Children & Youth	Deacon - SD and PC
	Staff Worship coordinator	Youth Ministries coordinator	Deacon - Visitation
	Staff n/a	n/a	Pastoral Care Coordinator
SCOPE (Groups & roles)	Regular & special worship services	Sunday Adult Forums	"Intentional Connection and Care for every member" coordinated by: Shepherds (Yellow Ribbon)
	Regular & special collections	Adult Bible/book study groups	
	Baptisms, Weddings & Funerals	EFM (Education for Ministry)	
	Pre-Evensong & other concerts	Children's worship	
	Boar's Head & Yule Log	Sunday school and delivered by:
	Organist & external musicians	Confirmation class - adults	Eucharistic Visitors
	Adult & Youth Choirs	Confirmation class - youth	Flower Delivery Ministry
	Acolytes & Eucharistic Ministers	Vacation bible school	Meal Ministry
	Altar Guild & Flower Guild	Women at the Well	Homebound Visitation
	Lay Readers & Ushers	Youth Group	Widows Group
	Verger Guild	Theology of Stewardship (delivery)	Card Ministry
	Guest Preachers & Speakers	Mid-week Forums (Tuesdays)	Stephen Ministry
	Congregation (including visitors)	Youth Choir (Christian & Music Ed.)	Good Samaritan Ministry (2015)
	Noreen McKeen visits		Intercessory Prayer
	Sound/Video system		Care Givers Support Group
	Planning & Schedules		
	BethesdaLife/Ministry Fair	BethesdaLife/Ministry Fair	BethesdaLife/Ministry Fair
2015 RESULTS	+ Liturgical drama exemplary	+ Teachers increased from 10 to 40	+ "Internal tag line"
	- Ministry "competition"	+ Additional adult offerings	+ Web page
	+ Boar's Head	+ C&Y dynamic & fun!	+ Care Giving started
	+ Concerts	+ Enhanced "Tuesday Evening"	+ Bears!
	? BBTS Choir: Male section numbers	+ Pilgrimage	+ Level/quality of Shepherd comms.
		+ Additional staff support	+ Additional staff support
		+ EFM restarted	- No. of Sheherds: 10 of 20
		- Senior staff turnover	- Senior staff turnover
STRATEGIC PRIORITIES			
	2016 to complete the design of an additional service at BBTS and to start providing the service by Fall, while ensuring all groups work together in a positive manner	to develop a comprehensive plan for Adult education (forums, groups, external speakers, etc.) in support of the BBTS Mission & Values.	to grow existing ministries (depth and quality) and create new ministries (where there are major needs), while ensuring improved communications (web page).
	2017 to polish all aspects of music at BBTS (recruitment, education, training, delivery)	to implement the new Adult education plan so that it is as dynamic as C&Y, while ensuring exemplary results in all areas.	to ensure that all major needs are met fully as part of delivering exemplary "connection and care" for all members.

BBTS Strategy 2016 PLAN	RECTOR'S COMMITTEES & WORKING GROUPS		
	OUTREACH COMMITTEE	FELLOWSHIP & HOSPITALITY COMMITTEE	EVANGELISM & COMM'S COMMITTEE
 PURPOSE	To embrace, engage and transform individuals and communities through effective sharing and coordination of BBTS time, talent and treasure for those in need in the local community and beyond. (Updated Vestry Policy)	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 ensure that all Bethesda communications (including evangelism) are aligned with and effectively express Bethesda's mission and values.
COMMITTEE LEADERS	Chair Pat Reichenbacher	Georgie Scover	Becky Myers
* = Vestry member	Co-Chair(s) Susan Barnhart	TBA	Helene Lorentzen
	Rector Rector (*)	Rector (*)	Rector (*)
	Lead Associate / Assistant Development & Outreach	Administration	Administration
	Staff Deacon - Port Ministry	Hospitality Sexton	Communications coordinator
	Staff n/a	Membership coordinator	n/a
	Staff n/a	n/a	n/a
SCOPE (Groups & roles)	Allocation of T3 (time, talent & treasure) resources: 1) Education - Mentors - Education Scholarships (Trusts) - Opportunity Inc. (Early Learning) 2) Shelter - My Little Roses - Faith*Hope*Love*Charity - Center for family services 3) Food - Backpacks - Empty Bowls (FinF) - Palm Beach Unites (FinF) - St Georges - Hot/Cold/Fundraiser 4) Port Ministry BethesdaLife/Ministry Fair	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 (2016) Fellowship/Coffee Hour Special hospitality events - Lenten Lunches - Homebound Luncheons - One-Off Events	"Member & Visitor Experiences" delivered through: Printed Materials Web site & e-mail Social Media Live streaming of services "Information center" Signage in church & grounds History archives Art worksplus communications with: Other local religious organizations
2015 RESULTS	+ Mentor Program + Feeding in February + Backpacks + St. Georges + Port Ministry + Early Learning - Education \$: 40% Vs 50% target ? Grants/scholarships approach ? Messaging of positive results	+ Inclusive Events: Wine under Stars + Quantity/quality volunteers + St. Mary's Guild expansion + Integration across Ministries + Support for "other" events ? Focus on Christian Fellowship + New IT system implemented	+ BBTS Catalog + Bulletin Content + Branding: Church Mouse + Facebook likes/hits + Web site upgrade + Printed materials more inclusive - Onsite visitor support ? Communicate inline with Mission ? Evangelism ? <20 members get physical comms.
STRATEGIC PRIORITIES			
	2016 to continue to expand the Outreach Education activities to reach the target of 50% of Outreach financial resources.	to plan and continue to expand the Christian Ministry of Fellowship to positively support the integration of all members (long-time and new).	Plan for a comprehensive visitor and member "center" while continuing the development of existing communication mediums.
	2017 to deliver Outreach Education from K-8 grades through the mentor program (9-12 to follow in 2018), while achieving exemplary levels in all areas.	to expand the Christian Ministry of Fellowship to positively support those members least involved.	Implement a new comprehensive visitor and member "center" (subject to funding).

BBTS Strategy 2016 PLAN	RECTOR'S COMMITTEES & WORKING GROUPS		
	STEWARDSHIP WORKING GROUP	 RETAIL WORKING GROUP	PERSONNEL WORKING GROUP
 PURPOSE	To ensure that BBTS has the required financial, people and physical resources to meet its ministry and operational needs, consistent with the BBTS Purpose, Strategy and Budget.	To generate funds for BBTS Outreach, to provide a service (physical donations and retail facilities) for members and the local community, and to increase awareness of BBTS in Palm Beach (updated Vestry policy).	To provide knowledgeable, qualified, dedicated and trained personnel to effectively assist in the church's daily operations.
COMMITTEE LEADERS	Chair Paul Coombs (*2017)	Pat Reichenbacher	Don McKenna
* = Vestry member	Co-Chair(s) n/a	n/a	n/a
Rector	Rector (*)	Rector (*)	Rector (*)
Lead Associate / Assistant	Development & Outreach	Administration	Administration
Staff	Stewardship Coordinator	n/a	n/a
Staff	n/a	Retail General Manager	n/a
Staff	n/a	Retail Manager	n/a
SCOPE (Groups & roles)	Time, talent & treasure (T3)	Church Mouse - donations	Hiring & Organization
	Annual program	Church Mouse - retail sales	Reviews and employee benefits
	Capital program	The Shoppe - retail sales	Human resource policies
	Planned Giving (Heritage Society)	Community awareness & service	Training
	Stewardship education (materials)		Staff Development
	BethesdaLife/Ministry Fair	BethesdaLife/Ministry Fair	
2015 RESULTS	+ 100% of \$ pledge target achieved	+ Donors up	+ All staff positions filled
	+ New team of 30+ built	+ New logo	- Staff team building/development
	+ 100% of restoration project \$'s	+ Planning for 50th year in 2020	
	+ 100% of Garden Chapel \$'s	? Messaging of positive results	
	+ New IT system implemented	? Future role of <i>The Shoppe</i>	
	? Focus on Planned Giving		
	- No dedicated staff for 2015!		
	- Unpledged gifts shortfall \$150k		
STRATEGIC PRIORITIES			
	2016 to ensure that Planned Giving is given the same high priority as the Annual campaign and the Capital Campaign.	to continue to increase the quality and quantity of volunteers while streamlining processes in anticipation of significant growth	target additional staff on strategic priorities for BBTS and the wider Episcopal Church.
	2017 move the median pledge level from below comparable churches to the top quartile within a comprehensive campaign.	Plan for and commence the major growth approach leading to the 50th anniversary in 2020.	consider why and how fellowships for junior clergy could be used to support the BBTS Mission and Values.

The Bethesda 2016 budget (listed on the next page) shows a very small surplus and is based on the following assumptions:

- REVENUE:
 - The two major increases to revenue relate to increased endowment draws (\$47k) and an increase in receipts from the Church Mouse (\$60k, offset by increased Outreach payments).
 - The annual unrestricted budget revenue is the same as the budget figure for 2015, although there was a \$156,000 shortfall in the actual amount received from members in 2015 that needs to be remedied by additional member contributions.
- EXPENSES:
 - Assumes all staff positions will be filled fully throughout the year (not the case in 2015 resulting in lower costs).
 - Increased Outreach distributions (as noted above).
 - A new worship service, starting in the Fall (planning started).
- STRATEGY:
 - If additional revenue (as noted above) is not received the ministries and staff support will need to be reduced, and projects identified by the “2015 Ask & Inform” initiative will be reduced, delayed or cancelled.
 - Bethesda strategic priorities are:
 - Education: increase quality/number of external speakers;
 - Evangelism & Communications: improve the on-site experience of Bethesda for members and visitors;
 - Leadership: improve effectiveness of the Vestry and extended leadership across the ministries;
 - Financials/Stewardship: continue to develop the endowments for the Building Preservation, and for the Ministries, to secure the long-term future of Bethesda.

	2016 BUDGET	2015 BUDGET
REVENUE		
Annual Budget - Unrestricted	1,944,370	1,944,370
Plate Offerings	82,419	82,419
Gifts from Charitable Trusts	30,000	30,000
Sub-Total Contributions	2,056,789	2,056,789
Endowment Draws	260,000	228,000
R & P Endowment Draws	115,000	100,000
Receipts for Special Flowers	35,000	35,000
Retail Operations (Net)	430,000	369,828
Weddings & Funerals (Net)	25,000	20,000
Room Use	14,000	14,000
Hospitality	6,000	6,000
Christian Education	3,000	2,000
Pastoral Care	400	400
Music Program & Special Events	45,500	45,500
Other Revenue	71,778	71,778
Sub-Total Other Revenue	1,005,678	892,506
TOTAL REVENUE	\$ 3,062,467	\$ 2,949,295
EXPENSES		
Payroll & Benefits	1,547,098	1,481,344
Administrative	87,300	107,200
Insurance	166,932	148,787
Communications	83,950	79,800
Diocesan Assessment	314,946	311,907
Stewardship	24,000	25,350
Buildings & Grounds	177,840	193,603
Total Support Services	2,402,066	2,347,991
Music & Special Events	182,350	172,850
Hospitality	18,000	20,000
Christian Education	16,000	17,000
Pastoral Care	14,000	18,950
Outreach	430,000	369,828
Total Parish Life	660,350	598,628
TOTAL EXPENSES	\$ 3,062,416	\$ 2,946,619
NET OPERATING SURPLUS (DEFICIT)	\$ 51	\$ 2,677