

2004 STRATEGIC PLAN EVALUATION TASK FORCE
REPORT

AUGUST 2009

A 2004 Strategic Plan Evaluation Task Force was appointed by Donna Depew, President of the Congregation, in May 2009 and given the following charge: 1. Evaluate the progress Federated Church made 2005-2008 toward achieving each of the four goals adopted by the congregation in 2004 as part of the church's strategic plan. 2. Note what additional work, if any, the task force feels Federated could do to achieve each of these goals. Appointed to this group were Lou Carr; Dennis Depew; Carolyn Jones, chair; and Vicki Spurlock.

In carrying out our charge, we studied the attached "Inventory of Proposed Goals, Actions, and Indicators of Success As Well As 2005-2008 Accomplishments." This material was compiled thru reading the 2004 planning documents; church officer, staff, board, and committee annual reports; and board, committee, and task force minutes and memoranda. Additional information was gathered thru conversations with church staff and members of the congregation. We also reviewed survey instruments and results and considered the data that was available relative to the church's 2005-2008 accomplishments.

The report that follows complements the material in the attachment and provides a summary of our findings and our thoughts about future activities. Both the report and the attached inventory are arranged around the four goals and eight initiatives the congregation incorporated into its 2004 Plan. Although not expressed as a goal or an initiative, the congregation also placed a major emphasis on expanding Federated's marketing endeavors. This topic is dealt with at the end of both documents. The pages on which the material about the various goals and initiatives as well as that about marketing can be found in each document as follows:

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GOAL: DEVELOP STRONG RELATIONAL GROUPS

The congregation identified four areas in which it planned to expand and strengthen relational groups—age and/or interest related groups, Bible Study groups, youth (grades 7-12) group, and child care. Based on the accomplishments the church made in each of these areas, it is clear that more progress was made in some than in others.

Age and/or Interest Related Groups

While several new age and/or interest related groups were started between 2005 and 2008, none were specifically for people in their 20s or for those with children per the 2004 Strategic Plan. Several of these new groups appear to have started as interest related ones—ex. Books and Coffee, Hoofing for Heart Health, and Just for Men-- but by meeting on weekdays during the daytime, their membership also tended to cluster around age. The same was true for the reestablished Tuesday Morning Women's Bible Study and the on-going Thursday Morning Women's Book Study Group. Regarding the Shepherd Program, the 2004 Plan called for it to be reorganized around age, interest, and geographic location. During this period, the mission of this program continued to focus on health and wellness ministries rather than on relational groups. Thus, it remained organized solely around geographic area. Also called for in the 2004 Plan was enhanced, then expanded communication about age/interest related groups. Based on the information found in the attached inventory, we feel this occurred.

If the congregation wants to continue to increase the number of age/interest related groups at Federated, we offer the following suggestions:

--To be successful, a group must have at least a facilitator if not a leader. Since it does not appear likely that Federated will have sufficient funding in the near future to hire staff to work with age and/or interest related groups, additional lay leadership will need to volunteer or be recruited to start as well as nurture these groups.

--Except within our retirement communities, forming viable groups whose members are of similar age, like interest, and live within close geographic proximity, as proposed in the 2004 Plan, may be difficult. However, forming groups based on two of these three variables probably would be feasible.

--The mission of the Shepherd Program should focus either on health and wellness ministries or on relational group activities, for we feel it would be difficult for this program to succeed if it tried to span both areas.

--Consideration should be given to assessing the congregation to see whether there might be interest in beginning multi-generational interest and/or social groups as well as new age-related and/or special interest groups.

Bible Study Groups

Shortly after the 2004 Strategic Plan was adopted, it was discovered the measures it called for regarding training and certifying Bible Study teachers were not needed. Three members of the congregation already had the expertise and experience necessary to be

outstanding teachers. Thus, special training and certification programs were not developed. The plan's proposed indicators of success noted that ten intermediate and ten advanced Bible Study classes should be held, and attendance in these classes should increase by 20%. During the third year (2007) the 2004 Plan advocated offering at least six beginning Bible Study classes.

The focus of the study groups included in the 2004 Strategic Plan was on Bible Study. However, in 2006, the Board of Christian Education voted to expand the concept of spiritual inquiry and study to include a broader array of spiritual disciplines. Groups studying books and even movies as well as the Bible were encouraged. Following this, an increased number of offerings of Lectio Divina, One Great Read, Theology Theater, Federated Faith Forums, and Spanish Inquisition occurred. Between 2005 and 2008, at least eight multi-week Bible Study groups plus 23 study opportunities, (many of them multi-week in duration) from the aforementioned list of groups were offered. Not included in these figures are the weekly meetings of the Tuesday Morning Women's Bible Study and Thursday Morning Women's Book Study groups nor the study opportunities offered through Sunday School, Worship and Wonder, Vacation Bible School, and various other children's and youth activities. While attendance data are not available, our perception is that more people seemed to have participated in this diversified set of study group opportunities than would have been involved had the offerings focused solely on Bible Study.

The 2004 Plan also called for enhanced, then expanded communication about Bible Study. As with age and/or interest related groups, we feel this enhancement/expansion occurred for all of the study groups. While some of these groups may have developed and maintained phone and e-mail lists of their membership per the Strategic Plan, we doubt this happened for each study group.

As for the future, we feel the church ought to continue offering study group opportunities, and these offerings ought to continue to be diversified. The church seems to be pleased with this diversification and we feel the congregation will continue to participate in and benefit from this variety in the future. In determining the types of study groups to offer, consideration might be given to including study group preferences in future congregational interest/needs assessment surveys.

Youth Program—Grades 7-12

One of the proposed strategies in the 2004 Plan related to strengthening the youth program was to increase staff to assist youth. This did not occur. If anything, we feel the percentage of staff time—both paid and volunteer—devoted to working with youth decreased. Moreover, there was considerable turnover in both the paid and volunteer staff who worked with youth between 2005 and 2008.

Although data are not available, it is our perception that contrary to the 20% increase in participation in youth activities the 2004 Plan aspired to, actual participation decreased. We feel at least two factors contributed to this decline—the aforementioned staff

decrease and turnover and the shift in focus of our youth ministries from serving primarily youth from families not affiliated with Federated to serving those basically with Federated family ties.

Several of the proposed indicators of success for our youth program were met. Youth went on at least one mission trip or spiritual retreat annually, and as individuals, they were involved in numerous church related/sponsored service projects. Opportunities were offered to participate in at least two recreational opportunities annually, but not all of these activities were recurring per the 2004 Plan. Although not called for in the 2004 Plan, a Sunday School class for high schoolers was reestablished and well received by the participants. In addition, Our Space, the large multi-purpose room, which among other things serves as the church's youth headquarters, was renovated, redecorated, and re-equipped, much to the pleasure of the users.

Federated's youth program appears to have been in a prolonged state of flux. If increased growth and relevancy are desired, we recommend consideration of the following:

- Lessen staff turnover—both paid and volunteer.
- Define the desired constituency—ex. Federated youth, youth from unchurched families, youth whose families are affiliated with other churches, all interested youth.
- Through interaction with both youth and their parents—i.e. personal contact, surveys, focus groups, a reestablished Youth Advisory Council, etc.—determine the amount and type of youth programming desired.
- Offer these programs and continually evaluate their effectiveness. Repeat, modify, or drop them accordingly and/or develop new ones as appropriate.

Child Care

Based on the congregation's proposed strategy to "offer child care for most church functions," we feel the church succeeded. Child care was provided for both worship services each Sunday. It also was available upon request for special events and meetings; however, rarely was it requested. We suspect that many people are not aware of this service nor do they know to whom they should make their requests for it. If the church wants to continue to seek to attract families with young children, better information needs to be more readily available about child care. For example, announcements about it could be flashed on the screens each Sunday in the narthex and Trimmer Hall.

GOAL: ENHANCE THE EXPERIENCE OF WORSHIP

The 2004 Strategic Plan incorporates two areas for enhancing the experience of worship—developing and implementing an alternative worship service and training greeters, ushers, and lay leaders. Progress was made in both areas toward achieving their respective proposed indicators of success.

Alternative Worship Service

Most of the strategies included in the 2004 Plan that needed to be implemented to start an alternative service were undertaken and completed. While the Plan called for this service to begin in 2006, the first one took place on Easter, 2007. With the exception of a three-week 2008 summer break, the alternative service was held continuously on a weekly basis beginning in September 2007. Initially this service was held on Saturday evening. Due in large measure to low attendance, it was moved to 11:15 on Sunday morning. Attendance increased following this move and ranged thereafter on the average from the mid-20s to the low-30s.

We realize patience is a virtue, for it takes time for new services to grow and mature. To attempt to accelerate this growth, we recommend the church consider the following:

- Identify and train greeters, ushers, and table hosts to welcome attendees, provide the information they seek, get their names and hopefully some contact information, and help them begin to develop relationships with others at the service.

- Explore the feasibility of moving the coffee hour to another location so that the the alternative service can begin, if necessary, before the coffee hour ends.

- Track attendance by name as well as number. Follow up with both visitors and those who have attended a few times but are missing. Offer opportunities for those who come frequently to be involved in the service—ex.greeter, usher, table host, tech crew, etc.—as a next step toward becoming integrated into the Federated Church family.

- Encourage attendees to invite their friends. Provide printed information about future services that attendees can take and distribute to others.

- Refer to the Marketing section of this report (pp. 7-8) for suggestions that might be helpful in marketing the alternative service.

- Evaluate the service at least quarterly. Solicit comments from attendees as well as staff to see what worked and what didn't. Make modifications accordingly.

- Define a threshold(s) within a specific time frame(s) that should be reached for the service to be deemed successful.

Greeters, Ushers, and Lay Leaders

All but one of the strategies proposed in the 2004 Plan in this area was implemented. Ushers were recruited by the Deacons and trained through material they were mailed about their responsibilities each time they served. Lay leaders were recruited by Marcile Eddy and were well coached by her and the Senior Minister. Greeters also were recruited by the Deacons, but unlike the other two groups of volunteers, received little training.

As for the future, we feel it would be helpful if the responsibilities of the greeters and ushers were expanded to encompass a broader array of welcoming, hospitality, and information services. Those fulfilling these roles should be trained accordingly. Reinstating the before-service prayer time with a Deacon, the Senior Minister, Minister,

and lay worship leader would provide an opportunity for last -minute communication as well as help set the tone for the worship service that follows.

GOAL: EXPAND VISITATION TO VISITORS AND MEMBERS

Of the four goals the congregation established in the 2004 Plan, we feel that it was in the area of visitation that the church accomplished the least. A home visitation plan was developed but never fully implemented. While the Cookie Patrol, which comprised the first phase of the plan, fulfilled its obligations, we have not been able to find any data indicating the impact their work had on cultivating new members. The plan also called for an adequate number of people to serve as second and third time callers, but they never came forward. Thus, the proposed visitation plan did not materialized as envisioned nor were the congregation's visitation expectations realized. However, between 2005-2008, the Senior Minister made 28 home visits to church visitors. People in 12 of these households eventually became members of Federated, and residents of 15 established on-going relationships with the church. The members of one household chose not to continue to attend Federated.

As for the future, we feel Federated needs to find a different way than defined in the 2004 Plan to think about visitation. Past experience has shown that our current membership has little interest in making home visits to prospective members. Moreover, home visits, at least not initially, may not be the best way to begin establishing successful relationships with the technologically-savvy 20-50 year old population we seek to attract. In developing a new plan, we feel serious thought should be given to at least the following:

- Finding a better method than we have at present to gather contact information about each visitor.

- Developing a plan that focuses on building successful relationships with visitors that encompasses more than home visitation.

- Clearly defining both the roles and expectations of the congregation and the staff in this relationship building process.

- Prior to approving a plan, ensuring that the people needed to implement it are identified and are willing to accept their assigned responsibilities.

- Identifying a person (either lay or staff) to be responsible for managing the approved plan to be sure it is fully implemented and that results are tracked and reported.

GOAL: EXPAND OUR FIELDS OF MISSION

The congregation identified two areas it wanted to pursue in expanding its fields of mission—health and wellness ministries and spiritual opportunities for children. Based on the accomplishments made in these areas between 2005 and 2008, we feel both were expanded considerably.

Health and Wellness Ministries

Without question, the church's accomplishments in this area of ministry are impressive. All of the proposed strategies were implemented, and all the proposed indicators of success achieved. In fact, the data and list of accomplishments seem to indicate that in this area, the church may have exceeded the congregation's initial expectations.

Additional strategies, if implemented, we believe would further enhance the church's accomplishments in health and wellness ministries include the following:

- Forge a closer reporting and working relationship between the Shepherd Program and health and wellness ministries.
- Undertake a new survey to assess the current health and wellness needs of the congregation, for these needs may have changed since the initial survey was conducted in 2005.

Spiritual Opportunities for Children

Federated's programs for children certainly have grown in number and seem to be more robust and diversified since the 2004 Strategic Plan was launched. A Director of Children's Ministries was hired. New groups and new Sunday School classes were formed, more special activities were offered, and an increased emphasis was placed on children's music and drama as well as on their participation in mission projects. In 2008, there were five children who could be considered "regulars" in the nursery and 35 in pre-kindergarten thru sixth grade. Neither comparative participation data nor comparative attendance data for 2005-2007 are available. Thus, we are unable to determine whether this growth in both quantity and quality of programs led to any growth in the number of children involved with them.

We feel that the following strategies, if implemented, would further enhance spiritual opportunities for children at Federated::

- Continue to assess needs on an on-going basis and adjust/augment programming accordingly.
- Be sure there is sufficient input and feedback from both the children and their parents about the programming. Consider reactivating the Children's Advisory Council.
- Track and report the number of participants in each program/activity.
- Create a greater sense of urgency within the congregation for the need for more volunteers to work with children's ministries. Without additional lay support, these programs will not be able to continue to thrive and grow.

MARKETING

Marketing was not considered a separate goal in the 2004 Strategic Plan but rather was viewed as a set of strategies that needed to be implemented and coordinated to promote all of Federated's programs and activities. With the exception of producing CDs/DVDs

for distribution to tout the alternative worship service and utilizing the Prayer Chain to communicate information about church activities, Federated implemented all of the proposed marketing strategies and achieved all of the proposed indicators of success included in the 2004 Plan. In addition, a new logotype was developed, new exterior and interior signage was created and placed, targeted mailing lists were purchased, a business-size card was created for distribution to promote Federated, and TV monitors displaying information about upcoming events were installed in the narthex. We feel that the Web site, brochures, postcards, door hangers and all of the items noted above were well done.

The question that remains is what effect is our new branding and messaging campaign having on enticing people who are not part of our church family “to try us out”? Unfortunately, it is difficult to discern the answer, for church marketing campaigns generally need to be active longer than Federated’s has before they produce noticeable results. The data that we do have, though, show that in the 19 months our Web site was operational in 2007-2008, the number of visits per month increased from a low of 40 (first month) to a high of 656. In 2008, the first year of full operation, it is interesting to note that the period with the greatest number of visits was from May thru September, the time in a university-dominated community when the highest portion of newcomers arrive and begin to look for churches. This may suggest that newcomers are visiting our Web site. However, it is too early to conclude this. More data over a longer period of time are necessary.

If church growth, indeed, is something Federated seeks, we suggest that the following be considered relative to our marketing campaign:

- Continually monitor the Web site to be sure it remains easily accessible via Google and other widely used search engines. Also be sure it remains, user-friendly, contains current and accurate material, and incorporates the kinds of information newcomers and church-shoppers seek. If not cost prohibitive, collect data regarding what portion of the total hits are coming from people not affiliated with Federated.

- In both the print and electronic media, articles about churches generally are more widely read and have greater impact than paid advertising. To increase our coverage, we need to enhance our relationships with local media sending them periodic news releases about Federated activities and accomplishments—ex. special worship services, community service projects, special speakers and/or programs, mission-related activities, etc.

- To be effective, direct mail campaigns need to be long-term and on-going. By continuing to use the targeted zip code mailing lists we purchased to send periodic postcards, flyers, etc. additional exposure would be given about Federated to the population we seek to attract.

- To help visitors become better acquainted with Federated, place materials about the church—ex. the current brochures, an information sheet with a catchy title—in the pew racks. Replenish this material as needed, but be sure it is in good supply when large numbers of visitors could be attending—ex. special programs, weddings, funerals.

--To get a better sense of which marketing strategies are producing results, ask visitors how they learned about Federated. Tabulate, analyze, and use the findings.

--Continually evaluate the church's programs and activities and make the additions, modifications, and deletions necessary to attract and retain participation at Federated.

FINAL THOUGHTS

After prayerfully seeking God's guidance at the beginning of our meetings, we started to realize that working on this project was providing us unique opportunities to think about our church from a variety of perspectives. At Federated, we take great pride in being a community of believers, a church family. Yet, as we studied the 2004 Plan and the church's 2005-08 accomplishments, we discovered the Plan contained four distinct—almost stand-alone-- goals. An underlying purpose or unifying theme seemed to be missing. If Federated aspires to continue to foster a community/ church family environment, we urge the congregation to develop future plans around a central theme or goal supported by a group of integrated initiatives that if successfully completed, will accomplish the type of community/family atmosphere the congregation seeks to achieve. In addition, we strongly encourage the congregation to incorporate the following measures into the next planning process:

--Design a process that from the outset encourages the entire congregation to become involved.

--Develop both qualitative and quantitative indicators of success and define how each is to be measured.

--Define and collect the necessary information/data within appropriate timeframes (daily, weekly, monthly, quarterly, annually, etc.) and file it in a clearly defined, central repository.

--Charge an individual or an existing council, board, or committee, or appoint a special task force to oversee the next strategic plan. Assign the person/group responsible for seeing that those charged with implementing the plan are doing so, that the needed information/data are being collected, and that periodic progress reports are prepared and shared with the appropriate governance groups, the church staff, and the congregation.

Respectfully submitted,

The 2004 Strategic Plan Evaluation Task Force

Lou Carr

Dennis Depew

Carolyn Jones, chair

Vicki Spurlock