

Appendix 2

Evolution of Strategic Planning in St. Andrew's Episcopal Church

Date	Goals	Product
2004	Look at change and management of change comprehensively	Initiate planning process.
Jan.-Apr. 2004	Guide to replacement of rector and foundation for future planning	Bob Schorr. Define core values of the parish and validation by parish poll.
Apr. 2004		Vestry mission statement reflects core values.
June 2004	Visioning event, 100+ parishioners participating	Define desired characteristics of new rector, vision of the parish based on core values and mission; vision statement drafted, foundation for future planning.
Fall 2004	Strategic Planning Committee with Bob Schorr as facilitator	Desired Future State descriptions (goals) for next four to five years are completed in 2005.
2007	Strategic Planning Committee describes parish 2012	Reviewed and validated 2004 and 2005 documents, with partial extension of desired Future State descriptions (incomplete).
Fall 2010	Plans for MMR	Initiated design questionnaire for parish survey.
Jan. 2011	Facilitated Vestry Retreat (Future)	Report showing options, core values, way forward is prepared.
July 2011	Parish Survey MMR	Very good representative response results in evaluated future state goals from previous planning.
Aug. 2011	Facilitated Vestry Retreat as part of the MMR	Evaluated parish responses, initial development of general goals and actions, report to parish.
Sept. 2011	Parish meeting for input to strategic planning	Presentation and discussion of MMR results is held.
Oct. 2011	Vestry Retreat to set plan methods and outline	Format and goal statements are developed; vestry leadership is established.
Oct.-Nov. 2011	Draft parish plan	Draft of parish plan is completed.
Dec. 2011	Parish review and discussion	Final draft follows parish discussion.