# Closing Report – STRAT PLAN 2021 – 10-page Summary

**Review #3 of 3 – Concluding Strat Plan 2021 – Initiating Strat Plan 2028**

This 10-page report concludes/summarizes SMM's 1st Strat Plan, & prepares the way for SMM's 2nd Strat Plan (from Strat Plan 2021 to Strat Plan 2028). The first four pages of this report are written summaries, while the last six pages are graphics/pictures from the seven year journey.

- 3 1/2 months after the 6th anniversary of ratification of SMM's original 2021 Strat Plan *(14 IX '14 at Whistler)*, the current 2021 Strat Plan Team ratified the 3rd and final/closing review of Strat Plan 2021, for presentation to the 2021 Vestry, as specified in its mandate.
- In the 2020 year of COVID, two Kelowna retreats were deferred, as was a local November retreat. The work planned for those retreats was ultimately achieved with 31 questions in two surveys. The results of the closing surveys is summarized in the following three sections; '*The Team Perspective*', '*Key Findings & Recommendations*', & '*Scoring the 21 SMART Goals*'.

## I. THE TEAM PERSPECTIVE

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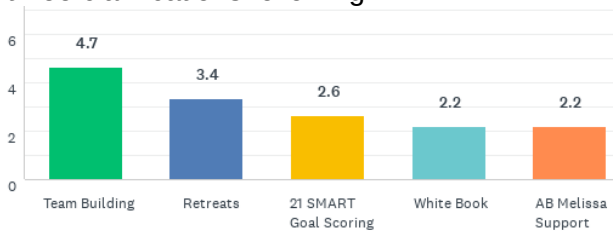
Amongst their last acts, the 12-member Strat Plan 2021 Team reflected on the most important aspects of their time together (in some cases 9 years!). The following graphic ranks the five most significant aspects, with three clarifications following:

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- *"Team Building"* (primarily through five "*Retreats*") stands out as the most significant success of the Strat Plan process. In multiple survey comments, the word "Family" was emphasized.

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- "*21 SMART Goal Scoring"* and *"White Books"* kept us focused & organized. While not visceral like the two aspects above, these two ensured we never deviated from our prime objective: *"continued implementation of Strategic Priorities."*

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- "*AB Melissa Support*" was apparent exactly two weeks after the Strat Plan was originally ratified. On 28 Sept 2014, then Bishop Melissa met with the whole team to congratulate them (see the back page for a cherished photo in a sunny Guildroom).

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Strat Plan 2021 almost precisely overlaps AB Melissa's seven years in the Diocese of New Westminster. Accordingly, the team would like to post-date the name of the Plan to

*THE AB MELISSA SMM 2021 STRAT PLAN – 2014-2021*

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A 1-page testimonial fleshes out the seven years of pastoral and multi-cultural initiatives that inspired this recommendation (see page 3 of 10 following).

## II. KEY FINDINGS & RECOMMENDATIONS

1. From 2014 through to 2020, SMM saw great accomplishments in five broad areas; Spirituality, Ministries, Anglican Communion/EAM, Organizational, and Financial. The 12 Strat Plan Team members unanimously concurred that implementing Strat Plan 2021 had been a major part of that success. Section III on the next page details the 21 SMART Goal granularity behind these five categories.

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2. Despite long hours over a long period of time, all members unanimously agreed that it was not too much; "*it was just right*." Further, they recommend that we continue the same level of commitment to a follow on Strat Plan (Strat Plan 2028).

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3. In addition to recommending a continued level of commitment to Strat Plan 2028, the Team recommends that NEW members be added to the Team, and that REDEVELOPMENT be a core part of the new Strat Plan. These two recommendations, as with all the others, are unanimous.

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## III. SCORING THE 21 SMART GOALS

Without a doubt, having 21 Goals seemed daunting back in Sept of 2014. Equally without a doubt, though, the team feels strongly that we would not have achieved what we did in the last seven years without these focused 'stretch objectives.'

**REPORT CARD**: One of our last acts was to do a rigorous team scoring on each of the 21 SMART Goals (as we had done every year since 2014). The graphic following is the model we have used to summarize the result of that scoring. Seven points following highlight some of the most significant 7 year achievements across the 21 SMART Goals (a readable, full page version of this icon appears on page 5 of 10).

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Greg Tatchell
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The Rev Wilmer Toyoken
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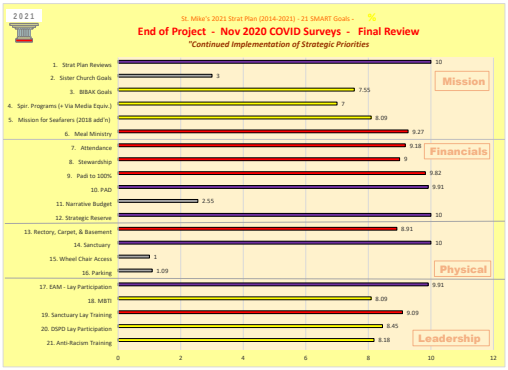


1) **Top 4 of 21 -** by the end of 2020, only 4 of our SMART Goals were considered to have met all objectives, with perfect scores of 10. While this was half the number prior to COVID (July 2019 scoring), the overall balance was much better, with substantial gains in Spiritual Programs, Mission for Seafarers, and Strat Plan Reviews.
2) **17 of 21** - 17 SMART Goals saw tangible progress over the 7 years, with scores of 7 and up.
3) **Bottom 4 of 21 -** Only 4 of the SMART Goals were not actioned/actionable in the 7 years (Wheel Chair Access, Parking, Narrative Budgets, and Sister Church Goals). Two of these goals will likely be addressed under the new 'REDEVELOPMENT' goal being recommended for Strat Plan 2028.
4) **SCORING the 21** - The annual exercise of scoring was a cherished form of review of all we had committed to in the Strat Plan, and ensured we stayed on track, without veering off into non-Strategic tangents. Necessity is the mother of invention, and our new approach of having all members score via a Survey, where all voices are heard and measured, will likely be our *modus operandi* for all of Strat Plan 2028's 7 years.
5) **COVID in 2020** - COVID's effect on the Strat Plan was mostly predictable. For the first time in our 7 years together, Goals regressed (Sunday Attendance & Stewardship). Compensating, two Mission goals grew in meeting specific needs during the pandemic; Spiritual Programs (Evening Prayer) and Mission for Seafarers.
6) **ONE ADDITION** - There was only one change to the SMART Goals in 7 years. With the blessing of AB Melissa, in 2018 we changed Goal #5 to 'MISSION for SEAFARERS', by combining the original SMART Goals 4 & 5 to create the space.
7) **STRAT PLAN 2028** - the 2021 Strat Plan Team recommends that the existing 21 SMART Goals continue to be the backbone focus of Strat Plan 2028, with one major addition.
   - It is recommended that SMART Goal #15 be dramatically expanded to **REDEVELOPMENT**.
   - The next page summarizes a +'ve Dec 17 meeting with the Diocesan Redevelopment Team.
   - As a result of that meeting, the Strat Plan Team is recommending that Phase I (Fact Finding) begin immediately, possibly leading to Phase II (Initial Planning) after the 2022 AVM.
   - The Strat Plan Team agrees with the Diocesan recommendation of a dedicated team. For Phase I in 2021, it recommends 7 members (MK,JB,BC,PB & MT, with WT & GT co-chairing).

The first 4 pages of this closing report are narrative perspectives on the 7 years 2014-2021.

The last 6 pages gather together seminal graphics & images from those same 7 years.

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## 17 DEC 2020 - MEETING BETWEEN DIOCESAN REDEVELOPMENT COMMITTEE & SMM.

*Present*: DIOCESAN REDEVELOPMENT TEAM – Tom Rowe, Tellison Glover & Paul Woehrle; SMM STRAT PLAN TEAM – Wilmer Toyoken, Moses Kajoba, Pilong Bosaing and Greg Tatchell.

**OBJECTIVE**: The objective of this meeting was to act on item 5.4 (Strat Plan 2021) of the 29 Nov 2020 Church Committee minutes:

> *5.4 A key recommendation was to add REDEVELOPMENT, with a Dec 17 meeting scheduled with the Diocese, to better understand what this may entail, for reporting to the 7 Feb 2021 Vestry.*

After introductions, SMM shared their concluding 7-year Strat Plan 2021 report, & then how Redevelopment was being considered in the new 7-year Strat Plan 2028 context.

The Diocesan team shared much with SMM during the one hour meeting, but the following seven seminal points stood out, as reviewed/refined by Tom & his Committee:

1. **GO FOR IT** – the Redevelopment Committee made this key recommendation:
   *"We would really recommend that you consider redevelopment on a major basis."*
2. **ROLES** – the role of the Diocese relative to the parish would be as follows:
   *"The Redevelopment Committee is here to support, but the parish is the Driver."*
3. **KEYSTONE** – the view of SMM redevelopment from a Diocesan context:
   *"SMM has the potential to be a keystone redevelopment in the Diocese."*
4. **ORGANIZATION** – the Diocese recommends the establishment of a dedicated SMM Redevelopment Committee.
5. **SISTER CHURCH's** – Amongst others, it was recommended that the SMM Redevelopment Committee consider meeting with Holy Trinity (Sharon Grove), and with Church of the Epiphany (the Rev. Stephen Rowe).
6. **THE CITY** – The Diocese highlighted the importance of dealing proactively with the City Planning Department, especially given the upcoming Broadway Corridor (see graphic below) Community Plan/Rezoning recommendations. Be part of the process.
7. **RESOURCES** – Van-City has an in-depth program called BUILDING IT RIGHT. The following web-link gives a sense for what is available/what is involved [starting 19 Jan 2021, Terry!] (*https://buildingitright.com/houseoftomorrow.html*).

St Michael's Multicultural was very impressed with how helpful Tom's Redevelopment Committee was in equipping SMM to develop an action plan in preparation for Vestry deliberations on 7 Feb 2021. Further to the 7 points above, the SMM Team were also grateful to the Diocesan team for their follow-on references & material, their offer of help in preparing for the City meeting, and their review/refinement of this summary.

Finally, we would like to finish with the prayer the Rev. Paul Woehrle concluded our meeting with, and which might serve as the guiding light for SMM redevelopment:

* *O God, let the whole world see and know*
*that things which were cast down are being raised up,*
*and things which had grown old are being made new,*
*and all things are being brought to perfection*
*by him through whom all things were made,*
*your Son Jesus Christ our Lord.*

* *Ordination of a Bishop (BAS p. 634)*

*Broadway Corridor SkyTrain Extension – note SMM location (bottom x)*

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## A Strat Plan 2021 Team Reflection - 7 years with Melissa & Eric

On her Christmas vacation, at home in Seattle with husband Eric, Her Grace gave a live Christmas Eve homily to St Michael's when SMM encountered technical difficulties with her pre-recorded Christmas homily. This providential happenstance was declared a miracle by one attendee, while her husband said that the live version exceeded the pre-recorded one. The serendipity family type environment encapsulated all that has been special about the relationship between Melissa and Eric and St Michaels Multicultural (SMM).

Mirroring the blessings of Her Grace's seven year episcopacy, this was the 3rd time that SMM had been blessed with her presence/her messages over a two month period in the twilight of her seven years:

1. Nov 1 - Danilla Severin & Pilong Bosaing were ODNW honored with AB Melissa's on-site presence.
2. Dec 20 - Advent IV - Our "official" bon voyage portrait of AB Melissa, Eric & Teddy, during an official visit that was scheduled in 2019, long before COVID.
3. Dec 24 - the unscheduled/spontaneous/live delivery of her "Is That Baby Jesus?" Christmas homily.

This 'trinity' gave many members of the SMM congregation an opportunity to express their love, and, as mentioned above, a chance on Advent IV to get a *'bon voyage'* portrait of Melissa & Eric & Teddy, as can be seen following (and also on the front cover of SMM's 2021 Annual Vestry package).

This portrait serves as a book-end to the first visit/portrait of our Bishop back on St Michaels Day on 28 September 2014. The occasion for the first visit/portrait was celebrating the completion/ratification of Strat Plan 2021, which had occurred exactly two weeks previously, in Whistler. This '*Genesis'* picture can be seen on the back cover of this report.

While these two pictures serve as book-ends on Her Grace's ministerial presence at SMM, her words on multi-culturalism serve as more meaningful book-ends relative to articulating SMM's spiritual/cultural core, as well as highlighting one of her major achievements in the Diocese and the broader Anglican Communion.

Prior to her 2013 Advent election as Bishop, she gave an in-depth reply, as follows, to a personal 24 Nov 2013 email asking for her thoughts on Multicultural Ministry and Racism; *"The issue of racism and the cultivation of multi-cultural ministry, I believe, must be a priority for the Diocese,"* concluding with *"… both the issue of racism and a commitment to multi-cultural ministry are important to me."* Seven years later, after Her Grace's Advent IV homily, the same person had the chance to ask the same question a second time, with the following response; *"Joy! It feels like something that I do for myself because it feeds me so much – I was attracted and drawn to the beautiful sense of community. The trip to Hawaii with SMM youth was a particularly joyful and lively time – it fed me for months. I'm going to do my very best to orient the next Bishop to the imperative of this work – pardon, not work, but fun!"*

The final two pictures capture aspects of her Grace's words in action. The 1st shows her and Eric in Sept 2018 with SMM at the Anglican Communion Episcopal Asian Ministry Consultation in Honolulu, Hawaii. The 2nd shows her at SMM celebrating the FilCon 2017 Convocation with the Episcopal Asian Ministry Missioner, the Rev. Dr. Fred Vargara. Missing is perhaps Her Grace's most ambitious undertaking; two trips to the Philippines with Eric, establishing a Sister Diocese relationship. Pictures of the first two instances can be seen on the last page of this report (p-10).

With the full arc of history of the occasions above, plus birthday visits, Bishop's Friends, and sharing a couple's expression of affection with their St Michael's family, Her Grace and Eric were never visitors, but were always part of the family. And will always be remembered that way.

Note: the link following will take you to the Jan 2021 TOPIC and an extensive farewell interview with Her Grace
(*https://www.vancouver.anglican.ca/news/january-february-2021-topic*)

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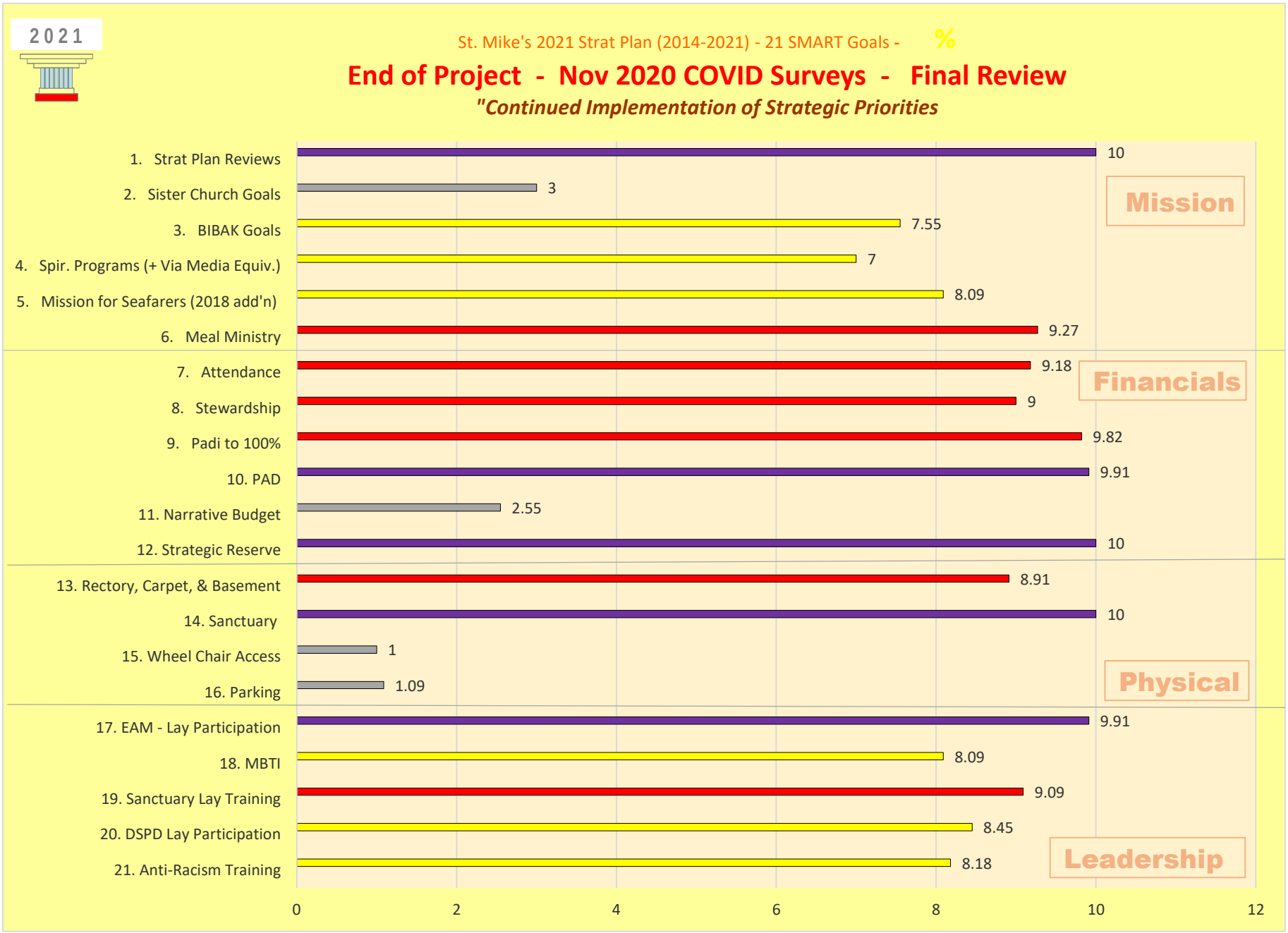


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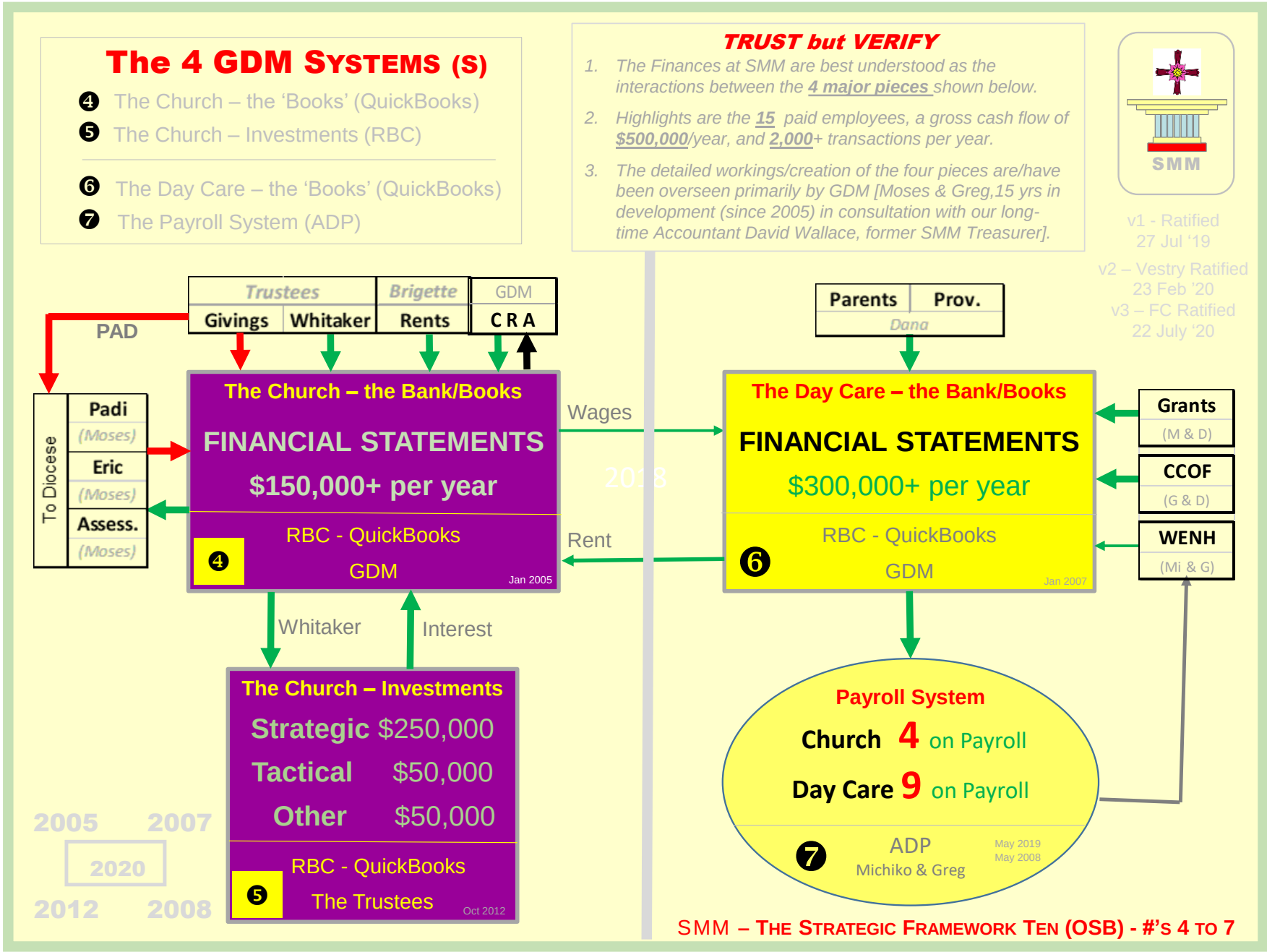

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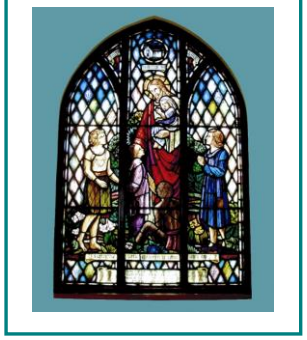
Cyril's Donut - St. Michael's Organizational Structure

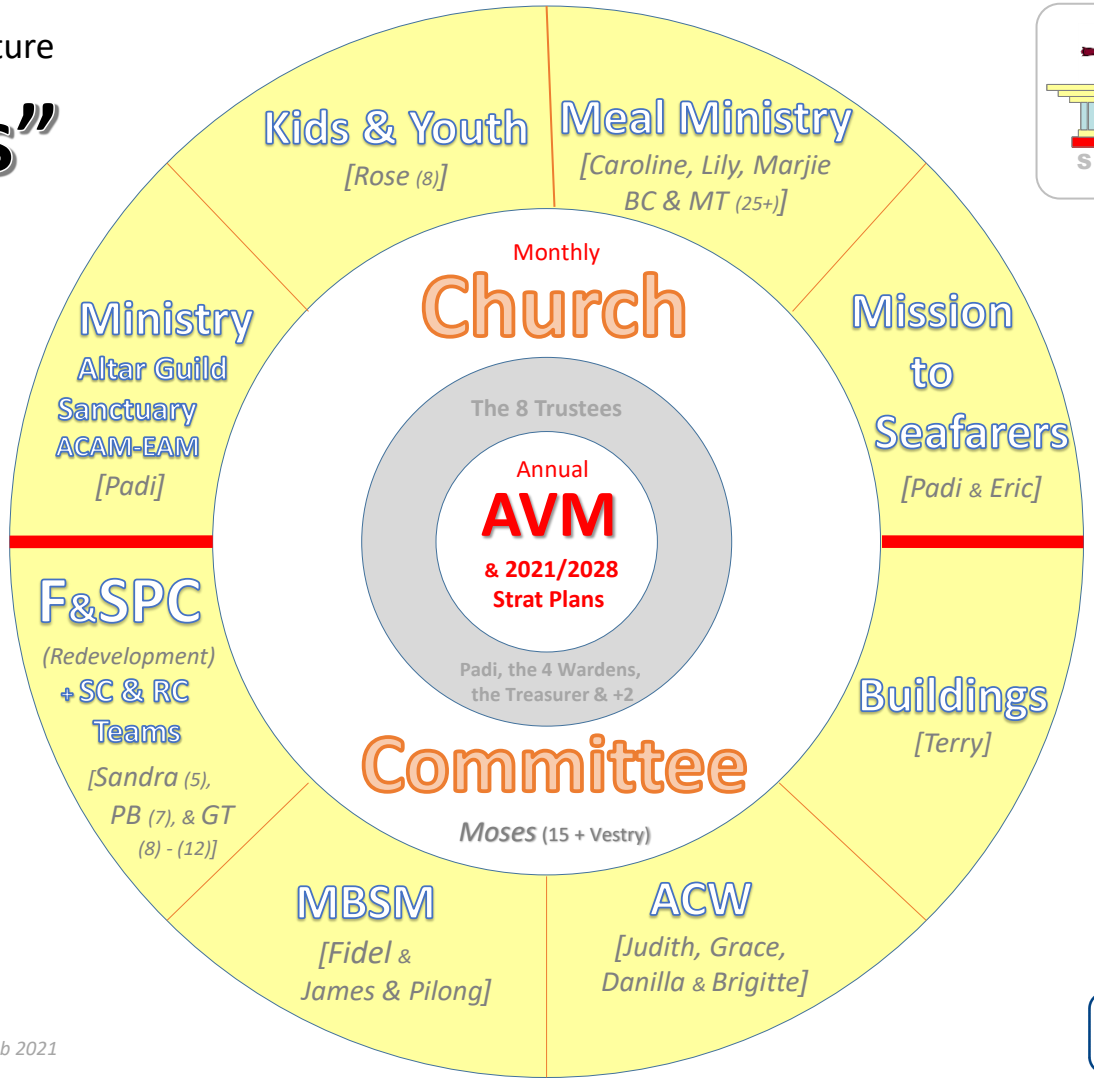
# "A Team of Teams"

## 2021

**"ESTABLISH AUTHORITY"**

*Authority as laid down in the Canons of the Diocese of New Westminster and the Constitution of St Michael's Multicultural Anglican Church (SMM)*






*v1 – ratified by Church Council 23 June 2015: To be updated annually at Vestry*

*v8 – draft revision at 6 Jan F&SPC meeting; to be finalized for Vestry ratification 7 Feb 2021*

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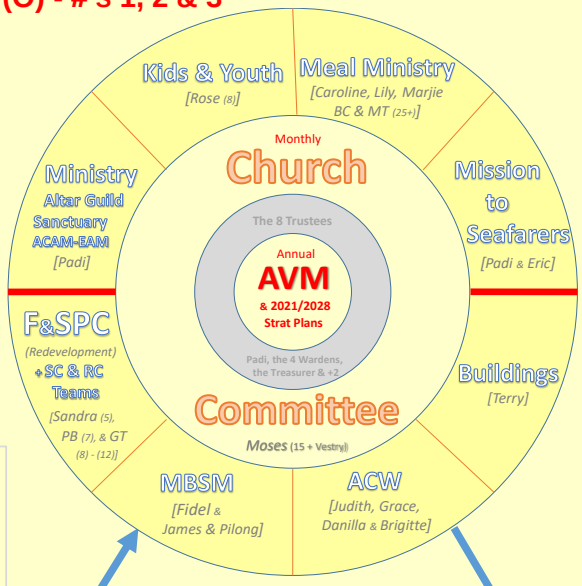
# SMM – The Strategic Framework Ten (O) - #'s 1, 2 & 3

## The GSF Trinity

1. Governance – Constitution
2. Strategy – 21 SMART Goals
3. Financials – 7-yr Budget




SMM

v1 Ratified
14 IX '18

v4 Revised/Ratified
7 Feb '21

Strategic Framework Synthesis
Developed, Ratified & Socialized
over a 3 month period
by the 2021 Strat Plan
& Church Committees
Summer 2018

2015
2018
2009
2014

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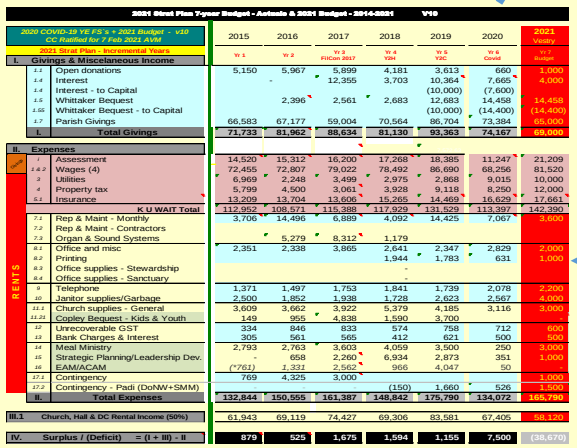

2021 Strat Plan 7-year Budget - Actuals & 2021 Budget - 2014-2021 V19

| | | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|---|---|---|---|---|---|---|---|---|
| | 2020 COVID-19 YE F3's + 2021 Budget - v18 CC Ratified for 7 Feb 2021 AVM | | | | | | | |
| | 2021 Strat Plan - Incremental Years | Yr 1 | Yr 2 | Yr 3 FICon 2017 | Yr 4 YIH | Yr 5 YSC | Yr 6 Covid | Yr 7 Budget |
| I. | Givings & Miscelaneous Income | | | | | | | |
| 1.1 | Open donations | 5,150 | 5,967 | 5,899 | 4,181 | 3,613 | 660 | 1,000 |
| 1.4 | Interest | - | | 12,355 | 3,703 | 10,364 | 7,665 | 4,000 |
| 1.4 | Interest - to Capital | | | | | (10,000) | (7,600) | |
| 1.5 | Whittaker Bequest | | 2,396 | 2,561 | 2,683 | 12,683 | 14,458 | 14,458 |
| 1.55 | Whittaker Bequest - to Capital | | | | | (10,000) | (14,400) | (14,400) |
| 1.7 | Parish Givings | 66,583 | 67,177 | 59,004 | 70,564 | 86,704 | 73,384 | 65,000 |
| I. | Total Givings | 71,733 | 81,962 | 88,634 | 81,130 | 93,363 | 74,167 | 69,000 |
| II. | Expenses | | | | | | | |
| 1 | Assessment | 14,520 | 15,312 | 16,200 | 17,268 | 18,395 | 11,247 | 21,209 |
| 1.4.2 | Wages (4) | 72,455 | 72,807 | 79,022 | 78,492 | 86,690 | 68,256 | 81,520 |
| 3 | Utilities | 6,969 | 2,248 | 3,499 | 2,975 | 2,868 | 9,015 | 10,000 |
| 4 | Property tax | 5,799 | 4,500 | 3,061 | 3,928 | 9,118 | 8,250 | 12,000 |
| 5.1 | Insurance | 13,209 | 13,704 | 13,606 | 15,265 | 14,469 | 16,629 | 17,661 |
| | K U WAIT Total | 112,952 | 108,571 | 115,388 | 117,929 | 131,529 | 113,397 | 142,390 |
| 7.1 | Rep & Maint - Monthly | 3,706 | 14,496 | 6,889 | 4,092 | 14,425 | 7,067 | 3,600 |
| 7.2 | Rep & Maint - Contractors | | | | | | | |
| 7.3 | Organ & Sound Systems | | 5,279 | 8,312 | 1,179 | | | |
| 8.1 | Office and misc | 2,351 | 2,338 | 3,865 | 2,641 | 2,347 | 2,829 | 2,000 |
| 8.2 | Printing | | | | 1,944 | 1,783 | 631 | 1,000 |
| 8.3 | Office supplies - Stewardship | | | | - | | | |
| 8.4 | Office supplies - Sanctuary | | | | - | | | |
| 9 | Telephone | 1,371 | 1,497 | 1,753 | 1,841 | 1,739 | 2,078 | 2,200 |
| 10 | Janitor supplies/Garbage | 2,500 | 1,852 | 1,938 | 1,728 | 2,623 | 2,567 | 4,000 |
| 11.1 | Church supplies - General | 3,609 | 3,662 | 3,922 | 5,379 | 4,185 | 3,116 | 3,000 |
| 11.21 | Copley Bequest - Kids & Youth | 149 | 955 | 4,838 | 1,590 | 3,700 | | |
| 12 | Unrecoverable GST | 334 | 846 | 833 | 574 | 758 | 712 | 600 |
| 13 | Bank Charges & Interest | 305 | 561 | 565 | 412 | 621 | 500 | 500 |
| 14 | Meal Ministry | 2,793 | 2,763 | 3,603 | 4,059 | 3,500 | 250 | 3,000 |
| 15 | Strategic Planning/Leadership Dev. | - | 658 | 2,260 | 6,934 | 2,873 | 351 | 1,000 |
| 16 | EAM/ACAM | (*761) | 1,331 | 2,562 | 966 | 4,047 | 50 | |
| 17.1 | Contingency | 769 | 4,325 | 3,000 | | | | 1,000 |
| 17.2 | Contingency - Padi (DoNW+SMM) | | | | (150) | 1,660 | 526 | 1,500 |
| II. | Total Expenses | 132,844 | 150,555 | 161,387 | 148,842 | 175,790 | 134,072 | 165,790 |
| III.1 | Church, Hall & DC Rental Income (50%) | 61,943 | 69,119 | 74,427 | 69,306 | 83,581 | 67,405 | 58,120 |
| IV. | Surplus / (Deficit) = (I + III) - II | 879 | 525 | 1,675 | 1,594 | 1,155 | 7,500 | (38,670) |

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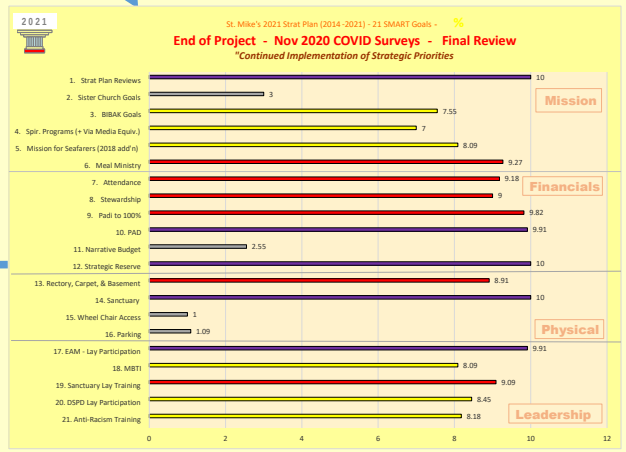

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## 2021 Strat Plan 7-year Budget - Actuals & 2021 Budget - 2014-2021 V10

| 2020 COVID-19 YE FS`s + 2021 Budget - v10 CC Ratified for 7 Feb 2021 AVM | | | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 Vestry |
|---|---|---|---|---|---|---|---|---|---|
| 2021 Strat Plan - Incremental Years | | | Yr 1 | Yr 2 | Yr 3 FilCon 2017 | Yr 4 Y2H | Yr 5 Y2C | Yr 6 Covid | Yr 7 Budget |
| **I.** | **Givings & Miscelaneous Income** | | | | | | | | |
| | 1.1 | Open donations | 5,150 | 5,967 | 5,899 | 4,181 | 3,613 | 660 | 1,000 |
| | 1.4 | Interest | | - | 12,355 | 3,703 | 10,364 | 7,665 | 4,000 |
| | 1.4 | Interest - to Capital | | | | | (10,000) | (7,600) | |
| | 1.5 | Whittaker Bequest | | 2,396 | 2,561 | 2,683 | 12,683 | 14,458 | 14,458 |
| | 1.55 | Whittaker Bequest - to Capital | | | | | (10,000) | (14,400) | (14,400) |
| | 1.7 | Parish Givings | 66,583 | 67,177 | 59,004 | 70,564 | 86,704 | 73,384 | 65,000 |
| | **I.** | **Total Givings** | **71,733** | **81,962** | **88,634** | **81,130** | **93,363** | **74,167** | **69,000** |
| **II.** | **Expenses** | | | | | | | | |
| Givings | i | Assessment | 14,520 | 15,312 | 16,200 | 17,268 | 18,385 | 11,247 | 21,209 |
| | 1 & 2 | Wages (4) | 72,455 | 72,807 | 79,022 | 78,492 | 86,690 | 68,256 | 81,520 |
| | 3 | Utilities | 6,969 | 2,248 | 3,499 | 2,975 | 2,868 | 9,015 | 10,000 |
| | 4 | Property tax | 5,799 | 4,500 | 3,061 | 3,928 | 9,118 | 8,250 | 12,000 |
| | 5.1 | Insurance | 13,209 | 13,704 | 13,606 | 15,265 | 14,469 | 16,629 | 17,661 |
| | | **K U WAIT Total** | 112,952 | 108,571 | 115,388 | 117,929 | 131,529 | 113,397 | 142,390 |
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| | 16 | EAM/ACAM | *(761)* | *1,331* | 2,562 | 966 | 4,047 | 50 | - |
| | 17.1 | Contingency | 769 | 4,325 | 3,000 | | | | 1,000 |
| | 17.2 | Contingency - Padi (DoNW+SMM) | - | - | - | (150) | 1,660 | 526 | 1,500 |
| | **II.** | **Total Expenses** | **132,844** | **150,555** | **161,387** | **148,842** | **175,790** | **134,072** | **165,790** |
| **III.1** | **Church, Hall & DC Rental Income (50%)** | | 61,943 | 69,119 | 74,427 | 69,306 | 83,581 | 67,405 | 58,120 |
| **IV.** | **Surplus / (Deficit) = (I + III) - II** | | **879** | **525** | **1,675** | **1,594** | **1,155** | **7,500** | **(38,670)** |

DS GT