

Association for Episcopal Deacons Strategic Plan 2017-20

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Introduction

The Association for Episcopal Deacons (AED) is a membership-funded association of persons and dioceses within The Episcopal Church. Its mission is to increase participation and involvement of all baptized persons in Christ’s diaconal ministry, especially by promoting and supporting the diaconate. AED has over 1,000 members in the United States and Canada.

AED decided to create a Strategic Plan to chart its direction for the next several years. This direction is aimed at increasing AED’s reach and relevance, to its members and beyond.

Process

The AED Board and staff has worked together throughout the first half of 2017 to create this Strategic Plan, covering the years 2017-2020. Guided by Lisa Bennett, CFRE, Principal Consultant of The Cornerstone Group, they named three working groups: Program, Organization, and Finance/Fundraising to organize their efforts. During January, February, and early March, these groups gathered information and considered major issues that needed to be addressed in the context of this plan. Each group’s thoughts, captured on paper, were circulated to the entire Board. On March 20, 2017, they held a retreat in Atlanta to hammer out broad goals for each area. After the retreat, each working group drafted SMART (Specific, Measurable, Achievable, Results-oriented, and Time-Specific) objectives that, when met, would help lead to attaining the goals.

This document is the result of that work. It is divided into the three areas: Program, Organization, and Finance/Fundraising. Each area has broad goals; each goal has related objectives. At the end is an overview timeline that presents the objectives in a single place, so readers may see the whole picture.

The AED Board and staff should evaluate progress toward these objectives on at least a semi-annual, if not quarterly, basis. This Strategic Plan can serve as a guide to annual planning for Board committees and staff alike.

PROGRAM GOALS

- 1. Deacons are connected effectively with other deacons, the wider Church and world, and their community.**
- 2. AED is a major resource portal for all aspects of diaconal ministry and formation.**
- 3. Advocacy is core to who we are and is enhanced by a built-in structure to provide training, networks, and resources.**

PROGRAM OBJECTIVES

Goal 1. Deacons are connected effectively with other deacons, the wider Church and world, and their community.

- 1.1 A3D attendees reflect the leaders in deacon formation and ministry.
 - By January 2018, AED knows every diocese's position on funding their archdeacons' attendance (99 dioceses in USA and 10 in Province IX)
 - By 2019, at least 35% of the dioceses send at least one archdeacon / deacon formation director to A3D
 - By 2020, at least 45% of the dioceses send at least one archdeacon / deacon formation director to A3D
- 1.2 At General Convention 2018, deacons have an effective presence.
 - A minimum of 300 individual deacons participate in at least one of AED's 6 or 7 activities, including advocating on behalf of deacons.
- 1.3 At the AED Triennial in 2019, we double the number of deacons.
 - 280 deacons (and friends) attend.
- 1.4 Provincial/Regional Gatherings in 2020, we expand the gatherings.
 - In 2020 we have at least three deacon gatherings (including joint events) with AED matching support that results in a minimum of 150 deacons in total being able to attend; cross-promotion; invitations to all.
- 1.5 Advocacy¹ component has a more intentional role at events by 2018:
 - Social Justice Committee forms in 2017 and becomes resource to AED by identifying 3 or more community organizing training possibilities, social-justice issues, and affinity groups.

¹ At 2018 A3D Conference, this theme will receive focus. Attendees will be polled about present involvement and desire to participate more in the above activities. AED will poll membership at the same time, combining this with a series of articles that will stress the importance of Deacons participating in the above activities.

- Deacons are encouraged to represent *Diakonia* through: attending gatherings within TEC (EPPN, EPF, Forma, UBE, etc.), engaging with affinity groups, and participating in the councils of the Church (GC, diocese, regional)

Goal 2. AED is a major resource portal for all aspects of diaconal ministry and formation.

- 2.1 Competencies are complete and Version 1.0 is published by EOY 2017.
 - Available for review and approval at the September 2017 board meeting.
- 2.2 The AED Board and Staff effectively serve the resource needs and wants of its members.
 - By December 2017, AED surveys its members and leaders (archdeacons and deacon formation directors) to identify most pressing concerns. Response rate from archdeacons and deacon formation directors is at least 50%.
 - AED holds regular listening opportunities at each of its gatherings to identify needs and wants, getting input from a minimum of 50 deacons per calendar year.
- 2.3 AED serves as communication portal for its members and those interested in diaconal formation
 - AED Board and Staff complete a communication plan by EOY 2018, answering how, why, and form whom each platform functions (website, Facebook page/group, Diakoneo, Deacon Update, anglodeacons, Twitter, Instagram)
 - AED Board and Staff examines current networks with natural affinity groups within TEC and in the world and uses these networks to full advantage (as part of communication plan)
 - By EOY 2017, VocDev identifies seminaries, local formation programs, and agencies (e.g. IAF, Ekklesia, programs, NAMI) who offer on-line, hybrid, or local programs that help deacon formation and lifelong learning
 - By mid-2018, VocDev in conjunction with Communications has formal resource curation methods in place for formation, continuing education, and supervision of deacons
- 2.4 AED provides structure for advocacy
 - Social Justice Committee forms in 2017 and proposes ways our communication platforms can function as resources for community organizing training possibilities and social-justice issues

ORGANIZATION GOALS

- 1. Establish, maintain, and grow connections with other relevant organizations.**
- 2. Develop clear and comprehensive structures to implement AED's mission.**
- 3. Provide adequate people resource to carry out AED's programs.**

ORGANIZATION OBJECTIVES

Goal 1. Establish, maintain, and grow connections with other relevant organizations.

- 1.1 AED further formalized relationship with Fund for the Diaconate by having the Fund liaison send a written report to the board after each semiannual Fund board meeting, beginning in May 2017.
- 1.2 AED created a list of "relevant" organizations by asking each board member to make suggestions, have a discussion, approve the list and assign liaisons from the board by December, 2017.

Goal 2. Develop clear and comprehensive structures to implement AED's mission.

- 2.1 Research and choose Skype / Zoom as a means for Board Members, task forces and committees to meet during the year by September 2017.
- 2.2 Develop a format for each committee and task force meeting including action steps (what will be done, by whom, by when). These are available online for any other board member to see by September 2017.
- 2.3 Develop a timeline, available to see online, on which the status of all projects is listed by September 2017.

Goal 3. Provide adequate people resource to carry out AED's programs

- 3.1 Form an Event Planning Committee consisting of several persons on the board, including a person with event planning experience, to plan AED gatherings and events by January 2018. This committee reports to the Board and Executive Director.
- 3.2 Develop and approve a plan for compensating for the increased number of hours the Executive Director spends on AED duties by February 2018.

FINANCE AND FUNDRAISING GOALS

- 1. AED has a transparent financial system functioning in accordance with GAAP that can effectively inform program and fund-raising.**
- 2. AED has a development plan that guides our fundraising efforts.**
- 3. AED has increased revenue from diverse revenue streams.**

FINANCE AND FUNDRAISING OBJECTIVES

Goal 1. AED has a transparent financial system functioning in accordance with GAAP that can effectively inform program and fund-raising.

1.1 By Sept. 30, 2017, AED will have, with appropriate professional assistance, evaluated its current bookkeeping and accounting practices, the viability of its electronic systems for money processing, and formulated a detailed written statement of financial protocols.

1.2 By November 1, 2017, AED's Finance Committee will have collaboratively formulated a 2018 budget in for consideration at the November Budget meeting.

Goal 2. AED has a development plan that guides our fundraising efforts.

2.1 By November 30, 2017, AED will have identified six members with racial, ethnic, provincial, geographic, and economic diversity, two co-chairs from the board, and three external bishops, for a fund-raising planning committee to serve a one-year term. By January 15, 2018, they will design a 3-year fund-raising plan that includes:

- a formal written assessment for the fund-raising efforts needed to move from a membership-based model of funding to a fund-raising based model;
- a draft case statement and supporting materials, including (but not limited to)
 - a goal and a gift range chart that shows the number of gifts needed at each level;
 - a variety of methods of identifying, cultivating, and soliciting prospective donors;
 - donor recognition and appreciation strategies;
 - a calendar of activities and interim milestones;
- a plan for recruiting and training an AED fundraising [?] ambassador for 75 TEC dioceses.

2.2 By February 2018, AED will have completed the legal research needed to confirm that it can solicit funds in all states.

2.3 By February 1, 2018, AED's board will be provided with this plan, and will formally approve this plan for presentation at A3D 2018.

2.4 At A3D 2018, all attendees will be furnished with appropriate materials relating to AED's fundraising plans.

Goal 3. AED has increased revenue from diverse revenue streams.

3.1 By March 2018, AED will have formulated a plan for the presentation of its case for funds to General Convention attendees, recruited at least 50 AED ambassadors, and have a formal statement of concrete steps needed to partner with The Fund for the Diaconate.

3.2 AED will, in the format recommended by its fundraising committee in 2.1 above, present its case for support to General Convention in 2018.

3.3 By October 2018, AED will, in the format recommended by its fundraising committee in 2.1 above, launch a campaign to encourage people to include AED in their estate planning, with the goal of identifying 20 persons each year who have done so.

3.4 By March 2019, AED will, in the format recommended by its fundraising committee in 2.1 above, launch a pilot Annual Campaign with the goal of raising revenue sufficient to support ½ of its operating funds by March 2020.

3.5 By March 2020, AED will have applied for five grants.

Association for Episcopal Deacons – Strategic Plan Objectives in Timeline

	June-Dec. 2017	Jan-June 2018	July-Dec. 2018	Jan.-Dec. 2019	2020
Program	<p>Ascertain each diocese's position on funding their archdeacons' participation in A3D</p> <p>Form Social Justice Committee</p>		<p>General Convention: min. 300 attend</p>	<p>Min 35% of dioceses send at least 1 AD or DD to A3D</p> <p>Triennial Assembly- 280 attend</p>	<p>Min 45% of dioceses send at least 1 AD or DD to A3D</p> <p>Min. 3 gatherings, which total 150+ deacons attend</p>
Organization	<p>FFD liaison begins sending report to AED Board after Board meetings.</p> <p>Figure out video-conferencing by Sept.</p> <p>Committee report formats and timelines developed; used online.</p> <p>Establish event-planning com.</p>	<p>Liaisons assigned to "relevant" orgs</p> <p>By Feb., develop compensation plan for E.D.'s extra hours</p>			
Finance/Fundraising	<p>Eval. current bookkeeping; develop protocols by Sept.</p> <p>2018 draft budget ready by Nov. 1</p> <p>Dev. Com. recruited by 11/30</p>	<p>3-year fundraising plan complete by 1/15; approved in Feb.</p> <p>Rsch. complete re: solicitation registration requirements</p> <p>A3D attendees receive FR materials</p> <p>Recruit 50+ GenCon ambassadors; develop case for AED</p>	<p>2019 draft budget ready by Nov. 1</p> <p>Present case for AED at Gen. Con.</p> <p>Launch Planned Giving campaign</p>	<p>By March, launch Annual Campaign</p> <p>Apply for some grants</p>	<p>Have applied for a min. of 5 grants</p> <p>Gifts provide ½ of annual revenue</p>