



**OUR  
STRATEGIC  
PLAN**


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**2024-2028**

**COME. BE.  
PALMER.**

PALMER MEMORIAL EPISCOPAL CHURCH





Gracious God, as we accept the invitation to  
**Come. Be. Palmer.**

and engage in strategic planning together,  
guide us in discerning your will for our  
congregation, that we may continue  
**to share in the City of Houston**  
**the love of Jesus Christ,**  
in whose name we pray. Amen.

*This is the prayer that was shared with Palmers  
throughout this strategic planning process.*

## **PALM•ER | PÄ(L)MER |**

**NOUN: PALMER; PLURAL NOUN: PALMERS**

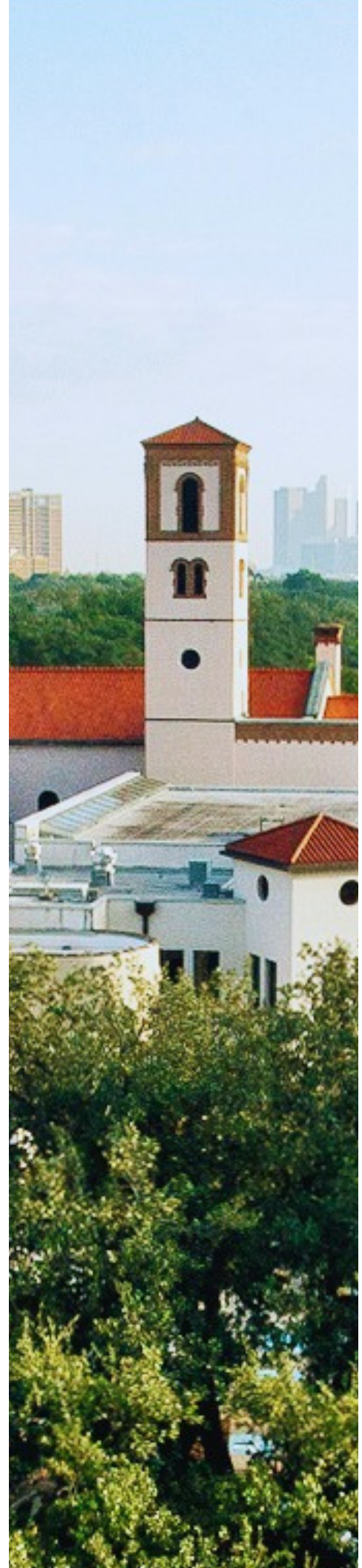
### **1. HISTORICAL**

**A PILGRIM, ESPECIALLY ONE WHO HAD RETURNED FROM THE  
HOLY LAND WITH A PALM FROND OR LEAF AS A SIGN OF  
HAVING UNDERTAKEN THE PILGRIMAGE.**

# TABLE OF CONTENTS

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- 5 PREFACE BY  
THE REV'D NEIL ALAN WILLARD, RECTOR
- 6 BACKGROUND
- 7 STRATEGIC PLANNING PROCESS
- 11 VISION, MISSION, VALUES, AND GUIDING  
PRINCIPLES
- 13 OVERARCHING GOAL, STRATEGIES, AND  
OBJECTIVES
- 16 STAFFING RECOMMENDATIONS
- 19 NEXT STEPS



# PREFACE

Grace and peace to you.

The Book of Common Prayer that we use in the Episcopal Church includes An Outline of the Faith that describes the mission of the Church. It says our mission, as Christians, “is to restore all people to unity with God and each other in Christ.” This mission, it further states, is carried out through every member of the Church — *including you* — as we pray and worship together, proclaim the good news, and promote justice, peace, and love. For many Christians, all of this brings to mind the words of Jesus at the end of the Gospel of Matthew, when he commanded those who followed him to go into the world, baptizing and teaching, and to remember this: “I am with you always, to the end of the age.”



So why has it been important to reflect on the particular, local mission of Palmer Memorial Episcopal Church at the corner of Cambridge and Main and encourage the entire congregation to participate in a strategic planning process? It’s because the context around us has changed, just as it has done since the very beginning of Palmer’s history. The oldest building on our campus, Autry House, was built in 1921 for the outreach of the Episcopal Diocese of Texas to students across the street at the Rice Institute. The space in which we worship on Sundays was built in 1927 as a chapel for the Rice Institute, then transitioned from a chapel to a church when it became the home for an Episcopal congregation in 1929. Palmer’s mission shifted throughout those years to meet the needs of the community.

We have done that ever since, and that is what we’ve been doing now, with every member of Palmer having been invited to participate in the process that produced this Strategic Plan. It will be our roadmap for the next five years, from 2024 to 2028, which, amazingly and wonderfully, will bring us to the threshold of Palmer’s centennial in 2029. And Jesus will be with us all the way as Palmers sing hosannas, following Jesus into Jerusalem, into the City of Houston, and into the lives of the people and the neighborhoods around us.

I hope you will join me in giving thanks for those who have come before us, for those who sit beside us in the pews today, and for the grace of God that binds us together and strengthens us to love both God and our neighbors.

— The Rev’d Neil Alan Willard, Rector

# BACKGROUND

In the fall of 2021, there was a consensus among the members of Palmer's Vestry to engage the members of our congregation in a strategic planning process as we look to the future, specifically in advance of our centennial celebration several years from now. This was timely not only in terms of reflecting together on our mission beyond the peak of the pandemic as we, like every other congregation in the United States, were reconnecting and rebuilding our relationships with one another but also because we have known since before the pandemic of the need to attend to long-term financial challenges related to the stewardship of the beautiful and historic buildings on our church campus. In other words, even in the absence of a global pandemic, those challenges would be something which we would have had to address as we think about the generations that will follow us.

There was an offer from generous Palmers to make an anonymous financial gift in support of a strategic planning process if that gift was matched by other Palmers and if everyone in the congregation was invited to participate. That gift was received and matched, and then Palmer also received a generous grant from the Bishop Quin Foundation of the Episcopal Diocese of Texas in order to be able to engage in a robust version of a strategic planning process. Neither the church staff nor congregational leaders wanted to take shortcuts as they set out on this journey with other Palmers. They desired a commitment to excellence.

Palmer's Vestry, an elected body of which the Rector is the presiding officer, voted in the spring of 2022, after a period of exploration and comparison, to engage Dr. Tucker Branham, principal of CDM (Change Develop Move), to guide us professionally through this process which we have called **Come. Be. Palmer.** Dr. Branham has a background in the Episcopal Church, extensive experience working with a wide variety of nonprofits and educational institutions, a master's degree in philanthropy and development, and a doctoral degree in organizational leadership. In addition to those strengths, the clergy, the rest of the church staff, and the members of the Vestry were impressed with the manner in which Dr. Branham invited others into conversation.



Lastly, something unique to the process proposed by Dr. Branham was an Infrastructure Report that would be created to support the Strategic Plan and our congregation's ability to implement the plan effectively and efficiently. This included recommendations about present and future staffing needs, how the Vestry works together for the health of the congregation, revisions to Palmer's Code of Procedures (i.e., by-laws), increasing and diversifying our financial support, etc. This report is a critical part of what made this a robust process.

# STRATEGIC PLANNING PROCESS

A typical strategic planning process is fairly insular and involves a small group of organizational and volunteer leadership deciding what they want to do and then telling everyone else what has been decided. That would be a process that focuses more on operations and less on culture and produces a plan that is done TO people.

In contrast to that, Palmer desired a strategic planning process that would include wide participation, that focuses on both culture and operations, and that produces a plan that is done WITH people. Our process was divided into three phases and took just over a year to complete because it was robust and inclusive. From the beginning, the entire congregation was invited to participate in this process multiple times. Here is a timeline of events:

## Phase I — Vision and Mission Work (August to December 2022)

- Dr. Tucker Branham, principal of CDM (Change Develop Move), held initial conversations in September of 2022 with the Rector, Senior Warden, and Junior Warden.
- The entire congregation was invited to fill out an initial survey from CDM about Palmer in September of 2022, with all of the responses made anonymous before going directly to Dr. Branham. This was an opportunity for Palmers to share what we feel is most important about our church, our experiences here, and our hopes for the congregation and community moving forward. At the end of the survey was an open-ended question that could be used to comment on our mission, our ministries, the changing contexts of our neighbors around us, or whatever else was on our mind. More than 200 Palmers participated in this initial survey.
- Data from the surveys was analyzed by Dr. Branham to determine key areas that needed attention for discussion points in upcoming focus groups and interviews with individual parishioners.



- Dr. Branham was introduced to the congregation in person during worship services on Sunday, October 9, 2022.
- A Vestry retreat was held on Sunday, October 9, 2022, with Dr. Branham and included discussions around the survey results, vision, mission, the future of Palmer, and the challenges and opportunities facing us.
- Beginning in November of 2022, Palmers were invited to sign up for focus groups with Dr. Branham, both in person and online, and each focus group was limited to a maximum of 12 people. Dr. Branham also began conducting interviews with individual parishioners this month.
- The Staff Committee was created in November of 2022, and the members were Jessica Evans, the Rev'd Ryan Hawthorne, Sue Howard, Roger Hutchison, Dustin Jesudason, Brady Knapp, and the Rev'd Neil Alan Willard. That same month, a visioning retreat for this committee, similar to the Vestry retreat, was held with Dr. Branham leading it.
- The Strategic Planning Task Force was created in December of 2022, and the members were Gail Adams, Bridgette Begle, Monica Gri, the Rev'd Ryan Hawthorne, Bet Hunter, Jim Key, Danna Kurtin, David Palma, David Robinson, and the Rev'd Neil Alan Willard. This task force included the clergy, members of the Vestry, and representation of the parish at large by individuals who have been involved in our common life for different lengths of time. The role of the task force was to work with Dr. Branham, assessing each process during Phase II and providing guidance and constructive feedback to keep the plan on the right track.
- Dr. Branham conducted interviews with individual staff members in December of 2022.

### **Phase II — Mission through Objectives Work (January to August 2023)**

- Beginning in January of 2023, the Strategic Planning Task Force met with Dr. Branham regularly, taking the work from the Vestry and Staff Committee retreats as a starting point for drafting Palmer's Vision, Mission, Values, and Guiding Principles.
- Dr. Branham in January of 2023 continued scheduling interviews with individual parishioners.
- When the last focus groups concluded in April of 2023, Dr. Branham had convened more than ten of these gatherings and reached over 100 Palmers.
- Data from the focus groups and individual interviews was analyzed by Dr. Branham.
- The draft of Palmer's Vision, Mission, Values, and Guiding Principles created by the Strategic Planning Task Force was presented to the members of the Vestry for review and discussion in April of 2023. Their comments were used to update this draft before it would be presented to the congregation at a parish forum in May of 2023.
- A parish forum was held on Sunday, April 23, 2023, to update the congregation about where we were in this process and to let Palmers know that all of the work up to this point would be the basis for defining our overarching goal and strategies that



would align with our Vision, Mission, Values, and Guiding Principles, which would be introduced at the next parish forum in May of 2023. The slides from this parish forum were posted on the Strategic Plan page of the church website.

- A ten-minute video with Dr. Branham explaining for the congregation the importance of this strategic planning process in advance of her presence at the next parish forum about it was posted in May of 2023 on the Strategic Plan page of the church website and also on Palmer's YouTube channel.
- A parish forum was held on Sunday, May 21, 2023, to update the congregation. Palmers had an opportunity to listen to Dr. Branham talk in person about where we were in the process and answer questions. Palmers also heard the voices of several members of the Strategic Planning Task Force as they introduced the draft version of our proposed Vision, Mission, Values, and Guiding Principles. The slides from this parish forum were posted on the Strategic Plan page of the church website.
- Dr. Branham met with Palmer's youth after worship on Sunday, May 21, 2023.



- Dr. Branham also met with the Vestry on Sunday, May 21, 2023. After having an opportunity to ask questions, the members of the Vestry offered their unanimous support for the proposed Vision, Mission, Values, and Guiding Principles as presented. This was communicated to the congregation, and the proposed Vision, Mission, Values, and Guiding Principles were posted on the Strategic Plan page of the church website.
- The entire congregation was invited in May of 2023 to offer feedback about the proposed Vision, Mission, Values, and Guiding Principles.
- The Vestry approved the proposed Vision, Mission, Values, and Guiding Principles, without revision, in June of 2023. The Strategic Plan page of the church website was updated to reflect this.
- The Congregational Committee was created in June of 2023, and the members were Ken Alexander, Rosine Hall, Alisha Renshaw, Kelli Soika, and John Wallace. The role of this committee was to work with Dr. Branham, contributing to the rest of the processes in Phase II and providing guidance and constructive feedback.

- The Vestry, Strategic Planning Task Force, Staff Committee, and Congregational Committee began identifying gaps between where we want to go and where we are today in June of 2023. These gaps were used to create a draft overarching goal and draft strategies. Later that same month the Vestry, Staff Committee, and Congregational Committee worked through draft objectives in support of those draft strategies.
- The Vestry, Strategic Planning Task Force, Staff Committee, and Congregational Committee met with Dr. Branham in July of 2023 and finalized the Overarching Goal, Strategies, and Objectives. This concluded the work of the Strategic Planning Task Force and the Congregational Committee.
- Palmer's Strategic Plan, which includes the Vision, Mission, Values, and Guiding Principles, together with the Overarching Goal, Strategies, and Objectives became nicknamed in many settings and conversations as the Four Pillars Report. That's because our strategies fell into the four categories, or pillars, of People, Place, Program, and Pay.
- The Vestry and Staff Committee began submitting ideas in July of 2023 for tactics to achieve the objectives related to the Four Pillars: People, Place, Program, and Pay.

### **Phase III — Tactics and Final Reports (September to October 2023)**

- The Vestry and Staff Committee in September of 2023 were divided into four committees, each assigned to finalize tactics for the first year of our five-year Strategic Plan for one of the Four Pillars: People, Place, Program, and Pay. These tactics will help us take steps toward meeting our objectives at the end of those five years for the strategies attached to each of these Four Pillars.
- The Infrastructure Report was created for the Vestry to support the Strategic Plan and our congregation's ability to implement that plan effectively and efficiently. This included recommendations about present and future staffing needs, how the Vestry works together for the health of the congregation, proposed revisions to Palmer's Code of Procedures (i.e., by-laws), increasing and diversifying our financial support, etc. That Infrastructure Report, together with the Strategic Plan, was presented to the Vestry and discussed in person with Dr. Branham in September of 2023.
- A parish forum was held on Sunday, September 24, 2023, to update the congregation. Palmers heard a presentation about the Overarching Goal, Strategies (related to the Four Pillars: People, Place, Program, and Pay), and Objectives. Palmers also saw charts with short-term and long-term staffing recommendations and heard a description of next steps, in particular the creation of working groups to implement first-year tactics and quarterly reviews with reports to the Vestry.
- The Vestry continued in October of 2023 its discussion of the Infrastructure Report.

### **After the Completion of the Infrastructure Report and Strategic Plan**

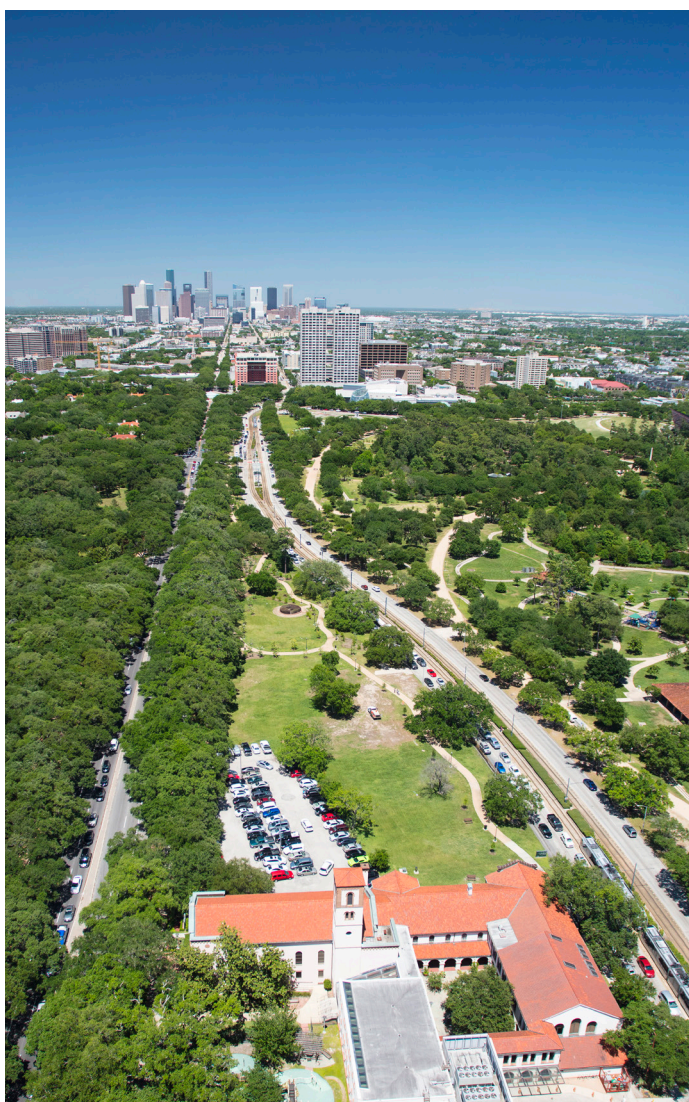
- This narrative was created and made available to Palmers in advance of the Annual Parish Meeting on Sunday, January 21, 2024. Soli Deo gloria!

# VISION, MISSION, VALUES, AND GUIDING PRINCIPLES

The vision describes the result of Palmer’s existence — our worship, witness, and loving service in the name of Jesus — not merely in the greater community but throughout the world at the end of our second century as a congregation more than 100 years from now. If we are following Jesus, who is “God from God, Light from Light, true God from true God,” as we say together on Sundays, what will be changed around us as our own hearts are changed from generation to generation?

The mission is the first leg of our journey toward realizing our vision. The wording of that mission below is an expanded version of words already familiar to many Palmers about knowing and sharing the love of Jesus Christ. The image of a journey is also familiar to many Palmers since Palm Sunday is the feast day of our parish, when we reflect on our identity as those following Jesus into Jerusalem.

Values both inform and constrain the kind of strategies we choose to achieve the overarching goal of our Strategic Plan. They put important and necessary guard-rails on that plan. If we develop strategies without regard to our congregational values, we may find faster and easier ways to achieve things, but we risk breaking the promise of our values statement and operating without integrity, which in our Christian setting includes our spiritual and theological integrity. The guiding principles explain what we will do to stay in line with their corresponding values.



## **Our Vision**

Bringing the peace of Jesus to the whole world.

## **Our Mission**

To know and boldly share the love of Jesus Christ through deep understanding of our relationship with God, ourselves, and our neighbors, in a joyfully engaged and welcoming community, dedicated to thoughtful and focused service, and inspired by worship that renews curiosity about all of creation.

## **Our Values and Guiding Principles**

### **Liturgical Excellence**

We believe in sharing God's unconditional love in Jesus, which we call grace, with all who come through our church doors. The beauty and power of our liturgy drawn from the Book of Common Prayer and our music drawn from the Anglican choral tradition are the beginning, not the end, of our weekly Christian journey. Like a flourishing tree, they root us in the past, shelter us in the present, and reach out to the future with the strength and confidence of God's promises to all.

### **Joyful Companionship**

We believe spending time together and connecting across the generations fosters our spiritual growth. Palmers accompany each other on our pilgrimage with God, toward God. We are an ever-growing household, for the youngest child and each of us through the end of life, built with grace, love, acceptance, laughter, tears, service, singing, and Jesus as our cornerstone.

### **Bold Curiosity**

We believe the gift of inquiry, curiosity, and profound conversation leads to a greater understanding of our place in God's creation and our relationship with God, ourselves, and our neighbors. Knowing and sharing the love of Jesus is experienced in our worship and also through artistic expression, intellectual generosity, and spiritual teaching.

### **Spiritual Sanctuary**

We believe God loves each of us, no exceptions. As human beings created in God's image, we should have a place where the love of Jesus is made real, a place where we can experience the celebration of who we are and an acceptance of where we are on life's journey. We aspire to be an inclusive community of faith and a beacon of hope for those seeking spiritual refuge.

### **Loving Service**

We believe following Jesus, as we are called to do, involves caring for our neighbors as we care for ourselves, joining in God's mission to connect with and work alongside an extraordinary array of people, institutions, and communities, and bearing witness to the work of the Holy Spirit in the world around us.

# OVERARCHING GOAL, STRATEGIES, AND OBJECTIVES

The overarching goal is where we want to be at the end of our five-year Strategic Plan. Reaching that goal would mean that Palmer has significantly narrowed the gaps identified between our stated mission and values and where Palmer is today.

The strategies described within the Four Pillars of People, Place, Programs, and Pay are key areas of focus that need to be a priority in order to achieve Palmer's overarching goal. These can be thought of as hypotheses to achieve that goal.

The objectives are measurable outcomes that indicate we are making progress toward our strategies. These can be thought of as ways to test our hypotheses. Some are subjective in nature, but they are all objective in outcomes since we will be able to measure each, year over year.

Note that in the objectives listed below, some of them refer to "X%" rather than to a specific percentage. Those are neither typos nor signs of Palmers not having done their homework, so to speak. Rather, specific figures will be added to those objectives as we work through the tactics identified to meet our objectives.

## **Our Overarching Goal**

By the centennial of Palmer Memorial Episcopal Church in 2029, our congregation will see an increase in active participants by increasing the accessibility to Christian teaching and spirituality for all ages, meaningful and joyful congregational connections, loving service that embraces the greater community, and inspiring and relevant worship that renews curiosity about all of creation.

## **Our Strategies and Objectives**

### **People**

Attract and retain an extraordinary array of staff, volunteers, and members who lead and participate in meaningful, relevant, and joyful relationships between God, our neighbors, and self.



**Staff Objective 1**

Hire adjust, or maintain 100% of identified needed positions to support the strategic initiatives and goals.

**Staff Objective 2**

100% of essential staff participate in professional development opportunities each year.

**Staff Objective 3**

100% of Rector, assisting clergy, and appropriate staff are engaged and participating in Palmer's programs and activities.

**Staff Objective 4**

100% of Rector, assisting clergy, staff, and Vestry understand their role and responsibilities and that of each other in supporting the overarching goal and mission of Palmer.

**Participants Objective 1**

Increase the number of members of Palmer by x%.

**Participants Objective 2**

90% of church volunteers feel the volunteer experience is meaningful and joyful.

**Participants Objective 3**

90% of active participants feel their church experience is meaningful and joyful.

**Participants Objective 4**

Increase the number of guests who attend more than one program or service by x%.

**Place**

Enhance our campus — infrastructure, security, sustainability, and access — to support the current and future needs of the congregation and community to foster our mission and values.

**Objective 1**

Complete deferred maintenance.

**Objective 2**

Identify and prioritize campus improvements.

**Objective 3**

Develop and implement a parking plan that provides reasonable access to 90% of the people 90% of the time.

## Objective 4

100% of the demographic groups feel safe while on Palmer's campus.

## Program

Create and implement enduring, creative, and varied programs for all ages and stages of life that focus on joyful and inspiring worship, Christian teaching and spirituality, congregational connections, and community partnerships.

## Objective 1

Increase the number of regularly attending participants across all age groups by X%.

## Objective 2

X% of adult program participants feel the adult and multi-generational programs offered are relevant, joyful, inspiring and foster community and a strong connection to Palmer.

## Objective 3

X% of children and youth program participants feel the children, youth, and multi-generational programs offered are relevant, joyful, and inspiring, and foster community and a strong connection to Palmer.



## Objective 4

X% of congregants that participate in service programs feel the programs are relevant, joyful, and inspiring, and foster connection and community.

## Pay

Grow the financial resources to meet current needs and prepare for future generations.

## Objective 1

Increased donated revenue and broaden participation.

## Objective 2

Increase earned revenue.

## Objective 3

Create an operating reserve (cash on hand).

# STAFFING RECOMMENDATIONS

Two themes that emerged from the focus groups were expressed in a desire by Palmers to maintain the current strength of our music ministry and to rebuild and strengthen our youth ministry. That desire is reflected in the following charts that show, respectively, short-term and long-term staffing recommendations. Both of these charts reveal no changes to the responsibilities of the church staff within our music ministry. However, both do reveal a shift in responsibilities among other members of the church staff, including those who work in our ministries with children and youth. The latter, in fact, began in the summer of 2023 when the Director of Christian Formation and Parish Life became Director of Children's and Youth Ministries, and a part-time children's ministry assistant was added to allow the Director of Children's and Youth Ministries to spend more time on Sundays with our youth and with our part-time youth ministry assistant.

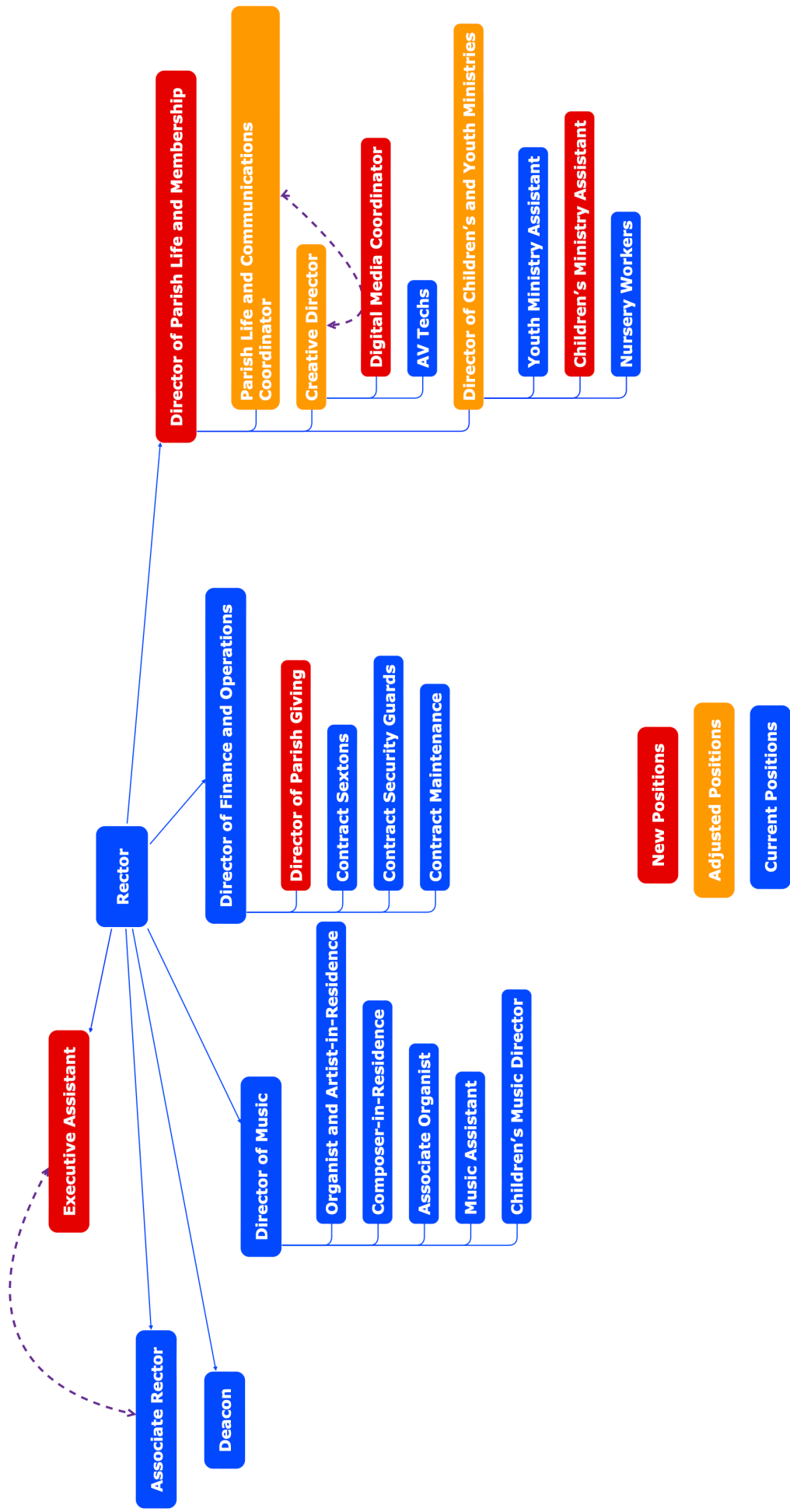
You will also notice the bold but important recommendation to add to the church staff a Director of Parish Giving and a Director of Parish Life and Membership, and to do that sooner rather than later. That will require some creativity in terms of thinking about how to fund these new positions, especially on the front end of things, within the constraints of our current financial realities. But know that conversations about possible paths toward doing that began in 2023.

Many of our peer congregations in the Episcopal Church already have a staff position similar to a Director of Parish Giving, as does Congregation Emanu El, which is the synagogue on the other side of the campus of Rice University. The reason they still have them is because of effectiveness. Someone in this role can organize our annual giving programs and ensure those run smoothly, apply for grants from a wide variety of foundations, and spend time seeking major gifts apart from regular annual giving, campaign gifts related to any future capital campaigns, and planned giving commitments related to Palmer's endowment.

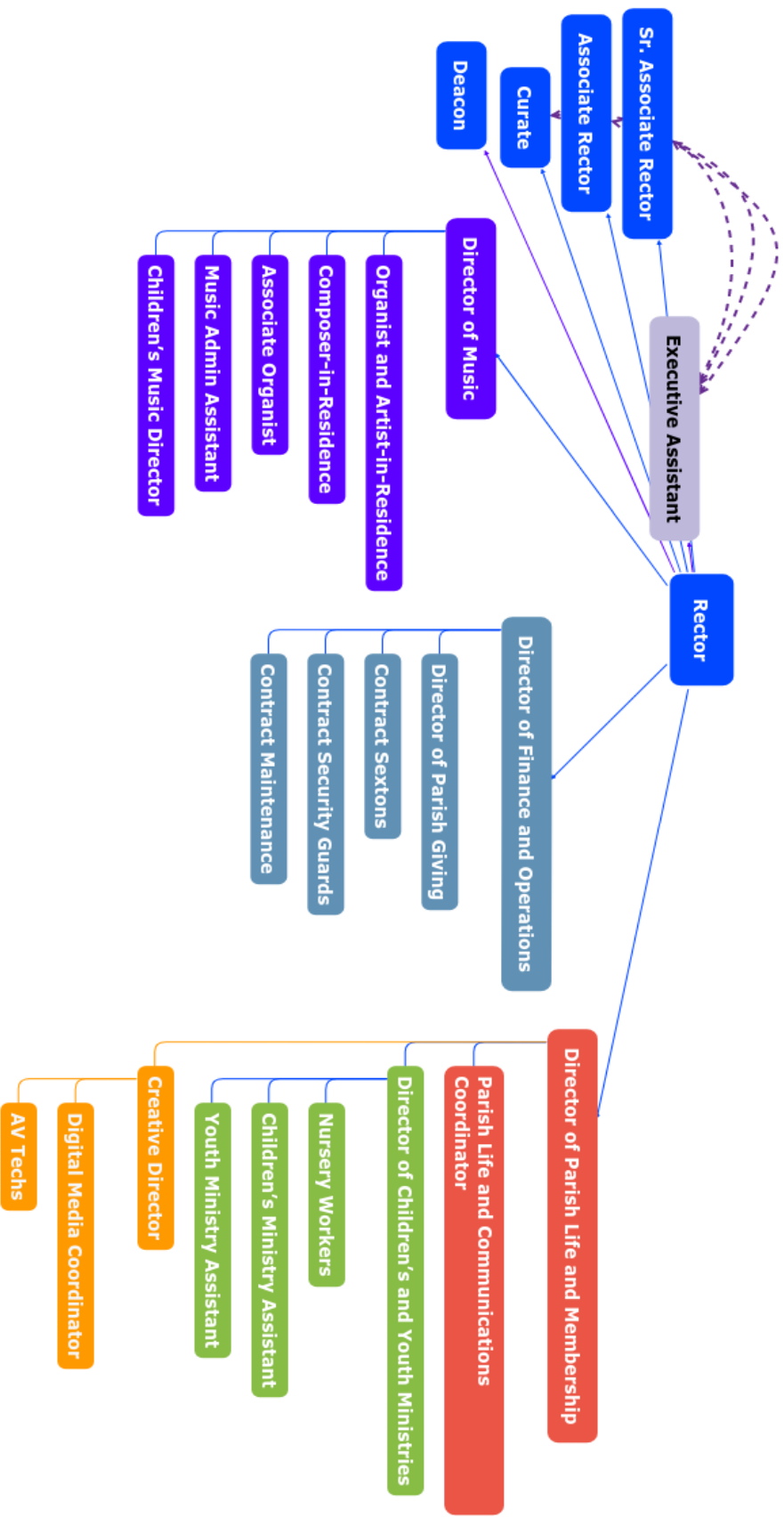
In many ways, a Director of Parish Life and Membership would function as the hub at the center of a wheel in this Strategic Plan. It is a critical position that would allow newcomers to be shepherded into our congregation in a much more comprehensive manner than we have been able to do in the past. It also would foster and strengthen connections within our community among those who are already members, closing further the back door, so to speak, through which members leave. This is the person who would most help us with growth in membership, inviting others to step from the edges of our community toward the center, the creation of social events at which people experience joy, and tracking how we are doing with respect to the ways Palmers and guests feel about our various programs.



# STAFFING RECOMMENDATIONS: 2023-2025



# STAFFING RECOMMENDATIONS: LONG-TERM



# NEXT STEPS

Working groups have been created to implement the first-year tactics within our five-year Strategic Plan to meet our stated objectives. There will be, as part of this process, quarterly reviews to assess those tactics with reports the Vestry.

It is important to note that our five-year Strategic Plan is a living document. Our tactics and our objectives, for example, will be tweaked along the way as we test our hypotheses about the best paths to take in order to reach our overarching goal.

As stated at the beginning of this narrative, the Book of Common Prayer reminds us that our mission as Christians in the Anglican tradition is carried out through every member of the Church — *including you*. We have much for which to be grateful as we look to the past 100 years at the corner of Cambridge and Main and the spiritual inheritance that we have received from those who have gone before us. What we do next will help to lay the foundation for the next 100 years for those who will come after us. Remember that Jesus is the chief cornerstone of that foundation and that he promises to be “with [us] always, to the end of the age.”

The first thing you can do right now is to pray, and these words can be your own:

*God of grace and glory, you are faithful  
from one generation to another:  
Grant to us, as Palmers, the courage to know  
and boldly share the love of Jesus Christ,  
that our own hearts and the world around us  
may be changed and reflect more and more  
your great mercy and compassion;  
through our Savior Jesus Christ. Amen.*





PALMER MEMORIAL  
EPISCOPAL CHURCH

— HOUSTON, TEXAS —