



# Three Year Strategic Plan

Spring 2022 - Spring 2025

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# Pathways Retreat Strategic Plan

Spring 2022

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# Executive Summary

Pathways Retreat Board of Directors and staff embarked on a goal-based strategic planning process to develop a three-year strategic plan to foster stronger alignment, collaboration, and above all direction through 2025.

In order to accomplish this work, Pathways Retreat Center engaged Keith Sarber, Principal of Good Turn Consulting, to facilitate the planning process. The accompanying pages are the extensive work of the planning team. In essence, the goals and heart of the work should be considered the driving document of the organization. However, as unforeseen changes and culture shifts in the organization and wider community, corrections and slight changes of direction may be made by the Co-Directors and/or Board of Directors to maintain the integrity of the strategic plan and to ensure the goals and objectives are met.

The planning process was divided into two phases. The process was handled by two separate, but related groups of directors, board members and members of the Pathways prayer community. Phase I developed Strategic Issue Areas, Goals, Objectives, Barriers and Critical Success Factors. Phase II established Strategies and Tactics to support each objective. Details of a goal-based strategic plan include the following:

1. Situational analysis (internal and external – Strengths, Weaknesses, Opportunities, and Threats)
2. Review and or establishment of the organization’s mission, vision, and values
3. Identification of critical issue areas
4. Establishment of strategic goals for each issue area
5. Formulation of objectives and strategies to address critical issues
6. Development of tactics (plan of action)
7. Implementation, monitoring, and adjustment (evaluation)

**The key theme that emerged from our planning is sustainability, described by this vision, set by the planning team early in the process.**

By Spring, 2025 we will:

- More sustainably provide more healing and wholeness
- More sustainably live our mission, vision, and values

Based on the work of both teams, the strategic plan was outlined into four issue areas with broad goals in each. These issue areas included:

- Programming
- How the work gets done
- Fund Development
- Board Development

The team members involved in the development of this plan included:

#### Phase 1 Team

- Linda Thomas, Co-director
- Julie Stegelmann, Co-director
- Evan Miller, Co-director
- Brian Roots, Board Member
- Ed Frutig, Board Member
- Melissa Schroeder, Board Member
- Betty Schrag, prayer community
- Mary Lehman Yoder, prayer community

#### Phase 2 Team

- Linda Thomas, Co-director
- Julie Stegelmann, Co-director
- Evan Miller, Co-director
- Janice Eigsti Miller, Board Chair
- Ruth Judy, Board member
- Janice Eigsti Miller, Board member
- Bodie Stegelmann, Board member
- Diane Woodworth, Board member
- Jes King, prayer community

## Mission, Vision and Values

**Mission:** Pathways Retreat is a spiritual retreat center for rest, reflection and renewal.

**Vision:** We envision a more compassionate community where all may know Love and Wholeness.

#### Values:

***Presence** - God is. Our response is awareness.*

***Contemplation** – Everything is sacred. Our response is awe.*

***Hospitality** - All are invited. Our response is welcome.*

***Creation** - Life emerges. Our response is nurture.*

***Grace** - All are loved. Our response is gratitude.*

***Wholeness** - Everything belongs. Our response is compassion.*

# Plan Overview

Issue area	What	Who	Target Completion	Urg.	Imp.
Programming	Create a description of the wholistic rhythm of everything <ul style="list-style-type: none"> <li>● Identify/discern key ingredients, including prayer</li> <li>● Design an infographic that illustrates rhythm</li> </ul>	Co-dirs	Spring 2022* Fall 2022	5 2	5 2
Programming	Nurture a pool of programming providers <ul style="list-style-type: none"> <li>● Reestablish contacts with local Spiritual Direction Network groups, and others</li> <li>● Set-up process for managing programming proposals.</li> <li>● Create a process for discerning offerings</li> <li>● Create process for evaluating programs</li> </ul>	Co-dirs & Admin	Winter 2024  Winter 2024 Spring 2024 Spring 2024	1 1 3 3	4 4 4 4
Programming	Build highly effective volunteer program <ul style="list-style-type: none"> <li>● Design &amp; model effective project mgmt for volunteers</li> <li>● Hire a new volunteer coordinator.</li> <li>● Monitor the outcomes of VC's efforts</li> <li>● Expand pool</li> <li>● Evaluate effectiveness of program</li> </ul>	Co-dirs	Fall 2022 Spring 2023 Ongoing Milestones 2023 & 2024 Ongoing	5 5 2 2 2	5 5 3 3 3
Programming	Integrate PW creation care on our website. <ul style="list-style-type: none"> <li>● Add a Creation Care landing page on our website.</li> <li>● Establish a rhythm of sharing information about Creation Care at Pathways</li> </ul>	Staff or contract	Fall 2024 Fall 2024	2 2	2 2
Programming	Identify and explore partnerships for creation care <ul style="list-style-type: none"> <li>● Build a comprehensive list of area groups.</li> <li>● Invite dialog to explore connection</li> </ul>	Staff & Board	Fall 2023 Ongoing, Winter 2024	2 2	2 2
Programming	Develop a plan to hire paid staff to support land stewardship <ul style="list-style-type: none"> <li>● Create job description of land steward</li> <li>● Determine funding model for new position.</li> </ul>	Co-dirs, staff, MLTF, board	Fall 2023 Spring 2024	2 2	5 5

	<ul style="list-style-type: none"> <li>● Hire land steward</li> <li>● Monitor outcomes.</li> </ul>		Summer 2024 Ongoing	2 2	5 5
Programming	Develop Meadowlands (ML) <ul style="list-style-type: none"> <li>● Secure city zoning variance needed to develop ML</li> <li>● Complete improvements in ML Areas 2, 4, and 5.</li> <li>● Complete open-air pavilion in ML Area 1.</li> <li>● Have a well-established prairie in ML Area 3</li> </ul>	Evan MLTF MLTF MLTF	Summer 2022 Summer 2022 Fall 2023 Winter 2025	5 5 2 3	5 5 3 3
How the work gets done	Discern staff roles and develop a new model for staffing <ul style="list-style-type: none"> <li>● Create an Operations Manual (OM)</li> <li>● Develop OM annual review/revision process</li> <li>● Develop the staffing plan for the following year.</li> </ul>	Co-dirs  Co-Dirs & Board	Fall 2022 Winter/Spring 2023 Spring 2023 Annual, begin Spring 2023	5 2 2 3	5 3 2 2
How the work gets done	Build budget to support staffing needs.	Finance	Annual, Spring	4	4
Fund Dev & Marketing	Model carrying capacity of Pathways land, facility, and staff <ul style="list-style-type: none"> <li>● Create task force</li> <li>● Task force report to the board and share findings.</li> </ul>	Board & new task force	Fall 2023 Spring 2024	2 3	3 3
Fund Dev & Marketing	Increase newsletter subscriptions <ul style="list-style-type: none"> <li>● Develop rhythm of creating compelling content</li> </ul>	Staff	Fall 2024	2	2
Fund Dev & Marketing	Revise rhythm of fundraising plan <ul style="list-style-type: none"> <li>● Build expense budget</li> <li>● Set fundraising goals for budgeted giving</li> </ul>	Finance & Fund Dev	Spring 2023	4 4	5 5
Board Dev	Reestablish Board Development committee <ul style="list-style-type: none"> <li>● Revisit board matrix</li> <li>● Consider expanding board</li> <li>● Recruit board members as needed</li> </ul>	Board, Board Dev Com.	August 2022 Fall 2023 Fall 2023 Ongoing	5 5 5 5	5 5 5 5
Board Dev	Update board orientation plan Assign new board members an experienced mentor	Board Dev	Winter 2023 Ongoing	2 3	3 4



# Detailed plan

## Issue Area - Programming

Goal: Provide programming that is grounded in prayer

**Full Goal Statement: Provide programming through staff and creative partnerships that wisely discerns and sustainably meets the needs for rest, reflection, and renewal in our diverse community.**

**Critical Success Factors:**

- Understanding seasonal needs for rest, reflection, renewal - determining how often this needs to be assessed
- Staffing roles clarified - overlap with who does the work
- Wise discernment of what is needed
- Wise allocation of resources to avoid staff burnout

**Barriers:**

- We may be too insular. We don't know what we don't know.
- Capacity of facility (competition for space)
- Staff capacity for ministry and administration
- Don't know who the community is? Who's needs? How to prioritize?

Objectives	Strategies	Tactics	Owner	Timeline
By June 30, 2022, create a visual and written description of the wholistic rhythm of everything: programming, hospitality, fundraising, marketing, creation care and land stewardship, board meetings, outhouse cleaning, and so forth.	Identify and discern the key ingredients of the PW Rhythm of Everything, especially the Rule of Life and the Rhythm of Prayer.  Design an infographic that illustrates this rhythm for all to see. Share this graphic in print and electronic form.	Have the directors name and list the rhythm of Pathways so there's a frame of reference.  Prayerfully discern what is essential and what must be released.	Codirectors  Other - contract with graphic designer	Begin May 1 Bulk of work: May 22-24, 2022 (Codirector's Retreat) June 2022 - test with community  Summer 2022 - Fall 2022.





## Issue Area: Programming

Goal: Foster an embodied culture of rest, reflection and renewal through creation care

**Full goal statement: Foster an embodied culture of rest, reflection and renewal through creation care, and foster a new generation of care-givers who may one day become stewards of the land.**

### Critical Success Factors:

- We have to walk the talk of embodied culture of RRR
- A volunteer program that is very effective
- Qualified person to lead the effort
- Healthy, collaborative relationship with Steve T that is not overly dependent on him

### Barriers:

- Volunteer program leadership is in flux, and, worse, unproven
- Finding right leadership
- Not communicating clear responsibility or authorizing person to act

Objectives	Strategies	Tactics	Owner	Timeline
By Summer 2023, have a highly effective volunteer program that connects people with passion for creation care with PW.	Design and model effective project management for volunteers	Do a workday April and May 2022, collaborating with Community Foundation of Elk Co.	Co-directors	Fall 2022
	Hire a new volunteer coordinator (VC).	Review, revise, and then post VC job description, interview and select candidate.	Co-directors	Spring 2023
	Monitor the outcomes of volunteer coordinator's efforts after six months, and then annually.	Provide oversight and resources to ensure the success of a new person.	Co-directors and Volunteer Coordinator	Ongoing
	Expand pool (database) of interested volunteers to 100 persons by Summer 2023, and 200 persons by Summer 2024.	Research, define, and select technology tool for managing pool of volunteers.	Co-directors	Milestones in 2023 and 2024  Ongoing, beginning when new person hired

	Evaluate effectiveness of fledgling volunteer program.			
By Fall 2023, integrate PW creation care on our website.	<p>Add a Creation Care landing page on our website.</p> <p>Establish a rhythm of sharing information about Creation Care at Pathways, including a baseline and periodic update on the state of native species at PW.</p>	<p>Design menus and page flow to support new section to be added to website.</p> <p>Develop and post content that shares theology of creation care, Rest, Reflection, Renewal.</p> <p>Establish rhythm of sharing “the state of our environmental community” at PW.</p> <p>Utilize DNR and state resources to support</p>	<p>Staff or Contracted</p> <p>Staff or Contracted</p> <p>Staff/Contract Borrow from wider writers</p> <p>Staff/DNR</p>	<p>Fall 2024</p> <p>Ongoing, beginning Fall 2024</p> <p>Ongoing, beginning Fall 2024</p>
By Winter 2023, identify and explore partnerships with other organizations active in land restoration and education.	Deepen relationships with existing groups such as Merry Lea, Goshen College, Master Naturalists program, Trees for Goshen, and so forth.	<p>Build comprehensive list of area groups.</p> <p>Invite dialog with key individuals to explore how PW land might support their mission without compromising PW mission, vision, values.</p>	<p>Staff</p> <p>Staff &amp; Board</p> <p>Staff/Board</p>	<p>Fall 2023</p> <p>Ongoing, beginning Winter 2024</p>
Develop a plan to hire paid staff to support land stewardship by June, 2023.	<p>Create job description of land steward</p> <p>Determine funding</p>	Hold conversation(s) with Steve Thomas to determine	<p>Steve/Board</p>	<p>Fall 2023</p> <p>Spring 2024</p>

	<p>model for new position.</p> <p>Advertise, interview, and hire land steward</p> <p>Monitor the outcomes of land steward's efforts after six months, and then annually.</p>	<p>description, and relationship to Steve Thomas. Clarify if person does whole place or meadowlands.</p> <p>Research other land stewardship job descriptions</p> <p>Write PWR own land steward job description</p> <p>Determine who this person reports to.</p> <p>Explore potential synergies between land steward, volunteer coordinator, administrator and Meadowlands project manager or other roles.</p>	<p>Meadowlands Task Force/Board</p> <p>Task Force/Board</p>	<p>Summer 2024</p> <p>Ongoing</p>
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## Issue Area - Programming

Goal: Execute the meadowlands development vision

**Full goal statement: Execute the meadowlands development vision so that it supports and enhances all of the other strategic goals.**

**Critical Success Factors:**

- Getting project manager
- Getting volunteers for the work
- Effective leadership

**Barriers:**

- Inadequate staffing
- Inadequate funding

Objectives	Strategies	Tactics	Owner	Timeline
By Winter 2025, implement the vision for Meadowlands development as affirmed by the Board in December, 2021.	Secure city zoning variance needed to develop and incorporate Meadowlands into Pathways.	Review prior complete history of variances granted to Pathways.	Coders and Board	Summer 2022
		Develop and present application for variance to Goshen Board of Zoning Appeals.	Meadowlands Task Force	Summer 2022
	Volunteer work crews remove brush and stumps, level and mow new paths.	Summer 2022		
	Purchase chairs, sculpture, and other equipment identified in plan.	Fall 2022		
	Complete an open-air pavilion in Meadowlands Area 1.	Publicly bless, commission, and promote these spaces. Secure city building permits. Complete building		MLTF
			Winter 2023	
Spring 2023				
Summer 2023				

	<p>Have a well-established prairie in Meadowlands Area 3, with ongoing maintenance sustainably implemented.</p>	<p>design with cost estimates.</p> <p>Raise required funds.</p> <p>Build pavilion.</p> <p>Dedicate new facility.</p> <p>Hire contract technical project manager to oversee conversion.</p> <p>Raise required funds.</p> <p>Remove invasive grasses and incompatible plants.</p> <p>Install desired rocks and other hardscape.</p> <p>Plant native grasses and forbes.</p> <p>Nurture new prairie.</p>	<p>MLTF</p>	<p>Fall 2023 (St Francis Blessing?)</p> <p>Spring 2022</p> <p>Summer 2022 and ongoing.</p> <p>Spring 2022 - Fall 2023</p> <p>Fall 2023</p> <p>Winter 2023</p> <p>Ongoing after installation</p>
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## Issue Area: How the Work Gets Done

Goal: Foster a sustainable leadership and operations culture

**Full goal statement: Foster a sustainable leadership and operations culture that gets things done, including succession plans, that enables Pathways to fulfill its mission, vision, and values now and into the future.**

**Critical Success Factors:**

- Comprehensive, shared understanding of the work that needs to be done
- Thoughtful discernment of which activities are essential to meeting mission, vision, values.
- Thoughtful discernment and honest conversation between co-directors regarding tasks and roles
- Sufficient income to staff activities with qualified people
- Qualified people to do the work.

**Barriers:**

- We don't know what the work actually is.
- We can't find people to do it.
- Biting off more than we can chew

Objectives	Strategies	Tactics	Owner	Timeline
Discern the roles of the existing codirectors and current staff, and develop a new model for sustainably staffing, including succession planning, by June 30, 2023.	Create an Operations Manual that catalogs current activities performed by all staff and volunteers, along with plans for when and how to hand these activities off to new people.	Define categories of activities (hospitality, communications, creation care, program, etc)	Codirectors	Fall 2022
	Develop an annual review process and schedule to update the Operations Manual to remove, add new, and update and review all activities and assignments.	Identify what we want to know about each activity (activity name, desired outcome from the activity, inputs, who does it, backup/succession staffing, etc.)	Codirectors/2-3 board members	Winter 2023
	Develop the staffing plan (who	Survey/brainstorm current activities.	Board	
		Prayerfully discern who accepts responsibility for each activity.		Annual, begin Spring 2023

	does each activity in the Operations Manual) for operating PR for the next year.			
Annually at the start of each fiscal year, build a budget to support staffing needs.	Develop a budget for staffing operations, and a funding plan to support the budget.	Have finance committee do this	Finance Committee w/Board	Annual, spring of each year



## Issue Area - Fund Development and Marketing

Goal: Promote Pathways as a community asset for rest, reflection, and renewal

**Full goal statement: Promote Pathways as a community asset for rest, reflection, and renewal, and foster a culture of abundance that invites the community to support Pathways' mission with time, talent, and money.**

**Critical Success Factors:**

- Having a clear idea of what we want to and can achieve.
- Resources (staff) to do the work

**Barriers:**

- It's easier to start something than it is to sustain it.
- A recession, high gas prices that impact the RV industry, etc.

Objectives	Strategies	Tactics	Owner	Timeline
By Spring, 2023, have a spreadsheet model that helps everyone understand the carrying capacity of Pathways land, facility, staff, along with financial implications.	Establish a task force to design the model	Decide composition of task force	Board	Fall 2023
		Task force meeting and get information	Carrying task force	Winter 2024
		Task force report to the board and share findings.	Board	Spring 2024
By Winter, 2025, have a 25% increase in newsletter subscribers, and establish a goal for improving the open rate.	Develop a rhythm of creating compelling content to be shared in the newsletter and on social media in support of the goal.	Identifying the staff who will do this.	Board	Fall 2024
		Create a monthly editorial calendar.	Staff	
		Write stories that promote Pathways programs, as well as PR as a community asset for RRR and foster a culture of abundance.	Staff	
		Develop processes for converting program proposals	Contingent on the program piece of the strategic plan	

		into compelling content		
By Summer, 2024, have a rhythm of fundraising that funds the gap between program income and PW expenses.	Build expense budget and projected income from program.  Set fundraising goals for budgetary giving. Develop tactics to raise necessary funds.	Develop a model of the gap between income and expenses based on carrying capacity.	Finance Committee	Begin Spring 2023

## Issue Area - Board Development

Goal: Cultivate a diverse, high-functioning board.

**Full goal statement: Cultivate a diverse, high-functioning board that empowers Pathways to faithfully fulfill its mission.**

**Critical Success Factors:**

- Getting feedback from current board members about their orientation process
- Leadership of board development committee
- Nurturing relationships between experienced and new board members
- Good succession planning for desired board turnover

**Barriers:**

- Board member burnout, turnover

Objectives	Strategies	Tactics	Owner	Timeline
By September 1, 2022, reestablish a board development committee that is responsible for recruiting and mentoring new board members.	Elect board member to chair board Development Committee	Revisit board matrix, identify gaps, and develop a plan to fill the gaps.  Consider expanding the board composition to meet needs of organization, especially when 3 board members are staff.  Recruit committee members	Board	Summer 2022  Summer / Fall 2022  Ongoing
By the middle of their first year of service, each board member will be able to describe our liturgy of discernment, sociocratic facilitation and decision making, and the	Cultivate board discussion about the nature of board leadership (chair/facilitation).  Update board orientation plan with board feedback on current process.	Allocate 10 minutes at the start of each board meeting to teach/refresh PW unique board practices.  Talk with most recent board members (Brian/Diane).	Board chair/Evan  Board chair	Immediately  Winter 2023

<p>responsibilities and contributions expected by board members.</p>	<p>Assign new board members an experienced mentor for the first year of service.</p>	<p>Collect information. Review. Update. Implement.</p> <p>Review previous process</p> <p>Create and/or enhance guidelines</p> <p>Establish best practices for mentors.</p> <p>Bring process to board.</p> <p>Implement process</p>		<p>Ongoing</p>
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