

**Strategic Initiative #1: Reach out to worldwide and US Franciscan leadership about developing the life and formation at the Mountain.**

**Conveners – Paul and Karen**

Action Item	Progress So Far
<p>1.1) Develop an expert group on the subject of Franciscan contemplation, helping us become a learning ground for others, nurturing a deeper understanding and formation into the life.</p>	<ul style="list-style-type: none"> <li>• Publication of Dan’s book, and launch plans and promotion will raise awareness of Dan, the subject and Mt. Irenaeus.</li> <li>• From multiple sources we are creating a more formalized formation benefiting incoming trustees, hires, companions, volunteers, Council of Spirit and Life members.</li> <li>• Two retreats this summer specifically to help us deepen our understanding of formation into our life and ministry</li> </ul>
<p>1.2) Build relationships through outreach to the larger Franciscan community. Garner a greater understanding of their interests in life and ministry, and where the Mountain may be a vessel to help express them. Offer all our gifts to those searching for Franciscan contemplation in their lives.</p>	<ul style="list-style-type: none"> <li>• Outreach to US-6 friars in leadership continues</li> <li>• Interprovincial Retreat Committee meeting at Mtn this Oct.</li> </ul>
<p>1.3) Identify and nurture relationships with friars who share an interest in our way of life, with the possibility of future ministry with us. Understand and break down resistance to friars’ interest in living here.</p>	<ul style="list-style-type: none"> <li>• Jimmy Kernan, SBU alum and friar in formation spent the summer with us, having a tremendous impact on the community and is interested in being involved and an advocate for the Mountain among his peers.</li> </ul>
<p>1.4) Develop specific partnerships to help with this initiative, including:</p> <ol style="list-style-type: none"> <li>a) With the guidance of friends like Kathleen Moffatt, begin to establish relationships with the Franciscan Federation and its membership.</li> <li>b) Visit Holy Name Provincial leadership to share the larger strategic plan, including the potential investment into a hermitage for the larger province.</li> <li>c) Work more closely with SBU friars to bring our collective gifts together as an offering to the larger community.</li> <li>d) Invite Franciscan leadership onto the Mountain’s board.</li> <li>e) Meet with Richard Rohr and his organization to share best practices in organizational development and growth.</li> <li>f) Connect with other influential friars about aspirations and see where they may help and we might (i.e. Dan Horan, Bill Short).</li> </ol>	<ul style="list-style-type: none"> <li>• Franciscan Federation conference a huge success. We are awaiting membership information as they are restructuring as well.</li> <li>• Mike has been asked to be part of leadership involved with emerging intentional communities across the Franciscan U.S. community.             <ul style="list-style-type: none"> <li>• Hosting a gathering at the Mtn next year.</li> </ul> </li> <li>• Richard Rohr visit very provocative for all who attended. Helpful to understand a similar non-profit/movement and how others are working sustaining their mission.</li> <li>• Consideration of Jimmy Kernan for the board.</li> </ul>

## Strategic Initiative #2: Seek others and develop a diverse community at the Mountain

Conveners: Mike New and Katie

Action Item	Progress So Far
<p>2.1) Working closely with the resident community, expand the responsibility of our personnel committee to include all areas of recruitment, application, acceptance and transition into the Mountain community</p>	<ul style="list-style-type: none"> <li>• Karen Pulaski successfully entered into our core community.</li> <li>• Two other candidates taken through our process with a decision to not offer an invitation</li> <li>• Currently beginning conversation with another companion considering long term community with us.</li> </ul>
<p>2.2) Identify and speak to other communities who live their mission through mixed Franciscan communities (i.e. St. Francis Inn, Center for Action and Contemplation) to see what we can learn from them.</p>	<ul style="list-style-type: none"> <li>• Visit to Center for Action and Contemplation in July was revelatory in this regard.</li> <li>• Mike’s involvement at St. Francis Inn has provided important observations of another Franciscan mixed community.</li> <li>• Involvement with Franciscan Federation Intentional Community Zooms.</li> </ul>
<p>2.3) Identify the community we aspire for three years from now. Seek a vision for an understanding of the following:            How many people live here?            Are there multiple communities that live here? Where do they live?</p>	<ul style="list-style-type: none"> <li>• Part of Initiative #5, continuous conversations with core community</li> </ul>
<p>2.4) Ensure that the mission and the way of life is consistent and being expressed in all who are live here.</p>	<ul style="list-style-type: none"> <li>• A draft of a “common life” document has been drafted by Kevin Kriso, based on fundamental documents.</li> <li>• Karen’s leadership to create an orientation book for Summer companions, consolidating from other fundamental documents. Likely has usage for others entering into the life</li> </ul>

### Strategic Initiative #3: Ensure Co-Ministry with SBU helps foster a transformational student experience.

**Conveners: Mike Fossaceca & Dianne**

Action Item	Progress So Far
3.1)Continue seeking to understand today's students, through relationship building and frank conversations, receive feedback of their Mountain experience through surveys and periodic focus groups.	<ul style="list-style-type: none"> <li>• Research professional willing to help on this when we are ready</li> </ul>
3.2)Foster partnerships on campus, expanding our outreach to the student population through channels including University Ministries and beyond.	<ul style="list-style-type: none"> <li>• Highly successful week long Becoming Bonnies project, partnering with Bona Responds, Umin to bring new students into a culture of service and reflection</li> <li>• Karen bringing students to St. Francis Inn (Phila, PA) over Fall break</li> <li>• Building relationships with DePerro school of Health Professions</li> <li>• Formation of Franciscan Justice Circles with SBU community</li> <li>• Resumption of Orientation overnights this summer.</li> </ul>
3.3)Consider hiring a minister to more deeply engage the student population, including online students.	<ul style="list-style-type: none"> <li>• Three candidates are entering into interview process.</li> </ul>
3.4)Look for new ways to connect with students directly, inviting them to get more deeply involved	<ul style="list-style-type: none"> <li>• Efforts underway to reestablish Mountain Community Leaders</li> <li>• Communications intern relaunched student-centric Instagram (mtirenaeus_happenings)</li> </ul>
3.5)Develop consistent messages and solutions to raise student awareness of ability to access the Mountain	<ul style="list-style-type: none"> <li>• Mountain van has begun Sunday trips once more for liturgy.</li> </ul>
3.6)Form stronger connections organizationally, with the President, senior leadership, our respective boards.	<ul style="list-style-type: none"> <li>• Positive experience with Jeff and Betsy Gingerich at the Mountain this summer</li> <li>• Jeff has agreed to join our board, vote has passed.</li> <li>• SBU Board of Trustees visiting the Mountain September 29<sup>th</sup> for first time in at least 15 years</li> <li>• Engagement with Dean Dave Hilmey, likely will become more involved with us.</li> </ul>
3.7)Look for ways to serve the staff, faculty and administration of St. Bonaventure.	
3.8)Review, update, and formalize agreements in place with St. Bonaventure.	<ul style="list-style-type: none"> <li>• Meeting with VP of Finance over summer opened conversations for the need to review agreements. We look to Jeff's engagement, SBU BOT's visit to launch this action item.</li> </ul>

## Strategic Initiative #4: Expand the Footprint of the Mountain beyond the Mountain.

Conveners : Matrecia & Greg

Action Item	Progress So Far
<p>4.1) Further develop on the road and virtual ministries, ensuring a common experience across all types of gathering, and cultivating local leadership to build their own communities.</p>	<ul style="list-style-type: none"> <li>• High-speed Internet and WiFi infrastructure now in place to stream gatherings and meetings from the Mountain more reliably</li> <li>• Fr. Dan's book launch will lead to several On the Road and In the Home gatherings this fall and winter.</li> </ul>
<p>4.2) Deeply review and recommend changes to our communication materials to make it very clear what it is we offer to the world.</p>	<ul style="list-style-type: none"> <li>• Updated draft style guide almost completed; will circulate once draft is ready. Final version will appear in marketing and ministry plan noted below.</li> <li>• Examining The Common Life document to align with mission and vision.</li> <li>• Continuing to review website and other communications materials noting areas of strength, opportunity, alignment and refinement.</li> <li>• At upcoming committee meetings, listen to lessons learned from recent visits to Arizona, Pittsburgh and Kansas City and recommend models to improve communications.</li> </ul>
<p>4.3) Develop a Marketing and Digital Ministry plan that provides more ways of sharing the gospel message lived out through the Mountain's life and ministry.</p>	<ul style="list-style-type: none"> <li>• Initial outline of marketing and ministry plan forthcoming to connect all strategy areas, identify assets (and needs).</li> <li>• Considering public survey about our communications efforts.</li> </ul>

## Strategic initiative #5: Design and development a physical master plan to visualize the future of the Mountain

Conveners : Terri & Sarino

Action Item	Progress So Far
<p>5.1) This group would help begin to visually shape the future of the Mountain in terms of the location and layout of new structures to support the above initiatives. Naturally this group would work closely with what is recommended from the preceding initiatives. This committee would partner closely with current Buildings and Grounds Committee, as well as the Advancement Committee, to align work and goals.</p>	<ul style="list-style-type: none"><li>• Design and development committee being created to help envision the future of the Mountain and share this vision with others. The goal is to begin meeting in October.</li><li>• Land Committee at various stages in supporting acquisition opportunities.<ul style="list-style-type: none"><li>• Habermehl property recently 3<sup>rd</sup> party appraised, working on an initial proposal</li><li>• Eschenbach letter regarding first rights to the Mountain being drafted</li><li>• Laureen Clark, neighbor adjacent to the Taylor House property, recently inquired if would want to purchase.</li></ul></li></ul>

## Strategic Initiative #6: Create a comprehensive advancement plan

Conveners: Kathy Colucci & Jackie Lanzillo

Action Item	Progress So Far
6.1) While we currently have a very healthy balance sheet and our friends support the “present” ministry of the Mountain, it has been more difficult to find friends who will support the future of the Mountain. This strategic planning project was the means to develop an exciting, vibrant, future vision that gets friends excited about our future. It’s now time to reach out and ask for their help.	<ul style="list-style-type: none"><li>• Living Stones gathering October 14<sup>th</sup> weekend, over 80 people will be attending</li><li>• Mike has begun meeting with perspective donors, as a follow up to Living Stones summer letter.</li><li>• A larger effort to engage others will take place as the design and development team helps bring our future vision forward.</li></ul>
6.2) Hire an Advancement director to oversee all elements of finding funds to continue our mission.	<ul style="list-style-type: none"><li>• Have begun receiving job applicants, with minimal candidates of interest so far.</li></ul>