

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

Action Item	ED's Assessment
<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>	<p>The Council of Spirit of Life has continued to grow and mature, and meets the needs around Franciscan formation that this item intended. The faith formation "pods" are a great example.</p>
<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>	<p>We are always building relationships, but we've made tremendous progress in this area, both within the OFM global community, the Franciscan Federation and others in the Franciscan world. Our stronger partnerships with UMin at St. Bonaventure University also reflect our Franciscan outreach.</p>
<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>	<p>Through the efforts of the HP friars, we've made good strides in outreach to other friars, including contemplative retreats. The issues around recruiting and inviting friars to live here still is an area to develop.</p>
<p>1.4) Develop specific partnerships to help with this initiative, including:</p> <ul style="list-style-type: none"> a) With the guidance of friends like Kathleen Moffatt, begin to establish relationships with the Franciscan Federation and its membership. b) Visit Holy Name Provincial leadership to share the larger strategic plan, including the potential investment into a hermitage for the larger province. c) Work more closely with SBU friars to bring our collective gifts together as an offering to the larger community. d) Invite Franciscan leadership onto the Mountain's board. e) Meet with Richard Rohr and his organization to share best practices in organizational development and growth. f) Connect with other influential friars about aspirations and see where they may help and we might (i.e. Dan Horan, Bill Short). 	<p>Great progress through all these areas of outreach, notably the Fran Federation, Franciscan leadership onto our board, meeting with Richard Rohr's organization.</p> <p>As noted above, our relationship with the new province is very good, thanks to the efforts of our friars. It does seem to still be an area of vulnerability related to controlling our own future with a desired friar presence.</p>

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

Action Item	ED's Assessment
<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>	<p>Always room for improvement but we have a process in place that brings candidates through a developed process. We used this process for Karen Pulaski, Fr. Bill and Mari Snyder. We need a review of our recruiting efforts, both for companions and friars.</p>
<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>	<p>We've met with CAC. We helped develop the Franciscan Intentional Community Network, that came out of the Fran Federation. Karen is a member of that team. We should continue to share best practices with others.</p>
<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>	<p>Breakthrough conversation last week – at this moment we are one community, there's not a desire for a community within the community. Living space for resident community and guests needs to continue to be reviewed, and the issue to discuss within our master plan.</p>
<p>2.4) Ensure that the mission and the way of life is consistent and being expressed in all who are live here.</p>	<p>Perception is this is something the resident community regularly speaks about. Potential for Maura Parda to help with this topic.</p>

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

Action Item	ED's Assessment
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.	The quality of programming and the level of activity with the student population has increased dramatically in the past three years.
3.2)Foster partnerships on campus, expanding our outreach to the student population through channels including University Ministries and beyond.	Our relationship with UMin has been strengthened. The new agreement with SBU clarifies our ties and reporting relationship. See above
3.3)Consider hiring a minister to more deeply engage the student population.	Complete!
3.4)Look for new ways to connect with students directly, inviting them to get more deeply involved	See above
3.5)Develop consistent messages and solutions to raise student awareness of ability to access the Mountain	Communication of gatherings is very good, and Instagram account directed to students continues to get better and better.
3.6)Form stronger connections organizationally, with the President, senior leadership, our respective boards.	Jeff Gingerich became president after strat plan and is a Mt. Trustee, great improvement in the relationship with his office. Relationship with University Mission/Ministries is better but needs continuous cultivation.
3.7)Look for ways to serve the staff, faculty and administration of St. Bonaventure.	The primary focus has been with students. We support staff/faculty in limited ways as resources allow.
3.8)Review, update, and formalize agreements in place with St. Bonaventure.	Complete!

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

Action Item	ED's Assessment
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.	CSL has been wonderfully organized, and plans are in place to continue expansion. Pods have been a tremendous success. We are coming off excellent on the road/in the home gatherings in Buffalo, Rochester, NYC, Washington DC
4.2) Deeply review and recommend changes to our communication materials to make it very clear what it is we offer to the world.	Led by Greg, we have looked regularly to improve our messaging. Support from our communications committee has grown in past 3 years.
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.	This has become a critical area since Dan's passing. Greg and I have discussed creating a content calendar, making it easier for many voices to carry our messaging, vs. the one prolific voice we've had.

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

Action Item	ED's Assessment
<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>	<p>There have been fits and starts to this project since the beginning. We need a renewal to our master plan efforts, to help bring this to completion. Completing the swap for land across from us will bring the opportunity for new possibilities, as will our upcoming endowment-centered campaign.</p>

Strategic Initiative #6: Create a comprehensive advancement plan

Action Item	ED's Assessment
<p>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.</p>	<p>Rob’s hiring has been a tremendous gift that has already borne much fruit already in his first three weeks. More to come in the afternoon session.</p>
<p>6.2) Hire an Advancement director to oversee all elements of finding funds to continue our mission.</p>	<p>Complete!</p>