

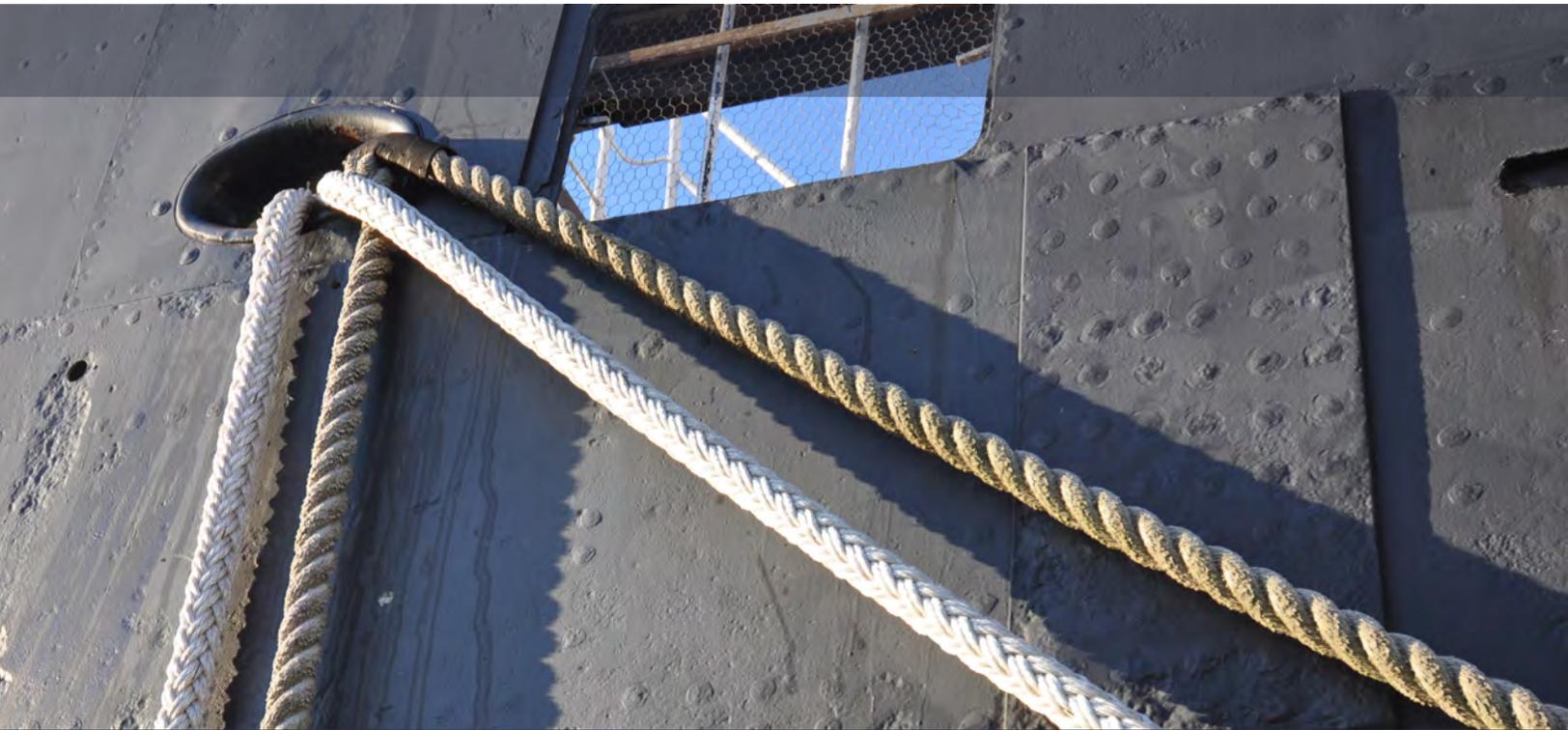
# Strategic Plan • 2012 – 2017

The Seamen's Church Institute

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## TABLE OF CONTENTS

INTRODUCTION .....	2
MISSION & VISION .....	4
STRATEGIC GOALS .....	5
I. Diversify the Role of the Port Newark Facility and Establish it as SCI's Flagship Seafarers' Facility	
II. Extend SCI's Ability to Support Mariners Around the Globe	
III. Anticipate and Serve the Evolving Needs of American Mariners	
IV. Ensure Strong, Ongoing Stewardship of SCI's Resources	
IMPLEMENTATION OF THE STRATEGIC PLAN .....	11

### APPENDIX

Membership of the SCI Strategic Planning Committee

## INTRODUCTION

Founded in 1834, the Seamen's Church Institute (SCI) is a voluntary, ecumenical agency affiliated with the Episcopal Church and the largest and most comprehensive service organization for mariners in North America. From its historical base in New York City, and more recently Port Newark, Paducah, Houston and Oakland, SCI provides port and river ministry, legal aid and continuing maritime education for over 40,000 mariners each year.

The Institute began its strategic planning process from a position of many strengths: a solid financial situation, strong reputation for anticipating and meeting the needs of today's mariners, history of leadership and innovation in the rapidly changing maritime industry and a growing array of programs, services and initiatives to improve the well-being of mariners.

- SCI officially reopened its state-of-the-art seafarer center in Port Newark in the spring of 2011. The newly renovated space brings together a new combination of SCI's staff and services in one location; provides space for a broader range of services and amenities to seafarers, port workers and truckers; and serves as a powerful and visible symbol of SCI's presence among and service to mariners. It provides a day-to-day real world connection with mariners and commensurate institutional benefits in terms of better understanding and responding to their needs both in Newark and beyond.
- The Institute recently upgraded its simulators at Paducah and Houston and presently has state-of-the-art technology for training. Its education programs are extensive, well regarded by industry and mariners alike and provide a range of educational programs to an industry in transition.
- SCI has anticipated and responded well to changes in the maritime industry. This is best illustrated by its recognition of the decline of American mariners in the blue water industry and a refocusing of SCI's attention on the growing American brown water segment, where it has built close ties with the industry operating along the inland waterways and, with its support, established best-in-class mariner training programs that have served also as a foundation for the Institute's successful river ministry.
- Overall, SCI serves as the largest and best funded of all mariner ministries in the country. No other institute has facilities that equal those at Port Newark, Paducah or Houston, let alone the breadth of programs and services, depth of ties to the maritime industry, brand identity, fund-raising prowess, quality of governance, professional staff or financial resources. This scale and scope alone gives SCI visibility and credibility domestically and internationally.

In spite of the maritime industry's rapid transformation as a result of the ever-shifting legal, political, economic and technological landscapes within which it operates, SCI remains in a highly advantageous position to move forward in achievement, renown and impact over the next five years and beyond.

From its longstanding base at the Port of New York and New Jersey, the Institute plans to increase its positive impact on the quality of life of mariners worldwide by:

- Diversifying the roles of the Port Newark facility and establishing it as SCI's flagship seafarers' facility;
- Extending its ability to support mariners around the globe;
- Responding to the evolving needs of American mariners and the domestic maritime industry; and
- Ensuring strong, ongoing stewardship of the Institute's resources.

These aspirations will define both SCI's identity and its legacy to future generations of mariners, the industry, and the public they serve.

The SCI Strategic Plan was prepared under the aegis of an SCI Board Strategic Planning Committee, the membership of which is listed in an appendix. The Committee retained Anthony Knerr & Associates (AKA) to assist it in development of the Plan. AKA interviewed SCI Board members, SCI staff and knowledgeable external observers of SCI and the maritime industry; reviewed extensive print and electronic material about SCI and the maritime industry; moderated meetings of the Committee; and drafted and edited the Plan.

## **MISSION & VISION**

### **Mission**

The largest and most comprehensive mariners' service organization in North America, the Seamen's Church Institute is a voluntary, ecumenical agency affiliated with the Episcopal Church. Founded in 1834, it promotes the safety, dignity and improved working environment for the men and women serving in North American and international maritime workplaces through pastoral care, training, advocacy and thought leadership.

### **Vision**

The Seamen's Church Institute will leverage the grassroots experience and expertise it gains through its day-to-day interaction with individual mariners to impact positively the quality of life of mariners as a whole. Through its relationships with and stature among maritime organizations worldwide, it will seek to influence policies, laws, and practices around the globe – among diverse nations, cultures, industries and employers – for the benefit of mariners.

Through its interdisciplinary approach, which connects the Institute's work in maritime ministry to fields such as law, public health and public policy, SCI will provide thought leadership globally on maritime commerce, the maritime workplace and mariner quality of life. Utilizing its state-of-the-art seafarer center in Port Newark, training centers in Paducah, KY and Houston, TX and its Bay Area branch, the Institute will serve as a laboratory for the development and testing of practices in the areas of mariner education, rights, health and wellness and ministry and will disseminate the knowledge it gains to further other efforts to better the lot of mariners throughout the world.

## STRATEGIC GOALS

To achieve the vision articulated above, SCI will pursue the following four strategic goals.

### I. **Diversify the Role of the Port Newark Facility and Establish It as SCI's Flagship Seafarers' Facility**

SCI's recently completed facility in Port Newark is a modern, state-of-the-art seafarers' center. The capacity, design and siting of the facility, as well as its location in the heart of one of the world's largest ports, provide SCI the opportunity to innovatively craft a diverse set of practical and symbolic roles for the Center that will enhance its value to each of the Institute's many constituencies (seafarers, port workers, SCI employees, donors, volunteers and interns, other maritime ministerial organizations, et. al.) and establish Port Newark as SCI's "gateway to the world."

- ***Establish the Port Newark facility as SCI's R&D center.***  
In addition to serving as the Institute's primary port ministry facility, Port Newark will serve as a unique laboratory for innovations in seafarer hospitality, advocacy and public health that might be replicated elsewhere in the nation and around the globe. In this manner, SCI will leverage its service and experience with individual seafarers in order to benefit seafarers as a whole.
- ***Provide intensive, multi-disciplinary port-based training.***  
SCI will continue to create internships and training programs appropriate to diverse student and professional segments (including, for instance, domestic and international ministers, law students and health professionals) to promulgate SCI's multi-service approach among other organizations and individuals concerned with mariner welfare. Through internships that bring together professionals from the diverse fields noted, SCI can expand the skills and knowledge of the individuals involved, highlight the value of its interdisciplinary approach and generate valuable research and hands-on practices that will enhance the Institute's reputation for thought leadership. To the extent such programs attract participants from overseas, SCI can extend its influence and stature worldwide without further investments in bricks and mortar.
- ***Explore the potential of creating a seafarer public health initiative at Port Newark.***  
SCI will explore an approach similar to that adopted at the Port of Hamburg, Germany, in which health professionals would provide wellness counseling, as distinct from formal medical services, to seafarers visiting the Port Newark Center. Such an initiative has the potential to help individual seafarers directly while allowing SCI to obtain useful information and pursue research that will benefit seafarers globally<sup>1</sup>.

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<sup>1</sup> Any information obtained from individual seamen as well as studies in which they might be involved would be conducted in a non-exploitative manner and within all appropriate guidelines for human subject research.

- ***Use SCI's Bay Area Seafarers' Center as a pilot for innovation.***  
SCI - Bay Area's International Maritime Center will serve as a branch of Port Newark, a West Coast laboratory for how to most efficiently and effectively serve seafarers in other ports throughout the nation and world. This may include:
  - Establishing relationships with area academic institutions, research institutes and other organizations in order to involve law and medical students, health professionals, scientists and other professionals in research and service activities along the lines described for Port Newark;
  - Developing an effective cost and revenue model for the operation of seafarer centers that could be replicated in other American ports where such centers are failing for financial and managerial reasons; and
  - Identifying appropriate evaluation criteria by which to measure the success of such centers.

## **II. Extend SCI's Ability to Support Mariners Around the Globe**

Although the number of American mariners on blue water vessels has declined over the past several decades, the size of the international seafaring work force and its needs have grown dramatically. Indeed, piracy, port security restrictions, reduced shore leave time, cost pressures on ship owners and a growing network of maritime regulations have increased stresses on the blue water workforce.

To address these challenges, SCI will use innovative practices in mariner ministry, advocacy and education that it develops in its domestic locations, seeking opportunities to bring them to scale around the globe. In this way, the Institute will extend its reach to benefit mariners internationally, while remaining mindful of the limitations on its human and financial resources.

- ***Expand collaborative initiatives with the major international maritime ministry organizations.***  
Of the five major maritime ministry organizations internationally,<sup>2</sup> only SCI provides services beyond port ministry. Given its current limited resources, the Institute would be overburdened if it were to provide such services internationally. However, SCI has the opportunity to utilize its on-the-ground experience and solid relationships with these maritime ministry organizations to

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<sup>2</sup> In addition to SCI, these are Mission to Seafarers (London), Sailors' Society (Southampton, England), German Seamen's Mission (Bremen, Germany) and Apostleship of the Sea (operating globally).

build their capabilities and capacity to offer maritime education, support for seafarer rights and other non-ministerial services to seafarers.

- ***Expand SCI's global reputation for thought leadership on maritime commerce, the maritime workplace and quality of life for mariners.***  
SCI has successfully tapped expertise from diverse disciplines – law, psychology, public health and public policy – in its work on piracy, where it has published journal articles and delivered presentations and workshops worldwide, thereby establishing its thought leadership on the issue. SCI will make this multi-disciplinary approach a model for its work on other issues. By doing so, the Institute will expand its reputation as the primary source worldwide for solid research and data on, evidence-based solutions to and seasoned experience in the most pressing mariner welfare concerns as they exist today and evolve in coming years.
- ***Broaden SCI's role as a knowledgeable, trusted, neutral convener of disparate parties concerned with seafarer safety and rights.***  
SCI has brought to the table the U.S. Coast Guard, maritime industry representatives and others with sometimes divergent interests in maritime regulation and safety and in doing so played an important role in identifying and helping these parties resolve complicated issues of mutual concern. SCI will expand on this approach in its work in the brown water and blue water segments.
  - In the safe and neutral setting that SCI provides, disparate, often disagreeing parties have developed deeper understandings of each other's needs and positions, established ongoing respectful relationships and sometimes crafted agreements that obviated the need for more intrusive or unilateral actions by regulating or governing bodies.
  - With this experience, SCI should continue to expand this work as a core strategy, taking advantage of its position within the International Christian Maritime Association (ICMA) to do so. ICMA serves as a neutral vehicle through which SCI can work alongside the International Transport Workers' Federation (ITF) and ship owners yet stay above the fray.

### **III. Anticipate and Serve the Evolving Needs of American Mariners**

SCI's responsiveness to dramatic changes in the American maritime industry over the past century has led to the Institute's longstanding, deep and mutually beneficial relationship with the brown water industry and its mariners. SCI will continue its commitment to American mariners through its work with the inland river segment and explore how it can have greater impact on other industry segments employing American mariners.

- ***Expand the scope and impact of the Center for Maritime Education.***  
SCI has built a strong relationship with inland river transportation companies primarily through the successes of the Center for Maritime Education (CME). As SCI looks for ways to build on these achievements, it will:
  - Identify new areas/topics in which to expand CME training programs, including, for instance, U.S. Coast Guard 46 CFR Subchapter M regulations, engineer training, personnel management training for captains, nighttime simulation and third-party competency evaluations;
  - Create e-learning and distance education initiatives compatible with CME's goals and approach that SCI might introduce as an adjunct to current curricula and to expand CME's customer base;
  - Keep abreast of advances in technology that might enable forms of online, remote simulation compatible with CME's training philosophy, especially if delivered in synchronous or hybrid forms; and
  - Seek to support the training needs of other American mariner segments – including, for instance, harbor tugs, marine pilots, coastwise shipping, shuttle tankers and off-shore supply vessels – and the potential for CME to serve them.
  
- ***Build upon SCI's efforts on behalf of Gulf Coast mariners.***  
The Gulf Coast supports a growing, highly visible and diverse population of mariners, serving on oil rigs, shuttle tankers and offshore supply and towing vessels. SCI will determine their specific pastoral needs and the most appropriate forms of ministry to meet them.

#### **IV. Ensure Strong, Ongoing Stewardship of SCI's Resources**

Although SCI currently enjoys a strong financial position, thanks in part to the 2011 sale of its Water Street building, anticipated ongoing complexities in the capital markets and the global economy will challenge the Institute's ability to manage its endowment and other financial assets. In response, SCI will fortify its fundraising capabilities, ensure thoughtful succession planning and develop long-term financial planning for all aspects of its mission.

- ***Continue to strengthen the governance of SCI.***  
This strategic plan speaks to diversifying SCI's constituencies, services and programs to serve a greater variety of mariners and to expand the Institute's approaches to serving them. To achieve these goals, SCI needs a more diverse and highly engaged Board of Trustees. The Board Nominating Committee will

develop appropriate processes and tools to enhance board member recruitment, development and evaluation by:

- Reviewing the completed Strategic Plan in detail and giving careful thought to how SCI can recruit new board members to create greater diversity in terms of industries, skills and demographics; develop board members in terms of knowledge of and contributions to the Institute; and evaluate members' performance to further develop and enhance their skills or ease them out of their roles; and
  - Creating opportunities that will increase the engagement of board members, not only with the Institute but with each other as board and industry colleagues. Doing so enhances the Board's oversight and planning abilities while building a stronger base for SCI's fundraising efforts.
- ***Design and implement thoughtful succession planning.***  
As SCI implements this Strategic Plan, it should execute a plan for the leadership, composition and role of the Board and the Institute's executive leadership in the longer term. Thus, SCI will:
    - Review and discuss on a regular basis succession planning for the entire Board and undertake biennial third-party reviews of Board performance and activities in order to ensure that its governance embodies and reflects best practices and continues to provide exemplary volunteer leadership; and
    - Create an SCI staffing and succession plan appropriate to support the initiatives outlined in this strategic plan and to take advantage of new opportunities that will arise in the coming years. The Board should review the staffing plan annually to ensure that it is reflected in SCI's longer-term financial planning and annual budgeting.
  - ***Establish clear criteria to evaluate opportunities for new initiatives.***  
SCI's interest in promoting mariner welfare knows no state or national boundaries. There are, however, practical limits to the Institute's human and financial resources that constrain its ability to offer services in multiple domestic and international locations. Taking advantage of its strong and growing reputation as a thought leader, SCI will devise creative ways to influence the quality of mariner life throughout the United States and around the globe without putting at risk the Institute's existing programs and services or financial resources. To this end, SCI will evaluate opportunities for initiatives using the following criteria.
    - The opportunity must provide a service to mariners that meets a real personal or professional need on their part;

- SCI must have sufficient capacity in terms of human resources and infrastructure to address the opportunity without taking on significant financial risk;
  - The opportunity must supplement SCI's core programs and services;
  - The opportunity must relate to genuine expertise that SCI already has; and
  - Pursuing the opportunity must meet a demand that no one else is adequately addressing.
- **Create rolling five-year business plans.**  
SCI will develop annual business/operational plans to ensure steady and successful implementation of this strategic plan.
    - In particular, the Board will look to the Institute's executive leadership to develop clear metrics by which the progress of implementation can be regularly monitored;
    - Additionally, SCI will develop a rolling five-year financial plan tied to this strategic plan and the annual business/operational plans, including, in particular, more detailed financial planning for CME; and
    - CME should operate on at least a break even operational basis. Moreover, SCI will set as a goal not to use any endowment funds to cover the cost of simulator replacement or significant upgrades, funding them instead through CME revenues and commitments from industry users of the facilities.
  - **Ensure effective budgeting and investment management.**  
The Institute will continue to strengthen oversight of its budgeting and investment management.
    - SCI will review quarterly its annual operating budget against actual results and make adjustments, as appropriate, to ensure effective stewardship and continued adherence to its financial policies;
    - The Institute will ensure that non-recurring budgetary events are not included in its annual operating budgets;
    - The Institute will establish a capital budget for all facility and equipment capital expenses; and
    - SCI will review quarterly the performance of its investment funds and ensure that its endowment and other financial assets are strictly managed in accordance with its Investment Guidelines.

- **Strengthen and diversify SCI's fundraising.**  
SCI fundraising remains highly dependent upon the Silver Bell Awards Dinner and an evolving major gifts program. SCI will diversify its private fundraising to include such additional opportunities as planned giving, corporate sponsorships and strong non-event-based development. In doing so, it will:
  - Ensure that the Board includes a broad enough set of connections to support a greater diversity of fundraising approaches and targets;
  - Target overseas ship owners for philanthropic support selectively, focusing on those with investments and business and personal interests in the U.S. (including, for instance, real estate, corporate offices and children attending school); and
  - Plan and launch a significant capital campaign upon completion and adoption of this strategic plan in order to better align its fundraising goals with its planned strategic initiatives, aspirations and long-term objectives.

#### **IMPLEMENTATION OF THE STRATEGIC PLAN**

SCI is committed to ensuring that the Strategic Plan remains a living document, actively guiding its growth and development over the next five years. To that end, the Board will receive and review quarterly reports prepared by its President and Executive Director on progress in implementing the strategic goals set out herein and confirm that its annual budgets and financial planning accurately reflect the Strategic Plan. Further, it will use the Strategic Plan as the basis for its outreach, communications and fundraising.

*Appendix*

**Membership of the SCI Strategic Planning Committee**

**SCI Board Members**

Peter M. Tirschwell (*SPC Chairman*), Senior Vice President, Journal of Commerce/UBM  
*Global Trade*

Richard T. du Moulin (*Vice Chairman, SCI Board*), President of Intrepid Shipping LLC

David S. French (*Chairman, SCI Board*), President, Starr Marine Agency, Inc.

Kathleen C. Haines, *Principal, Holbridge Capital Advisors*

Alfred Lee Loomis III (*Chairman Emeritus, SCI Board*), General Partner, Downtown  
*Associates*

Thomas L. McLane, *Managing Director, RSR Partners*

Robert C. North, *Rear Admiral (Ret.)*, United States Coast Guard; President, North Star  
*Maritime, Inc.*

Bruce G. Paulsen, Esq. (*Treasurer, SCI Board*), Partner, Seward & Kissel, LLP

Craig E. Philip, *Chief Executive Officer, Ingram Barge Company*

The Rev. David M. Rider, *President and Executive Director, Seamen's Church Institute*

**Consultants**

Anthony Knerr and John Braunstein, *Anthony Knerr & Associates*





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