“Where there is no vision, the people will perish.”

Proverbs 29:18
Rules of Engagement for Strategic Planning Retreat

1. We will stay on schedule (unless modified by the Facilitator who is OZ).

2. Titles, rank, position and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).

3. We will speak and interact confidentially. There can be NO repercussions for anything said. ("What happens in our meetings, stays in our meeting").

4. Ask questions if you don’t understand, because no idea or question is dumb (unless it has already been asked and answered).

5. Tangential/side issues will be parked.

6. No texting/emailing/tweeting/Facebooking/private conversation/phone calls until after our retreats. We must all stay focused and be dedicated.

7. All decisions will be made by consensus. We will not be voting. Majority does not rule. Consensus will prevail.

8. Bill’s 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can’t do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.

9. Everyone MUST participate. (“get in the game, or stay home”)

10. Be honest and “no spin.” No party lines. Think about what will really make a difference in the Church, and not just what you want. It’s all about Christ’s church.

11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. (“Seek first to understand, and then to be understood.”)

12. Absolutely NO “Discussion Killers.” (e.g., “we tried that once,” “it won’t work,” “you don’t know what you’re talking about,” etc.) Be positive/encouraging.

13. Think strategically, creatively and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny or personal stories for personal time discussions.)

15. We are all members of the Body of Christ, our Holy Orthodox Church and made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.
**Strategic Planning Retreat Schedule**  
*Metropolis of Chicago (the “Metropolis”)*  
Friday, November 2, 2018

1. First Day 6:00 p.m. - 11:00 p.m.¹

<table>
<thead>
<tr>
<th>#</th>
<th>Time</th>
<th>Presenter</th>
<th>Activity</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>6:00 - 6:30</td>
<td>Full SPT</td>
<td><strong>A. The Opening</strong></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Dinner</td>
</tr>
<tr>
<td>2</td>
<td>6:30 - 6:40</td>
<td>Met. Nathanael</td>
<td>Met. Nathanael’s Opening Remarks and Welcome</td>
</tr>
<tr>
<td>3</td>
<td>6:40 - 8:10</td>
<td>OZ</td>
<td>Review strategic planning process, goals, agenda, rules of engagement, facts and statistics, brain stimulation exercises</td>
</tr>
<tr>
<td>4a</td>
<td>8:10 - 9:30</td>
<td>4 SWOT Teams</td>
<td><strong>B. Metropolis SWOT</strong></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>Oz  SWOT explanation followed by each separate SWOT Team (see FRIDAY Team assignments of pages 19-21) develops a consensus list of the Metropolis’s Strengths, Weaknesses, Opportunities or Threats based on the results from the heat mapped SWOT submissions depending on to which SWOT Team they have been assigned. (See SWOT instructions on page 6. Your specific heat mapped results will be given to you in your room. Summaries of all heat mapped suggested SWOT conclusions are on pages 16-18.)</td>
</tr>
<tr>
<td>4b</td>
<td>8:10 - 9:30</td>
<td>Core Values Team</td>
<td>The Core Values Team (see FRIDAY Team assignments of page 19-21) develops a consensus list of the Metropolis’s Core Values. (See Core Values instructions on page 7. Heat mapped SPT suggested Core Values are on page 18)</td>
</tr>
<tr>
<td>5</td>
<td>9:30 – 11:00</td>
<td>Full SPT</td>
<td>Each SWOT Team presents their consensus proposed Metropolis Strengths, Weaknesses, Opportunities or Threats and the full SPT discusses and reaches consensus agreement on the Metropolis’s Strengths, Weaknesses, Opportunities and Threats</td>
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¹ Subject to change by OZ – See Rules of Engagement #1
2. Second Day 8:30 a.m. - 9:30 p.m.²

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<th>#</th>
<th>Time</th>
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<tbody>
<tr>
<td>6</td>
<td>8:30 - 9:00</td>
<td>Full SPT</td>
<td>Continental Breakfast</td>
</tr>
<tr>
<td>7</td>
<td>9:00 - 9:05</td>
<td>Met. Nathanael</td>
<td>Met. Nathanael’s Opening Remarks</td>
</tr>
<tr>
<td>8</td>
<td>9:05 - 11:30</td>
<td>Full SPT</td>
<td>Start With Why (Simon Sinek) – Develop Metropolis’s Statement of Why - “TO….. SO THAT….” (See samples on pages 7-8.)</td>
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<tr>
<td>9</td>
<td>11:30 - 12:15</td>
<td>Full SPT</td>
<td>Core Values Team presents their proposed list of Metropolis Core Values</td>
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<td>and the full SPT will discuss and reach consensus on the Metropolis’s</td>
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<td>Core Values (See summaries of heat mapped SPT suggested Core Values at bottom of page 18.)</td>
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<tr>
<td>10</td>
<td>12:15 - 1:15</td>
<td>Full SPT</td>
<td>Lunch</td>
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<tr>
<td>11</td>
<td>1:15 - 1:45</td>
<td>OZ</td>
<td>Explanation of Metropolis Mission Statement and Vision Statement</td>
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<td>development process (See SATURDAY Teams on pages 19-21)</td>
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<tr>
<td>12</td>
<td>1:45 - 3:15</td>
<td>Mission Groups 1 &amp; 2 and Vision Groups 3, 4 &amp; 5</td>
<td>Mission Groups 1 &amp; 2 discuss and determine by consensus the Metropolis’s Proposed Mission Statement (See pages 8-9) and Vision Groups 3, 4 &amp; 5 discuss and determine by consensus the Metropolis’s Proposed Vision Statement (See pages 9-11).</td>
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<tr>
<td>13</td>
<td>3:15 - 3:30</td>
<td>Full SPT</td>
<td>Break</td>
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<tr>
<td>14</td>
<td>3:30 - 5:00</td>
<td>Full SPT</td>
<td>Mission Groups 1 &amp; 2 have up to 5 minutes each to present their</td>
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<td></td>
<td>proposed consensus Metropolis Mission Statement followed by SPT</td>
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<td></td>
<td>discussion, development and agreement on consensus Metropolis</td>
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<td></td>
<td>Mission Statement</td>
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<tr>
<td>15</td>
<td>5:00 – 6:30</td>
<td>Full SPT</td>
<td>Vision Groups 3, 4 &amp; 5 have up to 5 minutes each to present their</td>
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<td>proposed consensus Metropolis Vision Statement followed by SPT</td>
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<td></td>
<td>discussion, development and agreement on consensus Metropolis Vision</td>
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<td></td>
<td></td>
<td>Statement</td>
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<tr>
<td>16</td>
<td>6:30 - 7:30</td>
<td>Full SPT</td>
<td>Dinner</td>
</tr>
<tr>
<td>17</td>
<td>7:30 - 8:30</td>
<td>Mission Groups 1 &amp; 2 and Vision Groups 3, 4 &amp; 5</td>
<td>Each of Mission Groups 1 &amp; 2 and Vision Groups 3, 4 &amp; 5 identify</td>
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<td>the various categories of Strategic Areas of Focus they believe the</td>
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<td>Metropolis should include in its Strategic Plan based upon the SWOT,</td>
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<td>Statement of Why, Core Values, Mission and Vision (See instructions on</td>
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<td>page 12, and pre-retreat suggestions on page 19.)</td>
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<tr>
<td>18</td>
<td>8:30 - 9:30</td>
<td>Full SPT</td>
<td>Each of Mission Groups 1 &amp; 2 and Vision Groups 3, 4 &amp; 5 has up to</td>
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<td>5 minutes to present their consensus of the prioritized Strategic</td>
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<td>Areas of Focus they believe should be in the Metropolis Strategic</td>
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<td>Plan followed by SPT discussion, development and consensus agreement</td>
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<td></td>
<td>on Metropolis Strategic Areas of Focus Task Forces</td>
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<tr>
<td>19</td>
<td>9:30</td>
<td>Full SPT</td>
<td>Each participant identifies their 1ˢᵗ, 2ⁿᵈ, 3ʳᵈ and 4ᵗʰ choice Strategic</td>
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<td>Area of Focus Task Force they wish to work on to develop the final</td>
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<td></td>
<td>Strategic Goals and Action Plans</td>
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</tbody>
</table>

² Subject to change by OZ – See Rules of Engagement #1
3. Third Day 1:00 p.m. - 5:00 p.m.³

<table>
<thead>
<tr>
<th>#</th>
<th>Time</th>
<th>Presenter</th>
<th>Activity</th>
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<tbody>
<tr>
<td>20</td>
<td>1:00 - 1:55</td>
<td>Full SPT</td>
<td>Lunch</td>
</tr>
<tr>
<td>21</td>
<td>1:55 - 2:00</td>
<td>Met. Nathanael</td>
<td>Met. Nathanael’s Opening Remarks</td>
</tr>
<tr>
<td>22</td>
<td>2:00 - 3:00</td>
<td>OZ</td>
<td>Review and finalize Metropolis SWOT, Statement of Why, Core Values. Mission, Vision and Strategic Areas of Focus Task Forces and announce Strategic Area of Focus Task Force assignments</td>
</tr>
</tbody>
</table>

É. Strategic Area of Focus Task Forces

| 23 | 3:00 - 4:05 | Strategic Areas of Focus Task Forces | Strategic Area of Focus Task Forces are formed and meet to select their Co-Chairs and Secretary, and specifically identify their work plan, meeting schedule, resource needs, and then start brainstorming possible Strategic Goals in their Strategic Area of Focus, and brainstorm people who can be on-ramped. (See instructions on pages 12.) |
| 24 | 4:05 - 4:55 | OZ                                | A full SPT discussion and review of Strategic Area of Focus Task Force Work Plans and discuss next steps, timetable and final retreat on **May 17, 18 and 19, 2019** (See Step 2 post-retreat summary instructions on pages 13-15.) |
| 25 | 4:55 - 5:00 | Met. Nathanael                   | Met. Nathanael’s final comments, closing prayer and dismissal             |

³ Subject to change by OZ – See Rules of Engagement #1
SWOT Guidelines - (Friday 8:10 - 9:30)

1. You have ONLY until 9:30 to reach consensus on the most critical items/issues in your chosen SWOT area based on heat mapped SWOT homework handout.

2. Base your decisions on consensus SWOT homework results in respective SWOT handouts, and NOT merely your personal opinions. (Summaries on pps.16-18)

3. Start with the items mentioned most frequently and identify root causes / common threads. Make sure the most popular answers make your final SWOT list.

4. Select a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus to the whole SPT.

5. Look for ROOT CAUSES and COMMON THREADS. Dig beneath the mere words.

6. This is a CONSENSUS process. Thus, something you may think is important may not make the consensus top SWOT issues list. We must focus on (and have a strategy for) the things that are the consensus most critical issue/items.

7. Don’t take anything personal (especially if your ministry/cause is mentioned or if your ministry/work/idea/thought/friend/family is criticized or not mentioned).

8. You cannot dismiss an item that received many mentions just because you disagree, or think people don’t understand or are wrong. Instead, ask where is the truth in that item/comment?

9. Develop the specific and brief wording of the SWOT items you propose should make our final list of biggest SWOT items.

10. To be an Opportunity or Threat, it has to be external to the Metropolis.

11. Remember and apply RULES OF ENGAGEMENT:
    - ROE # 1. Stay on schedule
    - ROE # 3. Confidentiality
    - ROE # 5. Don’t get stuck on tangential issues
    - ROE # 7. Decisions are by consensus
    - ROE # 8. Focus on Buckets 1 and 2
    - ROE # 9. Everyone participates
    - ROE # 10. Be honest and no “spin”
    - ROE # 11. No defensiveness – disagree agreeably
    - ROE # 12. NO discussion killers
    - ROE # 13. Think strategically (and outside the box)
    - ROE # 14. Speak precisely
    - ROE # 15. Treat each other with respect and invite the Holy Spirit.
CORE VALUES - (Friday 8:10 - 9:30)

1. CORE VALUES: (a) are beliefs shared among the stakeholders; (b) drive an organization’s culture and priorities; and (c) provide a framework for decision-making

2. Consult the separate Core Values Suggestions handout for the sample Core Values you suggested in your pre-retreat homework. (See the bottom of page 18 of this Handbook.)

3. Core values are simple single words or short phrases. There should not be too many.

4. Select a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus to the whole SPT.

WHY STATEMENT SESSION - (Saturday 9:05 - 11:30)

1. Can we articulate a compelling and inspirational reason why the Metropolis exists and why anyone should care or want to join us?

2. Our “Why” is the purpose, cause or belief that inspires us to do what we do. When we think, act and communicate starting with Why, we inspire ourselves and others.

3. There are 2 parts to an excellent WHY Statement. The “TO” part that identifies the contribution, and the “SO THAT” part that identifies the impact.

4. Here are some modified partial Parish and ministry WHY Statement examples:

   ~ TO welcome all SO THAT we may share Christ’s love with one another.
   ~ TO bring together all who want to serve and inspire others SO THAT we can all be ready to enter a life with Christ.
   ~ TO inspire everyone to discover their true purpose in life through the life and teachings of Jesus Christ SO THAT we may lead ourselves and others to salvation.
   ~ TO spread God’s living word to all SO THAT souls are saved.
   ~ TO be a beacon of Christ’s love SO THAT we may make disciples of all nations.
SAMPLE WHY STATEMENTS (cont.)

~ TO create engaged disciples of Christ SO THAT we may reflect the image and likeness of God in the world.

~ TO guide all people to the love of Christ SO THAT we may live eternally in heaven with God.

~ TO serve and nurture people SO THAT their path to salvation is an experience of love, peace and inclusion.

~ TO welcome those seeking holiness and salvation through a loving and nurturing spiritual family SO THAT we may manifest the presence of Christ on earth.

~ TO provide an authentic experience of transformational love, healing and peace SO THAT we may find the fullness of truth and salvation through Jesus Christ.

~ TO be a warm caring Christian environment SO THAT faith, service and community thrive.

(Stewardship Calling)
~ “TO help people, parishes and Christian organizations discover and live their stewardship callings, SO THAT they may have a good account before the awesome judgment seat of Christ.”

(Orthodox Christian Prison Ministry)
~ TO share the love of Christ and His Church with the incarcerated and their families SO THAT God may be glorified.

MISSION & VISION SESSIONS - (Saturday 1:45 - 3:15)

MISSION

1. Mission Groups 1 & 2 develop a consensus Metropolis Mission Statement.

2. Each group selects a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus Mission Statement to the whole SPT.

3. Mission: is a clear description of the fundamental purpose for which an organization exists and what it does to achieve its Vision.

4. Mission answers the question: "What do we do?"
5. Selected Mission Statements (taken from various churches/church organizations):

~ The Mission of Church of the Nativity is to: Love God, Love others, Make disciples.

~ The Mission of St. John the Baptist Greek Orthodox Church is to reach out and welcome all people to live an Orthodox Christian life, grow spiritually and become disciples of Jesus Christ through serving others.

~ The MISSION of Saint John the Divine is to proclaim the Holy Gospel by teaching and spreading the Orthodox Christian Faith in a dynamic and welcoming community devoted to serving all people who seek a growing relationship with Jesus Christ.

~ The Mission of St. Mary Orthodox Christian Church is to worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy and service to others.

~ The Mission of the Ukrainian Orthodox Church of the USA is to offer healing, comfort, wholeness, spiritual fulfillment and joy as we work together to reveal the beauty of God’s creation by proclaiming and living the Gospel of Jesus Christ.

~ The Metropolis of Atlanta’s mission is to energize, cultivate and guide the faithful in the Southeastern United States by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.

~ The Mission of St Athanasios is to reach out and welcome all people who seek the saving grace of Jesus Christ, and blend them together into one Eucharistic community, through the worship and the beliefs of the Greek Orthodox Archdiocese.

~ We will establish and grow a Church community in Christ, in Northern Colorado that embraces and teaches the Orthodox Christian Faith.

VISION


7. Each group selects a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus to the whole SPT.
8. VISION: (a) defines what the organization hopes to do in the future; (b) is an intermediate-term view; (c) focuses on “What do we want to accomplish?” “Where are we going?”; (d) is clear, concise, compelling, inspiring and easy to understand and share.

9. Acronyms in Vision Statements are not essential, but they sometimes help people remember the Vision Statement. Making the Vision Statement easier to remember is helpful. Get the Vision right and then see if you can create an acronym or other easy to remember mnemonic device. “Don’t let the acronym tail wag the Vision dog.”

10. In addition, many good Vision Statements have a stated time deadline by which they hope to accomplish that Vision.

11. SELECTED SAMPLE VISION STATEMENTS- (taken from various churches/church organizations)

~ During the next five years we will:
1. Increase Congregational Involvement
2. Train & Develop Leaders
3. Improve Communication/Trust
4. Attract & Welcome New Members
5. Expand Relational Groups & Our System of Caring
6. Make Better Use of Our Resources

~ Within 4 years the Orthodox Christian Prison Ministry will:
   P - Partner with affiliates and other organizations,
   R - Refine and develop Resources and model programs,
   I - Inspire through effective communications, information, analysis and metrics,
   S - Serve the incarcerated and their families,
   O - Optimize organizational and financial performance, and
   N - be a Nationally-recognized ministry leader

~ In 5 years, we will be better DISCIPLES through:
  Diversity
  Infrastructure, operations and physical plant
  Stewardship
  Communication
  Innovative technology
  Prayer and engagement in church services and experience
  Lifelong learning
  Engaging our youth
  Service-oriented Partnerships
~ St John the Divine will be a **SPARK** that proclaims and witnesses the Good News of Jesus Christ and the Orthodox Church by:
   Serving,
   Praying,
   Accepting,
   Relating,
   Knowing.

~ Our **SWEEPing** Vision: We will grow the Greek Orthodox Christian Church in the Western United States through Christ-centered:
   Stewardship,
   Worship,
   Education,
   Evangelism,
   Philanthropic outreach.

~ We will grow the Metropolis of Atlanta, and personally grow in Christ and make disciples, by living as witnesses of our faith through loving, faithful and purposeful Orthodox Christian communities focused on: worship, education, stewardship, philanthropy, and fellowship.

~ Our Vision is to ignite and sustain growing relationships with Jesus Christ through **GRACE**:
   Giving joyously,
   Reaching others in our community through Christ,
   Assisting through serving with our unique gifts,
   Caring for our church family, and
   Equipping One another for ministry.

~ Our Vision is to be a **TEAM** that:
   Teaches the people,
   Emphasizes Christ,
   Articulates the Faith,
   Ministers to all people.

~ Our vision is to manifest the Body of Christ, the fellowship of all Orthodox Christian believers, by learning and living the teachings of Jesus Christ and His Church. We do this by:
   worshipping (liturgia),
   witnessing (martyria),
   serving (diakonia), and
   socializing together (koinonia).
STRATEGIC AREA OF FOCUS SESSION – PART 1 - (Saturday 7:30 - 8:30)

1. Each of Mission Groups 1 & 2 and Vision Groups 3, 4 & 5 builds a consensus as to various broad categories of Strategic Areas of Focus on which we should concentrate based on the SWOT, WHY Statement, Mission, Vision and Core Values.

2. In determining the Strategic Areas on which we should focus, please start by considering first the Vision, then SWOT Weaknesses and Opportunities, and ensure alignment with our Mission and Core Values.

3. Select a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus proposed Strategic Areas of Focus to the whole SPT.

4. See the heat mapped pre-retreat suggestions on page 19; however, note that these were suggested BEFORE our retreat and are thus not binding. They now should be viewed through the lens of our SWOT, Why, Mission, Vision and Core Values.

STRATEGIC TASK FORCE FIRST MEETING - (Sunday 3:00 - 4:05)

1. Task Forces in each Strategic Area of Focus are formed and meet to specifically identify their work plan and brainstorm possible Strategic Goals in their specific Strategic Area of Focus.

2. Each Strategic Goal Task Force:
   (a) selects 2 Co-Chairs and a 1 Secretary;
   (b) starts to identify additional Task Force members to “on-ramp” and invite to join their Task Force;
   (c) brainstorm possible goals;
   (d) agrees on meeting schedule; and
   (e) identifies any resource needs.

3. If time permits, start to narrow down all the brain-stormed suggestions for Strategic Goals to the few key Strategic Goals your Task Force will recommend pursuing.
STEP TWO – (AFTER RETREAT #1)

1. Each Task Force must develop a reasonable number (no more than 3) “SMART” Strategic Goals and proposed implementation Action Plans.

2. At least monthly (or bi-weekly), Task Forces will have meetings/conference calls to finalize their Strategic Goals and detailed Action Plans. Each Task Force will have as many meetings, calls and information exchanges as may be necessary to complete their Goals and Action Plans.

3. Each Task Force is to specifically recruit and include new key individuals who can add value to a specific Strategic Goal – our “on-ramping opportunity.” (Start on-ramping new members immediately!)

4. Your Action Plans do **NOT** start now or at a date you will set. A start date for implementation will be chosen by a separate Implementation Task Force that will be selected after the planning is finished and before we start implementing the Strategic Plan.

5. Your Task Force will **NOT** determine the specific solution or way to achieve the Strategic Goal. Your Actions Plans will merely outline the steps the separate Implementation Task Force will use to determine the solution. **DO NOT determine the solution or research solutions.** Merely provide the new, to-be-formed Implementation Task Force the roadmap of the steps they need to follow to find it.

6. Each Action Plan will
   ~ 1st determine each individual step they need to take to complete the goal.
   ~ 2nd determine who must do each step.
   ~ 3rd figure out how many months it will take to complete each step from the end of the previous one. (Don’t set actual deadline dates since you don’t know what the start date will be.)
   ~ 4th determine how we will know when each step is completed.

7. Each Task Force should check with other Church constituencies affected by their Strategic Goals and:
   (a) seek input and advice;
   (b) recruit them as new members to your Task Force;
   (c) avoid conflicts with existing programs and ministries where possible (unless they are not working well and need to be fixed/replaced);
   (d) start to build the broadest consensus possible.

9. OZ will participate in some of your Task Force calls to make sure you are on the right track, answer your questions and help you finalize the specific wording of your Strategic Goals. OZ is working with all the Task Forces and thus can help avoid overlaps or conflicts among the Task Forces. As you start to finalize your draft goals, please send them to OZ for approval and editing.

10. Your final Strategic Goals MUST be in the SMART goal format we discussed in Retreat #1 Presentation: http://stewardshipcalling.com/chicago-metropolis-strategic-plan/ For other examples of approved SMART Goal and Action Plan format, please check out the Atlanta Metropolis Strategic Plan at: http://stewardshipcalling.com/final-atlanta-strategic-plan/

11. Each Task Force must COMPLETE all of their SMART Strategic Goals and the complete Action Plans and submit them to OZ by:

   NO LATER THAN MARCH 25, 2019

   (ΖΗΤΩ ΕΛΛΆΔΑ)

12. If you have ANY questions, please don’t guess, just email Oz at:
    Bill@stewardshipcalling.com

13. Promote this strategic planning process every chance you get among your friends, at Metropolis events and Parish activities as this is a critical part of the consensus-building and communications process.

14. This Handbook, the entire Retreat #1 PowerPoint presentation, the final consensus SWOT, Statement of Why, Core Values, Mission, Vision and Strategic Areas of Focus and Task Force teams (together with regular updates and information) will be available at: www.stewardshipcalling.com under the Church Strategic Planning Tab in the Chicago Metropolis drop down located at:
    http://stewardshipcalling.com/chicago-metropolis-strategic-plan/

15. Please download the Retreat #1 Presentation and use the Goal and Action Plan examples and instructions toward the end of the day 3 slides.
SECOND RETREAT

1. Please reserve May 17, 18, 19, 2019 on your calendar for our second retreat. **PLEASE NOTE THIS IS A DATE CHANGE!**

2. We will likely follow a similar two half-day and one full-day schedule.

3. The entire SPT (PLUS all “on-ramped” new Task Force members you recruit) will attend the 2nd retreat.

4. Each Task Force will present their proposed Strategic Goals and Action Plans and the entire SPT will debate, revise and reach consensus on the final Strategic Goals and Action Plans.

If you have ANY questions, please email OZ at: Bill@stewardshipcalling.com

This Handbook, the Retreat PowerPoint Presentation, Final SWOT, WHY Statement, Core Values, Mission, Core Values, Strategic Areas of Focus and other Strategic Planning information are all available at:  

“Where there is no vision, the people will perish”  
Proverbs 29:18
Summary Heat Mapped Top STRENGTHS

146 - New Hierarch & Clergy
120 - Community/Lay People
103 - Youth Programs/Fanari Camp
  91 - Orthodox Religion
  82 - Traditions, Culture & Ethnic Identity / Greek Heritage
  56 - Churches Physical Facilities & Locations/Geography
  54 - Parish Communities
  25 - Philoptochos
  24 - SIRC
  14 - Metropolis Technology/Social Media
  13 - Pan Orthodox Ministries & Missions/Programs/Charities
  12 - Family Synaxis
  10 - Monasteries
   2 - St. John Chrysostom Oratorical Sights & Sounds Festival

Summary Heat Mapped Top WEAKNESSES

133 - Stewardship – Human & Financial Resources & Volunteerism (Time, Talent & Treasures)
124 - Over Emphasis on Greek / Ethnic Culture vs. Being Orthodox – Language Issues - Unwelcoming to Converts Who Are Not Greeks
116 - Clergy Training, Support & Performance Issues
116 - Historical Metropolis Issues in Leadership, Organization, Administration & Operations, & Lack of Vision / Long Term & Strategic Plan
  99 - Religious Education Insufficiencies or Ineffectiveness – (Adult & Sunday School)
  82 - Lack of Trust - Integrity, Transparency & Accountability
  73 - Youth & Emerging Adults Issues
  68 - Insufficient Engagement in Church Services & Sermon Issues
  54 - Life Stage Ministries Issues (See Categories Below, Except For Youth Which Is Separately Addressed Above
    (21) - Under Emphasis on Seniors Ministries - Aging Population
    (13) - Insufficient Interfaith Marriage Support
    (4) - Insufficient Family Ministries
    (5) - Insufficient Ministries to The Middle Aged
    (3) - Lack of Emphasis on Young / Married Couples
    (8) - Weak Ministry Development / Offerings & Support
  51 - Leadership / Parish Council Training / Succession Challenges
  51 - Unwelcoming – Exclusionary - Alienating- Disrespectful- Clique
divisiveness- Hypocritical Judgmental Attitudes -
  44 - Communications / P. R. Challenges
Summary Heat Mapped Top WEAKNESSES (continued)
42 - Lack of Inter-Parish Cooperation – Parishes Outside of Chicago Are Ignored
  - Silos - Competition Between / Among Parishes
27 - Lack of Evangelism, Outreach & Missions Work
22 - Declining Membership / Attendance in Churches
21 - Orthodoxy Not Very Public or Visible on Contemporary Issues
20 - Female Inclusiveness - Women’s / Gender Challenges
19 - Technology – Social Media Inadequacies
17 - Monastic Emphasis – Monastery Issues
17 - Unwillingness to Change
14 - Music Ministry / Chanting – Choirs Issues
11 - Insufficient Pan Orthodox Ministries Activities
10 - Lack of Philanthropic, Charitable & Community Service
  8 - Too Much Politics in The Church
  8 - Busyness of Life
  7 - Lack of Inclusion & Diversity
  6 - Inadequate Service to The Poor / Needy / Homeless
  5 - Archdiocese (Metropolis) Assessments Too High
  5 - Lack of Deacons
  5 - Cultural Christianity- Secularization
  4 - Small Parish Issues
  4 - Parochial Day / High Schools
  4 - Greek Schools
  4 - Too Many Churches
  4 - Lack of Support of Monasteries
  3 - Inattention to Environmental Issues
  2 - Clergy Compensation Too High
  2 - Not Greek Enough
  2 - Greek Festival
  2 - Church Dress Code

Summary Heat Mapped Top OPPORTUNITIES
182 - Outreach & Evangelism to Seekers / Lapsed & Disillusioned
  80 - Technology & Communications
  62 - Greater Visibility, Engagement & Partnerships on Contemporary Social / Moral Issues
  36 - Pan-Orthodoxy
  28 - Location
  28 - Youth / Young Adults / Young Professionals Desires to Be More Active & Engaged
  23 - Orthodox Worship / Theology
  23 - Expansion of Schools / Educational Opportunities
  11 - Capacity for Greater Stewardship Due to Strong Economy & People’s Desire to Give to Worthy Causes
  2 - Greece
Summary Heat Mapped Top THREATS

135 - Competing Demands & Priorities / Interests
131 - Changing Moral Values / Culture / Environment
  96 - Other Churches / Religions
  59 - Living in A Secular World
  49 - Loss of Integrity – Religious Institution Scandals – Lack of Accountability
  48 - Demographic Shifting Trends – Churches Losing Youth & Aging Population
  37 - Perceived Greek Ethnicity Requirement / Challenges / Language
  35 - Technology / Social Media / Marketing
  31 - Poor Brand Awareness / Lack of Knowledge of Orthodoxy
  26 - Governmental Laws / Politics
  14 - Violence / Intolerance Towards Christians
  13 - Exclusionary / Superiority Mindset
  9 - Monastic Movement
  7 - Communications - Politics
  5 - Atheism
  3 - Resistance/Fear of Change

_____________________________________________________

Summary Heat Mapped Top CORE VALUES

67 - Philanthropic & Service Oriented
60 - Loving
59 - Integrity, Transparency & Truthfulness
46 - Merciful & Compassionate
38 - Christ-Centered & Faithful
17 - Inclusive
17 - Education
  5 - Leadership
  5 - Collaboration
  4 - Family
  4 - Community
  4 - Respectful & Non-Judgmental
  2 - Vision
  2 - Authentic
Summary Heat Mapped Pre-Retreat Top STRATEGIC AREAS OF FOCUS
(suggested before consensus determination of Why Statement, Core Values, Mission
and Vision)

67 - Youth
53 - Education, Spiritual/Faith
53 - Leadership Development
46 - Family
41 - Clergy Development
36 - Stewardship
24 - Metropolis Administration
19 - Elderly
12 - New / Non-Orthodox
11 - Outreach, Evangelism & Service to Others
10 - Technology
  8 - Membership
  8 - Language
  7 - Worship Experience - Liturgy
  3 - Divorced

SPT Break Out Group Assignments for Friday and Saturday

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“Where there is no vision, the people will perish.”
Proverbs 29:18

All Metropolis Strategic Planning materials can be found at:
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