“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 (except for straw polls). 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, May 17, 2019

5:30 p.m.  Prayer and Dinner
6:30 p.m.  Opening Remarks - Metropolitan Nathanael
6:45 p.m.  Strategic Planning review - OZ

- Review of Rules of Engagement, Retreat # 2 Agenda, SWOT, Statement of Why, Mission, Core Values, Vision,
10 Strategic Areas of Focus - 16 Strategic Goals, Clergy Laity Assembly Strategic Planning Day September 27, 2019 and transition from Strategic Planning to Implementation

Presentations to Finalize Goals & Action Plans (60-75 minutes each)

7:45 p.m.  Goal 1.1 - Clergy Wellness - Fr. Rick Andrews
9:00 p.m.  Goal 1.2 - Clergy Development - Harry Fournier
10:15 p.m. Goal 2.1 - Metropolis Communications Plan - Stacy Sennott
11:15 p.m. Closing Remarks and Dismissal - OZ

Saturday, May 18, 2019

8:30 a.m.  Prayer and Breakfast
9:00 a.m.  Welcome - Metropolitan Nathanael
9:05 a.m.  Review of Agenda and Questions - OZ
9:15 a.m.  Goal 2.2 - Metropolis Technology Plan - Aristides Smith
10:15 p.m. Goal 3.1 - Youth Religious Education - Thano Prokos
11:15 a.m. Goal 3.2 - Adult Religious Education - Susanna Homan
12:15 p.m. Prayer and Lunch (45 minutes)
1:00 p.m.  Goal 4.1 - Parish Council, Ministry & Youth Leadership Program - Fr. Ciprian Sas
2:15 p.m.  Goal 5.1 - Family Ministries - Chrystalla Daly
3:15 p.m.  **Goal 5.2 - Seniors Ministries**  
- Chrystalla Daly

4:15 p.m.  **Goal 6.1 - Best Practices Metropolis Operations Plan**  
- Peggy Papaioannou

5:30 p.m.  **Goal 6.2 - Ministry Accountability, Performance & Remediation**  
- Melpo Murdakes & Thania Panopoulos

6:30 p.m.  Prayer and Dinner  
- (1 hour)

7:30 p.m.  **Goal 7.1 - Comprehensive Parish Stewardship Ministries Program**  
- Perry Siatis

8:45 p.m.  **Goal 8.1 - Welcoming Ministries**  
- Tom Kanelos

10:00 p.m.  **Goal 8.2 - Outreach & Evangelism Ministries**  
- Dn. Perry Hamalis

11:00 p.m.  Closing Remarks and Dismissal  
- OZ

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**Sunday, May 19, 2019**

1:00 p.m.  Prayer and Lunch (45 minutes)

1:45 p.m.  **Goal 9.1 - Enhanced Worship Engagement & Accessibility**  
- Eunice Buhler & Eric Brown

3:00 p.m.  **Goal 10.1 - Comprehensive Youth &Emerging Adults Ministries**  
- Fr Kosmas Kallis

4:15 p.m.  Next Steps, Q&A and Closing Remarks  
- OZ

- **Final Revised Action Plans Due NO LATER THAN MAY 31, 2019**
  - Transition from Planning to Implementation
  - Implementation Management Teams and Process
  - Start Date Selection
  - Clergy Laity Assembly Strategic Planning Day - Friday September 27, 2019
  - Next Steps of Communication and Promotion
  - Sign up for Implementation Task Forces

5:15 p.m.  Closing Remarks, Thanks and Dismissal  
- Metropolitan Nathanael
STEP TWO – (AFTER RETREAT #2)

1. Each Task Force must **COMPLETE** all of their SMART Strategic Goal and the Action Plan edits from the retreat and submit them to OZ by:

**NO LATER THAN MAY 31, 2019.**

2. Please memorize or keep handy the Statement of WHY, Core Values, Mission, Vison, 16 Strategic Goals so that you can embrace and articulate them to others.

**STATEMENT OF WHY**

The Greek Orthodox Metropolis of Chicago exists to receive and share unconditional love, mercy, healing and peace, so that life has greater meaning and purpose.

**MISSION**

The Greek Orthodox Metropolis of Chicago is a Christ-centered community that loves, guides, engages and serves all people.

**CORE VALUES**

~ Christ-centered  
~ Integrity  
~ Service  
~ Humility  
~ Love  
~ Merciful  
~ Spiritual development  
~ Adaptable

**VISION**

In ___ years we will grow our Metropolis family through greater:

Fellowship & Welcoming  
Accountability  
Ministries & Education  
Innovation  
Leadership  
Involved Youth & Emerging Adults  
Engagement on critical issues  
Stewardship.
3. Please start to communicate the Statement of WHY, Core Values, Mission, Vision, 16 Strategic Goals and recruit members to the 16 Implementation Task Forces. Promote this Strategic Plan every chance you get among your friends and at parish and Metropolis events and activities, since your communication efforts are a critical part of the consensus-building and overall communications plan.

4. Attend the full day Strategic Plan roll-out event on Friday, September 27, 2019 at the Metropolis Clergy Laity Assembly in Minneapolis.

5. Encourage everyone you know (not just Delegates) to attend the September 27, 2019 full day Strategic Plan Day.

6. Communicate our 4 Big Themes:
   1. None of us can do as much as all of us can do together.
   2. None of us is as smart as all of us.
   3. No more “business as usual.”
   4. We have a great Strategic Plan that addresses our most critical needs.

7. Communicate our 4 New Messages:
   1. This is about the whole Metropolis coming together to work on addressing our most critical parish challenges.
   2. We have a great Strategic Plan that is focused on helping our parishes.
   3. We have a comprehensive implementation plan that ensures success.
   4. We want everyone to join us and become part of the implementation team.

8. Remind everyone that they can find all of the Strategic Plan information on the Metropolis web site under the Strategic Planning link at: http://chicago.goarch.org/strategic-planning.

9. If you have any questions, please don’t guess, just email OZ at: Bill@stewardshipcalling.com.

10. This Handbook, the entire Retreat #2 PowerPoint presentation, the final consensus SWOT, Statement of Why, Core Values, Mission, Vision and Strategic Goals and Action Plans will be available to you at: www.stewardshipcalling.com under the Church Strategic Planning Tab in the Chicago Metropolis dropdown located at: http://stewardshipcalling.com/chicago-metropolis-strategic-plan/.

11. Thank you for being an integral part of building a truly transformational Strategic Plan for the Metropolis of Chicago and its parishes!
Metropolis of Chicago Strategic Plan Implementation Volunteer Form

PLEASE PRINT LEGIBLY

1. Full Name: ________________________________________________________________

2. Full Mailing Address: ______________________________________________________

3. Email: ________________________________

4. Preferred phone number: ________________________________

5. See list of the 16 Strategic Goals and identify the specific full Goal number upon which you would like to work. You can select up to three specific Goals you are willing to volunteer to help implement. I want to work on:

   (a) Goal Number ___•___

   (b) Goal Number ___•___

   (c) Goal Number ___•___

6. I am willing to volunteer to be a Co-Captain and help lead the implementation of a Goal (identify the specific full Goal number which you are willing to help lead):

   I would be willing to be considered to serve as a Goal Co-Captain for Goal Number ___•___

7. Any other people you think would serve on a Goal Team, or as a Goal Captain (please, if possible, specify the specific full Goal number and provide their name and any contact information you have):

   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________
   __________________________________________________________________________

8. Any other comments / suggestions: __________________________________________

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
METROPOLIS OF CHICAGO STRATEGIC GOALS

Clergy Development & Formation
1.1 Clergy Wellness
1.2 Clergy Development

Communication & Technology
2.1 Metropolis Communications Plan
2.2 Metropolis Technology Plan

Education & Spiritual Literacy
3.1 Youth Religious Education
3.2 Adult Religious Education

Lay Leadership Development
4.1 Parish Council, Ministry & Youth Leadership Program

Life Cycle Ministries
5.1 Family Ministries
5.2 Seniors Ministries

Metropolis Administration & Best Practices
6.1 Best Practices Metropolis Operations Plan
6.2 Ministry Accountability, Performance & Remediation

Stewardship
7.1 Comprehensive Parish Stewardship Ministries Program

Welcome, Outreach & Evangelism
8.1 Welcoming Ministries
8.2 Outreach & Evangelism Ministries

Worship Engagement & Accessibility
9.1 Enhanced Worship Engagement & Accessibility

Youth & Emerging Adults
10.1 Comprehensive Youth & Emerging Adults Ministries