Metropolis of Chicago
Strategic Planning Retreat #1
Day 1

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

Bill Marianes – November, 2018
www.stewardshipcalling.com  Bill@stewardshipcalling.com
Opening Remarks
WHY
are you here?
“That the end of our lives may be Christian, without pain, blameless and peaceful, and for a GOOD ACCOUNT BEFORE THE AWESOME JUDGMENT SEAT OF CHRIST”

2 Corinthians 5:10

Orthodox Divine Liturgy
TODAY, IS THE DAY WE...
“The best time to plant a tree was 20 years ago. The second best time is today.”

Old Chinese Proverb
Special Thanks

• Metropolitan Nathanael for being a visionary leader to undertake this process
• Angela Zotos for organizing the SPT
• John Manos and Pam Argyris for helping to lead this strategic planning process
• Fr. Nicholas, Liz Dorner and Holy Apostles for being the best hosts ever
• Pam Argyris, Lori Chiampis, John Manos, George Nassis, Perry Siatis, Kosta Skoulikaris, Carol Stamas for 1st pass Advance Assignment heat mapping
• All of you for dedicating your most valuable assets - your time and love
Our Retreat Agenda

(p.s. it’s on pages 3-5 of your handbook)
2 Process Keys

Consensus

Rules of Engagement
2 Process Keys

Rules of Engagement
Our Rules of Engagement

(p.s. They are on page 2 of your handbook.)
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 meetings”).

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.

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

8. Oz’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 only on Bucket 1 and 2 issues (not 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 this Metropolis of Christ’s Church, and not just what you want.
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.)

15. We are all members of the Body of Christ, our Holy Orthodox Church and made in the image and likeness of God. Let’s interact with each other as if we were interacting with our Father / Creator. Let us treat one another with love and respect and allow the Holy Spirit to participate freely.
2 Process Keys

Consensus
Consensus

1. “Consensus” means seeking the “common mind” through a process of respectful dialogue without formal votes.

2. “Consensus” means an agreement that everyone can “live with” (even if it is not their first choice).

3. Consensus is achieved once everyone explains their issues and alternatives, and the discussion continues until all agree that:
   (a) the discussion has been full and fair;
   (b) they do not object to (or can live with) the modified proposal.
Who / What is OZ?

This ain't my first rodeo
Please keep the bull to yourself!
A journey ...

... of over 300,000+ miles over 11+ years

... presenting to over 500+ Parishes of all major Orthodox jurisdictions
Cities Hosting Live Igniting The Flame or Effective Church Model Programs
I have been blessed to complete strategic plans covering over 20% - 25% of Orthodox Christians in America

GOA Metropolis of San Francisco (7 Western States)

GOA Metropolis of Atlanta (8 Southeastern States)

Ukrainian Orthodox Church of the USA (entire USA)

St John The Divine (Jacksonville, FL)

St Mary (Wichita, KS)

St John The Baptist (Beaverton, OR)

Coming soon: GOA Metropolis of Chicago (6 Midwestern States); The Orthodox Christian Prison Ministry & Annunciation Cathedral and others…
Stewardship Calling Effective Church Model

Institutional

Effective Worship Experience

Worship

Vision

Consensus Vision and Strategic Plan

Engaged Disciples

Disciples

Stewardship

Culture of True Stewardship

Individual
This Presentation and Metropolis Strategic Planning Content Is Here

www.stewardshipcalling.com

You can download this entire presentation under the Church Strategic Planning tab and the Chicago Metropolis Strategic Plan page http://stewardshipcalling.com/chicago-metropolis-strategic-plan/

Send questions to: Bill@stewardshipcalling.com
How Is Our World Changing?
We are living in exponential times...

... the speed of change is unimaginable and accelerating

¹The following is based on the pioneering YouTube video “Did You Know?” (with certain updated statistics).
Did You Know? is licensed by Karl Fisch, Scott McLeod, and XPLANE under a Creative Commons Attribution Non-Commercial Share-Alike license. You are free to copy, distribute, remix and transmit the presentation as long as you give proper attribution to the original creators and share the resulting work under the same license. You may not use Did You Know? for commercial purposes without permission from the creators. (Selected statistics have been updated, as much as reasonably possible, from available sources.)
Years it took to reach 50 million users:

- Telephone - 75 years
- Radio - 38 years
- TV - 13 years
- Internet - 4 years
- Google Plus - 88 days
- Angry Birds - 35 days
- Pokémon GO - 19 days
60 hours of video are uploaded to YouTube every minute.

1 hour of video is uploaded to YouTube every second.
We are living in exponential times...
Facebook started almost 15 years ago in October 2003.

It now has over 2.2 Billion active monthly users.

It is has over 1.4 Billion active daily users.
If Facebook were a country . . .

. . . it would be the 2nd largest country in the world . . . behind only China.

Slightly larger than India and 5.5 times bigger than the U.S.
We are living in exponential times...
Email Facts

2.76 Billion email users worldwide

225 Billion daily worldwide emails

61% of all email is treated as SPAM
In 2014 in the U.S. alone there were an estimated 8.5 BILLION text messages... ... PER DAY
~ 97% of American adults text.

~ Text messages have a 98% open rate versus only 20% for email.

~ 95% of all text messages are read in under 3 minutes.
1 out of 8 couples married in the U.S. in 2005 ...
...
met online

By 2013, 1 out of 3 couples in the U.S. met online
We are living in exponential times...

So what does this mean for the Metropolis of Chicago and its Parishes?
“If the rate of change on the outside exceeds the rate of change on the inside, the end is near.”

“Change before you have to.”
So how are we doing at creating: "a good account before the awesome judgment seat of Christ"?
Selected “Spirituality” Challenge Facts
We Lost Our Adults

~47% of adults who were raised in the Orthodox Church have left the Church

Cradle Orthodox Adults Who Are Still in the Church

47% Gone

53% Stayed

¹ 2015 U.S. Religious Landscape Study - Pew Research Center
We Can “Kiss Our Youth Goodbye”

~ Millennials (aged 18-29) are over 2.5 times more likely than their adult parents to be unaffiliated with the Church²

We Can “Kiss Our Youth Goodbye”

- The nonprofit, nonpartisan Public Religion Research Institute data is worse reporting

39% Millennial youth are “NONEs”
~ Only 21% of all Greek Orthodox Archdiocese Church adherents attend church services on a regular weekly basis.¹

~ Our minds wander and we are distracted between 70% to 80% of the time during Orthodox church services (excluding the sermon/homily)\(^1\)

\(^1\) Personal survey data acquired from interviews of hundreds of Orthodox Christians by Stewardship Calling
Selected “Income” Financial Stewardship Challenge Facts
The Giving Facts

~People are giving a lower percentage of income to churches in the 2000’s than they did either during the Great Depression or the 1920’s.

~37% of church goers give $0 to the church.

¹ Christian Stewardship Association; Barna Research Group; Empty Tomb; Giving USA Foundation
The Giving Facts

~ Orthodox Christians are in the **TOP** quartile in annual income of people with religious beliefs in America¹

~ Orthodox Christians are in the **BOTTOM** quartile in their annual stewardship giving to their churches²

¹ The PEW Forum on Religion and Public Life
² Barna, Gallup and Stewardship Calling research
Selected “Numbers” Challenge Facts

But at least 2016 was better than most previous years…
GOA Baptisms Are Declining
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.
GOA Chrismations Are Declining
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.
GOA Weddings Are Declining
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.
And Finally, Something that is Generally Growing
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.
The Greek Orthodox Church Demographic Makeup Has Changed Significantly Over The Last 15 Years
4 Kinds of Orthodox Christians

- Intentional Orthodox Convert
- Intentional Cradle Orthodox
- Incidental Orthodox Convert
- Incidental Cradle Orthodox

Passion for the Faith

Accident of Birth

- Born Orthodox
- Born Non-Orthodox
4 Kinds of Orthodox Christians

Passion for the Faith

Every Cradle Orthodox Enters here

Accident of Birth

- Born Orthodox
- Born Non-Orthodox

Intentional Cradle Orthodox
Intentional Orthodox Convert
Incidental Cradle Orthodox
Incidental Orthodox Convert
4 Kinds of Orthodox Christians

- Intentional Cradle Orthodox
- Intentional Orthodox Convert
- Incidental Cradle Orthodox
- Incidental Orthodox Convert

Few Cradle Orthodox move here

Passion for the Faith

Accident of Birth

- Born Orthodox
- Born Non-Orthodox
4 Kinds of Orthodox Christians

- Intentional Orthodox Convert
- Intentional Cradle Orthodox
- Incidental Orthodox Convert
- Incidental Cradle Orthodox

Passion for the Faith

Accident of Birth

- Born Orthodox
- Born Non-Orthodox
4 Kinds of Orthodox Christians

Passion for the Faith

Accident of Birth

Intentional Cradle Orthodox

Incidental Cradle Orthodox

Intentional Orthodox Convert

Incidental Orthodox Convert

True Convert Orthodox Seekers end up here

Born Orthodox

Born Non-Orthodox
You need different strategies for each of the 4 categories of Orthodox Christians.

4 Kinds of Orthodox Christians

- Intentional Orthodox Convert
- Intentional Cradle Orthodox
- Incidental Orthodox Convert
- Incidental Cradle Orthodox

- Born Orthodox
- Born Non-Orthodox

Passion for the Faith

Accident of Birth
So how is the Metropolis doing at creating:

“a good account before the awesome judgment seat of Christ?”
2018 Listening Tour
Selected Survey Results Recap

September, 2018
Overview

- Metropolitan Nathanael completed a 12-stop Listening Tour across the 6 states of the Metropolis (June 15 to September 20)

- 1,093 parishioners participated in the Listening Tour

- 844 surveys were completed by participants (77% of those attending)
12 parishes hosted Listening Tour meetings

59 communities represented

- Sts. Peter & Paul - Glenview, IL
- St. Nicholas - St. Louis, MO
- Annunciation - Decatur, IL
- St. Nectarios - Palatine, IL
- St. Athanasios - Aurora, IL
- Annunciation - Milwaukee, WI
- St. George - Des Moines, IA
- St. Nicholas - Oak Lawn, IL
- St. Andrew - Chicago, IL
- St. George - St. Paul, MN
- St. George - Rock Island, IL
- Sts. Constantine & Helen - Merrillville, IN
Q1: How often do you attend church?

- A few times a year: 4.8%
- Major holidays only: 1.0%
- A few times a month: 21.0%

73% said weekly

GOA average = 21%
Q2: I believe membership at my parish is...

- Growing: 35.6%
- Stagnant: 30.2%
- Declining: 34.2%

64.4% believe their parish is declining or stagnant
Q3: I believe my parish is...

- No opinion: 16.4%
- On the wrong track: 20.6%
- On the right track: 62.9%

64% believe their parish is stagnant or declining, and yet 63% believe their parish is on the right track. **HUH??**
Q4: I am satisfied with the clergy leadership of my parish.

- Disagree: 12.6%
- Agree: 32.9%
- Strongly disagree: 8.1%
- Strongly agree: 46.4%

79.3% agree or strongly agree
Q5: I am satisfied with the lay leadership of my parish.

80.9% agree or strongly agree
Q6: I feel my parish is an integral part of my family's life.

- Disagree: 5.7%
- Agree: 35.1%
- Strongly agree: 58.3%
- Strongly disagree: 0.9%

93.4% agree or strongly agree
Q7: I am prepared to offer more of my time and treasure to my parish.

Disagree
1.3%
Not at this time
17.3%

Agree
81.4%

81.4 % agree or strongly agree
3 Rules For Your 5 Round Test

(1) everyone should try and answer the questions

(2) this is data the Metropolis should know

(3) I do love you, but someone's got to ask the tough questions and raise the tough topics
1. How many souls have we significantly helped on the road to salvation?

2. How many souls have we served?
1. How many families have we transformed?

2. How many families have we touched?
1. How many people are actively engaged in the Sunday Divine Liturgy?

2. How many people attend the Sunday Divine Liturgy?
1. How many effective disciples of Jesus Christ have we deployed?

2. How many disciples of Jesus Christ have we recruited?
1. What percentage, and how many, youth have we **effectively** taught in Sunday School who are now young adults actively engaged in their church?

2. What percentage, and how many, youth actively attended an **effective** Sunday School program?
Each 1st question was a “Big” question... a lagging indicator

1. Souls on road to salvation
2. Families transformed
3. Divine Liturgy engagement
4. Effective Disciples deployed
5. Retained young adults from Sunday School grads
Each 2nd question was a “Bigger” question... a leading indicator

1. Souls served
2. Families served
3. Divine Liturgy attendance
4. Effective Disciples recruited
5. Sunday school attended
1 Fundamental Rule and 1 Critical Question

~ “You cannot master what you do not measure.”

~ How are we measuring effectiveness/success?
A Great Process for Effective Execution and Leadership

The 4 Disciplines of Execution

1. Determine your WIG(s) (Wildly Important Goals)
2. Act on Lead Measures
3. Create a compelling scoreboard
4. Create a cadence of accountability

http://the4disciplinesofexecution.com/

NOTE: Some adaptation may be required to apply certain of these proven principles in a church or non-profit environment
If the Metropolis of Chicago ceased to exist, would anyone notice?
You Have Three Choices

1. Do nothing

2. Use a Band-Aid and make minor fixes to symptoms

3. Address the most significant root cause issues and make transformational and lasting change
Root Cause Process

~ Look beyond the symptoms to find and address the real causes

~ The “5 why’s” technique = keep asking “why?” (generally about 5 times) until you have gotten down to the root cause of the problem

~ Until you address the root cause, the problem can be masked by band-aids but will re-occur

~ Churches prefer the band-aid approach because it’s easier (“let’s just have another fundraiser/youth activity, etc.”)
Root Cause Process

Problem = very young children in a sub-Saharan African village were getting a high incidence of bacterial infections

Step 1: diagnose and treat symptoms (antibiotics)

Step 2: when kids keep coming back re-infected, discover the root cause

Step 3: fix root cause and solve the problem
Let’s Choose Option 3

1. Do nothing

2. Use a Band-Aid and make minor fixes to symptoms

3. Address the most significant root cause issues and make transformational and lasting change
Are You Willing To Play On A Championship TEAM?

WHAT HAPPENS TO MUSCLES DURING EXERCISE?

Comfort … Discomfort
Don’t Leave Your Teammates Hanging

~ When you disregard (or fail to timely respond to) a teammate, you de-value them and their time
~ You need to **timely** open and return emails/calls
  - 10 of you **never** responded to the 2 letters or 3 emails and never submitted your Advanced Assignments
  - 33% of you did not respond until the 3rd letter/email
  - 15 of you never even opened this week’s SPT email
~ Are you prepared to prioritize your “church work” the same way you prioritize your “work work”?
~ One helps you prepare for a perfect eternal life, the other one just makes you a current living
~ If you remain on this SPT, please make this transformational work a priority in your life and don’t leave your teammates hanging
Don’t measure yourself by what you have accomplished, but by what you should have accomplished with your ability.

UCLA Coach
John Wooden

Won 10 NCAA national basketball championships in 12 years – 7 in a row
It Actually Takes 2 Teams
It Actually Takes 2 Teams

• **SPT = Strategic Planning Team**
  A diverse, representative cross-section of Metropolis-wide strategic thinkers who **develop** the Strategic Goals, Action Plans and overall Strategic Plan

• **IT = Implementation Team**
  A larger diverse group of faithful and other experts who **implement** all of the Strategic Goals and Action Plans the SPT develops and who are accountable for the achievement of the Strategic Plan
“So we, being many, are one body in Christ, and every one members one of another.”

Romans 12:5
“Two are better than one, because they have a good return for their labor:

If either of them falls down, one can help the other up.

But pity anyone who falls and has no one to help them up.”

Ecclesiastes 4:9-10
Oz’s 2 Team Premises

1. None of us is as smart as all of us are.

2. None of us can do as much as all of us can do together.
You have been called as one of the 70 Disciples

Luke 10:1
TODAY, WE MAKE HISTORY

Life's most persistent and urgent question is, 'What are you doing for others?'
~ Martin Luther King, Jr.
What Is Metropolis’s Biggest Challenge?

- Entropy
- Everything in the universe eventually moves from order to disorder (*entropy* measures that change)
- If you don’t make positive changes you will get negative changes
“Leaders of a Church will either be risk takers, caretakers or undertakers.”

Pastor Rick Warren
You Have Three Choices

Which will it be?
Summary of 3 Critical Concepts to the Stewardship Calling Strategic Planning Process

1. “You cannot master what you do not measure.”

2. “To grow strong, one must have strong roots.” (or “Until you fix the roots (causes), nothing strong, lasting or beautify can grow.”)

3. “Since change is the only constant, you must constantly change.”
"WE CANNOT SOLVE OUR PROBLEMS WITH THE SAME THINKING WE USED WHEN WE CREATED THEM"
Strategic Planning
What Is Strategic Planning?

• A process for clarifying why we exist and our values, mission and vision, and determining a strategy to allocate our resources to achieve our vision

• It’s a way to manage the “busyness” of our Metropolis without turning our Metropolis into a “business”
A Strategic Plan must answer 4 fundamental questions:

1. Why do we exist?
2. Where are we now?
3. Where do we want to be?
4. How will we get there?
Stewardship Calling
Six Step Work Plan

Step One  Opening Retreat to determine SWOT, Statement of Why, Mission, Vision, Core Values, Strategic Areas of Focus

Step Two  Task Force Meetings to draft Strategic Goals and Action Plans

Step Three  Public Presentations of draft Strategic Goals and Action Plans for feedback and consensus-building (Task Forces synthesize comments)

Step Four  Closing Retreat to finalize SMART Strategic Goals and Action Plans

Step Five  Finalize Strategic Plan + Clergy Laity Assembly Roll Out

Step Six  Implementation with continual communication
# Metropolis of Chicago Strategic Plan Revised Timeline

<table>
<thead>
<tr>
<th>TASK</th>
<th>TARGET DATES</th>
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<tbody>
<tr>
<td>Start Date</td>
<td>6-1-18</td>
</tr>
<tr>
<td>Pick SPT Invitees¹</td>
<td>6-30-18</td>
</tr>
<tr>
<td>Finalize SPT</td>
<td>8-17-18</td>
</tr>
<tr>
<td>Homework due</td>
<td>9-21-18</td>
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<tr>
<td>Process homework</td>
<td>10-20-18</td>
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<tr>
<td><strong>First retreat</strong></td>
<td>11-2,3,4-18</td>
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<tr>
<td>Draft goals and action plans and feedback loop events</td>
<td>3-25-19</td>
</tr>
<tr>
<td><strong>Second retreat</strong></td>
<td>5-17,18,19-19</td>
</tr>
<tr>
<td>Finalize action plans</td>
<td>6-15-19</td>
</tr>
<tr>
<td>Write/print plan</td>
<td>6-30-19</td>
</tr>
<tr>
<td><strong>Clergy Laity Public Rollout</strong></td>
<td>9-27-19</td>
</tr>
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¹ SPT = Strategic Planning Team
SWOT ANALYSIS

- Sw -  Helpful to achieving the objective
  - Strengths
  - Weaknesses

- Ow -  Harmful to achieving the objective
  - Opportunities
  - Threats

Internal origin
(attributes of the organization)

External origin
(attributes of the environment)
SWOT Analysis

~ Answers strategic planning question #2: Where are we now?

~ We first focus on the INTERNAL Strengths and Weaknesses of our Metropolis

~ We second focus on the EXTERNAL Opportunities and Threats that our Metropolis faces from the outside
Internal Factors

Strengths and Weaknesses

(a) **Strengths** include characteristics of our Metropolis that give us advantages - things we do well

(b) **Weaknesses** include characteristics that place our Metropolis at a disadvantage - things we do poorly or problems we face
External Factors

Opportunities and Threats

External factors may include socio-cultural changes, macroeconomic matters, technological change, laws, as well as changes in our environment, etc.

(a) Opportunities include external chances to improve our performance in our environment.

(b) Threats include external elements in our environment that could cause trouble for our Metropolis.
SWOT

A SWOT Analysis is Biblical
“Examine yourselves as to whether you are in the faith. Test yourselves!”

2 Corinthians 13:5
CORE VALUES
Core Values

1. Are beliefs shared among the stakeholders

2. Drive an organization's culture and priorities

3. Provide a framework for decision-making

4. Strong Core Values are generally one word (or a simple phrase) and are as few as reasonably possible
CORE VALUES

Core Values Are Biblical
GOD’S CORE VALUES

I
THOU SHALT HAVE NO OTHER GODS BEFORE ME

II
THOU SHALT NOT MAKE UNTO THEE ANY GRAVEN IMAGE

III
THOU SHALT NOT TAKE THE NAME OF THE LORD THY GOD IN VAIN

IV
REMEMBER THE SABBATH DAY TO KEEP IT HOLY

V
HONOR THY FATHER AND THY MOTHER

VI
THOU SHALT NOT KILL

VII
THOU SHALT NOT COMMIT ADULTERY

VIII
THOU SHALT NOT STEAL

IX
THOU SHALT NOT BEAR FALSE WITNESS AGAINST THY NEIGHBOR

X
THOU SHALT NOT COVET
CHRIST’S CORE VALUES

THE BEATITUDES

Blessed are the poor in spirit, for theirs is the kingdom of heaven.

Blessed are those who mourn, for they shall be comforted.

Blessed are the meek, for they shall inherit the earth.

Blessed are those who hunger and thirst for righteousness, for they shall be satisfied.

Blessed are the merciful for they shall obtain mercy.

Blessed are the pure of heart, for they shall see God.

Blessed are the peacemakers, for they shall be called children of God.

Blessed are those who are persecuted for righteousness sake, for theirs is the kingdom of heaven.

Matthew 5:3-10
See heat mapped Core Values on middle of page 18 of Retreat Handbook
See Retreat Handbook Pages 19-21
Use your FRIDAY assignments to either Team Strengths, Weaknesses, Opportunities, Threats or Core Values (and only work in your assigned area)
Strengths = Philoptochos Room

Weaknesses = Room behind Holy Apostles Resource Center

Opportunities = Room 205 (St. James)

Threats = Room 206 (St. Simon)

Core Values = Room 201 (St. Peter)

(the “Room Behind HARC” and Room 201 are available from the main family room, and the other 3 rooms are just down the hall. Philoptochos room is next to the bathrooms and Rooms 205 and 206 are just beyond that.)
SWOT & Core Values Process (part 1)

Until 9:30 p.m.:

- Each SWOT team develops a consensus list of either Strengths, Weaknesses, Opportunities or Threats (WORK ONLY IN YOUR ASSIGNED SWOT AREA)

- Core Values Team develops a consensus of the Core Values they will recommend

- Base it on the consensus SWOT or Core Values heat mapped homework results provided to you not just your personal opinions

- Look beyond just the words used for the ROOT CAUSES and COMMON THREADS for SWOT items
For each issue/item, the number of times it (or something like it) was mentioned, is the first number you will see.

Make sure you start with the items mentioned the most frequently as you identify the root cause and common thread, and make sure those most popular answers make your final SWOT or Core Values list.

This is a CONSENSUS process; thus something you may think is important may not make the consensus top SWOT issues or Core Values list.

We must focus on (and have a strategy for) the things that are the consensus most critical issues/items.
SWOT & Core Values Process (part 1)

• Don’t take anything personal (especially if your work / idea / thought / friend / family member is criticized / not mentioned)

• You cannot dismiss an item that received a lot of mentions just because you disagree, or think people don’t understand or are wrong
  – ASK: Where is the truth in that comment?
  – ASK: Where is the Lord in that comment?
We Have To Listen

Leaders who don’t listen will eventually be surrounded by people who have nothing to say.

Andy Stanley
SmartLeadership
SWOT & Core Values Process (part 1)

• Develop the specific wording of the SWOT and Core Values items you propose should make our final list as this is the wording everyone in the Metropolis will see.

• Select a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus.

• Be back in your seats promptly at 9:30 p.m.
Opportunities – Threats

Caveat

• To be an Opportunity or Threat, it has to be **external** to the Metropolis and our situation and not internal to the Metropolis

• For example, a bad economy is an external financial “Threat;” however poor stewardship is an internal “Weakness”

• So for Opportunities and Threats teams, **DO NOT** consider ANY items that are essentially internal to the Metropolis

• Orthodoxy Threats and Opportunities are OK if they are outside of just the Metropolis
SWOT & Core Values Process (part 1)

• Remember and apply RULES OF ENGAGEMENT:
  ROE #1. Stay on schedule (55 minutes)
  ROE # 3. Confidentiality
  ROE # 5. Don’t get stuck on tangential issues
  ROE # 7. Decisions are by consensus
  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 (outside the box)
  ROE # 14. Speak precisely
  ROE # 15. Treat each other with respect and invite the Holy Spirit
90 MINUTES (9:30 – 11:00):

• Each SWOT team presents their consensus list of Strengths, Weaknesses, Opportunities or Threats in their assigned area and full SPT will discuss and reach consensus agreement on the Metropolis’s Strengths, Weaknesses, Opportunities and Threats
Strengths

➢ People (dynamic Hierarch, clergy and laity)
➢ Deep and authentic message (fullness of the faith and strong culture)
➢ Caring communities
➢ Youth ministries
➢ Diverse ministries
➢ Parish infrastructure and geographic reach
Weaknesses

- Insufficient leadership development for clergy and laity
- Insufficient Parish and Metropolis vision, administration, staffing & operations
- Clergy performance (including lack of clergy wellness, support, and clergy support of parishioners)
- Lack of life cycle church ministries
- Poor religious literacy
- Low levels of trust and transparency
- Unsatisfactory church experience (welcoming and liturgical)
- Poor youth and emerging adult ministries
- Inadequate stewardship and engagement
- Exclusionary (overemphasis on Greek culture and language and gender)
- Chicago-centric focus and lack of interparish cooperation, inter-Orthodox cooperation
Opportunities

➢ Outreach and Evangelism
➢ Use of technology and social media
➢ Engaging emerging adults
➢ Pan-Orthodox engagement through ministries
➢ Service and ministry (inside and outside of our geography)
➢ Public engagement on ethical and moral issues
➢ Competing demands for time talents and treasures
➢ Incongruent shift in moral and social values
➢ Competition from other religious institutions and secularism
➢ Mis-perceptions, negative perceptions and lack of awareness of the Greek Orthodox Church
You Have Three Choices

1. Do nothing

   JUST DO NOTHING.

2. Use a Band-Aid and make minor fixes to symptoms

3. Address the most significant root cause issues and make transformational and lasting change
You have been called as one of the 70 Disciples

Luke 10:1
Metropolis of Chicago
Strategic Planning Retreat #1
Day 2

~ ~ ~ ~ ~ ~ ~ ~ ~ ~

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

Proverbs 29:18

Bill Marianes – November, 2018

www.stewardshipcalling.com  Bill@stewardshipcalling.com
Opening Remarks
Are You Willing To Play On A Championship TEAM?

WHAT HAPPENS TO MUSCLES DURING EXERCISE?

Comfort … Discomfort
Strengths

➢ People (dynamic Hierarch, clergy and laity)
➢ Deep and authentic message (fullness of the faith and strong culture)
➢ Caring communities
➢ Youth ministries
➢ Diverse ministries
➢ Parish infrastructure and geographic reach
Weaknesses

➢ Insufficient leadership development for clergy and laity
➢ Insufficient Parish and Metropolis vision, administration, staffing & operations
➢ Clergy performance (including lack of clergy wellness, support, and clergy support of parishioners)
➢ Lack of life cycle church ministries
➢ Poor religious literacy
➢ Low levels of trust and transparency
➢ Unsatisfactory church experience (welcoming and liturgical)
➢ Poor youth and emerging adult ministries
➢ Inadequate stewardship and engagement
➢ Exclusionary (overemphasis on Greek culture and language and gender)
➢ Chicago-centric focus and lack of interparish cooperation, inter-Orthodox cooperation
Opportunities

➢ Outreach and Evangelism
➢ Use of technology and social media
➢ Engaging emerging adults
➢ Pan-Orthodox engagement through ministries
➢ Service and ministry (inside and outside of our geography)
➢ Public engagement on ethical and moral issues
Threats

➢ Competing demands for time talents and treasures
➢ Incongruent shift in moral and social values
➢ Competition from other religious institutions and secularism
➢ Mis-perceptions, negative perceptions and lack of awareness of the Greek Orthodox Church
You Have Three Choices

1. Do nothing

2. Use a Band-Aid and make minor fixes

3. Address the most significant root cause issues and make transformational and lasting change
Summary of 3 Critical Concepts to the Stewardship Calling Strategic Planning Process

1. “You cannot master what you do not measure.”

2. “To grow strong, one must have strong roots.” (or “Until you the fix the roots (causes), nothing strong, lasting or beautify can grow.”)

3. “Since change is the only constant, you must constantly change.”
Start With WHY?

~ Answers strategic planning question #1: Why do we exist?

~ Can we articulate a compelling and inspirational reason why our Metropolis exists and why anyone should care or want to join us?
WHY?

A Statement of Why is Biblical
“Men, **WHY** are you doing these things?”

Acts 14:14
Start With Why - How Great Leaders Inspire Everyone To Take Action

http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html
Your “Second Brain”¹

The enteric nervous system (“second brain”) in our gut has 100+ million neurons (more than our nervous system)

~ “The 2nd brain informs our state of mind…”
~ “A big part of our emotions are probably influenced by the nerves in our gut…”

¹ The Second Brain (HarperCollins) Dr. Michael Gershon, Chairman Department of Anatomy and Cell Biology at New York–Presbyterian Hospital/Columbia University Medical Center

² Pictures of midgut enteric neuron system taken from PhD dissertation of Dr. Alexis Marianes –“How to bust a gut: physiological and stem cell compartmentalization in the Drosophila midgut” - Johns Hopkins University (2013)
2 Parts to a WHY Statement

TO.....(the contribution)

SO THAT.... (the impact)
Statement of WHY?

“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.”
OCPM WHY Statement

To share the love of Christ and His Church with the incarcerated and their families so that lives are transformed and God is glorified.
Example WHY Statements

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 everyone to salvation.

TO spread God’s living word to all SO THAT souls are saved.
Example WHY Statements

TO be a beacon of Christ’s love SO THAT we may make disciples of all nations.

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.
To receive and share unconditional love, mercy, healing and peace, so that life has greater meaning and purpose.
CORE VALUES
Core Values

1. Are beliefs shared among the stakeholders

2. Drive an organization's culture and priorities

3. Provide a framework for decision-making

4. Strong Core Values are generally one word (or a simple phrase) and are as few as reasonably possible
CORE VALUES

Core Values Are Biblical
GOD’S CORE VALUES

I  THOU SHALT HAVE NO OTHER GODS BEFORE ME

II  THOU SHALT NOT MAKE UNTO THEE ANY GRAVEN IMAGE

III  THOU SHALT NOT TAKE THE NAME OF THE LORD THY GOD IN VAIN

IV  REMEMBER THE SABBATH DAY TO KEEP IT HOLY

V  HONOR THY FATHER AND THY MOTHER

VI  THOU SHALT NOT KILL

VII  THOU SHALT NOT COMMIT ADULTERETY

VIII  THOU SHALT NOT STEAL

IX  THOU SHALT NOT BEAR FALSE WITNESS AGAINST THY NEIGHBOR

X  THOU SHALT NOT COVET
CHRIST’S CORE VALUES

THE BEATITUDES

Blessed are the poor in spirit, for theirs is the kingdom of heaven.

Blessed are those who mourn, for they shall be comforted.

Blessed are the meek, for they shall inherit the earth.

Blessed are those who hunger and thirst for righteousness, for they shall be satisfied.

Blessed are the merciful for they shall obtain mercy.

Blessed are the pure of heart, for they shall see God.

Blessed are the peacemakers, for they shall be called children of God.

Blessed are those who are persecuted for righteousness sake, for theirs is the kingdom of heaven.

Matthew 5:3-10
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
45 MINUTES (11:30 – 12:15):

- Core Values Team presents their consensus list Core Values and the full SPT will discuss and reach consensus agreement on Metropolis’s Core Values
Core Values

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

Mission Statement
Mission:

~ Answers strategic planning question #3: What do we do?

~ A clear description of the fundamental purpose for which an organization exists and what it does to achieve its Vision
MISSION

A Mission Statement is Biblical
“Go therefore and make disciples of all the nations”
VISION

Vision Statement
Vision

~ Answers strategic planning question #4: Where do we want to be?

~ Following our sense of God’s calling, we need to pick a reasonable time in the future and outline a vision of our Metropolis at that time
Vision

~ Defines what the organization hopes to do in the future
  “What do we want to achieve?”
  “Where are we going?”

~ Is an intermediate term view

~ Inspires people to accomplish the vision
A Vision must:

1. Be clear, easy to understand, concise and easy to share
2. Be compelling and inspiring
3. Paint a picture of where you're going (that’s why they call it a vision statement)
4. Be about the future
5. Be possible...
Vision Statements:

~ Often have a stated time (deadline) by which they hope to accomplish what is envisioned

~ Frequently use acronyms or other helpful pneumonic devices to aid in remembering them - (however don’t let the acronym “tail” wag the Vision “dog”)
VISION

A Vision Statement is Biblical
“Go therefore and make disciples of all the nations
...baptizing them in the name of the Father and the Son and the Holy Spirit, teaching them to observe all that I commanded you.”
“... and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the ends of the earth.”
Until 3:15 (take a break from 3:15-3:30):
~ Mission Groups 1 & 2 discuss and determine by consensus the Metropolis’s proposed Mission Statement (don’t focus on Vision)

~ Vision Groups 3, 4 & 5 discuss and determine by consensus the Metropolis’s proposed Vision Statement (don’t focus on Mission)

~ Select a secretary (with good handwriting) who fills out flip chart and reports your team’s consensus

~ Be back in the room at 3:30 sharp!
See Mission Statement explanation and examples on pages 8 - 9 of Retreat Handbook.
See Vision Statement explanation and examples on pages 9-11 of Retreat Handbook
You Have Three Choices

Which will it be?
Your Teams

See Retreat Handbook Pages 19-21
Use your SATURDAY assignments to either Mission Team 1 or 2; or VISION Team 3, 4 or 5 (and only work in your assigned area Mission or Vision)
Mission Groups 1 & 2 have up to 5 minutes each to present their proposed consensus Metropolis Mission Statement followed by SPT discussion, development and agreement on consensus Metropolis Mission Statement
The Greek Orthodox Metropolis of Chicago is a Christ-centered community that loves, guides, engages and serves all people.
Vision Process (part 2)

1 Hour & 30 Minutes (5:00 - 6:30)

Vision Groups 3, 4 & 5 have up to 5 minutes each to present their proposed consensus Metropolis Vision Statement followed by SPT discussion, development and agreement on consensus Metropolis Vision Statement
In (3) 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
Strategic Areas of Focus  
Part 1  
One Hour (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.

2. 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 and should now be viewed through the lens of our SWOT, Why, Mission, Vision and Core Values

5. Be back in your seats by 8:30
Your Teams

See Retreat Handbook Pages 19-21

Use your SATURDAY assignments to either Mission Team 1 or 2; or VISION Team 3, 4 or 5
One Hour (8:30 - 9:30)

Each of Mission Groups 1 & 2 and Vision Groups 3, 4 & 5 presents their consensus Strategic Areas of Focus followed by SPT discussion, development and agreement on consensus Metropolis Strategic Areas of Focus
Strategic Areas of Focus

1. Clergy Development & Support
2. Communications, Technology & Innovation
3. Education & Spiritual Literacy
4. Lay Leadership Development
5. Life Cycle Ministries
6. Metropolis Administration & Best Practices
7. Stewardship
8. Welcoming, Outreach & Evangelism
9. Worship, Engagement & Accessibility
10. Youth & Emerging Adults
Strategic Area of Focus
Task Forces

~ Each SPT Member Selects their 1\textsuperscript{st}, 2\textsuperscript{nd}, 3\textsuperscript{rd} and 4\textsuperscript{th} Strategic Area of Focus they would like to work on

~ Insert in the spreadsheet on OZ’s computer a 1, 2, 3, and 4 in the appropriate column to identify your first four choices (in order, with 1 being your 1\textsuperscript{st} choice)

~ You can leave once you’ve entered your 4 choices in the spreadsheet
You have been called as one of the 70 Disciples

Luke 10:1
Metropolis of Chicago
Strategic Planning Retreat #1
Day 3

~ ~ ~ ~ ~ ~ ~ ~ ~ ~

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You Have Three Choices

Which will it be?
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➢ Caring communities
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➢ Diverse ministries
➢ Parish infrastructure and geographic reach
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To receive and share unconditional love, mercy, healing and peace, so that life has greater meaning and purpose.
Core Values

~ Christ-centered
~ Integrity
~ Service
~ Humility
~ Love
~ Merciful
~ Spiritual development
~ Adaptable
The Greek Orthodox Metropolis of Chicago is a Christ-centered community that loves, guides, engages and serves all people.
Vision Statement

In (3) 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
Strategic Areas of Focus

1. Clergy Development & Support
2. Communications, Technology & Innovation
3. Education & Spiritual Literacy
4. Lay Leadership Development
5. Life Cycle Ministries
6. Metropolis Administration & Best Practices
7. Stewardship
8. Welcoming, Outreach & Evangelism
9. Worship, Engagement & Accessibility
10. Youth & Emerging Adults
STRATEGIC GOALS
Strategic Goals

~ Strategic Goals are a roadmap of how to implement the vision and achieve the organization’s goals

~ They keep the organization going in the right direction
Action Plan

~ Answers strategic planning question #4: How will we get there?

~ This is where the "rubber hits the road" and where very specific activities are outlined in step-by-step detail

~ For each step to achieve the goal, you must identify:

1) the specific detailed action
2) who must do it
3) the deadline for its completion
4) how you will know when it is completed
STRATEGIC GOALS

Strategic Goals are Biblical
“These twelve Jesus sent out, charging them, “...

(1) go rather to the lost sheep of the house of Israel. And

(2) preach as you go...

(3) Heal the sick,

(4) raise the dead,

(5) cleanse lepers,

(6) cast out demons.

You received without paying, give without pay.’"

Matthew 10:1, 5-8
The “SMART” goal process helps ensure our Strategic Goals are achieved.
SMART Strategic Goals

**Specific:** Is the goal clear and specific enough so that everyone will understand it?

**Measurable:** Is there a way to measure the success of the goal?

**Attainable:** Is the goal truly attainable by us within a reasonable time?

**Relevant:** Is the goal most relevant to us and is it “Realistically written”?

**Timeline:** Is there a realistic timeline to achieve the goal to ensure completion and accountability?
Strategic Planning Samples

You can find sample Goals and Action Plans under the Church Strategic Plan tab at:

www.stewardshipcalling.com

GOA Metropolis of San Francisco (7 Western States)
GOA Metropolis of Atlanta (8 Southeastern States)
Ukrainian Orthodox Church of the USA (entire USA)
St John The Divine (Jacksonville FL)
St Mary (Wichita, KS)
St John The Baptist (Beaverton, OR)
Philanthropic Outreach Objective  #3

Within 2 years, each Parish will implement at least one signature Outreach ministry.
Missions/Evangelism Objective #1

Within 1-2 years, we will establish a Missions and Evangelism Ministry in each Parish that within 1-2 years from formation will:

(a) plan and execute Parish and regional area outreach events;
(b) energize a Welcoming Committee to improve outreach and growth;
(c) create an OCMC Ambassador program; and
(d) increase church membership.
Engagement and Accessibility Goal

Within 2 years, we will develop and implement a process to more fully engage our parishioners in a dynamic worship experience.
Engagement and Accessibility Goal 2.2

Within 1 year, we will develop and implement a process that ensures our newcomers are fully embraced and welcomed.
Youth Objective #4

(a) Within 9 months, we will launch a Youth Website that better addresses the needs of youth and youth workers; and

(b) Within 1.5 years, we will provide a comprehensive information resource for youth related activities and better youth leader training.
Youth & Young Adults Goal 5.1

Comprehensive Youth and Young Adults Programs

Within 2 years, we will create and implement comprehensive, separate programs that focus on increasing spiritual and intellectual engagement, fellowship and service among:

a. pre-teens (ages 9-12),
b. teens (ages 13-18),
c. young adults (ages 18-25),
d. young adults (ages 25-30).
Within 3 years, each Parish will begin to implement our comprehensive Igniting The Flame Of Stewardship program, including a youth stewardship program, adapted to the needs of the Parishes.
## Stewardship Goal 9.1 Action Plan

<table>
<thead>
<tr>
<th>Specific Key Actions Necessary To Achieve Stewardship Goal 9.1</th>
<th>Who Must Do Each Action</th>
<th>Timetable: How Many Months or Days To Finish Action From Previous Action</th>
<th>How Will We Know When This Action Has Been Completed</th>
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<tr>
<td><strong>DEFINE THE STEWARDSHIP PROGRAM</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1. Recruit Stewardship Goal 1 Task Force (“STF1”)</td>
<td>Stewardship Strategic Planning Task Force and the Goal Captain</td>
<td>1 month after Start Date</td>
<td>STF1 members agree to serve</td>
</tr>
<tr>
<td>2. STF1 meets and allocates work to: (a) review the current Metropolis Igniting the Flame of True Orthodox Christian Stewardship Program and assess what is effective and what needs to be retooled; and (b) complete research of other stewardship best practices that can be implemented in the Metropolis, including youth stewardship programs</td>
<td>STF1</td>
<td>1 month after step 1</td>
<td>Meeting has occurred and re-tooling process and best practices research has started (to be updated as new best practices are identified per Stewardship Goal 2)</td>
</tr>
<tr>
<td>3. Complete the assessment and research in the previous step 2, including determination of what constitutes best practices</td>
<td>STF1</td>
<td>3 months after step 2</td>
<td>Assessment and research is complete</td>
</tr>
<tr>
<td>4. Synthesis of new stewardship best practices and best of the current Igniting the Flame of True Orthodox Stewardship Program to create a new and improved Metropolis of Atlanta Igniting the Flame Stewardship Program (“Igniting The Flame of Stewardship Program”) and publish it on Metropolis Resource Center Portal (“Portal”)</td>
<td>STF1</td>
<td>5 months after step 3</td>
<td>New and improved Metropolis Igniting the Flame of Stewardship Program has been developed and published on the Portal</td>
</tr>
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## Stewardship Goal 9.1 Action Plan

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<td>5. Clergy Skype-type sessions (and Clergy retreat sessions) will build a consensus as to the nature of Parish stewardship challenges, the proposed solution and their support</td>
<td>STF1 Clergy leader</td>
<td>Simultaneously with steps 2 - 4</td>
<td>All Clergy have participated in a Skype-type (and Clergy retreat) session</td>
</tr>
<tr>
<td>6. Recruit Stewardship Trainers (the “Stewardship Trainers”) for the Metropolis Igniting The Flame of Stewardship Program</td>
<td>STF1 and Stewardship Trainers</td>
<td>Simultaneously with steps 2 - 4</td>
<td>Stewardship Trainers have accepted responsibility</td>
</tr>
<tr>
<td>7. Recruit a team (the “Stewardship Support Team”) to assist Parishes that have received stewardship training with ongoing support to help address their stewardship challenges and fully implement the Metropolis Igniting The Flame of Stewardship Program</td>
<td>STF1 and Stewardship Support Team</td>
<td>Simultaneously with steps 2 – 4</td>
<td>Stewardship Support Team have accepted responsibility</td>
</tr>
<tr>
<td>8. Develop a support process by which Parishes that have received stewardship training can receive ongoing support to help address their stewardship challenges and fully implement the Metropolis Igniting The Flame of Stewardship Program</td>
<td>STF1 and Stewardship Support Team</td>
<td>2 months after step 4</td>
<td>Parish Stewardship Support Process has been developed</td>
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<td><strong>TEACH THE STEWARDSHIP PROGRAM</strong></td>
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<tr>
<td>9. Conduct a Train the Trainers program for both the Stewardship Trainers and Stewardship Support Team (both in person and via webinar/Skype-type sessions)</td>
<td>STF1, Stewardship Trainers, and Stewardship Support Team</td>
<td>2 months after steps 5 -7</td>
<td>Training programs have been completed</td>
</tr>
<tr>
<td>10. Communicate to the Parishes the availability of the Metropolis Igniting The Flame of Stewardship Program to the Parishes and schedule stewardship training programs between the Stewardship Trainers and the Parishes</td>
<td>STF1 together with Stewardship Trainers and Stewardship Support Team</td>
<td>1 month after step 8</td>
<td>Each Parish has been contacted to schedule its Metropolis Stewardship Training</td>
</tr>
<tr>
<td>11. Create an overall schedule that ensures each Parish can receive specific and personalized training in the Metropolis Igniting the Flame of Stewardship program (both in person and via webinar/Skype-type sessions)</td>
<td>STF1 and Stewardship Trainers</td>
<td>2 months after step 9</td>
<td>Each Parish has a scheduled Metropolis Igniting the Flame of Stewardship program</td>
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<td><strong>SUPPORT THE STEWARDSHIP PROGRAM</strong></td>
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<tr>
<td>12. Establish Portal location and process for Parishes and STF1 to share new stewardship best practices and results</td>
<td>STF1 and TTF</td>
<td>Simultaneously with step 3</td>
<td>Best practices sharing has been enabled on the Portal</td>
</tr>
<tr>
<td>13. Follow-up each Parish training program with Stewardship Support Team process and regularly scheduled (weekly or monthly) follow-up conference call/webinar/Skype-type sessions to deal with specific Parish issues and challenges</td>
<td>Stewardship Support Team</td>
<td>Beginning immediately after each Parish receives Stewardship Training</td>
<td>Each Parish has a Support Schedule tailored to its needs</td>
</tr>
<tr>
<td>14. Conduct follow-up assessment with Parishes of Stewardship Trainers and Stewardship Support Team process, successes, challenges and revise the Metropolis Igniting the Flame of Stewardship program and Stewardship Support Process and make necessary improvements</td>
<td>STF1 (in conjunction with Training Team and Stewardship Support Team)</td>
<td>Each Parish receives follow-up within 6 months of Training and at least semi-annually thereafter</td>
<td>Each Parish has received follow-up assessment and Metropolis Igniting the Flame of Stewardship program and Stewardship Support Process has been improved</td>
</tr>
</tbody>
</table>
Strategic Area of Focus
First Task Force Meeting

One Hour & Five Minutes (3:00-4:05)

~ Each Strategic Area of Focus Task Force:
  1. Selects 2 Co-Chairs and 1 Secretary
  2. Brainstorms people to on-ramp
  3. Agrees on a meeting schedule, call process and resource need
  4. Brainstorms possible Strategic Goals in their area of focus to achieve the Vision and address the Weaknesses/Opportunities
Strategic Goals

~ Be back in the room at 4:05 sharp

~ Fill in the on-screen chart with names and contact info of Task Force Co-chairs and Secretary
Strategic Areas of Focus

1. Clergy Development & Support
2. Communications, Technology & Innovation
3. Education & Spiritual Literacy
4. Lay Leadership Development
5. Life Cycle Ministries
6. Metropolis Administration & Best Practices
7. Stewardship
8. Welcoming, Outreach & Evangelism
9. Worship, Engagement & Accessibility
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<tr>
<td><strong>Clergy Development &amp; Support</strong></td>
<td>Fr. Richard Andrews</td>
<td>Fr. Panagiotis Boznos</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:fatherrick@usa.com">fatherrick@usa.com</a></td>
<td><a href="mailto:frp@ssppglenview.org">frp@ssppglenview.org</a></td>
</tr>
<tr>
<td></td>
<td>Harry Fournier</td>
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<td></td>
<td><a href="mailto:hjf@fournierlawfirmltd.com">hjf@fournierlawfirmltd.com</a></td>
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What’s Next in Step 2?
Step 2 – Strategic Area of Focus
Task Force Calls/Meetings

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

- Bi-weekly (or no less frequent than monthly) Task Force meetings/conference calls to finalize their Strategic Goals and detailed Action Plans

- Each Task Force is to IMMEDIATELY start recruiting and including new key individuals who can add value to a specific Strategic Goal (“on-ramping opportunity”)
Step 2 – Strategic Area of Focus Task Force Calls/Meetings

~ After this 1st retreat, we will be posting on the Metropolis web site the specific Strategic Areas of Focus and the contact information of the Co-Chairs to allow people from the Metropolis to join the process.

~ Please respond to their requests on a timely basis and welcome them into the process.

~ Have them begin by downloading and reviewing the updated post-retreat version of this presentation and the final SWOT, Statement of Why, Core Values, Mission and Vision we developed at this retreat from: http://stewardshipcalling.com/chicago-metropolis-strategic-plan/
Step 2 – Strategic Area of Focus

Task Force Calls/Meetings

~ After the 2nd retreat where all Goals will be agreed-upon, a separate Goal Implementation Team will be selected (we hope you’ll find a Goal to work on)

~ Your Action Plans DO NOT start now and the start date will be selected by the Implementation Team

~ Your Actions Plans DO NOT identify the specific solution, so do not do research

~ You are merely outlining the steps the Implementation Team will use to determine the solution and giving them a roadmap of the steps they need to follow to achieve the Strategic Goal
Step 2 – Strategic Area of Focus
Task Force Calls/Meetings

Each Action Plan will:
1st - determine each 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 step (don’t set the dates)

4th - determine how we will know when each step is completed
Step 2 – Strategic Area of Focus

Task Force Calls/Meetings

~ Each Task Force should have as many meetings and calls/meetings as necessary

~ Each Task Force should check with other constituencies affected by their Strategic Goals and:

1. seek input and advice;
2. recruit new Task Force members;
3. avoid conflicts with existing programs and ministries where possible; and
4. start to build the broadest consensus possible

~ The first Action Plan step for each Goal is to recruit the implementation team to work on the goal (you don’t have to recruit them)
~ Your Goal wording MUST FIRST be approved by OZ (to ensure consistency), so please share your drafts early (and often) to get comments before you start on Action Plans.

~ Goals MUST use the SMART Goal wording format in the provided examples - (for additional examples look at Metropolis of Atlanta Strategic Plan).

~ All Action Plan wording MUST ALSO FIRST be approved by OZ (to ensure consistency).

~ You MUST use the Strategic Goal Action Plan PowerPoint Presentation Template found at: http://stewardshipcalling.com/chicago-metropolis-strategic-plan/
~ Each Task Force must COMPLETE all of their draft SMART Goals and their complete Action Plans and have the approved by OZ and submitted in final form by NO LATER THAN:

**MARCH 25, 2019**

(ZHTΩ ΕΛΛΑΔΑ)

~ Send everything to Bill@stewardshipcalling.com for editing and comments

~ Please invite OZ to participate in some Task Force calls to make sure you are on the right track and answer your questions
Step 2 – Strategic Area of Focus

Task Force Calls/Meetings

~ Check out Atlanta Metropolis Strategic Plan for examples of the correct format for SMART Goals and detailed Action Plans at:

http://stewardshipcalling.com/final-atlanta-strategic-plan/

~ Additional examples and strategic planning information, as well as this presentation, can be accessed at:

www.stewardshipcalling.com
www.stewardshipcalling.com

Church Strategic Planning tab

Chicago Metropolis

Atlanta Metropolis

San Francisco Metropolis

Ukrainian Orthodox Church USA

St. John Jacksonville

St. Mary Wichita

Stewardship Calling
What are you doing with all of the gifts God has given you?

Chicago Metropolis Strategic Plan

Atlanta Metropolis Strategic Plan

San Francisco Metropolis Strategic Plan

Ukrainian Orthodox Church USA Strategic Plan

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This Presentation and Metropolis Strategic Planning Content Is Here

www.stewardshipcalling.com

You can download this entire presentation under the Church Strategic Planning tab and the Chicago Metropolis Strategic Plan page http://stewardshipcalling.com/chicago-metropolis-strategic-plan/

Send questions to: Bill@stewardshipcalling.com
Second SPT Retreat

~ May 17, 18 & 19, 2019 (note new date)

~ Similar 2 half-day and 1 full-day schedule

~ Entire SPT (PLUS “on-ramped members”) present, debate and finalize all Strategic Goals and Action Plans
“The best time to plant a tree was 20 years ago.
The second best time is today.”

Old Chinese Proverb
Special Thanks

• Metropolitan Nathanael for being a visionary leader to undertake this process

• Fr. Nicholas, Liz Dorner and Holy Apostles for being the best hosts ever

• All of you for dedicating your most valuable assets - your time and love
You Have Three Choices

Which will it be?
“Then he said to his disciples, ‘The harvest is plentiful but the workers are few. Ask the Lord of the harvest, therefore, to send out workers into his harvest field.’ ”

Matthew 9:37-38
Why Are We Doing This?

“That the end of our lives may be Christian, without pain, blameless and peaceful, and for a good account at the awesome judgment seat of Christ.”
You have now been called as one of the 70 Disciples

Luke 10:1
Closing Remarks