Metropolis of Chicago
Strategic Planning Retreat #2
Day 1

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

Bill Marianes – May, 2019
www.stewardshipcalling.com  Bill@stewardshipcalling.com
Christ HAS risen!
Χριστός ἀνέστη!
Христос воскрес!
Христос васкрсе!
Opening Remarks
WHY
are you here?
WHY Statement

To be a welcoming and inspiring community of God so that we experience Christ’s love with all seeking eternal life.
“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
The Chosen & The Willing

THANK YOU!

• Metropolitan Nathanael
• John Manos & Pam Argyris & Task Force Co-Captains/Secretaries
• Sandra Glisic & Fr. Panagiotis Boznos
• Some who began the journey could not be with us this weekend
• Some who began the journey have left
• Many who were not there at the beginning, have joined us now
• Many more will join the journey
You have been called as one of the 70 Disciples

Luke 10:1
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
Our Retreat
Friday

6:30 - Metropolitan Nathanael’s Opening Remarks

6:45 - Strategic Planning Review

7:45 - Goal 1.1 Clergy Wellness

9:00 - Goal 1.2 Clergy Development

10:00 - Goal 2.1 Metropolis Communications Plan

11:00 - Closing Remarks and Dismissal
Saturday

8:30 - Prayer and Breakfast

9:00 - Welcome - Metropolitan Nathanael

9:05 - Review of Retreat Agenda and Questions

9:15 - Goal 2.2 - Metropolis Technology Plan

10:15 - Goal 3.1 Youth Religious Education

11:15 - Goal 3.2 Adult Religious Education

12:15 - Prayer and Lunch (45 minutes)
Saturday

1:00 - Goal 4.1  Parish Council, Ministry & Youth Leadership Program

2:15 - Goal 5.1  Family Ministries

3:15 - Goal 5.2  Seniors Ministries

4:15 - Goal 6.1  Best Practices Metropolis Operations Plan

5:30 - Goal 6.2  Ministry Accountability, Performance & Remediation

6:30 - Prayer and Dinner (1 hour)
Saturday

7:30 - Goal 7.1 Comprehensive Parish Stewardship Ministries Program

8:45 - Goal 8.1 Welcoming Ministries

10:00 - Goal 8.2 Outreach & Evangelism Ministries

11:00 - Closing Remarks and Dismissal
Sunday

1:00 - Prayer and Lunch (45 minutes)

1:45 - Goal 9.1 Enhanced Worship Engagement & Accessibility

3:00 - Goal 10.1 Comprehensive Youth & Emerging Adults Ministries

4:15 - Next Steps, Transition to Implementation and OZ’s Closing Remarks

5:15 - Metropolitan Nathanael’s Closing Remarks and Thanks
Here is What I Heard From You

- “We are changing: too much / not enough.”
- “My idea/issue should have been addressed (i.e., forget this consensus stuff).”
- “We are going: too fast / too slow.”
- “We had: not enough time / plenty of time”
- “We got: sidetracked / hijacked.”
- “Some team members: didn’t work / did all the work.”
- “These ideas are: too new / long overdue.”
- “We want to start doing and stop planning.”
- “You are pushing us: too hard / not hard enough.”
- “OZ is a big old: *&&%#@+!”
“So we, being many, are one body in Christ, and every one members one of another.”

Romans 12:5
What Are Our Expectations?

“And whoever does not bear his cross and come after Me cannot be My disciple.”

Luke 14:27
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
1 hour of video is uploaded to every second
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.
~ 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...
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
How are we doing at preparing for ourselves:

“A GOOD ACCOUNT BEFORE THE AWESOME JUDGMENT SEAT OF CHRIST”
After 60 years of essentially no changes, the last 20 years have experienced a 20% membership decline in churches, synagogues and mosques.
Conclusions From Latest Gallup Research
(April 18, 2019 “U.S. Church Membership Down Sharply in Past Two Decades” – Jeffrey Jones)

“...fewer Americans than in the past now have any religious affiliation.”

“...even those who do identify with a particular religion are less likely to belong to a church or other place of worship than in the past.”

“...Americans have lost more confidence in it (organized religion) than in most other institutions.”

“The percentage of millennials with no religion may be continuing to grow, as an average of 33% in Gallup surveys conducted in 2019 to date say they have no religious affiliation.”
“But ... membership ... has been stable among Mormons (near 90%) over the past two decades.”

“It is clear then, that the nature of Americans’ orientation to religion is changing, with fewer religious Americans finding membership in a church or other faith institution to be a necessary part of their religious experience.”
How Are We Doing?
We Lost Our Adults

~ 47% of adults who were raised in the Orthodox Church have left the Church¹

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 adherents attend church services regularly on a weekly basis.¹

P.S. It averages 37% in Antiochian parishes

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
The Giving Facts¹

~ Orthodox Christians in the U.S. are in the
(a) top third of annual income

(b) bottom third of giving to their churches in the form of annual financial stewardship

¹ Pew Forum income data compared with analysis of several hindered Orthodox parish financial statements (mostly in GOA) by Stewardship Calling
The Orthodox Church Makeup Has Changed Dramatically Over The Last 15 Years
4 Kinds of Orthodox Christians

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

Passion for the Faith

Every Cradle Orthodox Enters here

Accident of Birth

Born Orthodox
Born Non-Orthodox
4 Kinds of Orthodox Christians

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

Accident of Birth

- Born Orthodox
- Born Non-Orthodox

Few Cradle Orthodox move here.

Passion for the Faith
4 Kinds of Orthodox Christians

- **Passion for the Faith**
  - **Intentional Orthodox Convert**
  - **Intentional Cradle Orthodox**
  - **Incidental Orthodox Convert**
  - **Incidental Cradle Orthodox**

- **Accident of Birth**
  - **Born Orthodox**
  - **Born Non-Orthodox**

Nominal Orthodox

enter here
4 Kinds of Orthodox Christians

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

**Passion for the Faith**

**Accident of Birth**

- **True Convert Orthodox Seekers end up here**
- **Born Orthodox**
- **Born Non-Orthodox**
4 Kinds of Orthodox Christians

~ You need different strategies for each of the 4 categories of Orthodox Christians

Passion for the Faith

Accident of Birth

Intentional
Cradle
Orthodox

Intentional
Orthodox
Convert

Incidental
Cradle
Orthodox

Incidental
Orthodox
Convert

Born
Orthodox

Born Non-
Orthodox
“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.”
What Is The Biggest Challenge Facing Your Parishes?

- 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
Why Are We Here?

“The best time to plant a tree was 20 years ago. The second best time is today.”

Old Chinese Proverb
Let’s Review:
Strategic Planning,
SWOT,
Statement of Why,
Core Values,
Mission,
Vision
Our Rules of Engagement

(p.s. they’re in your handouts)
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.**
6. **No phone calls / texting / emailing / tweeting / Facebooking / private conversations during retreat. Stay focused.**

7. **All decisions will be made by consensus. We will not be voting (except for straw polls). Majority does not rule; consensus will.**

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 only Bucket 1 and Bucket 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 Parish 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.**
Strategic Planning
What Is Strategic Planning?

A process for clarifying:
1. Why we exist (Why Statement)
2. What we believe (Core Values)
3. Where we are now (SWOT)
4. What we do (Mission Statement)
5. Where we want to be (Vision Statement)
6. How we will get there (SMART Strategic Goals and Action Plans)
Strategic Planning is Biblical
“Where there is no vision, the people will perish”
"For I know the plans that I have for you," declares the Lord, ‘plans for well-being, and not for calamity, in order to give you a future and a hope."
SWOT ANALYSIS

- **Strengths**
  - Helpful to achieving the objective

- **Weaknesses**
  - Harmful to achieving the objective

- **Opportunities**
  - Internal origin (attributes of the organization)

- **Threats**
  - External origin (attributes of the environment)
SWOT Analysis

~ Answers where are we now?

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

~ We second focus on the EXTERNAL Opportunities and Threats that our Parish faces from the outside
SWOT

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

2 Corinthians 13:5
Strengths

➢ People (dynamic Hierarch, clergy and laity)
➢ Deep and authentic message (fullness of the faith and strong culture)
➢ Caring communities
➢ Some 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)
➢ Youth and emerging adult ministries that are not sufficient or consistently effective
➢ Inadequate stewardship and engagement
➢ Exclusionary (overemphasis on Greek culture and language and gender)
➢ Chicago-centric focus and lack of interparish cooperation, inter-Orthodox cooperation
How’d We Do Regarding Addressing Our Weaknesses?
<table>
<thead>
<tr>
<th>Section</th>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.2 &amp; 4.1</td>
<td><strong>LEADERSHIP</strong></td>
<td>(Insufficient leadership development for clergy and laity)</td>
</tr>
<tr>
<td>6.1 &amp; 6.2</td>
<td><strong>ADMINISTRATION &amp; OPERATIONS</strong></td>
<td>(Insufficient Parish and Metropolis vision, administration, staffing &amp; operations)</td>
</tr>
<tr>
<td>1.1 &amp; 1.2</td>
<td><strong>CLERGY</strong></td>
<td>(Clergy performance (including lack of clergy wellness, support, and clergy support of parishioners))</td>
</tr>
<tr>
<td>5.1 &amp; 5.2</td>
<td><strong>LIFE CYCLE MINISTRIES</strong></td>
<td>(Lack of life cycle church ministries)</td>
</tr>
<tr>
<td>3.1 &amp; 3.2</td>
<td><strong>EDUCATION</strong></td>
<td>(Poor religious literacy)</td>
</tr>
<tr>
<td>6.1, 6.2 &amp; 4.1</td>
<td><strong>TRUST &amp; TRANSPARENCY</strong></td>
<td>(Low levels of trust and transparency)</td>
</tr>
<tr>
<td>9.1, 3.1 &amp; 3.2</td>
<td><strong>CHURCH EXPERIENCE</strong></td>
<td>(Unsatisfactory church experience (welcoming and liturgical))</td>
</tr>
<tr>
<td>10.1 &amp; 3.1</td>
<td><strong>YOUTH &amp; EMERGING ADULTS</strong></td>
<td>(Youth and emerging adult ministries that are not sufficient or consistently effective)</td>
</tr>
<tr>
<td>7.1</td>
<td><strong>STEWARDSHIP</strong></td>
<td>(Inadequate stewardship and engagement)</td>
</tr>
<tr>
<td>8.1 &amp; 8.2</td>
<td><strong>NON-INCLUSIVENESS</strong></td>
<td>(Exclusionary (overemphasis on Greek culture and language and gender))</td>
</tr>
<tr>
<td>2.1, 2.2 &amp; others</td>
<td><strong>CHICAGO CENTRIC</strong></td>
<td>(Chicago-centric focus and lack of interparish cooperation, inter-Orthodox cooperation)</td>
</tr>
</tbody>
</table>
How’d We Do Regarding Addressing Our Weaknesses?
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
How’d We Do Regarding Addressing Our Opportunities?
Opportunities

8.2 Outreach and Evangelism

2.1 & 2.2 Use of technology and social media

10.1 & 3.2 Engaging emerging adults

6.2, 8.2 & others Pan-Orthodox engagement through ministries

8.1, 8.2, 6.2, 4.1 Service and ministry (inside and outside of our geography)

6.1 & 2.1 Public engagement on ethical and moral issues
How’d We Do Regarding Addressing Our Opportunities?
➢ 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
Start With WHY?

~ Answers why we exist?

~ Can we articulate a compelling and inspirational reason why our Metropolis and parishes exist 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

TED.COM

http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html
To receive and share unconditional love, mercy, healing and peace, so that life has greater meaning and purpose.
“If you’re looking for a place where you will receive unconditional love, mercy, healing and peace, so that your life can have greater meaning and purpose, boy do I have a church for you.”
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
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
Core Values

~ Christ-centered
~ Integrity
~ Service
~ Humility
~ Love
~ Merciful
~ Spiritual development
~ Adaptable
MISSION
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”
The Greek Orthodox Metropolis of Chicago is a Christ-centered community that loves, guides, engages and serves all people.
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 Parish at that time
VISION

A Vision Statement is Biblical
The Great Commission
(Vision – Part 2) Matthew 28:18-20

“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.”
Vision Statement

In $(X)$ 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
We’ll reassess how long the Vision should be after all Goals are edited at the end of this retreat.

1 - 2 years = green
2 - 3 years = blue
3 - 4 years = purple
4 - 5 years = red
How’d We Do Regarding Addressing Our Vision?
How’d We Do Regarding Addressing Our Vision?

In \((X)\) years we will grow our Metropolis family through greater:

| 8.1 & 8.2 | **Fellowship & Welcoming** |
| 6.1, 6.2 & 4.1 | **Accountability** |
| 1.2, 3.1, 3.2, 4.1, 5.1, 5.2, 6.2, 8.1, 8.2 & 10.1 | **Ministries & Education** |
| 6.1 & 2.2 | **Innovation** |
| 4.1 & 1.2 | **Leadership** |
| 10.1 & 3.1 | **Involved Youth & Emerging Adults** |
| 6.1 & 2.1 | **Engagement on Critical Issues** |
| 7.1 | **Stewardship** |
How’d We Do Regarding Addressing Our Vision?

100%

PERFECT SCORE
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
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
Strategic Areas of Focus

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

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
Strategic Goals

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
Some Key Concepts

~ Everything we do must be align with our WHY and Core Values, and help us live our Mission and realize our Vision

~ We are making change not just product
   ❖ Just making something available doesn’t change anything
   ❖ People must be trained and it must be implemented in the parishes and they must be supported

~ You can’t know the right things to do until the right questions get asked and answered
   ❖ Don’t design anything without doing all the research
   ❖ Research ALL best practices, not just Greek / Orthodox
   ❖ Identify best practices and how we will measure them (the “M” in SMART Goals)
Some Key Concepts

~ALL of the 16 Strategic Goals directly help the parishes, their ministries and parishioners

~ A primary reason the Metropolis exists is to help its parishes by efficiently and effectively organizing the best talent, resources and tools to help the parishes and their parishioners

~ We exist for them, not the other way around!
WHY Statement

To be a welcoming and inspiring community of God so that we experience Christ’s love with all seeking eternal life.
Presentation Process
~ One person from each Task Force will present each Goal and Action Plan

~ Start by reading the Goal answering any questions and taking any edits

~ Repeat the process for each Action Plan step (but skip step 1 which is identical)

~ One person from each Task Force is the scrivener to legibly record all edits
Presentation Process

~ We will reach a group consensus “we can live with” as to the exact wording of each Goal and Action Plan

~ Please do not be defensive about comments or suggestions

~ Background about why specific language was used might be occasionally enlightening; however, please be open to language improvements

~ Some approved language/changes will need to be made to all Goals and Action Plans with similar language, so pay attention to the all comments and agreed changes
Presentation Process

~ We will NOT debate the Oxford comma
~ Please listen carefully and offer suggested improvements to make the Goals/Action Plans the best we can make them
~ We’ve are going from 50,000 feet to 1 foot so wordsmithing and being pedantic is welcome and essential
~ This detailed work is hard and tedious, so please be attentive, focused and patient
  ➢ We need your diverse perspectives/comments
  ➢ You need to decide which Goal you want to help implement
  ➢ You need to know the Goals & Action Plans to be able to help recruit others
Friday

6:30 - Metropolitan Nathanael’s Opening Remarks

6:45 - Strategic Planning Review

7:45 - Goal 1.1 Clergy Wellness

9:00 - Goal 1.2 Clergy Development

10:00 - Goal 2.1 Metropolis Communications Plan

11:00 - Closing Remarks and Dismissal
Goal 1.1

Clergy Wellness

Within 18 months, we will develop and implement a Clergy Wellness Program in which at least:

(a) 50% of the clergy will participate within 12 months of implementation; and

(b) 100% of the clergy will participate within 24 months of implementation.
### Clergy Development & Formation Goal 1.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 1.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Clergy Development &amp; Formation Strategic Goal 1.1 Task Force (“CD&amp;F1.1TF”).</td>
<td>Strategic Planning Team and Goal Captains</td>
<td>1 month from Start Date</td>
<td>CD&amp;F1.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Prepare, distribute and collect surveys of clergy and clergy spouses and families on their most critical needs and issues and specifically in the areas of wellness.</td>
<td>CD&amp;F1.1TF</td>
<td>4 months after step 2</td>
<td>Surveys distributed and completed by at least 75% of Metropolis clergy and families</td>
</tr>
<tr>
<td>3. Conduct comprehensive research to: (a) determine best practices for clergy wellness, financial literacy, marriage enrichment and other clergy family needs; (b) examine programs, materials, resources from both Orthodox and non-Orthodox sources; and (c) specifically identify objective evidence of the effectiveness of each.</td>
<td>CD&amp;F1.1TF</td>
<td>Simultaneous with step 2</td>
<td>A comprehensive report of programs, materials and resources that are researched is completed, including objective evidence of effectiveness</td>
</tr>
<tr>
<td>4. Complete “Comprehensive Clergy Wellness Report” by qualitatively analyzing and assessing: (a) all researched programs, materials, resources and content: (i) categorize them according to topics and objective evidence of their effectiveness; and (ii) create a comprehensive list of topics and best practices; (b) most critical needs from clergy and clergy family survey data from step 2; and (c) best methods for delivery of programs, materials, resources and content.</td>
<td>CD&amp;F1.1TF</td>
<td>2 months after steps 2 and 3</td>
<td>Comprehensive Clergy Wellness Report is completed including qualitative analysis of all programs, materials, resources and content, survey data and alternative delivery systems</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 1.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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<tr>
<td>5. Create and finalize all elements of the “Clergy Wellness Program,” based on the findings in the Comprehensive Clergy Wellness Report, including: (a) specific goals and objectives for each element and program; (b) identify gaps between the Clergy Wellness Program and available best practices programs, materials, resources and content; (c) establish the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within an established timeline (“Gap Analysis Workplan”); and (d) the specific actions to be taken to modify, build or procure the technologies or platform (the “Clergy Wellness Delivery Platform”) necessary to best deliver the Clergy Wellness Program as identified in step 4(c).</td>
<td>CD&amp;F1.1TF</td>
<td>3 months after step 4</td>
<td>Clergy Wellness Program elements, goals, objectives work plan and Gap Analysis Workplan are complete</td>
</tr>
<tr>
<td>6. Finalize Clergy Wellness Program by: (a) researching, gathering, revising, developing, and/or soliciting the development of additional materials needed for missing areas, or areas that do not meet best practices, or most effective standard as determined through Gap Analysis Workplan; and (b) create feedback mechanism to measure effectiveness of each element (the “Feedback Mechanism”).</td>
<td>CD&amp;F1.1TF</td>
<td>4 months after step 5</td>
<td>Gap Analysis Workplan is executed and gaps are filled to finalize the Clergy Wellness Program, and Feedback Mechanism created</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 1.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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</tr>
<tr>
<td>7. Complete:</td>
<td>CD&amp;F1.1TF</td>
<td>3 months after step 6</td>
<td>Trainers identified and recruited and Wellness Delivery Platform completed and content is loaded</td>
</tr>
<tr>
<td>(a) the identification and recruitment of talented and experienced individuals who can provide training to clergy and parishes as a part of the Clergy Wellness Program (the “Trainers”);</td>
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<tr>
<td>(b) the modification, building or procurement of the technologies outlined in the Clergy Wellness Delivery Platform;</td>
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<tr>
<td>(c) the uploading of appropriate parts of the Clergy Wellness Program to the Clergy Wellness Delivery Platform; and</td>
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<tr>
<td>(d) organize regional or other training programs in order to maximize clergy and their families’ accessibility and engagement in training.</td>
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<tr>
<td>8. Begin official promotion and roll out of Clergy Wellness Program.</td>
<td>CD&amp;F1.1TF and Trainers</td>
<td>1 month after step 7</td>
<td>Clergy Wellness Program is officially rolled-out</td>
</tr>
<tr>
<td>9. Implement a regularly scheduled evaluation plan for reviewing the performance of Clergy Wellness Program by:</td>
<td>CD&amp;F1.1TF</td>
<td>Beginning after each Program is delivered</td>
<td>Evaluations reviewed and improvements made in each element of Clergy Wellness Program</td>
</tr>
<tr>
<td>(a) implementing the Feedback Mechanism created in step 6, as appropriate, after delivery of each program element; and</td>
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<tr>
<td>(b) make improvements based on the results of such evaluations.</td>
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<tr>
<td>10. Conduct at least a semi-annual review, evaluation and update of:</td>
<td>CD&amp;F1.1TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment is complete, improvements implemented and 100% clergy target is achieved</td>
</tr>
<tr>
<td>(a) all materials and the entire Clergy Wellness Program to ensure that all materials are the most effective best practices available; and</td>
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<tr>
<td>(b) the continued promotion and roll-out to ensure that the target of 100% of clergy participating is achieved.</td>
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</table>
Within 18 months, we will develop and implement a Clergy Development Program in which 100% of the clergy will participate on an annual basis thereafter within 24 months of implementation.
### Clergy Development & Formation Goal 1.2 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 1.2</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Clergy Development &amp; Formation Strategic Goal 1.2 Task Force (“CD&amp;F1.2TF”).</td>
<td>Strategic Planning Team and Goal Captains</td>
<td>1 month from Start Date</td>
<td>CD&amp;F1.2TF team members agree to serve</td>
</tr>
<tr>
<td>2. Prepare, distribute and collect surveys of clergy and parish leadership on the most critical clergy development and education needs and issues, including continuing education, leadership, spiritual formation, and other areas.</td>
<td>CD&amp;F1.2TF</td>
<td>4 months after step 1</td>
<td>Surveys distributed and completed by at least 75% of Metropolis clergy and families</td>
</tr>
</tbody>
</table>
| 3. Conduct comprehensive research to:  
  (a) determine best practices for clergy continuing education, leadership development, spiritual formation, and other areas;  
  (b) examine programs, materials, resources from both Orthodox and non-Orthodox sources; and  
  (c) specifically identify objective evidence of the effectiveness of each. | CD&F1.2TF | Simultaneous with step 2 | A comprehensive report of programs, materials and resources that are researched is completed, including objective evidence of effectiveness |
| 4. Complete “Comprehensive Clergy Development Report” by qualitatively analyzing and assessing:  
  (a) all researched programs, materials, resources and content:  
    (i) categorize them according to topics and objective evidence of their effectiveness; and  
    (ii) create a comprehensive list of topics and best practices;  
  (b) most critical needs from clergy and clergy family survey data from step 2; and  
  (c) best methods for delivery of programs, materials, resources and content. | CD&F1.2TF | 2 months after steps 2 and 3 | Comprehensive Clergy Development Report is completed including qualitative analysis of all programs, materials, resources and content, survey data and alternative delivery systems |
# Clergy Development & Formation Goal 1.2 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 1.2</th>
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</tr>
</thead>
</table>
| 5. Create and finalize all elements of the “Clergy Development Program,” based on the findings in the Comprehensive Clergy Development Report, including:  
(a) specific goals and objectives for each element and program;  
(b) identifying gaps between the Clergy Development Program and available best practices programs, materials, resources and content;  
(c) establishing the “Gap Analysis Workplan” that will include the process and timeline for specifically filling such gaps, and who is responsible for achieving each step within an established timeline; and  
(d) the specific actions to be taken to modify, build or procure the technologies or platform (the “Clergy Development Delivery Platform”) necessary to best deliver the Clergy Development Program as identified in step 4(c). | CD&F1.2TF | 3 months after step 4 | Clergy Development Program elements, goals, objectives work plan and Gap Analysis Workplan are complete |
| 6. Finalize Clergy Development Program by:  
(a) researching, gathering, revising, developing, and/or soliciting the development of additional materials needed for missing areas, or areas that do not meet best practices, or most effective standard as determined through Gap Analysis Workplan: and  
(b) create feedback mechanism to measure effectiveness of each element (the “Feedback Mechanism”). | CD&F1.2TF | 4 months after step 5 | Gap Analysis Workplan is executed and gaps are filled to finalize the Clergy Development Program, and Feedback Mechanism created |
### Key Actions Necessary To Achieve Strategic Goal 1.2

#### 7. Complete:
- (a) the identification and recruitment of talented and experienced individuals who can provide training to clergy and parishes as a part of the Clergy Development Program (the “Trainers”);
- (b) complete the modification, building or procurement of the technologies outlined in the Clergy Development Delivery Platform;
- (c) the uploading of appropriate parts of the Clergy Development Program to platform; and
- (d) organize regional or other training programs in order to maximize clergy and their families’ accessibility and engagement in training.

<table>
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<th>Responsible Party</th>
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</thead>
<tbody>
<tr>
<td>CD&amp;F1.2TF</td>
<td>3 months after step 6</td>
<td>Trainers identified and recruited and Clergy Development Delivery Platform completed and content is loaded</td>
</tr>
</tbody>
</table>

#### 8. Begin official promotion and roll out of Clergy Development Program.

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>CD&amp;F1.2TF and Trainers</td>
<td>1 month after step 7</td>
<td>Clergy Development Program is officially rolled-out</td>
</tr>
</tbody>
</table>

#### 9. Implement a regularly scheduled evaluation plan for reviewing the performance of Clergy Development Program by:
- (a) implementing the Feedback Mechanism created in step 6, as appropriate, after delivery of each program element; and
- (b) make improvements based on the results of such evaluations.

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<tbody>
<tr>
<td>CD&amp;F1.2TF</td>
<td>Beginning after each Program is delivered</td>
<td>Evaluations reviewed and improvements made in each element of Clergy Development Program</td>
</tr>
</tbody>
</table>

#### 10. Conduct at least a semi-annual review, evaluation and update of:
- (a) all materials and the entire Clergy Development Program to ensure that all materials are the most effective best practices available; and
- (b) the continued promotion and roll-out to ensure that the target of 100% of clergy participating is achieved.

<table>
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<tbody>
<tr>
<td>CD&amp;F1.2TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment is complete, improvements implemented and 100% clergy target is achieved</td>
</tr>
</tbody>
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Communications & Technology

Goal 2.1

Metropolis Communications Plan

(a) Within 18 months, we will create and implement a Metropolis Strategic Communications Plan to more effectively connect the Metropolis, its parishes and parishioners that will achieve key milestones that measurably improve both internal and external communications of the Metropolis and its parishes, and that will include enhanced social media, websites and other effective communications tools; and

(b) Over the implementation term of this Strategic Plan, assist other Strategic Plan Implementation Task Forces, as requested, with the communications regarding their ministries, activities, deliverables, programs, training and support.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 2.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Communications &amp; Technology Goal 2.1 Task Force (“C&amp;T2.1TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month after Start Date</td>
<td>C&amp;T2.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Create a “Communications Research Report” that includes research of:</td>
<td>C&amp;T2.1TF</td>
<td>5 months after step 1</td>
<td>Research is completed and Communications Research Report is finalized with all required elements</td>
</tr>
<tr>
<td>(a) effective ways to measure high levels of engagement and accessibility in church communications and what constitutes best practices associated with church communications;</td>
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<tr>
<td>(b) both Orthodox and non-Orthodox Churches that report high levels of effective communications, including conducting site visits and interviews to determine successful techniques that can be adapted; and</td>
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<tr>
<td>(c) most effective online, social media and website strategies and approaches to improve levels of communications and engagement with parishes and parishioners.</td>
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<tr>
<td>3. Design, distribute and collect surveys and other data gathering techniques with parishes and parishioners to:</td>
<td>C&amp;T2.1TF</td>
<td>Simultaneous with step 2</td>
<td>Survey and other data gathering techniques to parishes and parishioners are designed, distributed and collected</td>
</tr>
<tr>
<td>(a) measure parishioner use of, and satisfaction with, current Metropolis online resources, website, social media, communications, information, processes and ministries and</td>
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<td>(b) identify impediments to effective communications between and among the Metropolis, its parishes and parishioners and strategies that would be more effective.</td>
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<td>Key Actions Necessary To Achieve Strategic Goal 2.1</td>
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<tr>
<td>4. Compile research and data from steps 2 and 3 and: (a) review and analyze results and current levels and effectiveness of Metropolis communications, social media, websites and other strategies; and (b) identify potential ways to address communications barriers and increase levels of effectiveness of each communications channel.</td>
<td>C&amp;T2.1TF</td>
<td>2 months after steps 2 and 3</td>
<td>Data Analysis Report is complied with all findings and recommendations</td>
</tr>
<tr>
<td>5. Develop the “Metropolis Communications Plan” to be deployed in the Metropolis that will include: (a) a strategy and detailed implementation plan and timeline that addresses a prioritized list of communications barriers and opportunities (including social media, websites, etc.); (b) a process and timeline to implement the Metropolis Communications Plan; (c) the necessary budget and resources (financial or other) to fully implement the Metropolis Communications Plan; and (d) the metrics to be used to measure its success and conformity to best practices.</td>
<td>C&amp;T2.1TF</td>
<td>4 month after step 4</td>
<td>Metropolis Communications Plan is developed and completed with all required elements</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 2.1</td>
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<tr>
<td>6. Raise any necessary funds or obtain necessary resources to effectively implement the Metropolis Communications Plan based on an established budget.</td>
<td>C&amp;T2.1TF and the Metropolis Council</td>
<td>5 months after step 5</td>
<td>Fundraising is completed based on established budget</td>
</tr>
<tr>
<td>7. Begin to implement the Metropolis Communications Plan based on the timeline established in step 5(b).</td>
<td>C&amp;T2.1TF</td>
<td>1 month after step 6</td>
<td>Metropolis Communications Plan implementation begins</td>
</tr>
<tr>
<td>8. At least semi-annually: (a) review and analyze success of Metropolis Communications Plan against defined best practices metrics/goals identified in steps 2 - 4; and (b) refine the Metropolis Communications Plan accordingly.</td>
<td>C&amp;T2.1TF</td>
<td>Semi-annual review</td>
<td>Review completed and improvements in Metropolis Communications Plan are implemented</td>
</tr>
<tr>
<td>9. Reach out to all Metropolis Strategic Plan Implementation Task Forces and inquire as to what forms of assistance they will need to successfully and effectively communicate the availability of the ministries, activities, deliverables, programs, training and support they are developing and offering, and, as a part of the Metropolis Communications Plan, assist as needed in the design of the necessary materials, training, support and communications for each such Task Force to successfully implement its plan.</td>
<td>C&amp;T2.1TF</td>
<td>Continuously over the implementation time periods established by the Implementation Task Forces</td>
<td>Each Implementation Task Force that requests assistance receives the communications and related assistance necessary to more effectively achieve their Strategic Goal</td>
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</table>
Metropolis of Chicago
Strategic Planning Retreat #2
Day 2

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

Bill Marianes – May, 2019
www.stewardshipcalling.com  Bill@stewardshipcalling.com
TODAY,
WE MAKE HISTORY

TODAY,
WE MAKE A DIFFERENCE
Do Something Today That Your Future Self Will Thank You For
WHY Statement

To be a welcoming and inspiring community of God so that we experience Christ’s love with all seeking eternal life.
Saturday

8:30 - Prayer and Breakfast

9:00 - Welcome - Metropolitan Nathanael

9:05 - Review of Retreat Agenda and Questions

9:15 - Goal 2.2 - Metropolis Technology Plan

10:15 - Goal 3.1 Youth Religious Education

11:15 - Goal 3.2 Adult Religious Education

12:15 - Prayer and Lunch (45 minutes)
Metropolis Technology Plan

Within 18 months, we will create and implement a comprehensive and state of the art technology and innovation infrastructure plan and platform using the best available tools, technologies and resources for the Metropolis to better serve the needs of its parishes and parishioners, including a web-based Best Practices Metropolis Resource Portal to deliver Metropolis Strategic Plan materials and other ministries’ programs.
### Communications & Technology Goal 2.2 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 2.2</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
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</thead>
<tbody>
<tr>
<td>1. Form Communications &amp; Technology Goal 2.2 Task Force (“C&amp;T2.2TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>C&amp;T2.2TF team members agree to serve</td>
</tr>
<tr>
<td>2. Design distribute and collect a detailed online Technology Capabilities Survey which includes: (a) the details of the current parishes’ software, products, hardware platforms, electronic methods of communicating with parishioners and externally with their communities along with social media and their formats; (b) an assessment of all current Metropolis technologies, platforms, hardware, software and services: and (c) assessments of what technological connectedness with the Metropolis, its ministries and other parishes would be most valuable.</td>
<td>C&amp;T2.2TF</td>
<td>6 months after step 1</td>
<td>Metropolis survey assessment completed and Technology Capabilities Survey responses are received from at least 75% of parishes</td>
</tr>
<tr>
<td>3. Create a “Technology Research Report” that includes research of: (a) effective latest technologies used by both Orthodox and non-Orthodox Churches; (b) how best to create an effective Metropolis online portal (the “Portal”) onto which all Strategic Planning Task Forces can deliver their new programs, materials, training and ministries resources; and (c) the best practices key performance indicator and ways to measure high levels of technological engagement with parishes and parishioners and what constitutes best practices associated with church technologies (including site visits and interviews as appropriate) to determine successful techniques that can be adapted.</td>
<td>C&amp;T2.2TF</td>
<td>Simultaneous with step 2</td>
<td>Research is completed and Technology Research Report is finalized with all required elements</td>
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## Communications & Technology Goal 2.2 Action Plan

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<tr>
<td>4. Finalize a “Metropolis Technology Plan” that: (a) compiles research and data from steps 2 and 3 and reviews and analyzes results and current level and effectiveness of Metropolis technologies and other strategies; (b) identifies best practices to increase levels of technological effectiveness and connectedness between and within the Metropolis and its parishes and parishioners; and (c) outlines what is necessary to establish the most effective Metropolis Portal.</td>
<td>C&amp;T2.2TF</td>
<td>3 months after steps 2 and 3</td>
<td>Metropolis Technology Plan is completed. Compilation of survey and research results and submission of recommendations</td>
</tr>
<tr>
<td>5. Finish creation of Metropolis Portal and communicate availability to Metropolis Strategic Plan Implementation Task Forces.</td>
<td>C&amp;T2.2TF</td>
<td>Simultaneous with steps 4</td>
<td>Metropolis Portal is live</td>
</tr>
<tr>
<td>6. Raise any necessary funds, and obtain necessary resources, to effectively implement the Metropolis Technology Plan based on an established budget and begin to roll out technology solutions at the Metropolis level.</td>
<td>C&amp;T2.2TF and the Metropolis Council</td>
<td>7 months after steps 4 and 5</td>
<td>Fundraising is completed based on established budget</td>
</tr>
<tr>
<td>Key Actions Necessary to Achieve Strategic Goal 2.2</td>
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<tr>
<td>7. The portions of the Metropolis Technology Plan that can be implemented by the parishes are communicated to all parishes by all available means and at all Metropolis gatherings and events, and periodic group discussions are planned and take place throughout the Metropolis among parishes implementing portions of the Metropolis Technology Plan to discover lessons learned and ways to improve the Metropolis Technology Plan.</td>
<td>C&amp;T2.2TF</td>
<td>Starting 1 month after step 6 and continuously thereafter</td>
<td>Regular communications to and with parishes occurs regarding the Metropolis Technology Plan</td>
</tr>
<tr>
<td>8. At least annually: &lt;br&gt;(a) the parishes are surveyed about the effectiveness of the Metropolis Technology Plan; &lt;br&gt;(b) the Metropolis Technology Plan is assessed against the best practice key performance indicators identified in step 3; and &lt;br&gt;(c) appropriate adjustment and improvements are made in the Metropolis Technology Plan and communicated throughout the Metropolis.</td>
<td>C&amp;T2.2TF</td>
<td>Starting annually after step 7</td>
<td>Annual assessment is completed and improvements in the Metropolis Technology Plan are incorporated and communicated</td>
</tr>
</tbody>
</table>
Within 18 months, we will research and develop a best practices set of learning standards, and online and in-person training programs for all parish youth in order to achieve proficiency in our Orthodox faith, history, and practices that will be thereafter successfully implemented in at least:

(a) 40% of the parishes within 2 years; and

(b) 60% of the parishes within 3 years.
## Key Actions Necessary To Achieve Strategic Goal 3.1

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<th>Timetable</th>
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<tbody>
<tr>
<td>1. Form Education &amp; Spiritual Literacy Goal 3.1 Task Force (E&amp;SL3.1TF).</td>
<td>E&amp;SL3.1TF</td>
<td>1 month from start date</td>
<td>E&amp;SL3.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Conduct comprehensive research from all available sources to determine how to properly measure the effectiveness of church religious education programs, content and materials for youth and establish an “Effectiveness Measurement Methodology and Process” to test the effectiveness of Metropolis youth religious education programs, content and materials.</td>
<td>E&amp;SL3.1TF</td>
<td>2 months after step 1</td>
<td>Effectiveness Measurement Methodology and Process Report is completed</td>
</tr>
<tr>
<td>3. Conduct comprehensive research to determine best in class Orthodox and non-Orthodox Christian youth religious and spiritual education materials, learning standards, content, programs, delivery options and best practices (including site visits to successful churches and reviewing existing religious education materials and other offerings from existing Christian youth education programs, content and materials, the Archdiocese Department of Religious Education, Orthodox Christian School Association, and the parishes and Religious Education Directors) and specifically identify objective evidence of the effectiveness of each.</td>
<td>E&amp;SL3.1TF</td>
<td>3 months after step 1 and simultaneous with step 2</td>
<td>All materials are researched including objective evidence of effectiveness based on Effectiveness Measurement Methodology and Process</td>
</tr>
<tr>
<td>4. Qualitatively analyze and assess:</td>
<td>E&amp;SL3.1TF</td>
<td>2 months after step 3</td>
<td>Comprehensive report completed of qualitative analysis of all content/materials, and alternative delivery systems</td>
</tr>
<tr>
<td>(a) all researched and submitted educational materials and learning standards and categorize them according to topics and objective evidence of their effectiveness and create a comprehensive list of topics and best in class content;</td>
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<tr>
<td>(b) all existing and new content against the Effectiveness Measurement Methodology and Process to determine the most effective content; and</td>
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<tr>
<td>(c) best alternative methods for delivery of most effective youth religious education content.</td>
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</tr>
<tr>
<td>5. Finalize outline of comprehensive “Youth Religious Education Program” and delivery schedule and methods and identify gaps in the Program and the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within the established timeline (“Gap Analysis Workplan”).</td>
<td>E&amp;SL3.1TF</td>
<td>3 months after step 4</td>
<td>Youth Religious Education Program and Gap Analysis Workplan is complete</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 3.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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<tr>
<td>-----------------------------------------------------</td>
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</tr>
<tr>
<td>6. Research, gather, revise, develop, and/or solicit the development of additional materials needed for missing Youth Religious Education areas, or areas that do not meet best practices, or most effective learning standards as determined through Gap Analysis Workplan, including replacing those materials that are deemed ineffective.</td>
<td>E&amp;SL3.1TF</td>
<td>4 months after step 5</td>
<td>Gap Analysis Workplan is executed and gaps are filled</td>
</tr>
<tr>
<td>7. Recruit and train at least 10 trainers (the “Trainers”) that can train the parish teachers and administrators on how to most effectively deliver the Youth Religious Education Program.</td>
<td>E&amp;SL3.1TF</td>
<td>Simultaneous with step 6</td>
<td>At least 10 Trainers agree to serve</td>
</tr>
<tr>
<td>8. Begin to conduct at least 6 multiple Metropolis-wide training programs to train parish teachers and administrators on how to most effectively deliver the Youth Religious Education Program.</td>
<td>E&amp;SL3.1TF and Trainers</td>
<td>4 months after steps 6 and 7</td>
<td>At least 6 Metropolis-wide training programs are held</td>
</tr>
<tr>
<td>9. Establish and implement alternative online, video and/or other platform for delivery of Youth Religious Education Program, including a format for peer review and commentary, as well as a process to submit newer and more effective materials.</td>
<td>E&amp;SL3.1TF</td>
<td>Simultaneous with step 7</td>
<td>Online, video or alternative delivery options established and implemented</td>
</tr>
<tr>
<td>10. Begin official roll out of Youth Religious Education Program and widely communicate its availability and effectiveness.</td>
<td>E&amp;SL3.1TF</td>
<td>1 month after steps 8 and 9</td>
<td>Youth Religious Education Program is officially rolled-out</td>
</tr>
<tr>
<td>11. Semi-annual review, evaluation and update of all materials and entire Youth Religious Education Program to ensure that all materials are the most effective best practices available and the stated goal target percentages are achieved.</td>
<td>E&amp;SL3.1TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment of Youth Religious Education Program is complete, improvements are implemented and the stated goal target percentages are achieved</td>
</tr>
</tbody>
</table>
Within 20 months, we will research and develop a best practices set of learning standards, and online and in-person training programs for adults in order to achieve proficiency in our Orthodox faith, history, and practices that will be thereafter successfully implemented in at least:

(a) 40% of the parishes within 2 years; and

(b) 60% of the parishes within 3 years.
# Key Actions Necessary To Achieve Strategic Goal 3.2

<table>
<thead>
<tr>
<th>Action</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Education &amp; Spiritual Literacy Goal 3.2 Task Force (E&amp;SL3.2TF).</td>
<td>E&amp;SL3.2TF</td>
<td>1 month from start date</td>
<td>E&amp;SL3.2TF team members agree to serve</td>
</tr>
<tr>
<td>2. Conduct comprehensive research from all available sources to determine how to properly measure the effectiveness of church religious education programs, content and materials for adults and establish an “Effectiveness Measurement Methodology and Process” to test the effectiveness of Metropolis adult religious education programs, content and materials.</td>
<td>E&amp;SL3.2TF</td>
<td>3 months after step 1</td>
<td>Effectiveness Measurement Methodology and Process Report is completed</td>
</tr>
<tr>
<td>3. Conduct comprehensive research to determine best in class Orthodox and non-Orthodox Christian adult religious and spiritual education materials, learning standards, content, programs, delivery options and best practices (including site visits to successful churches and reviewing existing religious education materials and other offerings from existing Christian adult education programs, content and materials, the Archdiocese Department of Religious Education, Orthodox Christian School Association, and the parishes and Religious Education Directors) and specifically identify objective evidence of the effectiveness of each.</td>
<td>E&amp;SL3.2TF</td>
<td>simultaneous with step 2</td>
<td>All materials are researched including objective evidence of effectiveness based on Effectiveness Measurement Methodology and Process.</td>
</tr>
<tr>
<td>4. Qualitatively analyze and assess: (a) all researched and submitted educational materials and learning standards and categorize them according to topics and objective evidence of their effectiveness and create a comprehensive list of topics and best in class content; (b) all existing and new content against the Effectiveness Measurement Methodology and Process to determine the most effective content; and (c) best alternative methods for delivery of most effective adult religious education content.</td>
<td>E&amp;SL3.2TF</td>
<td>3 months after steps 2 and 3</td>
<td>Comprehensive report completed of qualitative analysis of all content/materials, and alternative delivery systems</td>
</tr>
<tr>
<td>5. Finalize outline of comprehensive “Adult Religious Education Program” and delivery schedule and methods and identify gaps in the Program and the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within the established timeline (“Gap Analysis Workplan”).</td>
<td>E&amp;SL3.2TF</td>
<td>3 months after step 4</td>
<td>Adult Religious Education Program and Gap Analysis Workplan is complete</td>
</tr>
</tbody>
</table>
### Key Actions Necessary To Achieve Strategic Goal 3.2

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
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</thead>
<tbody>
<tr>
<td>6.</td>
<td>Research, gather, revise, develop, and/or solicit the development of additional materials needed for missing Adult Religious Education areas, or areas that do not meet best practices, or most effective learning standards as determined through Gap Analysis Workplan, including replacing those materials that are deemed ineffective.</td>
<td>E&amp;SL3.21TF</td>
<td>6 months after step 5</td>
<td>Gap Analysis Workplan is executed and gaps are filled</td>
</tr>
<tr>
<td>7.</td>
<td>Recruit and train at least 5 trainers (the “Trainers”) that can train the parish teachers and administrators on how to most effectively deliver the Adult Religious Education Program.</td>
<td>E&amp;SL32 TF</td>
<td>Simultaneously with step 6</td>
<td>At least 5 Trainers agree to serve</td>
</tr>
<tr>
<td>8.</td>
<td>Begin to conduct at least 5 multiple Metropolis-wide training programs to train parish teachers and administrators on how to most effectively deliver the Adult Religious Education Program.</td>
<td>E&amp;SL32 TF and Trainers</td>
<td>3 months after steps 6 and 7</td>
<td>At least 5 Metropolis-wide training programs are held</td>
</tr>
<tr>
<td>9.</td>
<td>Establish and implement alternative online, video and/or other platform for delivery of Adult Religious Education Program, including a format for peer review and commentary, as well as a process to submit newer and more effective materials.</td>
<td>E&amp;SL3.2TF</td>
<td>Simultaneously with step 8</td>
<td>Online, video or alternative delivery options established and implemented</td>
</tr>
<tr>
<td>10.</td>
<td>Begin official roll out of Adult Religious Education Program and widely communicate its availability and effectiveness.</td>
<td>E&amp;SL3.2TF</td>
<td>1 month after steps 8 and 9</td>
<td>Adult Religious Education Program is officially rolled-out</td>
</tr>
<tr>
<td>11.</td>
<td>Semi-annual review, evaluation and update of all materials and entire Adult Religious Education Program to ensure that all materials are the most effective best practices available and the stated goal target percentages are achieved.</td>
<td>E&amp;SL3.2TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment of Adult Religious Education Program is complete, improvements are implemented and the stated goal target percentages are achieved</td>
</tr>
</tbody>
</table>
Saturday

1:00 - Goal 4.1 Parish Council, Ministry & Youth Leadership Program

2:15 - Goal 5.1 Family Ministries

3:15 - Goal 5.2 Seniors Ministries

4:15 - Goal 6.1 Best Practices Metropolis Operations Plan

5:30 - Goal 6.2 Ministry Accountability, Performance & Remediation

6:30 - Prayer and Dinner (1 hour)
Lay Leadership Development
Goal 4.1

Parish Council, Ministry & Youth Leadership Program

Within 18 months, we will develop and implement a comprehensive, effective and best practices Orthodox Servant Leadership training and development program that thereafter will be:

(a) mandatory for all Parish Council members for all parishes within 6 months of its availability; and

(b) successfully implemented for all Ministry Leaders and youth leaders training immediately after it is available:

(i) in the Metropolis;

(ii) in at least 25% of the parishes within 12 months; and

(iii) in at least 50% of the parishes within 18 months.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 4.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Lay Leadership Development Goal 4.11 Task Force (“LLD4.1TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>LLD4.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Conduct comprehensive research and identify: (a) best practices in Lay Servant Leadership (both inside and outside the Orthodox church); (b) key leadership skill elements and gaps which need to be filled for all three groups of Parish Council, Ministry Leaders and youth (the “3 Constituents”); (c) how to properly benchmark and measure the effectiveness of leadership training for all 3 Constituents.</td>
<td>LLD4.1TF</td>
<td>3 months after step 1</td>
<td>Research is completed and best practices summary report generated</td>
</tr>
<tr>
<td>3. Develop data collection methods, tools, metrics and targets (e.g. surveys, personal interviews, web solicitations, research from Orthodox and non-Orthodox sources) that will effectively capture information from a diverse group of persons both inside and outside the Orthodox Church (including clergy, laity and youth) that are selected in order to identify needed lay leadership skills and content for all 3 Constituents, as well as gaps and weaknesses of current lay leadership skills and content (the “Data Collection Plan”).</td>
<td>LLD4.1TF</td>
<td>Simultaneous with step 2</td>
<td>Full Data Collection Plan is finalized</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 4.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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<tr>
<td>4. Implement the Data Collection Plan among all targeted individuals and sources identified in step 3 to gather all the research called for in step 3 for all 3 Constituents.</td>
<td>LLD4.TF</td>
<td>2 months after steps 2 and 3</td>
<td>Data Collection Plan is completed consistent with guidelines set out in step 3</td>
</tr>
<tr>
<td>5. Compile research and data from steps 2, 3, and 4 and review and analyze results to identify: (a) best practices in lay leadership training for all 3 Constituents; (b) strengths, weaknesses, skills and gaps in current lay leadership programs for all 3 Constituents; and (c) specific information on how to best reach and train all 3 Constituents and measure effectiveness of such training.</td>
<td>LLD4.1TF</td>
<td>2 months after step 4</td>
<td>Data Analysis Report is complied with all findings and recommendations</td>
</tr>
<tr>
<td>6. From all available resources, materials, and research (including the work done in steps 2-5), develop a best practices comprehensive “Lay Leadership Training Program” (including written materials, manuals and online resources) that addresses the specific lay leadership needs of all 3 Constituents.</td>
<td>LLD4.1TF</td>
<td>4 months after step 5</td>
<td>The Lay Leadership Training Program is finalized for all 3 Constituents.</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 4.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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<tr>
<td>7. Recruit and train a team to help train and support the parishes in the implementation of the Lay Leadership Training Program (the “Training and Support Team”). Additionally develop a training and support strategy, program and schedule with a detailed roll out action plan and timeline that allows the stated goal target percentages to be achieved (the “Training and Support Program”).</td>
<td>LLD4.1TF</td>
<td>3 months after step 6</td>
<td>At least 7 Training and Support Team members agree to serve and the Training and Support Program is finalized</td>
</tr>
<tr>
<td>8. The Training and Support Team will: (a) communicate to all parishes the availability of the Lay Leadership Training Program, including ensuring that all online content is properly uploaded; (b) initially conduct at least 8 regional Lay Leadership Training Program training sessions throughout the Metropolis; and (c) continue to provide Lay Leadership Training Program training sessions throughout the Metropolis on the schedule determined in step 7 according to the Training and Support Program.</td>
<td>LLD4.1TF and Training and Support Team</td>
<td>3 month after step 7 for the initial 8 training sessions</td>
<td>At least 8 regional training programs are conducted for part (a) and the other training programs are offering per the schedule in part (b) are completed according to the Training and Support Program</td>
</tr>
<tr>
<td>9. After every Leadership Training Program, perform an assessment of its effectiveness and identify areas for improvement and make necessary course corrections.</td>
<td>LLD4.1TF</td>
<td>After each program</td>
<td>Assessments are completed after every program and improvements implemented.</td>
</tr>
<tr>
<td>10. At least annually, comprehensively survey and assess the Leadership Training Program for all 3 Constituents and make necessary changes to ensure that all materials are the most effective best practices available and the Goal Targets of mandatory training are achieved.</td>
<td>LLD4.1TF</td>
<td>Beginning annually after step 8</td>
<td>At least annual assessment of Leadership Training Program is completed, improvements are implemented, and training targets are achieved.</td>
</tr>
</tbody>
</table>
Within 18 months, we will research, develop and train each parish how to implement a comprehensive series of family ministries to meet the various needs of their families through their life cycles that will successfully be implemented in at least:

(a) 25% of the parishes within 12 months; and

(b) 50% of the parishes within 24 months.
# Life Cycle Ministries Goal 5.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 5.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Life Cycle Ministries Goal 5.1 Task Force (“LCM5.1TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>LCM5.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Conduct comprehensive research from all available sources to determine how to properly measure the effectiveness of family life cycle ministries and programs, content and materials and establish an “Effectiveness Measurement Methodology and Process” to test the effectiveness of Metropolis and parish family ministries, programs, content and materials.</td>
<td>LCM5.1TF</td>
<td>2 months after step 1</td>
<td>Effectiveness Measurement Methodology and Process Report is completed</td>
</tr>
<tr>
<td>3. Conduct comprehensive research to determine best in class Orthodox and non-Orthodox Christian family ministries programs, content materials, delivery options, best practices, and objective evidence of their effectiveness, including: (a) site visits to churches with successful family ministries; (b) reviewing all existing family ministries, programs, content and materials in the Metropolis of Chicago and its parishes and in other GOA Metropolises and Orthodox jurisdictions; and (c) compiling whatever data is available regarding the family ministries of the Metropolis of Chicago and its parishes.</td>
<td>LCM5.1TF</td>
<td>3 months after step 1 and simultaneous with step 2</td>
<td>All materials are researched including objective evidence of effectiveness based on Effectiveness Measurement Methodology and Process</td>
</tr>
</tbody>
</table>
## Key Actions Necessary To Achieve Strategic Goal 5.1

<table>
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<tr>
<th>Action</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Qualitatively analyze and assess:</td>
<td>LCM5.1TF</td>
<td>3 months after step 3</td>
<td>Comprehensive report completed of qualitative analysis of all programs, content and materials and alternative delivery systems</td>
</tr>
<tr>
<td>(a) all researched family ministries, programs, content and materials identified in steps 2 and 3 according to family life cycle topics that address key needs and the objective evidence of their effectiveness and create a comprehensive list of topics and best in class content;</td>
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</tr>
<tr>
<td>(b) all existing and new content against the Effectiveness Measurement Methodology and Process to determine the most effective content; and</td>
<td></td>
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</tr>
<tr>
<td>(c) best alternative methods for delivery of family ministries, programs, content and materials.</td>
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</tr>
<tr>
<td>5. Finalize outline of comprehensive “Family Ministries” and delivery schedule and methods and identify gaps in the Family Ministries and the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within the established timeline (“Gap Analysis Workplan”).</td>
<td>LCM5.1TF</td>
<td>3 months after step 4</td>
<td>Family Ministries and Gap Analysis Workplan is complete</td>
</tr>
<tr>
<td>6. Research, gather, revise, develop, and/or solicit the development of additional programs, content and materials needed for missing Family Ministries areas, or areas that do not meet best practices, or most effective learning standard as determined through Gap Analysis Workplan, including replacing those ministries, programs, content and materials that are deemed ineffective.</td>
<td>LCM5.1TF</td>
<td>3 months after step 5</td>
<td>Gap Analysis Workplan is executed and gaps are filled</td>
</tr>
</tbody>
</table>
### Key Actions Necessary To Achieve Strategic Goal 5.1

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>7. Recruit and train at least 10 trainers (the “Trainers”) that can train the parishes on how to effectively implement the Family Ministries in the parishes.</td>
<td>LCM5.1TF</td>
<td>Simultaneous with step 6</td>
<td>At least 10 Trainers agree to serve</td>
</tr>
<tr>
<td>8. Begin to conduct at least 6 multiple Metropolis-wide training programs to train parish Family Ministries leaders on how to most effectively implement the Family Ministries in the parishes.</td>
<td>LCM5.1TF and Trainers</td>
<td>4 months after steps 6 and 7</td>
<td>At least 6 Metropolis-wide training programs are held</td>
</tr>
<tr>
<td>9. Establish and implement alternative online, video and/or other platform for delivery of Family Ministries, including a format for peer review and commentary, as well as a process to submit newer and more effective materials.</td>
<td>LCM5.1TF</td>
<td>Simultaneous with step 7</td>
<td>Online, video or alternative delivery options established and implemented</td>
</tr>
<tr>
<td>10. Begin official roll out of Family Ministries and widely communicate its availability and effectiveness.</td>
<td>LCM5.1TF</td>
<td>1 month after steps 8 and 9</td>
<td>Family Ministries is officially rolled-out</td>
</tr>
<tr>
<td>11. Annual review, evaluation and update of all materials and Family Ministries to ensure that all materials are the most effective best practices available and the stated goal target percentages are achieved.</td>
<td>LCM5.1TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment of Family Ministries is complete, improvements are implemented and the stated goal target percentages are achieved</td>
</tr>
</tbody>
</table>
Within 18 months, we will research, develop and train each parish how to implement dynamic and engaging ministries focused on the physical, emotional and spiritual needs of their senior citizens that will be successfully implemented in at least:

(a) 25% of the parishes within 12 months; and

(b) 50% of the parishes within 24 months.
### Key Actions Necessary To Achieve Strategic Goal 5.2

<table>
<thead>
<tr>
<th>Action Description</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Life Cycle Ministries Goal 5.2 Task Force (“LCM5.2TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>LCM5.2TF team members agree to serve</td>
</tr>
<tr>
<td>2. Conduct comprehensive research from all available sources to determine how to properly measure the effectiveness of seniors ministries and programs, content and materials and establish an “Effectiveness Measurement Methodology and Process” to test the effectiveness of Metropolis and parish seniors ministries, programs, content and materials.</td>
<td>LCM5.2TF</td>
<td>2 months after step 1</td>
<td>Effectiveness Measurement Methodology and Process Report is completed</td>
</tr>
<tr>
<td>3. Conduct comprehensive research to determine best in class Orthodox and non-Orthodox Christian seniors ministries, programs, content materials, delivery options, best practices, and objective evidence of their effectiveness, including: (a) site visits to churches with successful seniors ministries; (b) reviewing all existing seniors ministries, programs, content and materials in the Metropolis of Chicago and its parishes and in other GOA Metropolises and Orthodox jurisdictions; and (c) compiling whatever data is available regarding the seniors ministries of the Metropolis of Chicago and its parishes.</td>
<td>LCM5.2TF</td>
<td>3 months after step 1 and simultaneous with step 2</td>
<td>All materials are researched including objective evidence of effectiveness based on Effectiveness Measurement Methodology and Process</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 5.2</td>
<td>Responsible Party</td>
<td>Timetable</td>
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</tr>
<tr>
<td>4. Qualitatively analyze and assess:</td>
<td>LCM5.2TF</td>
<td>3 months after step 3</td>
<td>Comprehensive report completed of qualitative analysis of all ministries, programs, content and materials and alternative delivery systems</td>
</tr>
<tr>
<td>(a) all researched seniors ministries, programs, content and materials identified in steps 2 and 3 according to seniors ministries topics that address key needs and the objective evidence of their effectiveness and create a comprehensive list of topics and best in class content;</td>
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<td></td>
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</tr>
<tr>
<td>(b) all existing and new content against the Effectiveness Measurement Methodology and Process to determine the most effective content; and</td>
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</tr>
<tr>
<td>(c) best alternative methods for delivery of seniors, ministries, programs, content and materials.</td>
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<tr>
<td>5. Finalize outline of comprehensive “Seniors Ministries” and delivery schedule and methods and identify gaps in the Seniors Ministries and the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within the established timeline (“Gap Analysis Workplan”).</td>
<td>LCM5.2TF</td>
<td>3 months after step 4</td>
<td>Seniors Ministries and Gap Analysis Workplan is complete</td>
</tr>
<tr>
<td>6. Research, gather, revise, develop, and/or solicit the development of additional ministries, programs, content and materials needed for missing Seniors Ministries areas, or areas that do not meet best practices, or most effective learning standard as determined through Gap Analysis Workplan, including replacing those ministries, programs, content and materials that are deemed ineffective.</td>
<td>LCM5.2TF</td>
<td>3 months after step 5</td>
<td>Gap Analysis Workplan is executed and gaps are filled</td>
</tr>
</tbody>
</table>
### Life Cycle Ministries Goal 5.2 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 5.2</th>
<th>Responsible Party</th>
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</tr>
</thead>
<tbody>
<tr>
<td>7. Recruit and train at least 10 trainers (the “Trainners”) that can train the parishes on how to effectively implement the Seniors Ministries in the parishes.</td>
<td>LCM5.2TF</td>
<td>Simultaneous with step 6</td>
<td>At least 10 Trainners agree to serve</td>
</tr>
<tr>
<td>8. Begin to conduct at least 6 multiple Metropolis-wide training programs to train parish Seniors Ministries leaders on how to most effectively implement the Seniors Ministries in the parishes.</td>
<td>LCM5.2TF and Trainers</td>
<td>4 months after steps 6 and 7</td>
<td>At least 6 Metropolis-wide training programs are held</td>
</tr>
<tr>
<td>9. Establish and implement alternative online, video and/or other platform for delivery of Seniors Ministries, including a format for peer review and commentary, as well as a process to submit newer and more effective materials.</td>
<td>LCM5.2TF</td>
<td>Simultaneous with step 8</td>
<td>Online, video or alternative delivery options established and implemented</td>
</tr>
<tr>
<td>10. Begin official roll out of Seniors Ministries and widely communicate its availability and effectiveness.</td>
<td>LCM5.2TF</td>
<td>1 month after steps 8 and 9</td>
<td>Seniors Ministries are officially rolled-out</td>
</tr>
<tr>
<td>11. Annual review, evaluation and update of all materials and entire Seniors Ministries to ensure that all materials are the most effective best practices available and the stated goal target percentages are achieved.</td>
<td>LCM5.2TF</td>
<td>Semi-annual review</td>
<td>Semi-Annual assessment of Seniors Ministries is complete, improvements are implemented and the stated goal target percentages are achieved</td>
</tr>
</tbody>
</table>
(a) Within 18 months, we will determine a best practices Metropolis operations plan, and independently evaluate the Metropolis in the areas of structure, staffing, operations, integrity, transparency, accountability and engagement on key social issues; and

(b) Within 9 months thereafter, we will remediate any deficiencies and ensure that all such best practices metrics are consistently met or exceeded, and annually re-evaluated, to ensure that all parishes and parishioners throughout the Metropolis are more effectively served with complete integrity, transparency and accountability.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 6.1</th>
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<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Metropolis Administration &amp; Best Practices Goal 6.1 Task Force (MA&amp;BP6.1TF).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>MA&amp;BP6.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Obtain and review existing documentation about current operations and processes of management of the Metropolis and its ministries and key operations, including recent surveys by Metropolis, and conduct interviews with current staff and key volunteers to document what they do and current processes, supporting technologies, requirements, issues and gaps.</td>
<td>MA&amp;BP6.1TF</td>
<td>4 months after step 1</td>
<td>Complete review of current operations, processes, personnel and management and compile report of key findings</td>
</tr>
<tr>
<td>3. Research best practices for church administration operations, and staffing from other religious (Orthodox and non-Orthodox) and non-profit organizations and identify what should be measured and how, with focused emphasis on increasing integrity, transparency, accountability and engagement on key social issues.</td>
<td>MA&amp;BP6.1TF</td>
<td>Simultaneous with step 2</td>
<td>Research of best practices is completed and report of key elements is compiled</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 6.1</td>
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</tr>
<tr>
<td>4. Create, distribute and collect surveys of parish clergy and parish Ministry leaders regarding: (a) current levels of service and support from the Metropolis and what works, does not work and what is missing; (b) current and future needs; (c) expectations and ways in which the relationship and support between the parishes and Metropolis can be improved, and integrity, transparency, accountability, and engagement on key social issues can be enhanced.</td>
<td>MA&amp;BP6.1TF</td>
<td>Simultaneous with steps 2 and 3</td>
<td>Surveys are created, distributed and collected</td>
</tr>
<tr>
<td>5. Map each area’s and operation’s current workflow and procedures and related available metrics and: (a) identify key operational metrics and key performance indicators (“KPIs”) to assess in each area of operations; (b) current levels of KPIs performance in each area; (c) specific achievable desired percentage performance KPIs improvements; and (d) timeline to achieve them (the “Operational Metrics Plan”).</td>
<td>MA&amp;BP6.1TF</td>
<td>4 months after steps 2, 3 and 4</td>
<td>Operational Metrics Plan is completed</td>
</tr>
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</table>
## Metropolis Administration & Best Practices

### Goal 6.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 6.1</th>
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<tbody>
<tr>
<td>6. From all available resources, materials, research, surveys and interviews (including the work done in steps 2-5) create “Operations Improvement Plan” to include at least: (a) finalized Operational Metric Plan; (b) employee and volunteer staffing job descriptions, development, training, succession and needs plan (the “Staffing Plan”); (c) other key recommendations to improve Metropolis operations and service to parishes and parishioners and integrity, transparency, accountability and engagement on key social issues; (d) a shared dashboard (the “Dashboard”) to easily and visibly present the relevant KPIs for each area.</td>
<td>MA&amp;BP6.1TF</td>
<td>5 months after step 5</td>
<td>Draft Operations Improvement Plan is completed</td>
</tr>
<tr>
<td>7. Submit draft Operations Improvement Plan for approval of the Metropolitan and Metropolis Council and work with Metropolis Council to reach consensus on Final Metropolis Operations Improvement Plan.</td>
<td>MA&amp;BP6.1TF, Metropolitan and Metropolis Council</td>
<td>3 months after step 6</td>
<td>Final Metropolis Operations Improvement Plan is approved by Metropolitan and Metropolis Council</td>
</tr>
<tr>
<td>8. Begin communication, rollout and implementation of Final Operations Improvement Plan, including: (a) regular public reporting of Dashboard of KPIs; and (b) at least annually conduct talent performance development assessments privately for employees and volunteers.</td>
<td>MA&amp;BP6.1TF</td>
<td>1 month after step 7</td>
<td>Implementation begins, Dashboard KPIs are regularly publicly reported and annual private talent assessments are completed</td>
</tr>
<tr>
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<tr>
<td>9. Conduct ‘listening’ sessions throughout the Metropolis to solicit feedback on Metropolis Operations Improvement Plan and the degree to which the Metropolis is achieving its objectives and any new or improved recommended amendments to the Metropolis Operations Improvement Plan.</td>
<td>MA&amp;BP6.1TF and Metropolitan</td>
<td>Beginning 6 months after step 8</td>
<td>At least 6 listening tour events are completed throughout the geography of the Metropolis</td>
</tr>
<tr>
<td>10. Feedback from the listening tour is considered by the Metropolitan and Metropolis Council, and make any necessary changes to the Metropolis Operations Improvement Plan based on feedback from the listening tour.</td>
<td>MA&amp;BP6.1TF, Metropolitan and Metropolis Council</td>
<td>3 months after step 9</td>
<td>Metropolis Operations Improvement Plan is amended accordingly with results of the listening tour</td>
</tr>
<tr>
<td>11. At least annually assess the Metropolis Operations Improvement Plan against actual experience and evolving best practices and make necessary adjustments and improvements and continuously publicly report results and progress toward best practices</td>
<td>MA&amp;BP6.1TF, Metropolitan and Metropolis Council</td>
<td>At least annually thereafter</td>
<td>Annual assessment of Metropolis Operations Improvement Plan is completed and improvements are implemented</td>
</tr>
</tbody>
</table>
Within 21 months, we will research, develop and begin teaching a best-practices **Ministry Accountability, Performance and Remediation** process for measurably evaluating the performance and effectiveness of all parish and Metropolis ministries, programs and teams to help ensure that all people are more effectively embraced and served and inter-parish and inter-Orthodox cooperation is enhanced that will be successfully implemented thereafter in at least:

(a) 25% of the parishes within 12 months; and
(b) 50% of the parishes within 24 months.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 6.2</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Metropolis Administration &amp; Best Practices Goal 6.2 Task Force (“MA&amp;BP6.2TF”).</td>
<td>MA&amp;BP6.2TF</td>
<td>1 month from Start Date</td>
<td>MA&amp;BP6.2TF team members agree to serve</td>
</tr>
<tr>
<td>2. Research most effective best practices, metrics, methods and strategies to effectively assess, evaluate, establish goals for and remediate church ministries from both non-Orthodox and Orthodox churches.</td>
<td>MA&amp;BP6.2TF</td>
<td>3 months after step 1</td>
<td>Report of most effective best practices is completed</td>
</tr>
<tr>
<td>3. Develop and execute data collection methods and tools (e.g., surveys, personal interviews, web solicitations, and original research from other Orthodox and non-Orthodox sources) that will effectively capture agreed-upon ministry effectiveness and operations data and information with a consistent methodology from the widest possible spectrum of parishes and ministries.</td>
<td>MA&amp;BP6.2TF</td>
<td>3 months after step 2</td>
<td>Data collection tools and processes are finalized and executed</td>
</tr>
<tr>
<td>4. Compile research and data from steps 2 and 3, and review and analyze results and the current level of Metropolis ministry effectiveness and identify necessary elements for a new “Metropolis Ministry Performance &amp; Accountability Process” to help ensure parishes operate more effective ministries.</td>
<td>MA&amp;BP6.2TF</td>
<td>2 months after step 3</td>
<td>Report including key findings from all research and data collection efforts is completed</td>
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<tr>
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<tr>
<td>5. Based on all of the research and information gathered in steps 2 through 4, establish a best practices Metropolis <em>Ministry Performance &amp; Accountability Process</em> to provide a uniform process and step-by-step method and all tools and metrics necessary to assess and improve the effectiveness of parish ministries.</td>
<td>MA&amp;BP6.2TF</td>
<td>3 months after step 4</td>
<td>Metropolis Ministry Performance &amp; Accountability Process is created</td>
</tr>
<tr>
<td>6. Develop a “Technical Assistance Training Guide” to train and assist parishes in implementing the Metropolis Ministry Performance &amp; Accountability Process and provide ongoing support to help parishes address their implementation issues.</td>
<td>MA&amp;BP6.2TF</td>
<td>2 months after step 5</td>
<td>Technical Assistance Training Guide completed</td>
</tr>
<tr>
<td>7. Recruit a Training and Technical Assistance Team (“TA Team”) to use the Technical Assistance Training Guide to support parishes as they implement the Metropolis Ministry Performance &amp; Accountability Process.</td>
<td>MA&amp;BP6.2TF</td>
<td>Simultaneous with step 6</td>
<td>TA Team established and members agree to serve</td>
</tr>
<tr>
<td>8. Train TA Team on Metropolis Ministry Performance &amp; Accountability Process.</td>
<td>MA&amp;BP6.2TF</td>
<td>3 months after steps 6 and 7</td>
<td>Training of TA Team is completed</td>
</tr>
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<tr>
<td>9. Recruit in each parish one or more individuals to work with Metropolis representatives from MA&amp;BP6.2TF to establish a Metropolis Ministry Review Board that regularly communicates and shares best practices, experiences, lessons learned and collaborate ways to improve parish ministries.</td>
<td>MA&amp;BP6.2TF</td>
<td>Concurrent with step 8</td>
<td>Ministry Review Board (MRB) established with representatives of Metropolis and all parishes and roster is published</td>
</tr>
<tr>
<td>10. Schedule and conduct regional training of the Metropolis Ministry Performance &amp; Accountability Process (in-person and web-based) to reach as many parishes in the Metropolis as possible.</td>
<td>MA&amp;BP6.2TF</td>
<td>3 months after steps 8 and 9</td>
<td>Training scheduled completed and published</td>
</tr>
<tr>
<td>11. Continue conducting training and roll out the Metropolis Ministry Performance &amp; Accountability Process in each parish after it is trained until the stated goal target percentages are achieved.</td>
<td>MA&amp;BP6.2TF</td>
<td>Starting 1 month after step 10 and ongoing thereafter</td>
<td>Trainings completed until the stated goal target percentages are achieved</td>
</tr>
<tr>
<td>12. At least quarterly, assess the effectiveness of Metropolis Ministry Performance &amp; Accountability Process, and Technical Assistance Training Guide and make changes to ensure best practices and share all such improvements with all parishes.</td>
<td>MRB and MA&amp;BP6.2TF</td>
<td>Beginning quarterly after step 11</td>
<td>Quarterly assessment and remediation are completed and communicated to the parishes</td>
</tr>
</tbody>
</table>
Saturday

7:30 - Goal 7.1 Comprehensive Parish Stewardship Ministries Program

8:45 - Goal 8.1 Welcoming Ministries

10:00 - Goal 8.2 Outreach & Evangelism Ministries

11:00 - Closing Remarks and Dismissal
Stewardship
Goal 7.1

Comprehensive Parish Stewardship Ministries Program

Within 18 months, each parish will begin to implement the Metropolis comprehensive new Stewardship ministries program, including a youth stewardship program, adapted to the needs of the parishes, that will be completely implemented throughout the Metropolis over the next 2 years.
## Stewardship Goal 7.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 7.1</th>
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<tr>
<td><strong>DEFINE THE STEWARDSHIP MINISTRIES PROGRAM</strong></td>
<td></td>
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</tr>
<tr>
<td>1. Recruit Stewardship Goal 7.1 Implementation Task Force (S7.1TF).</td>
<td>Stewardship Strategic Planning Task Force and the Goal Captain</td>
<td>1 month after Start Date</td>
<td>S7.1TF members agree to serve and list of members and contact information is completed</td>
</tr>
<tr>
<td>2. S7.1TF meets and allocates work to: (a) begin to identify how objective measures of a successful stewardship ministries and programs will be determined and what will constitute best practices; (b) review any existing current Stewardship Ministries and programs that may exist at the Chicago Metropolis level (or in other Orthodox jurisdictions, Metropolises and Diocese levels) and begin to assess what has proven effective in those ministries and programs and what might need to be replaced or re-tooled; and (c) survey, research and evaluate other stewardship best practices ministries and programs in parishes, Metropolises, Jurisdictions, and other churches both within and outside of Orthodoxy that can be implemented in the Metropolis, including specifically successful youth stewardship ministries and programs.</td>
<td>S7.1TF</td>
<td>1 month after step 1</td>
<td>Meeting has occurred and re-tooling process and best practices and other research has started (to be updated as new best practices are identified) and a list of S7.1TF assignments is completed</td>
</tr>
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### Stewardship Goal 7.1 Action Plan

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<tr>
<td>3. Compete the assessment and research in the previous step 2, including: (a) determination of what constitutes best practices and how to measure effectiveness; and (b) gaps in the all of the identified existing ministries and programs and materials and the process and timeline for specifically filling such gaps, including who is responsible for achieving each step within the established timeline (“Gap Analysis Workplan”).</td>
<td>S7.1TF</td>
<td>3 months after step 2</td>
<td>Assessment and research report are completed for each of the sub teams and Gap Analysis Workplan is completed</td>
</tr>
<tr>
<td>4. Research, gather, revise, develop, and/or solicit the development of additional materials needed for missing areas, or areas that do not meet best practices, or most effective standard as determined through Gap Analysis Workplan, including replacing those materials that are deemed ineffective and synthesize new stewardship best practices to create the official Metropolis of Chicago Stewardship Ministries Program (“Stewardship Ministries Program”), which includes a youth stewardship ministries and program. Publish the Stewardship Ministries Program on Metropolis Resource Center Portal (“Portal”) that will include a process for parishes and S7.1TF to share new stewardship best practices and results. During this step, coordination will occur with any other relevant Metropolis Task Force, including Welcoming, Outreach &amp; Evangelism and Youth &amp; Emerging Adults, providing those teams an opportunity to review and comment on Stewardship Ministries Program ideas and ensure alignment.</td>
<td>S7.1TF</td>
<td>5 months after step 3</td>
<td>Official Metropolis of Chicago Stewardship Ministries Program, including a youth stewardship ministries program, has been developed and published on the Portal and best practices sharing has been enabled on the Portal.</td>
</tr>
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</table>
## Stewardship Goal 7.1 Action Plan

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<tr>
<td>5. In conjunction with research and evaluation of existing stewardship plans, identify parish stewardship challenges and proposed solutions by holding clergy online/video conference sessions (and clergy retreat sessions) and prioritize challenges and solutions through consensus to garner support of the clergy in building a new Metropolis stewardship ministries program.</td>
<td>S7.1TF and its clergy members</td>
<td>Simultaneous with step 4</td>
<td>The majority of clergy have participated in an online (and/or clergy retreat) session and a report is completed of the findings</td>
</tr>
<tr>
<td>6. Recruit Stewardship Trainers and Support Team (the “Stewardship Trainers and Support Team”) and conduct a “Train the Trainers” program for the Stewardship Trainers and Support Teams (both in person and via webinar/online sessions) on how to help train parishes on the new Stewardship Ministries Program and provide ongoing support to help address their stewardship challenges and fully implement the Stewardship Ministries Program.</td>
<td>S7.1TF and Stewardship Trainers and Support Teams</td>
<td>4 months after steps 4 and 5</td>
<td>Stewardship Trainers and Support Team personnel have accepted responsibility and a list of Stewardship Trainers and Support Team contact information is finalized and training programs have been completed</td>
</tr>
<tr>
<td>7. Develop and announce: (a) an overall schedule that ensures each parish can receive specific and personalized training in the Metropolis Stewardship Ministries Program (both in person and via webinar/online sessions); and (b) a Metropolis 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 Stewardship Ministries Program.</td>
<td>S7.1TF and Stewardship Trainers and Support Teams</td>
<td>2 months after step 6 (which training will occur over the next 12 to 24 months until all parishes training is completed)</td>
<td>Parish Stewardship Training and Support Process has been developed and documented and each parish has a scheduled training and receives training regarding the Metropolis Stewardship Ministries Program.</td>
</tr>
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</table>
# Stewardship Goal 7.1 Action Plan

## Key Actions Necessary To Achieve Strategic Goal 7.1

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<tr>
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<tr>
<td>8. Begin official roll out and promotion of new Metropolis Stewardship Ministries Program and communicate to the parishes the availability of the Metropolis Stewardship Ministries Program and schedule stewardship training sessions between the Stewardship Trainers and Support Team and the parishes.</td>
<td>S7.1TF and Stewardship Trainers and Support Teams</td>
<td>2 months after step 7</td>
<td>Roll out officially begins and is publicly announced and each parish has been contacted to schedule its Metropolis Stewardship Training</td>
</tr>
<tr>
<td>9. After every delivery of Stewardship Ministries Program, conduct an evaluation of the Stewardship Ministries Program, training and support and systematically review all evaluations and challenges raised and update the Metropolis Stewardship Ministries Program to address challenges.</td>
<td>S7.1TF</td>
<td>Continuously after each Stewardship Ministries Program</td>
<td>Evaluation completed after each program and improvements are made in Metropolis Stewardship Program</td>
</tr>
</tbody>
</table>
# Stewardship Goal 7.1 Action Plan

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<tr>
<td><strong>ON-GOING SUPPORT OF THE STEWARDSHIP MINISTRIES PROGRAM</strong></td>
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<tr>
<td>10. Follow up each parish training session with Stewardship Trainers and Support Team process and regularly scheduled (weekly or monthly) follow-up conference call/webinar/online type sessions to deal with specific parish issues and challenges.</td>
<td>Stewardship Trainers and Support Team</td>
<td>At scheduled intervals after each parish receives Stewardship Training</td>
<td>Each parish has at least one Support session scheduled tailor to its needs, supported by the Stewardship Trainers and Support Team.</td>
</tr>
<tr>
<td>11. Conduct follow-up assessment with parishes of Stewardship Trainers and Support Team process, successes, challenges and revise the Metropolis Stewardship Ministries Program and Stewardship Support Process and make necessary improvements.</td>
<td>S7.1TF in conjunction with Stewardship Trainers and Support Team</td>
<td>Each parish receives follow-up within 6 months of Training and at least semi-annually thereafter</td>
<td>Each parish receives follow-up assessment on Metropolis Stewardship Ministries Program and Stewardship Support Process and Stewardship Ministries Program are improved as a result of lessons learned and feedback received</td>
</tr>
<tr>
<td>12. Every year following the completion of step 11, schedule and hold several meetings (both in person and online) throughout the geography of the Metropolis for parishes to come together and share best practices and lessons learned relating to the implementation of Stewardship Ministries Programs at the parish level.</td>
<td>S7.1TF and Stewardship Trainers and Support Team</td>
<td>Annually after step 11</td>
<td>Several meetings open to all parishes and representatives of their stewardship committees take place throughout the Metropolis (in-person, virtual/video/audio access)</td>
</tr>
</tbody>
</table>
Within 21 months, we will research and develop a best practices program that will help parishes establish effective Welcoming Ministries to ensure that all newcomers are fully embraced and welcomed, that thereafter will be successfully implemented in at least:

(a) 20% of the parishes within 2 years; and

(b) 40% of the parishes within 3 years.
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<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 8.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
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</thead>
<tbody>
<tr>
<td>1. Form Welcoming Outreach &amp; Evangelism Goal 8.1 Task Force (“WO&amp;E8.1TF”).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>SG1TF team members agree to serve and have first meeting</td>
</tr>
<tr>
<td>2. Research most effective best practices metrics and methods regarding Welcoming from both non-Orthodox and Orthodox churches (including visiting other successful churches) and determine appropriate best practices and proper welcoming metrics (including barriers to success) to collect and analyze.</td>
<td>WO&amp;E8.1TF</td>
<td>2 months after step 1</td>
<td>Best practice research methods and metrics for a Welcoming Ministries have been defined.</td>
</tr>
<tr>
<td>3. Develop data collection methods and tools from other Orthodox and non-Orthodox sources that will effectively capture agreed-upon welcoming data and input with a consistent methodology from the widest possible spectrum of parishes, other churches and jurisdictions and beyond (including people who may be interested in becoming Orthodox).</td>
<td>WO&amp;E8.1TF</td>
<td>1 month after step 2</td>
<td>Welcoming research tools and data collection procedures established and finalized.</td>
</tr>
<tr>
<td>4. Execute the data collection methods and tools chosen from step 3 above to identify welcoming data, barriers, opportunities and areas of improvement.</td>
<td>WO&amp;E8.1TF</td>
<td>2 months after step 3</td>
<td>Welcoming research and data collection process implemented at all parishes and other targeted organizations and groups.</td>
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</table>
## Welcoming, Outreach & Evangelism Goal 8.1
### Action Plan

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<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 8.1</th>
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<tbody>
<tr>
<td>5. Compile research and data from steps 2, 3 and 4, and review and analyze results and the current level of welcoming in parishes and identify potential solutions and necessary elements for Welcoming ministries to substantially expand their efforts to better help parishes welcome people into their parish and Orthodox Church.</td>
<td>WO&amp;E8.1TF</td>
<td>2 months after step 4</td>
<td>Welcoming research data from all sources has been collected and analyzed to assess current practices and identify other necessary elements to include in successful Welcoming Ministries Program.</td>
</tr>
<tr>
<td>6. Develop a strategy and detailed program with action plan &amp; timeline (the “Welcoming Ministries Program”) to address the prioritized list of welcoming barriers, programs and training the parishes will need in order to effectively implement the Welcoming Ministries Program, and identify financial, personnel or other resources needed to fully implement it according to the agreed-upon implementation schedule.</td>
<td>WO&amp;E8.1TF</td>
<td>3 months after step 5</td>
<td>Welcoming Ministries program action plan and timelines are finalized.</td>
</tr>
<tr>
<td>7. Implement the Welcoming Ministries Program, by pilot testing it at a minimum of 3 different types, locations and demographics of parishes and their communities throughout the Metropolis.</td>
<td>WO&amp;E8.1TF</td>
<td>2 months after step 6</td>
<td>Parishes are selected and agree to participate in pilot test for Welcoming Ministries Program.</td>
</tr>
<tr>
<td>8. Run the Program at pilot sites, review the results of the Pilot tests, and make changes in the Welcoming Ministries Program as a result of the lessons learned.</td>
<td>WO&amp;E8.1TF</td>
<td>5 months after step 7</td>
<td>Pilot test evaluation is completed. Changes and improvements made to Welcoming Ministries Program.</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 8.1</td>
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<tr>
<td>9. Recruit and train a team to help train and support the parishes in the implementation of the Welcoming Ministries Program (the “Training and Support Team”).</td>
<td>WO&amp;E8.1TF</td>
<td>3 months after step 8</td>
<td>Welcoming Team support members recruited and trained.</td>
</tr>
<tr>
<td>10. Communicate to all parishes the availability of the Welcoming Ministries Program and begin to train and support them based on the established implementation timetable.</td>
<td>WO&amp;E8.1TF</td>
<td>Concurrent with step 9</td>
<td>All parishes receive the Welcoming Ministries Program package. Training and support timetable is implemented on a Metropolis-wide basis.</td>
</tr>
<tr>
<td>11. Communicate/Announce/Publicize any success stories occurring as a result of the implementation of the Welcoming Ministries Program as a “win” to help create momentum and support.</td>
<td>WO&amp;E8.1TF</td>
<td>Concurrent with step 10 and continuously thereafter</td>
<td>Successful Welcoming practices are communicated to all parishes on a timely basis.</td>
</tr>
<tr>
<td>12. At least annually thereafter conduct follow-up assessments with implementing parishes and review and assess success against appropriate welcoming metrics identified in step 2 and assess the effectiveness of the adopting parishes’ activities and then refine the Welcoming Ministries Program accordingly to ensure that goal target percentages of parishes implementing the Welcoming Ministries program is achieved.</td>
<td>WO&amp;E8.1TF</td>
<td>At least annually after step 11 assess parish participation rate and program successes</td>
<td>Welcoming Ministries Program is updated to reflect changes and improvements, and additional churches are recruited to ensure that goal target percentages of parishes implementing the Welcoming Ministries program is achieved.</td>
</tr>
</tbody>
</table>
Within 2 years, we will establish a Metropolis Department of Outreach & Evangelism Ministries to research, develop and train all parishes on how to implement effective Outreach & Evangelism Ministries, that include at least one Signature Outreach or Evangelism Activity each year, so that they will substantially expand their outreach and evangelism efforts to bring more people into the Orthodox Church and better serve their communities.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 8.2</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Welcoming Outreach &amp; Evangelism Goal 8.2 Task Force (&quot;WO&amp;E8.2TF&quot;).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>WO&amp;E8.2TF team members agree to serve and provide contact list of members</td>
</tr>
<tr>
<td>2. Research most effective best practices metrics and methods regarding outreach &amp; evangelism from both non-Orthodox and Orthodox churches (including visiting other successful churches) and determine appropriate best practices and proper outreach and evangelism metrics (including both measures of success and barriers to success) to collect and analyze.</td>
<td>WO&amp;E8.2TF</td>
<td>3 months after step 1</td>
<td>O&amp;E best practices methodology and metrics have been defined.</td>
</tr>
<tr>
<td>3. Develop data collection methods and tools from other Orthodox and non-Orthodox sources that will effectively capture agreed-upon outreach and evangelism data and input with a consistent methodology from the widest possible spectrum of parishes, other churches and jurisdictions and beyond (including people who may be interested in becoming Orthodox and those who have lapsed in participation).</td>
<td>WO&amp;E8.2TF</td>
<td>2 months after step 2</td>
<td>Research methodology and data collection procedures established and finalized.</td>
</tr>
</tbody>
</table>
## Welcoming, Outreach & Evangelism Goal 8.2
### Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 8.2</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>4. Execute the data collection methods and tools chosen from step 3 above to identify outreach and evangelism data, barriers, opportunities and areas of improvement.</td>
<td>WO&amp;E8.2TF</td>
<td>2 months after step 3</td>
<td>O&amp;E research procedures implemented at all parishes and other targeted organizations and groups.</td>
</tr>
<tr>
<td>5. Compile research and data from steps 2, 3 and 4; review and analyze results and the current level of outreach and evangelism in parishes; identify potential solutions and necessary elements and initiatives for a new Metropolis Department of Outreach &amp; Evangelism whose mission is to expand their outreach and evangelism efforts, to help parishes bring more people into the Orthodox Church, and to serve their communities better.</td>
<td>WO&amp;E8.2TF</td>
<td>3 months after step 4</td>
<td>O&amp;E research data from all sources has been collected and analyzed to assess current practices. Outline necessary elements, potential solutions and initiatives for a new Metropolis Department of Outreach &amp; Evangelism</td>
</tr>
<tr>
<td>6. Develop a strategy and set of detailed initiatives with action plans and timelines (the “Outreach &amp; Evangelism Initiatives”) to: (a) address the prioritized list of outreach and evangelism barriers; (b) provide the training parishes will need in order to effectively implement Outreach &amp; Evangelism Initiatives; (c) allow parishes to define and establish at least one annual “Signature Outreach &amp; Evangelism Activity;” (d) identify financial or other resources needed to fully implement it according to the agreed-upon implementation schedule; and (e) create the Metropolis Department of Outreach &amp; Evangelism (“MDOE”).</td>
<td>WO&amp;E8.2TF</td>
<td>3 months after step 5</td>
<td>Outreach &amp; Evangelism Initiatives, action plans, and timelines are finalized for Items 1-5.</td>
</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 8.2</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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</tr>
<tr>
<td>7. Raise any necessary funds or obtain any necessary resources to create a Metropolis Department of Outreach &amp; Evangelism (“MDOE”) and implement the Outreach &amp; Evangelism Initiatives.</td>
<td>WO&amp;E 8.2TF</td>
<td>2 months after step 6</td>
<td>Adequate funding and resources to create the MDOE and implement Outreach &amp; Evangelism Initiatives have been received.</td>
</tr>
<tr>
<td>8. Create job descriptions for, and then recruit and train: (a) the MDOE leader (whether paid staff or volunteer); and (b) the necessary team to help teach the parishes how to implement the Outreach &amp; Evangelism Initiatives and to support their implementation efforts.</td>
<td>WO&amp;E 8.2TF</td>
<td>2 months after step 7</td>
<td>MDOE leader and a MDOE support team have been recruited and trained.</td>
</tr>
<tr>
<td>9. Implement Outreach &amp; Evangelism Initiatives by pilot testing at a minimum of 5 different types of parishes (e.g. urban, suburban, rural) throughout the Metropolis.</td>
<td>WO&amp;ETF 8.2TF MDOE</td>
<td>3 months after step 8</td>
<td>Parishes are selected and agree to participate in pilot test of Outreach &amp; Evangelism Initiatives</td>
</tr>
<tr>
<td>10. Review the results of the pilot tests and make changes in Outreach &amp; Evangelism Initiatives as a result of the lessons learned.</td>
<td>WO&amp;ETF 8.2TF MDOE</td>
<td>1 month after step 9</td>
<td>Pilot test evaluation is completed with changes and improvements made to Outreach &amp; Evangelism Initiatives</td>
</tr>
</tbody>
</table>
### Welcoming, Outreach & Evangelism Goal 8.2 Action Plan

<table>
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<tr>
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<tbody>
<tr>
<td>Communicate to all parishes in the Metropolis the availability of Outreach &amp; Evangelism Initiatives and begin to train and support them based on the established implementation timetable.</td>
<td>WO&amp;E8.2TF MDOE</td>
<td>2 months after step 10</td>
<td>All parishes receive Outreach &amp; Evangelism Initiatives package. Training and support timetable created is implemented.</td>
</tr>
<tr>
<td>Communicate/Announce/Publicize any parish success stories occurring as a result of the implementation of Outreach &amp; Evangelism Initiatives and Signature Outreach &amp; Evangelism Activities as a “win” to help create momentum and support.</td>
<td>WO&amp;E8.2TF MDOE</td>
<td>Concurrently with step 11 and continuously thereafter.</td>
<td>Reports of successful parish O&amp;E activities circulated to all parishes on a timely and continuous basis.</td>
</tr>
<tr>
<td>At least annually thereafter conduct follow-up assessments with implementing parishes and review and assess success against appropriate outreach and evangelism metrics identified in step 2 and assess the effectiveness of the adopting parishes’ Signature Outreach &amp; Evangelism Activities, and refining the Outreach &amp; Evangelism Initiatives accordingly.</td>
<td>WO&amp;E8.2TF MDOE</td>
<td>O&amp;E initiatives and activities are reassessed at least annually after completion of step 11 and periodically thereafter at agreed upon intervals.</td>
<td>The Outreach &amp; Evangelism Initiatives model is revised after each periodic assessment and all parishes are notified of changes and updates in a timely manner.</td>
</tr>
</tbody>
</table>
Metropolis of Chicago
Strategic Planning Retreat #2
Day 3

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

Bill Marianes – May, 2019
www.stewardshipcalling.com  Bill@stewardshipcalling.com
To be a welcoming and inspiring community of God so that we experience Christ’s love with all seeking eternal life.
Sunday

1:00 - Prayer and Lunch (45 minutes)

1:45 - Goal 9.1 Enhanced Worship Engagement & Accessibility

3:00 - Goal 10.1 Comprehensive Youth & Emerging Adults Ministries

4:15 - Next Steps, Transition to Implementation and OZ’s Closing Remarks

5:15 - Metropolitan Nathanael’s Closing Remarks and Thanks
Enhanced Worship Engagement & Accessibility

Within 2 years, we will develop and implement a plan to more fully and measurably engage people of all ages in dynamic worship and sacramental experiences that will be thereafter successfully implemented in at least:
(a) 20% of the parishes within 1 year; and
(b) 33% of the parishes within 2 years.
<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 9.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Worship Engagement &amp; Accessibility Goal 9.1 Task Force.</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month after Start Date</td>
<td>WE&amp;A9.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Research: (a) effective ways to measure and assess high levels of engagement and accessibility in church services and what constitutes best practices associated with worship engagement; (b) both Orthodox &amp; non-Orthodox Churches that report high levels of engagement and accessibility and make site visits and interview to determine successful techniques that can be adapted; (c) most effective metrics and methods to assess and improve levels of engagement and accessibility of church services, all of which will be organized in a comprehensive “Research Report.”</td>
<td>WE&amp;A9.1TF</td>
<td>3 months after step 1</td>
<td>Research is completed and Research Report is finalized with all required elements</td>
</tr>
</tbody>
</table>
## Worship Engagement & Accessibility Goal 9.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 9.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
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</thead>
<tbody>
<tr>
<td>3. Develop data collection methods and tools (e.g. surveys, personal interviews, web solicitations, research from Orthodox and non-Orthodox sources) that will effectively capture worship engagement and accessibility barriers data and input with a consistent methodology from the widest possible spectrum of people (the “Data Collection Plan”), including, but not limited, to: (a) parishioners who regularly attend services; (b) parishioners who do not regularly attend services; (c) youth; (d) seniors; (e) converts; (f) young families; (g) newlyweds; (h) college students; (i) clergy; (j) people who have left the Orthodox church; (k) non-Orthodox.</td>
<td>WE&amp;A9.1TF</td>
<td>2 months after step 2</td>
<td>Full Data Collection Plan is finalized.</td>
</tr>
<tr>
<td>4. Implement the Data Collection Plan to gather the research of barriers associated with worship engagement and accessibility, identify areas of improvement, possible best practices, etc.</td>
<td>WE&amp;A9.1TF</td>
<td>3 months after step 3</td>
<td>Data Collection Plan is completed consistent with guidelines set out in step 3.</td>
</tr>
</tbody>
</table>
## Worship Engagement & Accessibility Goal 9.1
### Action Plan

<table>
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<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 9.1</th>
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<tbody>
<tr>
<td>5. Compile research and data from steps 2, 3, and 4 and review and analyze results and current level of engagement and accessibility and identify potential ways to address barriers and increase level of worship engagement and accessibility.</td>
<td>WE&amp;A9.1TF</td>
<td>2 months after step 4</td>
<td>Data Analysis Report is complied with all findings and recommendations</td>
</tr>
<tr>
<td>6. Develop the “Worship Engagement &amp; Accessibility Plan” to be deployed in the Metropolis that will include: (a) a strategy and detailed implementation plan and timeline that addresses a prioritized list of engagement and accessibility barriers; (b) a process and timeline to train the parishes on the Plan; (c) the necessary budget and resources (financial or other) to fully implement the Plan; and (d) the metrics to be used to measure its success and conformity to best practices.</td>
<td>WE&amp;A9.1TF</td>
<td>4 month after step 5</td>
<td>Worship Engagement &amp; Accessibility Plan is developed and completed with all require elements</td>
</tr>
<tr>
<td>7. Raise any necessary funds or obtain necessary resources to effectively implement the Worship Engagement and Accessibility Plan based on an established budget.</td>
<td>WE&amp;A9.1TF</td>
<td>3 months after step 6</td>
<td>Fundraising is completed based on established budget</td>
</tr>
</tbody>
</table>
# Worship Engagement & Accessibility Goal 9.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 9.1</th>
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<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Recruit:</td>
<td>WE&amp;A9.1TF</td>
<td>Simultaneous with step 7</td>
<td>Pilot Parishes are recruited and agree to participate and people agree to serve on Parish Team</td>
</tr>
<tr>
<td>(a) a minimum of 5 different types of parishes from throughout the Metropolis to pilot test the Worship Engagement and Accessibility Plan (the “Pilot Parishes”); and (b) a team to help teach parishes (“Parish Team”) how to implement the Worship Engagement &amp; Accessibility Plan and support the parish’s implementation.</td>
<td></td>
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</tr>
<tr>
<td>9. Begin the “Pilot Test” of the Worship Engagement &amp; Accessibility Plan in the Pilot Parishes, and the Parish Team are trained on how to best support parishes in implementing the Worship Engagement and Accessibility Plan.</td>
<td>WE&amp;A9.1TF and Pilot Parishes</td>
<td>1 month after steps 7 and 8</td>
<td>Pilot Test begins in the Pilot Parishes</td>
</tr>
<tr>
<td>10. Review the results of the Pilot Test and make adjustments/changes to the Worship Engagement &amp; Accessibility Plan based on results and feedback from Pilot Parishes.</td>
<td>WE&amp;A9.1TF and Parish Team</td>
<td>4 months after step 9</td>
<td>Worship Engagement and Accessibility Plan is modified based on lessons learned in the Pilot Test</td>
</tr>
</tbody>
</table>
## Worship Engagement & Accessibility Goal 9.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 9.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
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<tbody>
<tr>
<td>11. Communicate to all parishes the availability of the Worship Engagement &amp; Accessibility Plan and success of the Pilot Tests and recruit, train and successfully implement the Worship Engagement and Accessibility Plan in: (a) at least 20% of the parishes over the next year; and (b) 33% of the parishes over the next two years, all based on an implementation timetable to be established.</td>
<td>WE&amp;A9.1TF and Parish Trainers</td>
<td>1 month after step 10</td>
<td>Availability of Worship Engagement and Accessibility Plan is promoted and the respective target numbers of parishes are recruited and trained pursuant to the implementation timetable</td>
</tr>
<tr>
<td>12. At least annually thereafter: (a) follow-up assessments with all implemented parishes are completed to review and analyze success against defined metrics/goals identified in step 2 and refine the Worship Engagement &amp; Accessibility Plan accordingly; and (b) additional parishes are recruited and trained in the Worship Engagement and Accessibility Plan in order to achieve the desired stated goal target percentages to be achieved.</td>
<td>WE&amp;A9.1TF</td>
<td>Annual review</td>
<td>Annual review completed and Worship Engagement and Accessibility Plan refined based on lessons learned and additional parishes are recruited, trained and implemented in order to achieve the stated goal target percentages</td>
</tr>
</tbody>
</table>
Within 18 months, we will fully research, develop and begin implementing comprehensive, measurably excellent and separate ministries and programs that demonstrably and materially increase spiritual and intellectual engagement, fellowship and service among:

(a) middle and high school youth

(b) college age and graduate school students

(c) emerging adults.
# Youth & Emerging Adult Goal 10.1 Action Plan

<table>
<thead>
<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 10.1</th>
<th>Responsible Party</th>
<th>Timetable</th>
<th>Completion Confirmation Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Form Youth and Emerging Adults Goal 10.1 Task Force (&quot;Y&amp;EA10.1TF&quot;) (that will include the Metropolis Youth Director).</td>
<td>Strategic Planning Team and Goal Captain</td>
<td>1 month from Start Date</td>
<td>Y&amp;EA10.1TF team members agree to serve</td>
</tr>
<tr>
<td>2. Research and investigate from both non-Orthodox and Orthodox churches (including visiting other successful churches):</td>
<td>Y&amp;EA10.1TF</td>
<td>3 months after step 1</td>
<td>Report is finalized summarizing root cause issues and most appropriate best practices metrics and methods</td>
</tr>
<tr>
<td>(a) root cause issues facing youth and emerging adult ministries for (the &quot;3 Target Demographics&quot;):</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(i) middle and high school youth;</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(ii) college age and graduate school students; and</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>(iii) emerging adults.</td>
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</tr>
<tr>
<td>(b) most appropriate and effective best practices metrics and methods to evaluate youth and emerging adult ministries in all 3 Target Demographics in order to demonstrably and materially increase youth and emerging adult spiritual and intellectual engagement, fellowship and service.</td>
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</tr>
<tr>
<td>Key Actions Necessary To Achieve Strategic Goal 10.1</td>
<td>Responsible Party</td>
<td>Timetable</td>
<td>Completion Confirmation Test</td>
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</tr>
<tr>
<td>3. Develop uniform data collection methods and tools (e.g., surveys, personal interviews, web solicitations, and original research from other Orthodox and non-Orthodox sources) that will most effectively capture from the widest possible spectrum of Metropolis youth and emerging adults, parishes, and other both Orthodox and non-Orthodox churches, jurisdictions and beyond, the agreed-upon youth and emerging adult ministries data, input, root cause problems solutions and best practices for each of 3 Target Demographics.</td>
<td>Y&amp;EA10.1TF</td>
<td>Simultaneous with step 2</td>
<td>Report on data collection methods is finalized and surveys are prepared</td>
</tr>
<tr>
<td>4. Execute the data collection methods and tools chosen from step 3 above to identify youth and emerging adult ministries data, input, root cause problems solutions and best practices for each of 3 Target Demographics.</td>
<td>Y&amp;EA10.1TF</td>
<td>3 months after step 3</td>
<td>Data collection is completed</td>
</tr>
</tbody>
</table>
# Youth & Emerging Adult Goal 10.1 Action Plan

<table>
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<tr>
<th>Key Actions Necessary To Achieve Strategic Goal 10.1</th>
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<th>Timetable</th>
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<tbody>
<tr>
<td>5. Compile research and data from steps 2, 3 and 4 and:</td>
<td></td>
<td></td>
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<tr>
<td>(a) review and analyze results and the current level of youth and emerging adult spiritual and intellectual engagement, fellowship and service in parishes; and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(b) identify potential solutions and necessary elements and metrics for youth and emerging adult ministries to demonstrably and materially increase spiritual and intellectual engagement, fellowship and service efforts for all 3 Target Demographics.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Y&amp;EA10.1TF</td>
<td>2 months after step 4</td>
<td>Report summarizing findings and potential best in class solutions from all collected data is completed</td>
<td></td>
</tr>
</tbody>
</table>
# Youth & Emerging Adult Goal 10.1 Action Plan

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<tbody>
<tr>
<td>6. Develop a strategy and detailed program with action plan and timeline (the “Youth and Emerging Adult Ministries”) to address the prioritized list of youth and emerging adult opportunities, issues, programs and training the parishes will need in order to effectively, demonstrably and materially increase spiritual and intellectual engagement, fellowship and service for all 3 Target Demographics, including identifying: (a) the metrics we will measure to determine success of the Youth and Emerging Adult Ministries for each of the 3 Target Demographics; and (b) the financial, personnel or other resources needed to fully implement it according to the agreed-upon established implementation schedule.</td>
<td>Y&amp;EA10.1TF and Metropolitan</td>
<td>4 months after step 5</td>
<td>Youth and Emerging Adult Ministries has been approved by the Metropolitan and Metropolis Youth Director</td>
</tr>
</tbody>
</table>
# Youth & Emerging Adult Goal 10.1 Action Plan

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<tr>
<td>7. Begin to recruit and train a team to help train and support the parishes in the implementation of the final Youth and Emerging Adult Ministries (the “Training and Support Team”).</td>
<td>Y&amp;EA10.1TF</td>
<td>2 months after step 6</td>
<td>Training and support team of at least 8 members agree to serve</td>
</tr>
<tr>
<td>8. Training and Support Team will conduct at least 8 regional training programs regarding the Youth and Emerging Adult Ministries throughout the Metropolis.</td>
<td>Y&amp;EA10.1TF and Training and Support Team</td>
<td>2 months after step 7</td>
<td>At least 8 regional training programs are conducted</td>
</tr>
<tr>
<td>9. Communicate to all parishes the availability of the Youth and Emerging Adult Ministries and continue to train and begin to support them in the implementation based on the established implementation timetable created in step 6.</td>
<td>Y&amp;EA10.1TF and Training Support Team</td>
<td>1 month after step 8</td>
<td>Communication is delivered to each parish with information about training and support</td>
</tr>
</tbody>
</table>
## Youth & Emerging Adult Goal 10.1 Action Plan

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<tbody>
<tr>
<td>Communicate/Announce/Publicize any success stories occurring as a result of the implementation of the Youth and Emerging Adult Ministries as a “win” to help create momentum and support.</td>
<td>Y&amp;EA10.1TF</td>
<td>At least monthly after step 9</td>
<td>Monthly success stories are publicized</td>
</tr>
<tr>
<td>At least annually thereafter conduct follow-up assessments with implementing parishes and review and assess success against appropriate youth and emerging adult metrics identified in steps 2 and 5 and assess the effectiveness of the adopting parishes’ activities and then refine the Youth and Emerging Adult Ministries to ensure that is has demonstrably and materially increased spiritual and intellectual engagement, fellowship and service for each target demographic.</td>
<td>Y&amp;EA10.1TF</td>
<td>Beginning annually after step 10</td>
<td>Annual update to Youth and Emerging Adult Ministries is published</td>
</tr>
</tbody>
</table>
Transition from Strategic Planning to Implementation
Next Steps For Success

1. Pick the Term Of the Strategic Plan and Vision Statement

In \((X)\) 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
<table>
<thead>
<tr>
<th></th>
<th>Strategic Goals</th>
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<tbody>
<tr>
<td>1.1</td>
<td>30 months</td>
<td></td>
</tr>
<tr>
<td>1.2</td>
<td>42 months</td>
<td></td>
</tr>
<tr>
<td>2.1</td>
<td>18 months</td>
<td></td>
</tr>
<tr>
<td>2.2</td>
<td>18 months</td>
<td></td>
</tr>
<tr>
<td>3.1</td>
<td>54 months</td>
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</tr>
<tr>
<td>3.2</td>
<td>56 months</td>
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<td>4.1</td>
<td>36 months</td>
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<td>5.1</td>
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<td>5.2</td>
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<td>6.1</td>
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<td>6.2</td>
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<td>7.1</td>
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<td>8.1</td>
<td>57 months</td>
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<tr>
<td>8.2</td>
<td>24 months</td>
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<tr>
<td>9.1</td>
<td>48 months</td>
<td></td>
</tr>
<tr>
<td>10.1</td>
<td>18 months</td>
<td></td>
</tr>
</tbody>
</table>

1 - 2 years = green
2 - 3 years = blue
3 - 4 years = purple
4 - 5 years = red
Strategic Goals

Clergy Development & Formation
1.1  Clergy Wellness  (30 months)
1.2  Clergy Development  (42 months)

Communication & Technology
2.1  Metropolis Communications Plan  (18 months)
2.2  Metropolis Technology Plan  (18 months)

Education & Spiritual Literacy
3.1  Youth Religious Education  (54 months)
3.2  Adult Religious Education  (56 months)

Lay Leadership Development
4.1  Parish Council, Ministry & Youth Leadership Program  (36 months)
Strategic Goals

Life Cycle Ministries
5.1 Family Ministries (42 months)
5.2 Seniors Ministries (42 months)

Metropolis Administration & Best Practices
6.1 Best Practices Metropolis Operations Plan (27 months)
6.2 Ministry Accountability, Performance & Remediation (45 months)

Stewardship
7.1 Comprehensive Parish Stewardship Ministries Program (42 months)
Welcome, Outreach & Evangelism
8.1 Welcoming Ministries (57 months)
8.2 Outreach & Evangelism Ministries (24 months)

Worship Engagement & Accessibility
9.1 Enhanced Worship Engagement & Accessibility (48 months)

Youth & Emerging Adults
10.1 Comprehensive Youth & Emerging Adults Ministries (18 months)
Next Steps For Success

2. Action Plan Finalization

➢ MAY 31, 2019 FINAL RETREAT #2
   EDITS MUST BE SENT TO OZ

3. Communications Begins

Metropolis, Metropolitan and all of you start to communicate about Strategic Plan elements and continue recruitment of Implementation Team Members
4. The Implementation Management Team

~ All 16 Strategic Goals will have:
  • Goal Co-Captains to manage and lead the work to execute the Action Plan steps to achieve that specific goal
  • Its own Implementation Task Force

~ The Head Coach (with support from staff) will coordinate with all Goal Co-Captains and, together with Metropolitan Nathanael form the IHQ (Implementation HeadQuarters) to manage the implementation
Next Steps For Success

The Implementation Leadership Team

- Head Coach
- Assistants

- Clergy
- Com/Tech
- Education
- Leadership
- Life Cycle
- Met Admin
- Stewardship
- Welcome O&E
- Worship
- Youth &EA
Next Steps For Success

5. Strategic Plan Step 4
   Final writing and graphic design of the Strategic Plan book begins in June and July with finalization and printing of book in August

6. Start Date Selection
   A start date for each Goal is determined by Goal Co-Captains (with input from IHQ)
7. **Strategic Plan Step 5 Roll Out**

- Metropolis-wide roll out event
  - Friday September 27, 2019 at Clergy Laity Assembly in Minneapolis
- All day (multiple presenters)
- EVERYONE is invited, not just CLA delegates
- Everyone get to attend 2 breakout sessions from the 10 Areas of Focus to learn about the Goals
- Everyone is recruited to volunteer

**Next Steps For Success**
8. What can you do?

➢ Let IHQ know what role you would like to play (e.g., Goal Captain, Goal Task Force member, support, proof reading, communications, anything else...)

➢ Talk it up (parish, friends)

➢ Be positive

➢ Repeat the Why, Mission, Vision...

➢ Recruit others to specific Goal Teams

➢ Get people to the Strategic Plan Rollout at Clergy Laity

➢ Constantly communicate about it
8. Where can someone learn more?

➢ As the work is completed, it will all be posted on the Metropolis of Chicago Strategic Planning Pages of its Website: http://chicago.goarch.org стратегический планирование
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 are together.”

3. “No more business as usual.”

4. “We have a great Strategic Plan that addresses our most critical needs.”
Four New Big Messages

1. This is about the whole Metropolis coming together to work on addressing our most critical 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 team
We want **YOU** to complete the Implementation Volunteer Form

Tell us on which Goal(s) you want to work and if you’re willing to be a Goal Captain

Recruit your talented friends to work on these Goals
Please Fill Out The Volunteer Form Now!
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
WHY Statement

To be a welcoming and inspiring community of God so that we experience Christ’s love with all seeking eternal life.
THANK YOU!

- Metropolitan Nathanael
- John Manos & Pam Argyris & Task Force Co-Captains/Secretaries
- All who have joined us, and will join on this amazing journey that has really just begun
The one comprehensive solution to many of our challenges is:

ENGAGEMENT
Christ’s 3 C’s Messages

Christ’s Great Commandment

“That you love one another; as I have loved you”

John 13:34

Christ’s Great Charge

“Go and do likewise”

Luke 10:37

Christ’s Great Commission

“Go therefore and make disciples of all the nations”

Matthew 28:19
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
We are what we repeatedly DO.

Excellence, then, is not an act, but a HABIT

~ Aristotle
“Your life does not get better by chance. It gets better by change”

Jim Rohn
“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”

Sun Tzu
“A dream is just a dream. A goal is a dream with a plan and a deadline.”

Harvey Mackay
“You must be the change you wish to see in the world.”

Mahatma Gandhi
“Leaders of a Church will either be risk takers, caretakers or undertakers.”

Pastor Rick Warren
“The best time to plant a tree was 20 years ago.
The second best time is today.”

Old Chinese Proverb
The Holy Spirit and Boldness

“Until one is committed, there is hesitancy, the chance to draw back... Concerning all acts of initiative (and creation), there is one elementary truth that ignorance of which kills countless ideas and splendid plans: that the moment one definitely commits oneself, then Providence moves too. All sorts of things occur to help one that would never otherwise have occurred... Whatever you can do, or dream you can do, begin it. Boldness has genius, power, and magic in it. Begin it now!

Goethe - William Hutchinson Murray
“It is not the critic who counts; not the person who points out how the strong person stumbled or where the doer of deeds could have done them better. 
The credit belongs to the person who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs and comes short again and again; who knows great enthusiasms, the great devotions; who spends themselves in a worthy cause; who at the best, knows in the end the triumph of high achievement, and who, at the worst, if they fail, at least fail while daring greatly so that their place shall never be with those timid souls who neither know victory nor defeat.”

President Theodore Roosevelt
“Either lead, follow or get out of the way.”

- Ted Turner
- General George S. Patton
- Lee A. Iacocca
- Thomas Paine
- Bill Marianes
“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”
“...I beg you to lead a life worthy of the calling to which you have been called...”

St. Paul’s Letter to the Ephesians 4:1
It’s Time To Get Busy

“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
What was Albert Einstein’s greatest contribution?

E=mc²

“NOTHING HAPPENS UNTIL SOMETHING MOVES”
“NOTHING HAPPENS UNTIL SOMEBODY MOVES”
Closing Remarks
You have been called as one of the 70 Disciples

Luke 10:1