



Strategic Planning



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

Proverbs 29:18

Bill Marianes – September, 2015

Bill@stewardshipcalling.com

www.stewardshipcalling.com



**“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”**



Today's Goal





Awaken





Reset Something In Your Life





Make Something Happen!





TODAY,
WE MAKE HISTORY

TODAY,
WE MAKE A DIFFERENCE



2 Premises

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



2. None of us can do as much as all of us can do together.

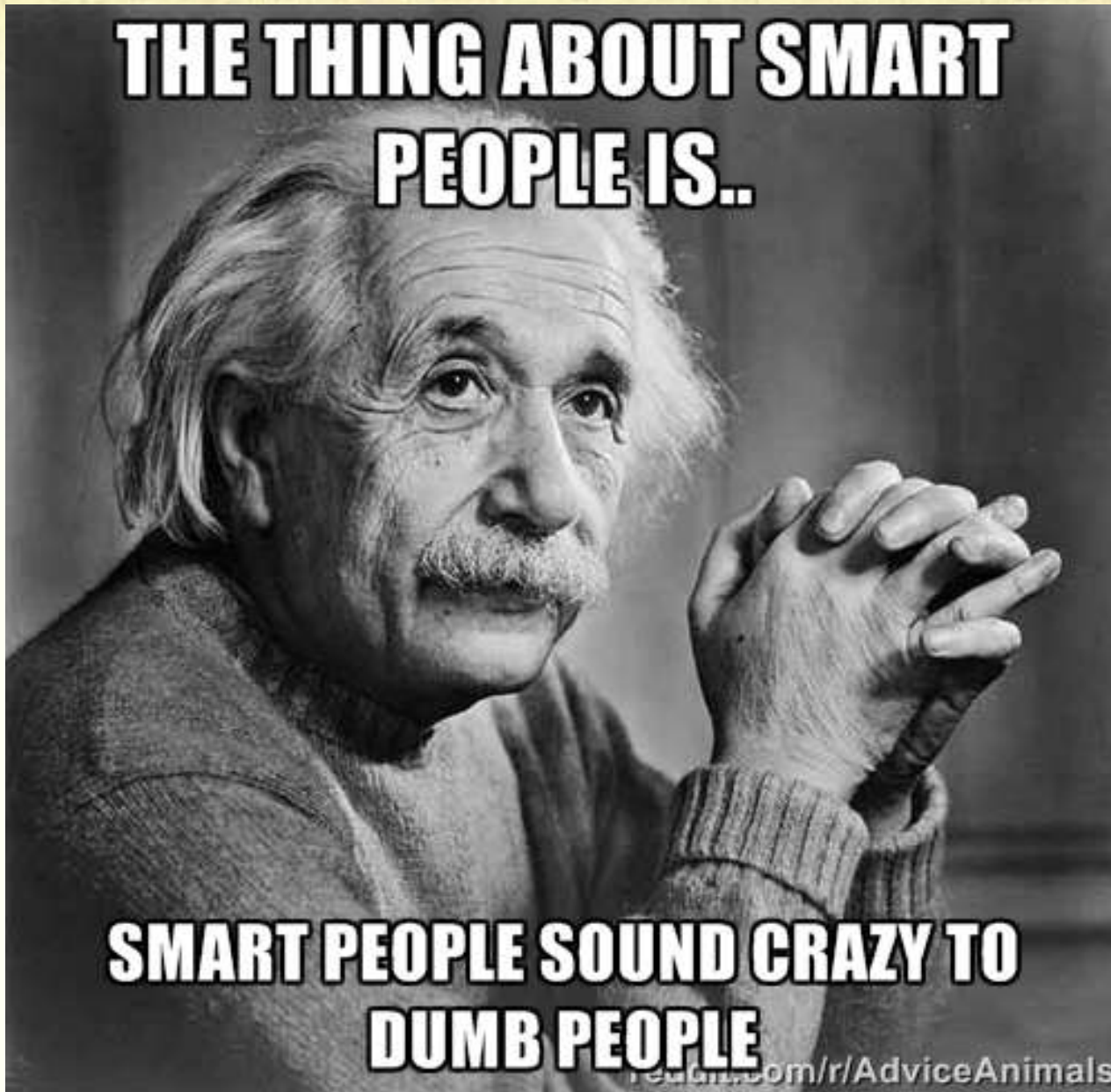


¹Japanese Proverb - Ken Blanchard – Others – Bill Marianes

² Bill Marianes



**THE THING ABOUT SMART
PEOPLE IS..**



**SMART PEOPLE SOUND CRAZY TO
DUMB PEOPLE**

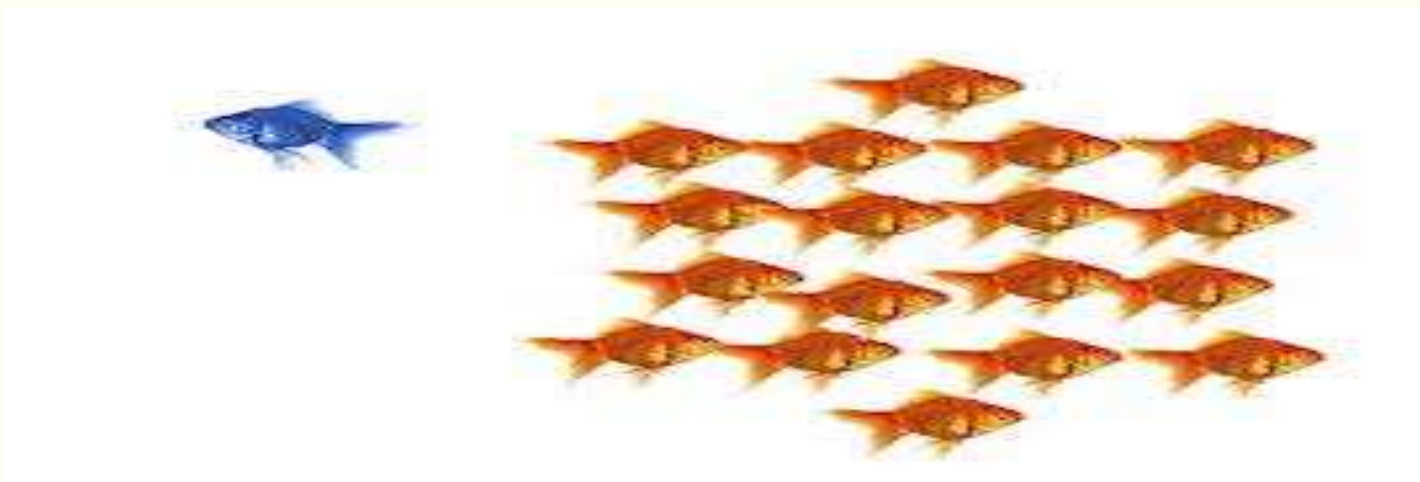


Intelligence Test





**Before we get started,
let's have some fun and
expand our minds and
creative thinking...**





Part 1

WHY ?

Parish Strategic Planning



How has our world changed?



Why do we need a strategic plan for our Parish?



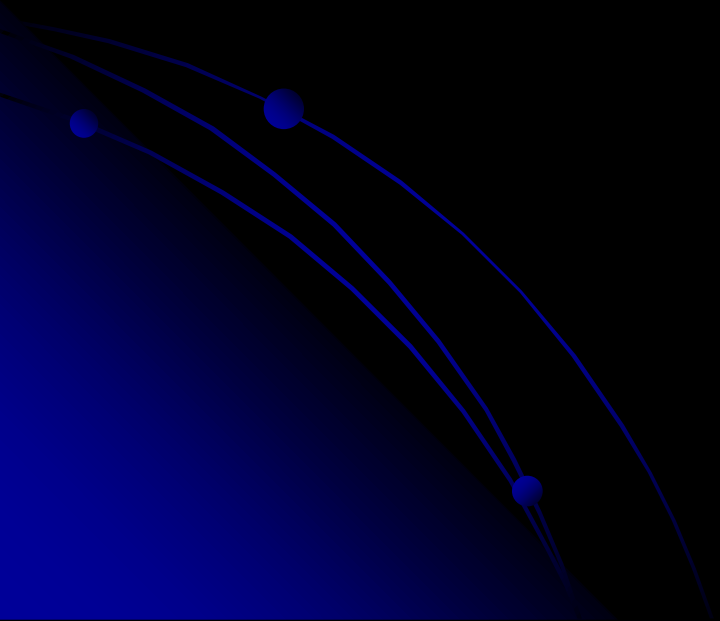
We are living in exponential times²...

... the speed of change is
unimaginable and accelerating

² The 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.)

We are living in exponential times...



Years it took to reach 50 million users:

Telephone - 75 years



Radio - 38 years



TV - 13 years



Internet - 4 years



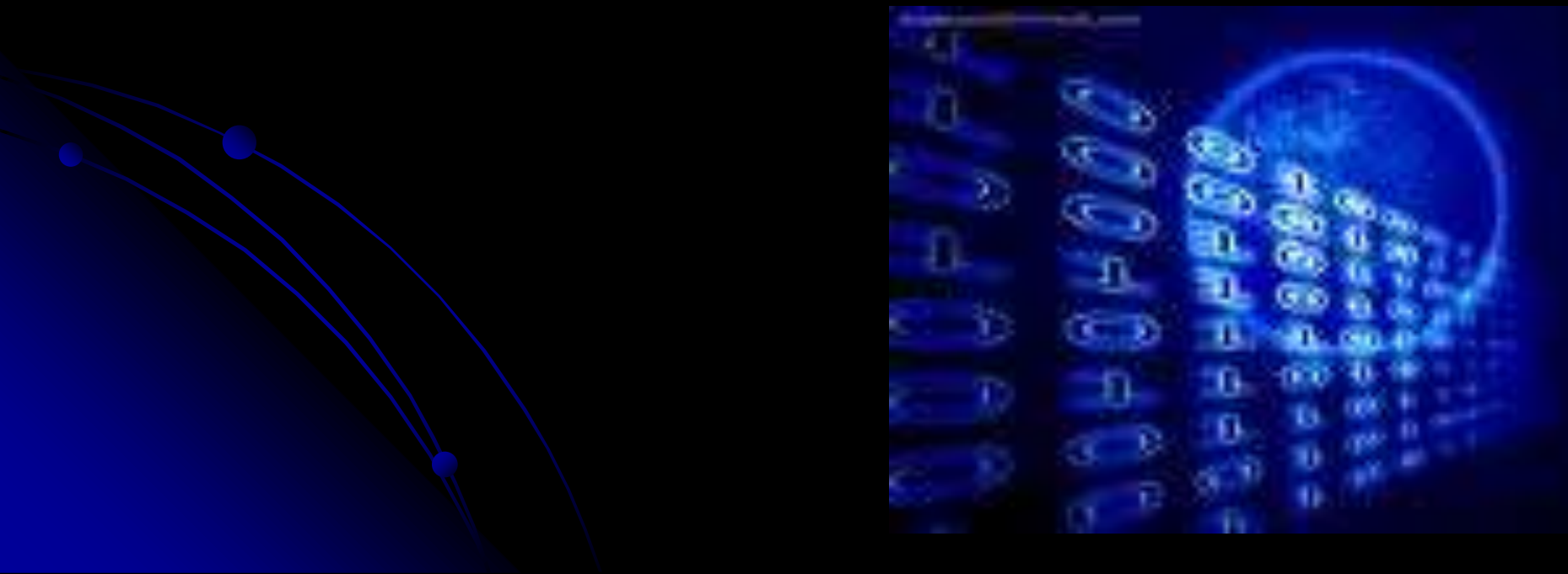
Google Plus - 88 days



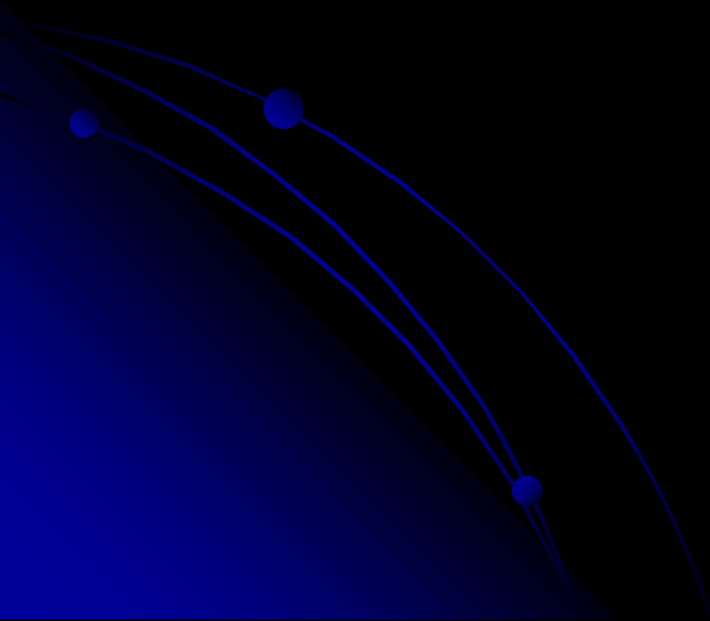
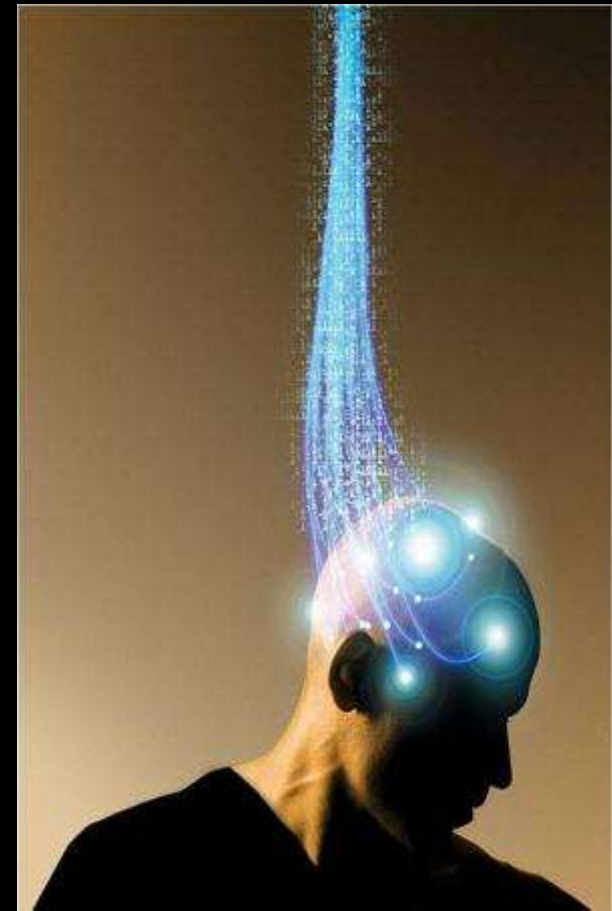
Angry Birds - 35 days



The amount of new technical information being created was doubling every 2 years at the beginning of the last decade.



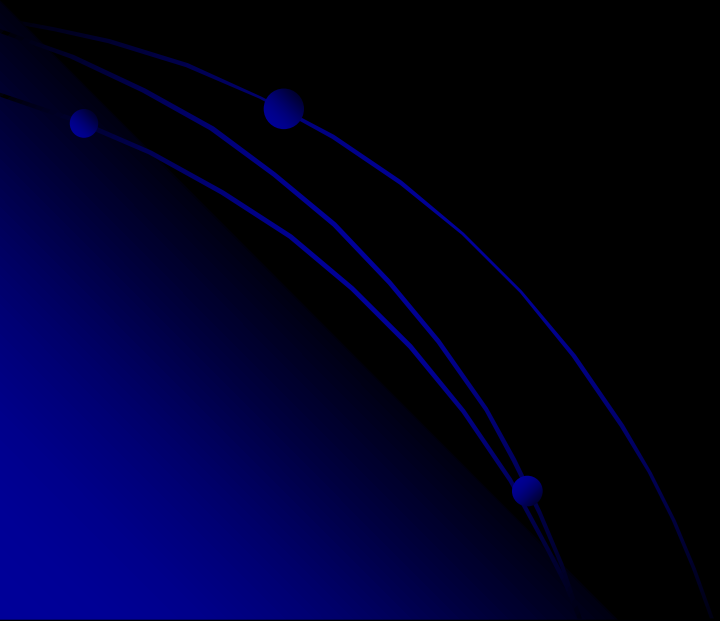
The amount of new technical information is currently estimated to double every 72 hours as of 2010.



Modern Smart phones have much more computing power when compared to Apollo mission computers that NASA used to go to the moon in the 1960s.



We are living in exponential times...



You  started in December
2005...

... it currently experiences over
1 Billion unique viewers
EACH MONTH.

... it currently experiences
over 6 Billion hours
viewed EACH MONTH.

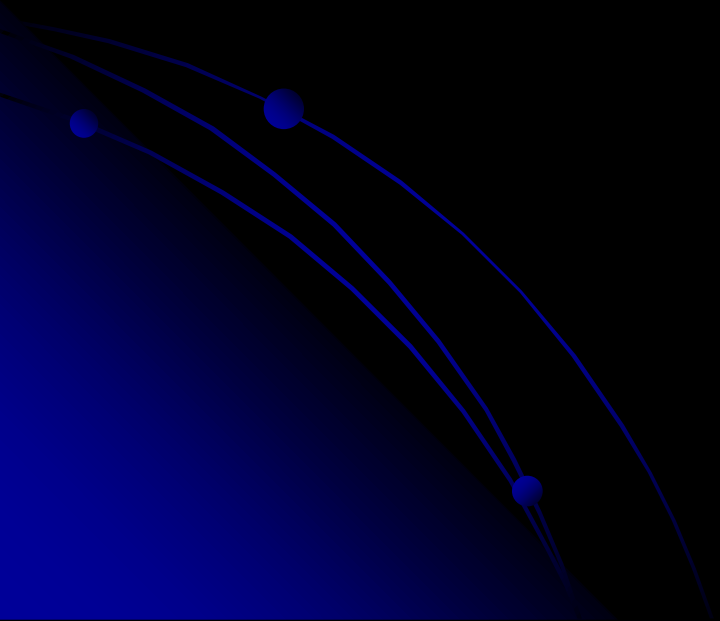
More video content was
uploaded to **You Tube**
in the last 2 months...

Then the amount of content that
would be aired if all three major
networks broadcast content



24 hours per day
for 62 years

We are living in exponential times...



Twitter receives 500 million tweets per day.



...and hit a peak of 143,199 tweets per second in 2013

facebook.

started about 12
years ago in October 2003

It now has over 1.49 Billion
active monthly users.

It is has over 968 Million
active daily users.

Average U.S. Woman
has 250 friends.

If Facebook were a country . . .



. . . it would be the
2nd largest country
in the world

. . . behind only China.

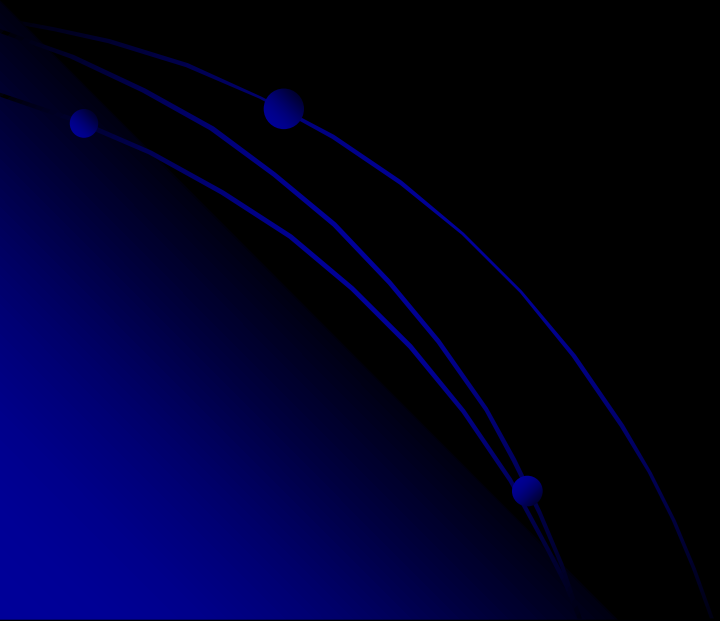
Slightly larger than
India and 4.7 times
bigger than the U.S.

Recent PEW research concluded that:

over 30% of people now get their news from **facebook.**

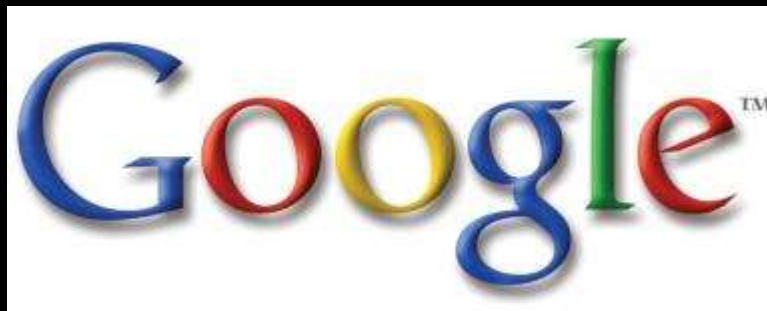
64% of adults in the US use Facebook

We are living in exponential times...



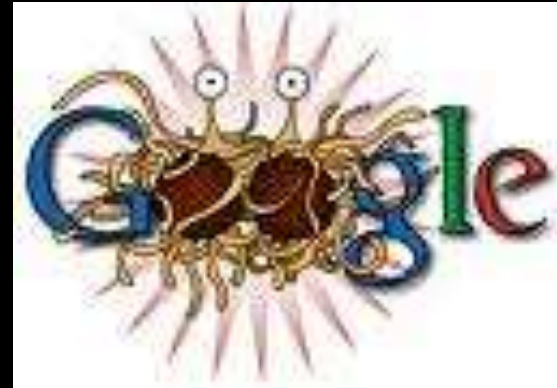
There are approximately
3.5 BILLION Google
internet searches per DAY

(1.2 TRILLION per year)



To whom were those
questions directed B.G?

(Before Google)





Email Facts 2012

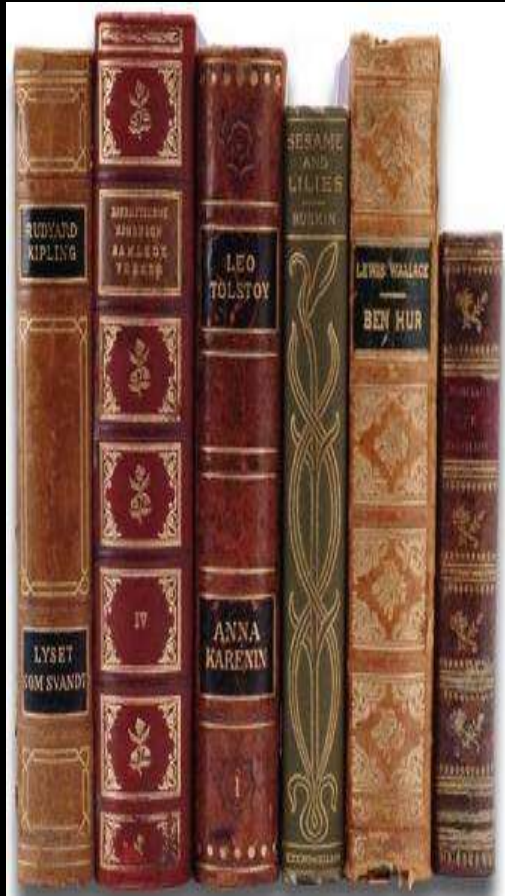


2.6 Billion email users worldwide

205 Billion daily worldwide emails

900 Million Gmail accounts globally

est. 59% of all email is SPAM



More than 6,000
new books are
published
globally...

. . . Daily



A week's
worth of New
York Times
contains more
information...



...than a person
was likely to come
across in a lifetime
in the 18th
century.



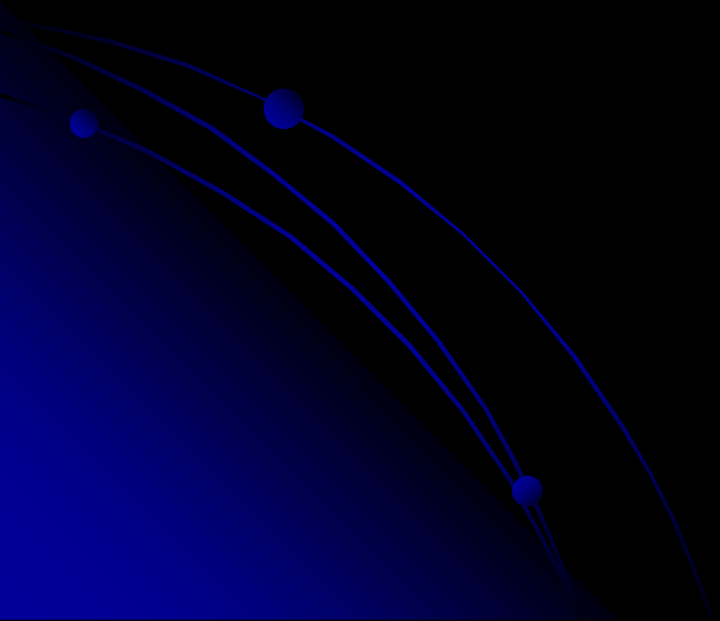


In a recent study, online students out-performed...



...those students receiving face-to-face instruction.

We are living in exponential times...





Within the life
of the current
“younger generation”
the number one
English speaking
country in the
world will be

... China



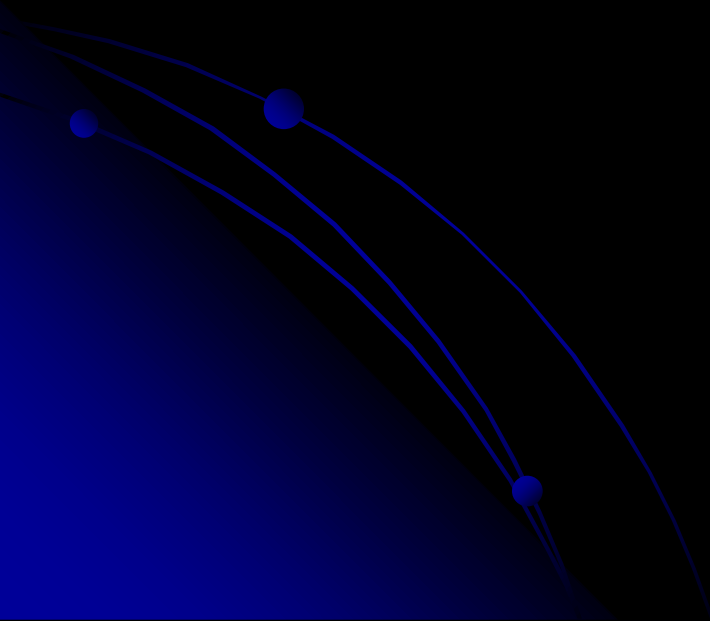
How many
college
graduates in
India speak
English?

...100%



The 25% of India's population with the highest IQ is greater than the total population of the U. S.

Translation: India has
more honors kids than
the U.S. has kids



We are living in exponential times...

... Your children live in a different world than you did and are playing

"a game with which you are not familiar."¹

¹ In 1965, at The Masters, golfing legend Bobby Jones used this phrase to describe the play of Jack Nicklaus.

The average kid today sends
2,640 text messages...



...per month

That's 88 per day...

In 2014, there will be an
estimated 50 BILLION text
messages sent in the world..

... PER DAY





90% of kids have used a computer by age 2.



By age 5, 50% of children use computers or tablet devices on a routine basis



In a recent study, online students out-performed...



...those students receiving face-to-face instruction.

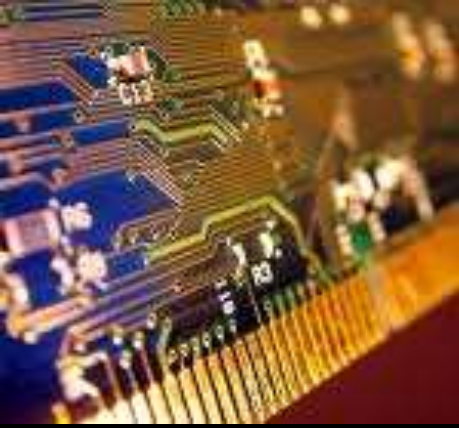
The top 10 on demand jobs in 2012...



... did not even exist in
2004

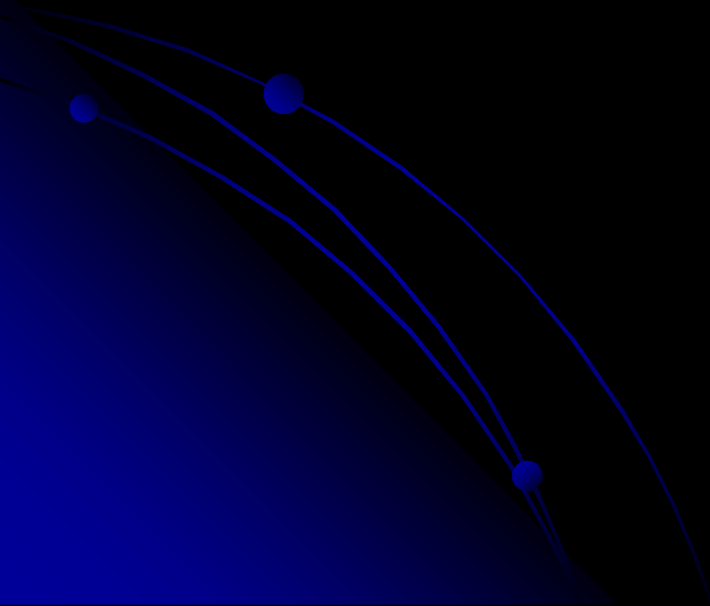


In other words, we
are currently
preparing students
for jobs that don't
yet exist



. . . using technologies
that haven't yet been
invented...

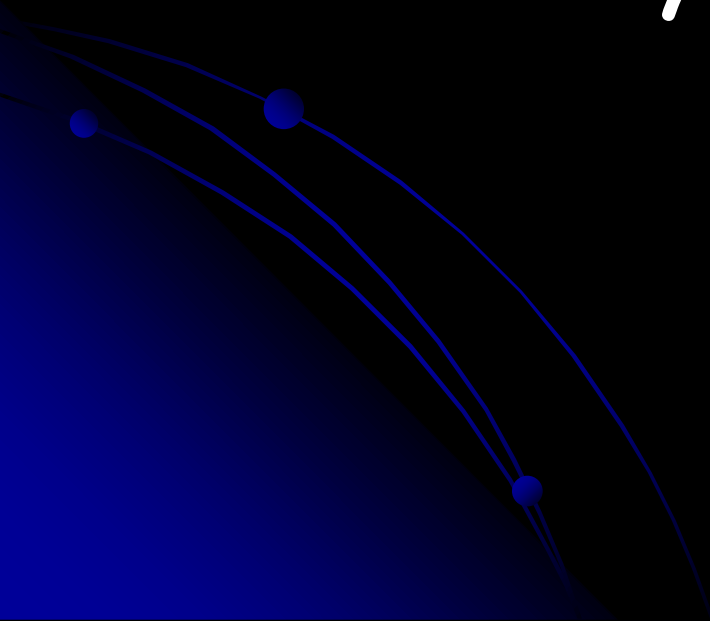
...in order to solve
problems we don't
even know are
problems yet





Today's learners
will have 10 to
14 jobs...

... by their 38th birthday



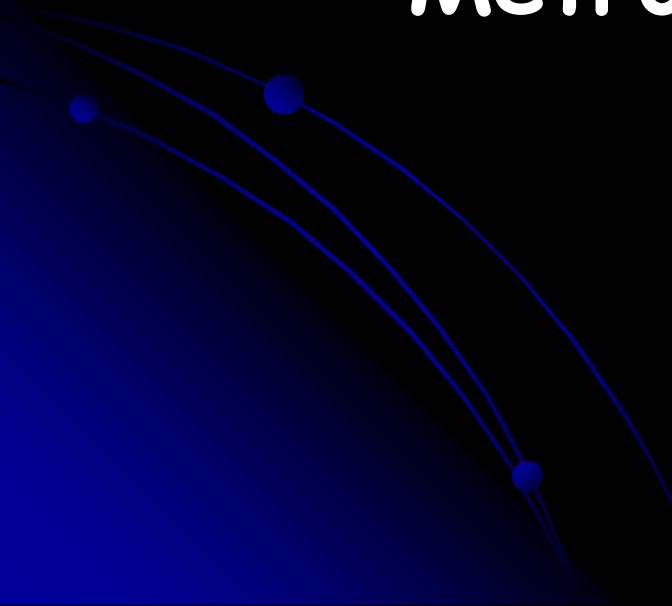


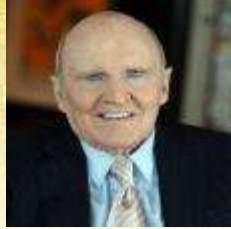
1 out of 8 couples married in
the U.S. in 2005 . . .
. . .met online

By 2013, 1 out of 3
couples in the U.S.
met online

We are living in exponential times...

So what does this mean for the
St. John the Divine Greek
Orthodox Church and the
Metropolis of Atlanta





Jack Welch

Chairman & CEO - General Electric



“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.”





The Challenge - Real Facts, Figures and Statistics





So how are we doing at creating:

“a good account before the awesome judgment seat of Christ”?

The Facts Regarding the “SIN” Challenges Facing American Christian Churches

Spirituality challenges

Income challenges

Numbers challenges

We Have an Unemployment and Underemployment Challenge



The 2 Biggest Parish Challenges

1. Unemployment - the “parishioners” who are not involved in any ministries or services
2. Underemployment - the parishioners who are not as actively engaged in ministries and services as they could be



Selected “Spirituality” Challenge Facts





Laity Spirituality Challenges 1

- “Regular Bible reading dropped over the last decade from 45% to 37%.
- Volunteering at church declined from 27% to 20% over the same decade.
- Church attendance has slipped from 49% to 42% percent.
- 40% of Christians do not attend church or read the Bible in a typical week
- 70% of Christians are not involved in a small group that meets for spiritual purposes
- There are more than 10 million Christians who are un-churched”

¹ State of the Church report by the Barna Research Group (BRG) from a nationwide study of the country's faith practices and perspectives

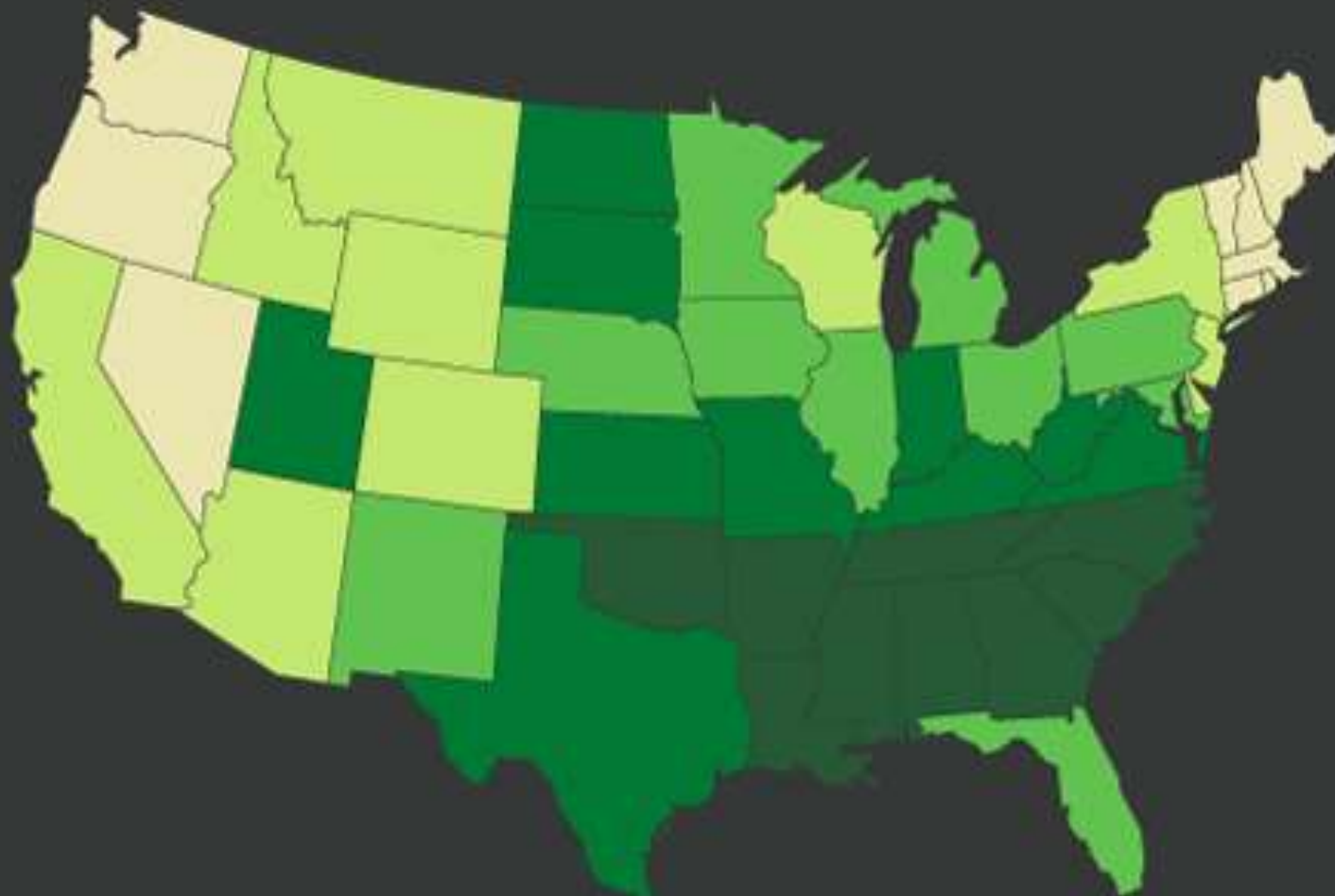


Where You Live Matters

State of the States
Importance of Religion

GALLUP POLL

- Most Religious
- More Religious
- Average
- Less Religious
- Least Religious



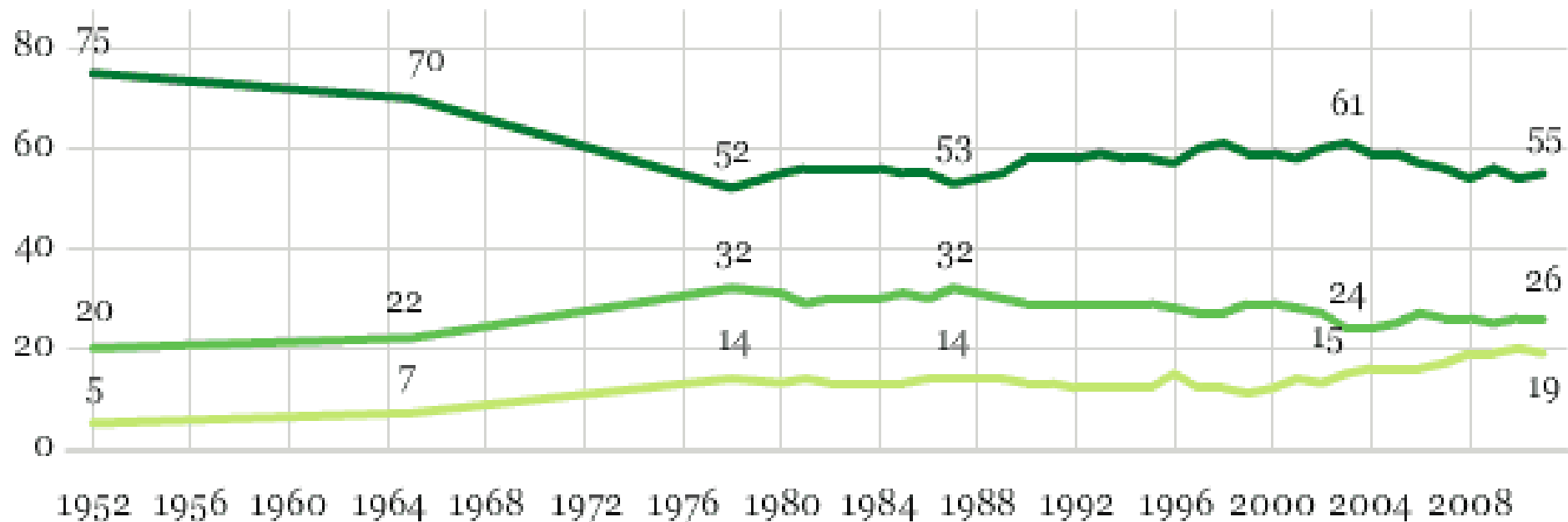


The Importance of Religion

How important would you say religion is in your own life -- very important, fairly important, or not very important?

Annual averages

■ % Very important ■ % Fairly important ■ % Not very important





The Youth Challenge Facts

The “millennial generation” (born after 1980) is “less religiously affiliated” than any previous generation.¹

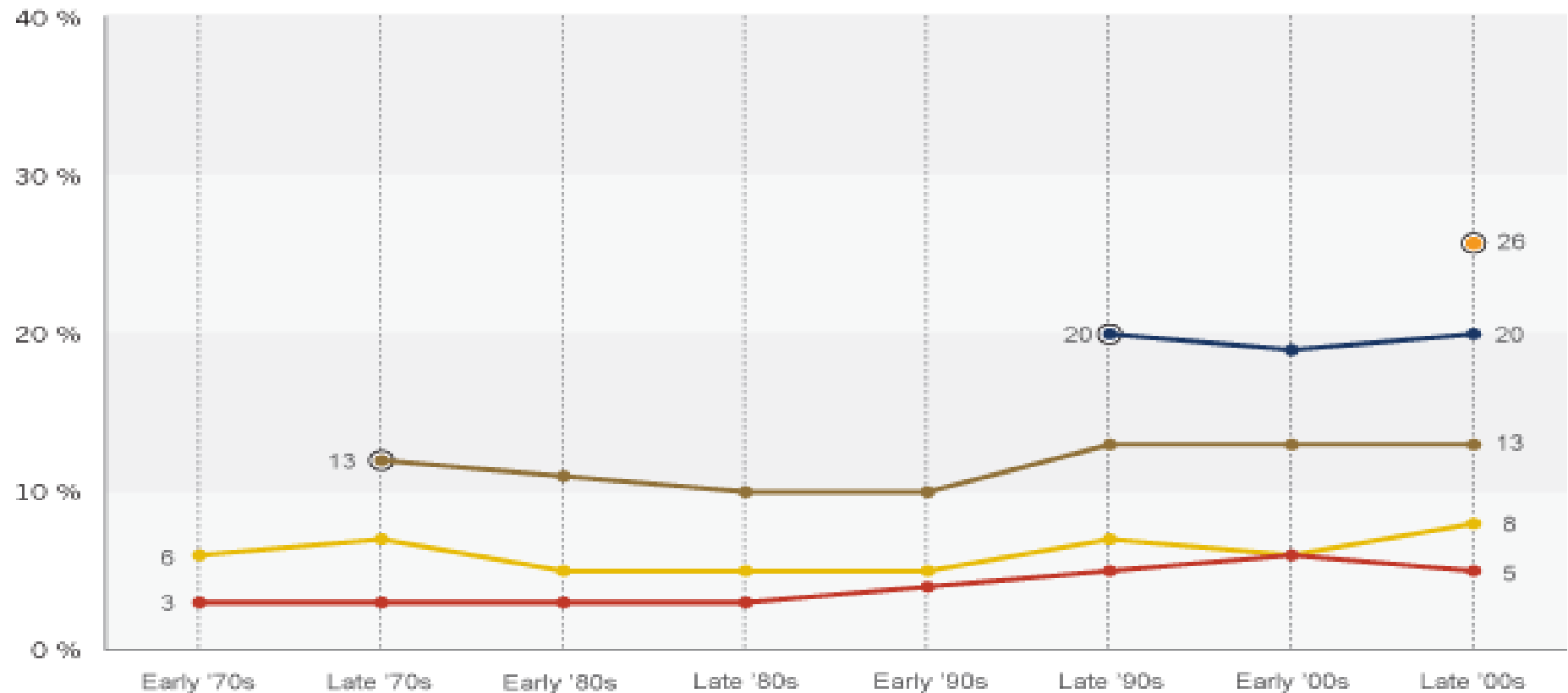
One in four Americans aged 18-29 do not affiliate with any particular religious group.

Millennials are twice as unaffiliated as Baby Boomers (born between 1946 and 1964) were at the same age.

¹ Religion in the Millennial Generation (2010) and U.S. Religious Landscape Survey (2007), Pew Forum on Religion & Public Life of the Pew Research Center.

Young People Less Religiously Affiliated

Percent unaffiliated with a religion, by generation



Source: General Social Surveys.

Question Wording: What is your religious preference?

Is it Protestant, Catholic, Jewish, some other religion or no religion?

- Millennial (born 1981 or later)
- Gen X (born 1965-80)
- Boomer (born 1946-64)
- Silent (born 1928-45)
- Greatest (born before 1928)
- Indicates point when generations were at comparable ages

“Kiss Your Youth Goodbye!”

U.S. Religious Group Retention Rates¹

% of adults who still identify with their childhood religion

1. Hindu.....	80%
2. Muslim	77%
3. Jewish.....	75%
4. Historically Black Protestant.....	70%
5. Evangelical Protestant.....	65%
6. Mormon.....	64%
7. Catholic.....	59%
8. Orthodox.....	53%
9. Unaffiliated.....	53%
10. Mainline Protestant.....	45%
11. Buddhist.....	39%
12. Jehovah’s Witness.....	34%



Selected “Income” Financial Stewardship Challenge Facts

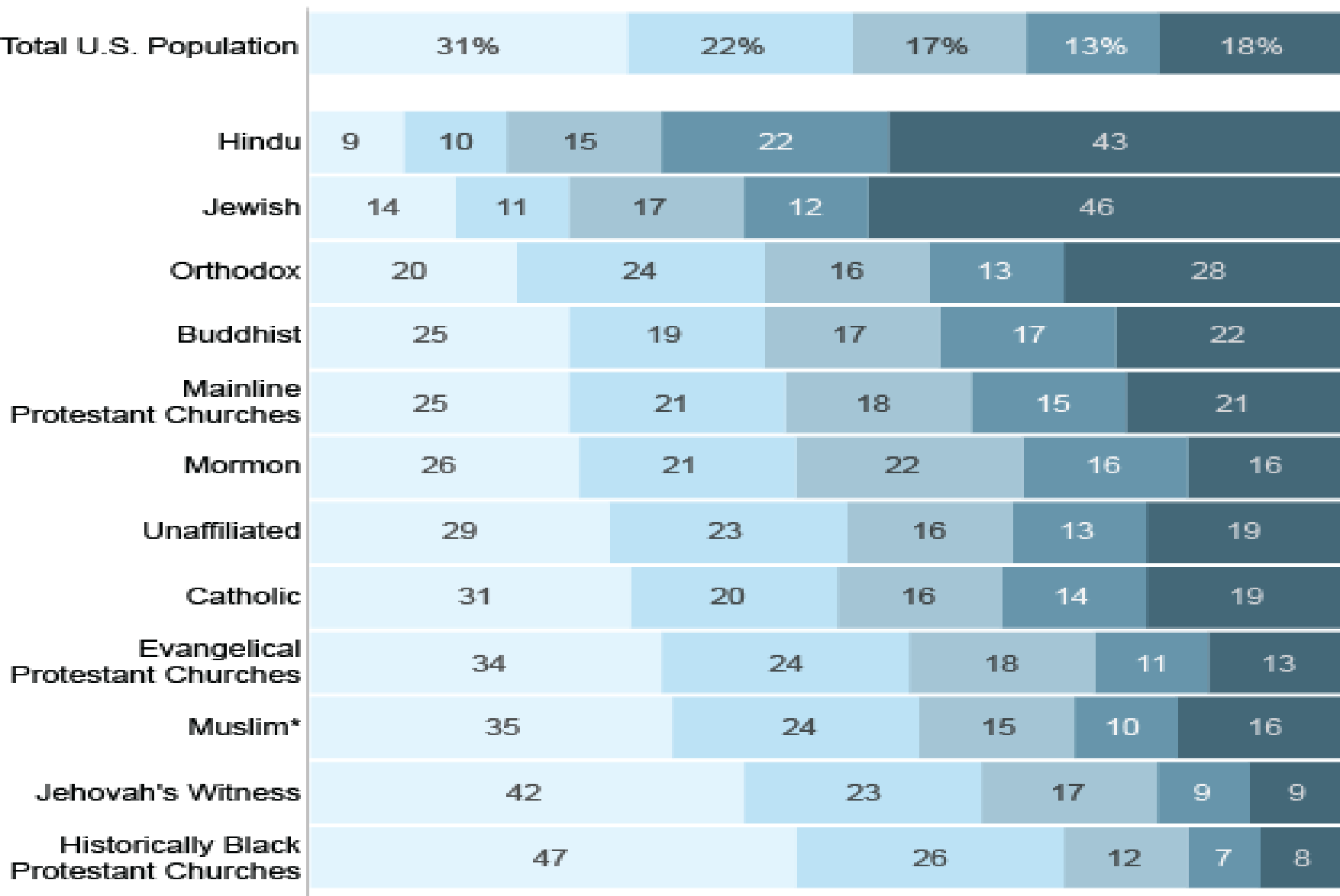




The Giving Facts

- **People are giving a lower percentage of income to churches in the 2000's than they did either during the Great Depression or the 1920's**
- **37% of church goers give \$0 to the church**

Percentage of each group making...





Archdiocese and U.S. Christian Charitable Giving Statistics¹

	<u>\$</u>	<u>%</u>
<u>Best case 2010 stewardship of Greek Orthodox Archdiocese</u> Parishioners per person per year average =	\$218	--
<u>U.S. Christian</u> average =	\$880	+403%
<u>U.S. Evangelical Protestant</u> average =	\$1,165	+534%

¹ All numbers are per person - per year direct financial stewardship contributions

G. O. Archdiocese Steward Giving¹

INCOME TOTALS

- Stewardship = 52%
- Disguised Stewardship = 20%
- NO (Non-Orthodox) Income = 28%

¹ This is a compiled statistical average from many different parishes of different sizes from many different Metropolises and areas. This sample is constantly being updated, but the percentages are not changing materially, except for slight decreases in Stewardship and slight increases in Non-Parishioner income.

Selected “Numbers” Challenge Facts





2015 U.S. Religious Landscape Study - Pew Research Center

“The Christian share of the U.S. population is declining...

...the number of U.S. adults who do not identify with any organized religion is growing...

...the drop in Christian affiliation ... is occurring among Americans of all ages.”



2015 U.S. Religious Landscape Study - Pew Research Center

From 2007 to 2014:

“...the percentage of adults who describe themselves as Christians has dropped by nearly 8% ¹

... the percentage of Americans who are religiously unaffiliated (“nothing in particular,” atheist, agnostic, etc.) has jumped (i.e., increased) nearly 7%” ²

¹ (from 78.4% to 70.6%)

² (from 16.1% to 22.8%)

Major Denominations That Are Declining





“Top 25” Denominations Reporting One Year Membership Decreases



- | | |
|--|--------------------|
| 1. The <u>Catholic Church</u> (68.2 M members) | down 0.44% |
| 2. <u>Southern Baptist Convention</u> (16.1 M members) | down 0.15% |
| 3. The <u>United Methodist Church</u> (7.6 M members) | down 1.22% |
| 7. <u>Evangelical Lutheran Church in America</u> (4.2 M members) | down 5.9% |
| 10. <u>Presbyterian Church</u> U.S.A. (2.6 M members) | down 3.42% |
| 13. <u>The Lutheran Church – Missouri Synod</u> (2.2 M members) | down 1.45 % |
| 14. <u>The Episcopal Church</u> (1.9 M members) | down 2.71 % |
| 19. <u>American Baptist Churches</u> in the U.S.A. (1.3 M members) | down 0.19% |
| 21. <u>United Church of Christ</u> (1 M members) | down 2.02% |

¹ National Council of Churches' 2012 Yearbook of American & Canadian Churches (NOTE: ALL BUT ONE OF THESE DENOMINATIONS HAD DECREASES IN MEMBERSHIP IN THE PRIOR YEAR ALSO)

But Some Major Denominations Are Increasing





Top 25” Denominations Reporting One Year Membership Increases



	(2012)	(prior year)
4. <u>Church of Jesus Christ of Latter-day Saints</u> <u>(Mormon Church)</u> (6.1 M members)	up 1.6%	up 1.4%
9. <u>Assemblies of God</u> (3 M members)	up 3.9%	up 0.5%
20. <u>Jehovah’s Witnesses</u> (1.1 M members)	up 1.9%	up 4.4%
24. <u>Seventh-Day Adventist Church</u> (1 M members)	up 1.6%	up 4.3%

¹ National Council of Churches' 2012 Yearbook of American & Canadian Churches



Which “Churches” Are Growing

The only growing U.S. traditional Christian church organizations are:

1. “big box” unaffiliated “mega-churches”
2. evangelical “churches”

NOT mainstream Christian churches¹

¹ (excluding through foreign immigration) National Council of Churches' 2011 Yearbook of American & Canadian Churches

How Are We Doing?





Top 10 Orthodox Christian Churches in the USA

1. Greek Orthodox Archdiocese of America	476,900
2. Orthodox Church in America	84,900
3. Antiochian Orthodox Christian Archdiocese	74,600
4. Serbian Orthodox Church in North America	68,800
5. Russian Orthodox Church Outside of Russia	27,700
6. Ukrainian Orthodox Church of the USA	22,400
7. Patriarchal Parishes of the Moscow Patriarchate	12,400
8. Romanian Orthodox Archdiocese	11,200
9. American Carpatho Russian Orthodox Diocese	10,400
10. Vicariate for the Palestinian / Jordanian Orthodox Christian Communities	6,800

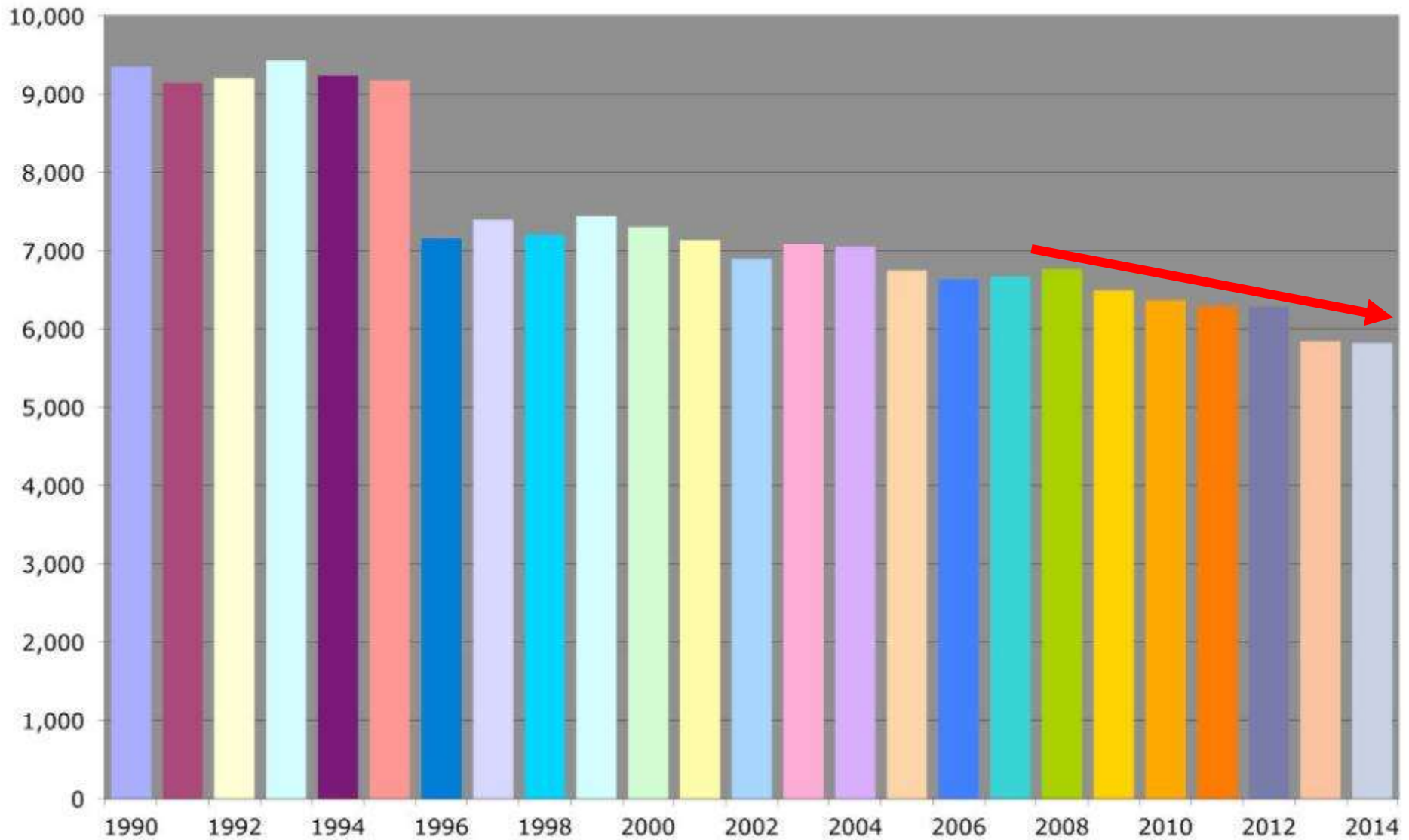
20 ORTHODOX JURISDICTIONS TOTAL = 1,043,300



GOA Baptisms Are Declining

Baptisms 1990 - 2014

Greek Orthodox Archdiocese of America

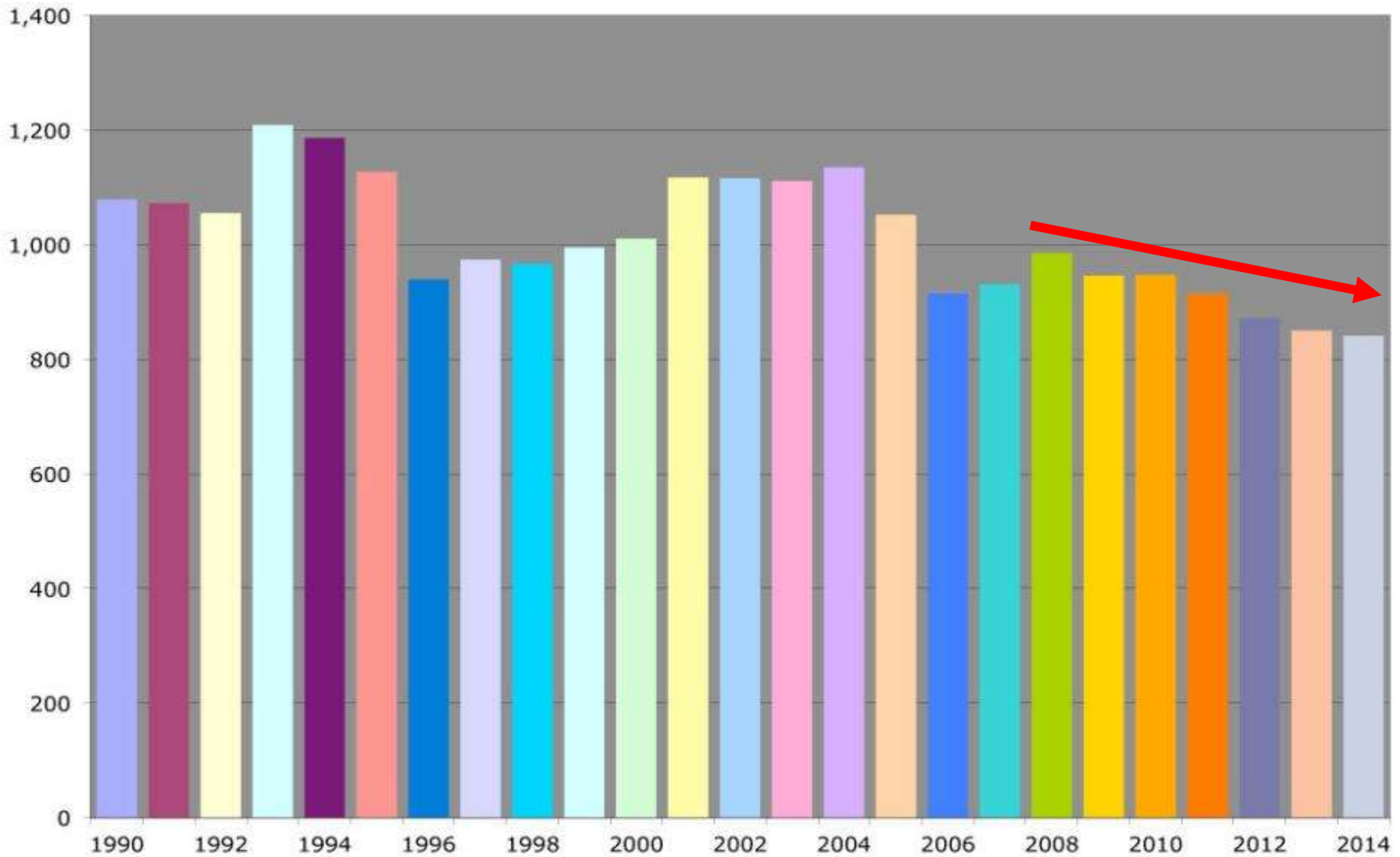


Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.

GOA Chrismations Are Declining

Chrismations 1990 - 2014

Greek Orthodox Archdiocese of America



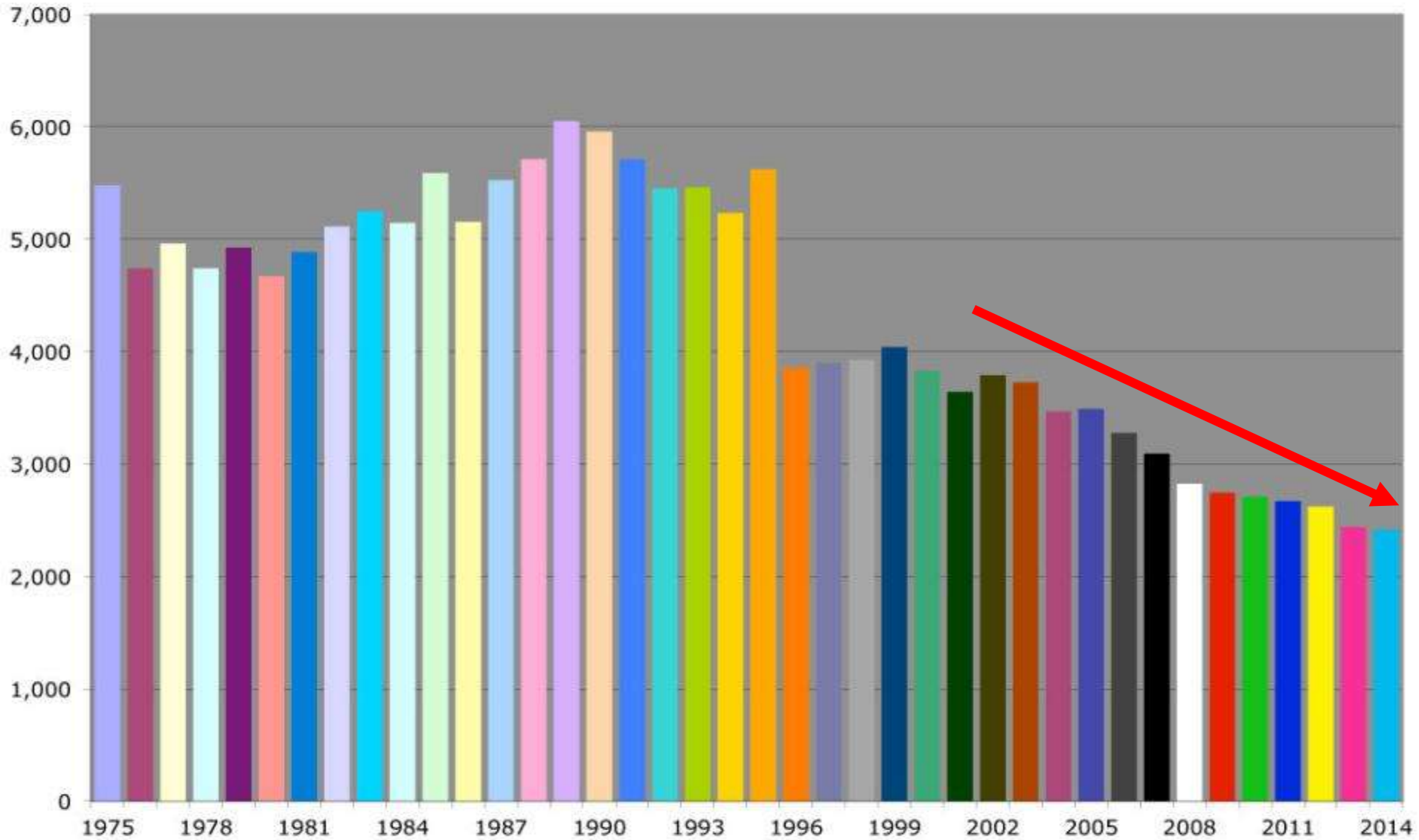
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.



GOA Weddings Are Declining

Weddings 1975 - 2014

Greek Orthodox Archdiocese of America



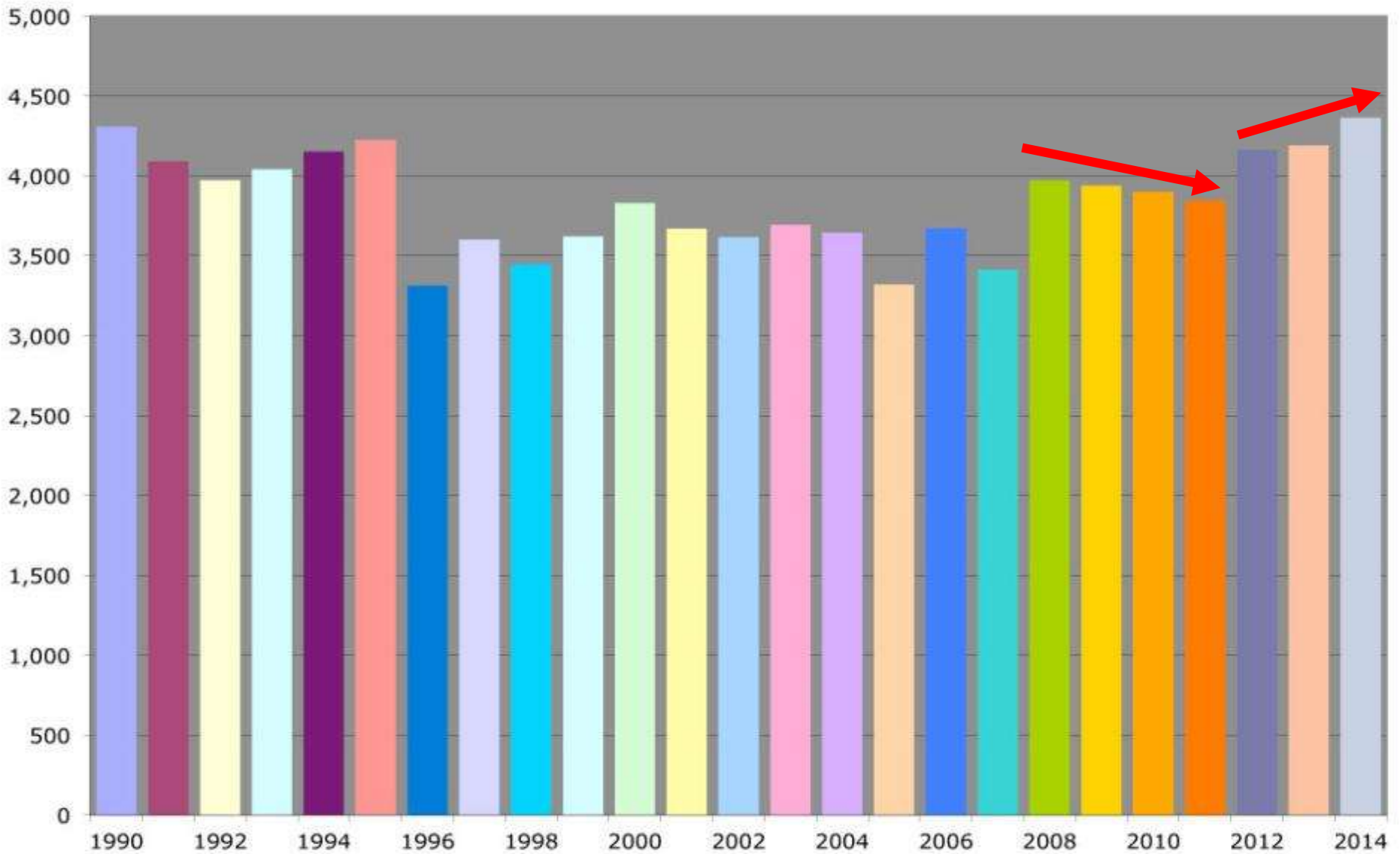
Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.



**And Finally, Something That
is Sometimes Growing
(kinda sorta)...**

Funerals 1990 - 2014

Greek Orthodox Archdiocese of America



Since 1996, statistics from Canada, Central America and South America were no longer included in Registry tabulations.



The Bottom Line

- Church membership is declining
- Church sacraments are declining
- Church contributions are declining
- Church member spirituality is declining
- Church relevance is declining
- Church stewardship is declining
- Church disengagement by youth is increasing
- Church member deaths are increasing
- Church dependence on Festivals is increasing



**So how are
we doing
at creating:**

**“a good
account
before the
awesome
judgment
seat of
Christ”?**



This Is How You Want To Solve Your Parish's Challenges



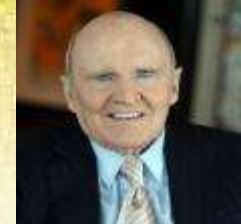


This Is What Christ Said The Answer Is

**“The Lord said... He who
does not take his cross
and follow me is not
worthy of me...”**



Matthew 10:38



Jack Welch

Chairman & CEO - General Electric

~ ~ ~ ~ ~

“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.”



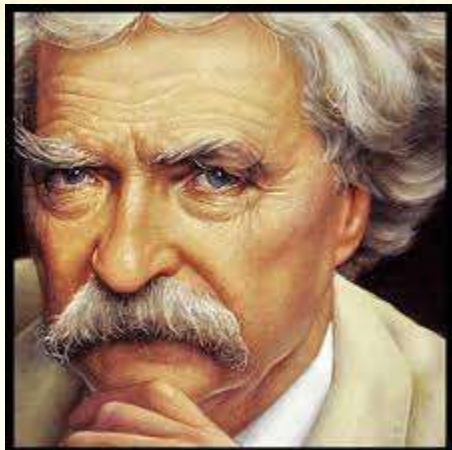


Start With Why

WHY?



Why are you
here?



The 2 most important days of your life are:

- 1. The day you were born**
- 2. The day you figure out why**



What is your job
regarding your
Orthodox faith?



The Great Commission (Calling) Matthew 28:18-20

And Jesus came up and spoke to them, saying, "All authority has been given to Me in heaven and on earth."

**“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 lo, I am with you always, even to the end of the age."



**How many
Disciples
have you
made?**



**What are you
going to do
next to make
more
Disciples?**



Ἡ ΕΥΝΑΣΙΣ
 ἙΒΔΟΜΗΚΟΝΤΑ ΑΠΟΣΤΟΛΩΝ

Luke 10:1



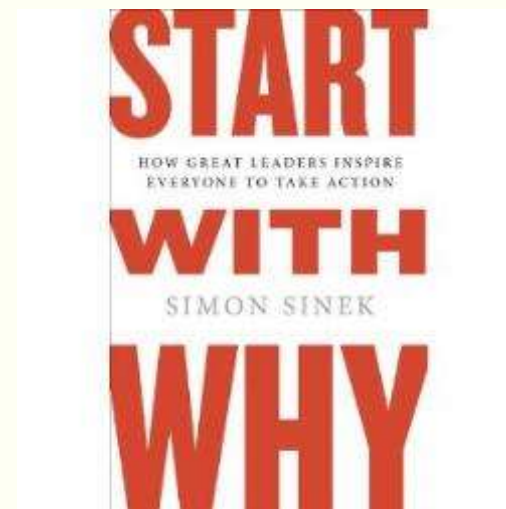
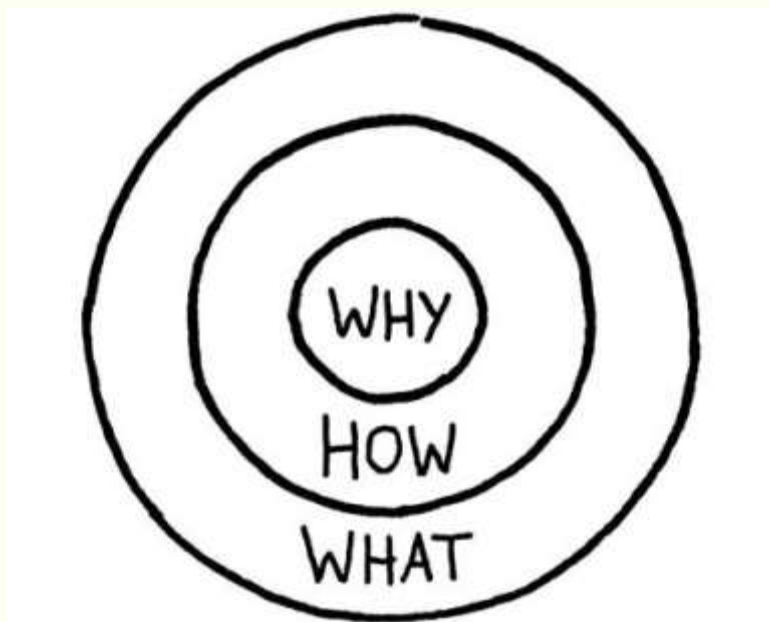


Start With Why

How Great Leaders Inspire Everyone To Take Action



TED.COM



http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html



There Are Leaders - And There Are Those Who Lead

- **Leaders = hold a position of power or influence**
- **Those who lead = inspire us to follow them**
- **To be a leader requires followers**
- **We follow those who lead, not for them, but for ourselves**



Church Leaders

“The most basic task of the Church leader is to discern the spiritual gifts of all those under his authority, and to encourage those gifts to be used to the full for the benefit of all.

Only a person who can discern the gifts of others and can humbly rejoice at the flowering of those gifts is fit to lead the Church.”

+ Saint John Chrysostom



Why Are You Here?

WHY did your Creator make you in His image and likeness and give you all of your unique talents and experiences?



Every person is made in the image and likeness of God.



**Each of you have a personal
stewardship calling!**



God's

Calling



Will You Answer?



“BRETHREN, having gifts that differ according to the grace given to us, let us use them...

if service, in our serving; he who teaches, in his teaching... he who contributes, in liberality; he who gives aid, with zeal; he who does acts of mercy, with cheerfulness...”

St. Paul's Letter to the Romans 12:6-14



BRETHREN, grace was given to each of us according to the measure of Christ's gift. Therefore it is said, "When he ascended on high he led a host of captives, and he gave gifts to men."

And his gifts were that some should be apostles, some prophets, some evangelists, some pastors and teachers,

to equip the saints for the work of ministry, for building up the body of Christ, until we all attain to the unity of the faith and of the knowledge of the Son of God, to mature manhood, to the measure of the stature of the fullness of Christ.



Your Stewardship Calling

**What are you good
at that your church
could use?**



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



Why are we here?

**“Go therefore and make
disciples of all the
nations.”**



A Holy Commission

“But you shall receive power when the Holy Spirit has come upon you;

and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the end of the earth.”

Acts 1:8



Jacksonville



The Ends of the Earth
Samaria

Judea

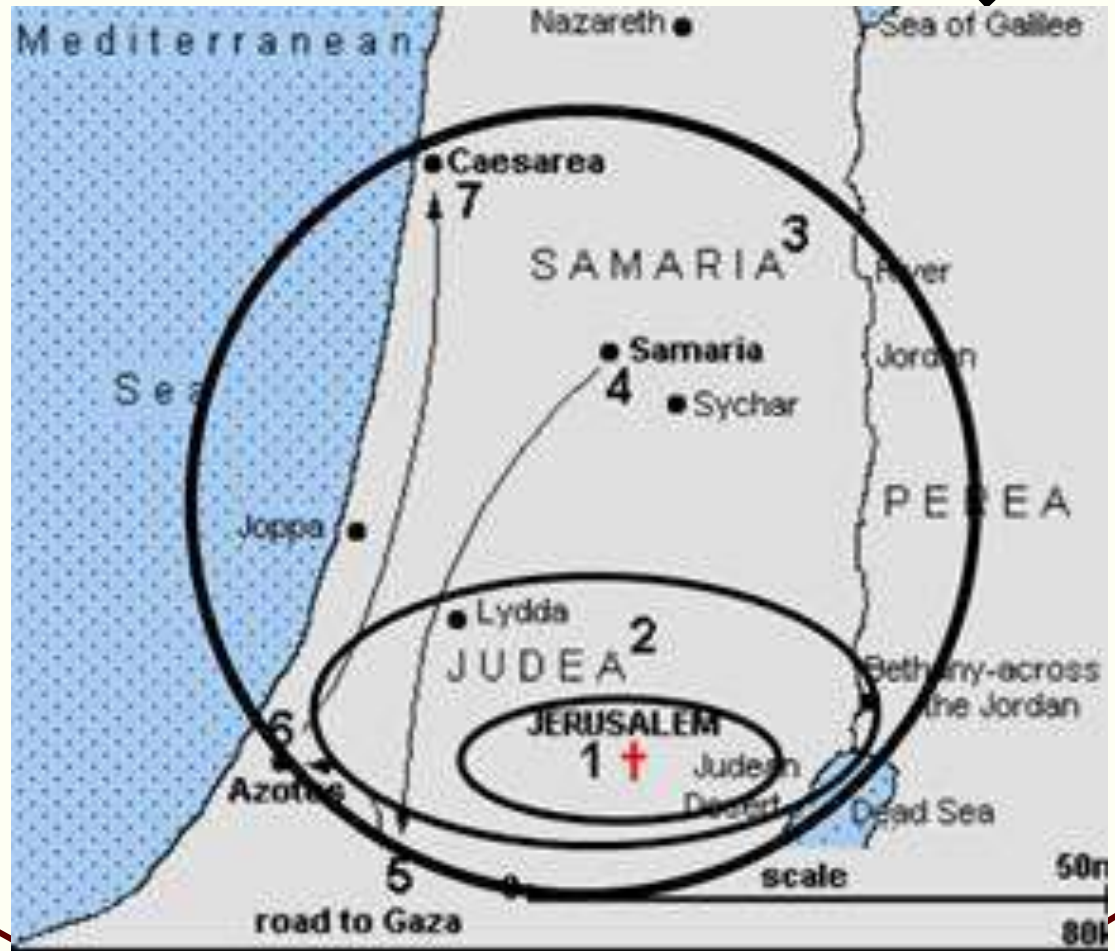
Jerusalem



Jacksonville

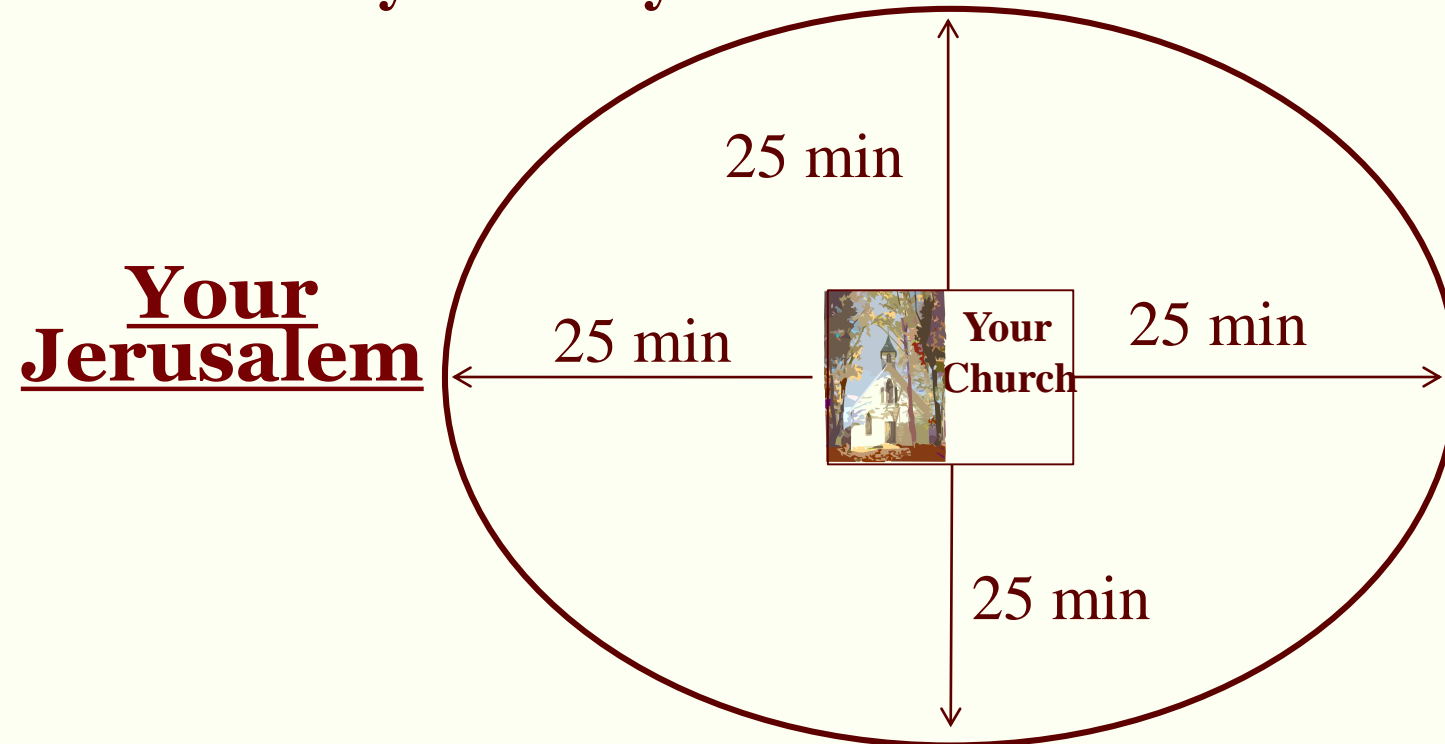


The Ends of the Earth





- **83% of U.S. Christians are willing to travel 25 minutes or less to attend church services¹**
- **Your Jerusalem is a 25-minute radius around your church**
- **How well are you doing at making Disciples of everyone in your Jerusalem?**

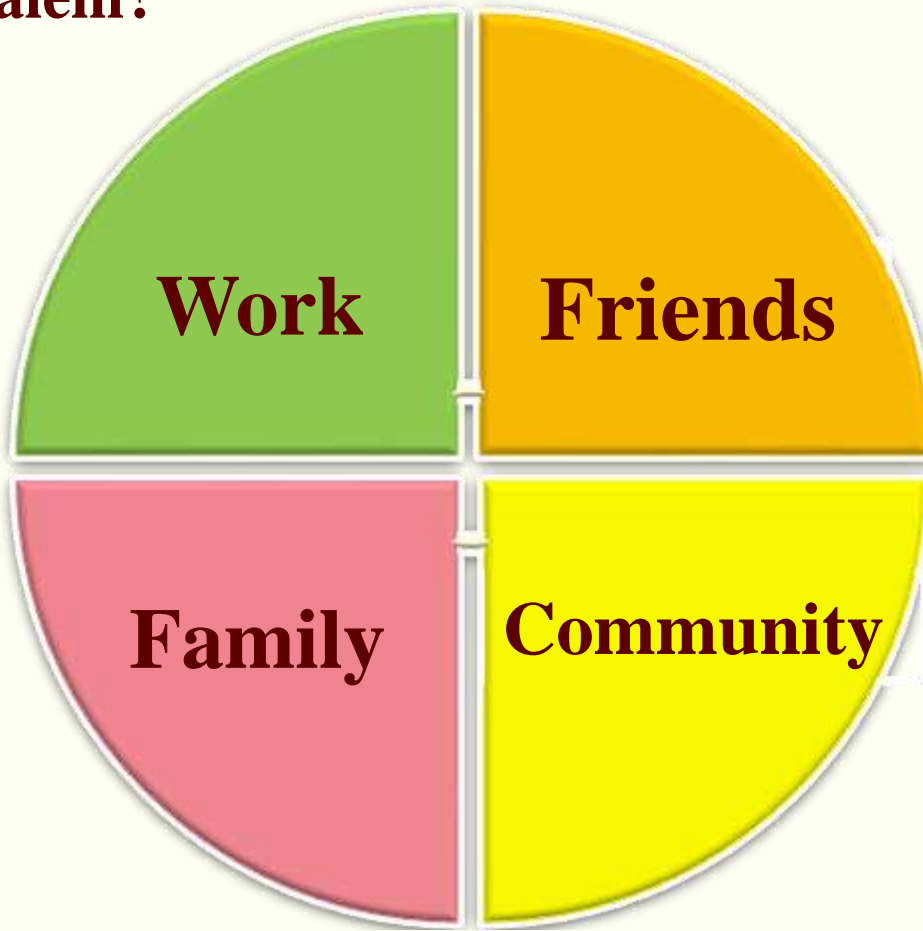


¹The Nuts and Bolts of Church Planning, Aubrey Malphurs summarizing research from Dr. Win Arn



A Provocative Thought About Your Personal Jerusalem

- What if YOUR Jerusalem is where YOU are personally?
- How are YOU doing to make Disciples of everyone in YOUR Jerusalem?





**"Your life does not get better
by chance, it gets better by
change."**

- Jim Rohn

GnosticWarrior.com

“A dream is just a dream.

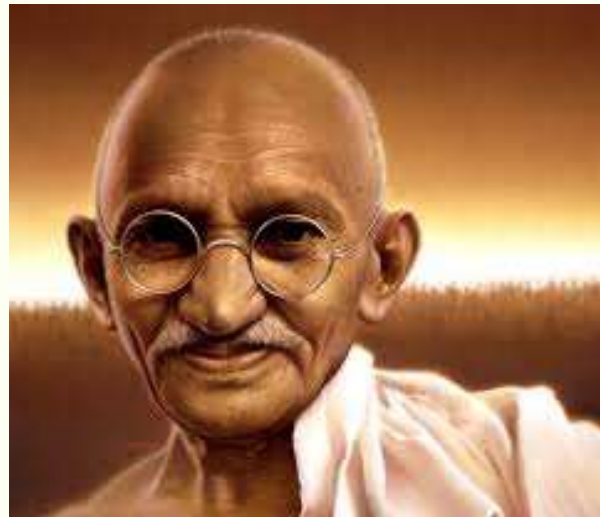
**A goal is a dream with a plan and a
deadline.”**

Harvey Mackay



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

Mahatma Gandhi



***“The best time to
plant a tree was
20 years ago.***

***The second best
time is today.”***



Old Chinese Proverb

**“Either lead, follow
or get out of the way.”**



- Ted Turner
- General George S. Patton
- Lee A. Iacocca
- Thomas Paine
- Bill Marianes





Now that you
understand the WHY,
we will explore the
WHAT and HOW
of Parish Strategic
Planning



One Stop - Always Free Parish Information Resource

www.stewardshipcalling.com

Bill Marianes: Bill@stewardshipcalling.com (404) 443-5700

Igniting The Flame of True Orthodox Christian Stewardship Video:

<http://stewardshipcalling.com/videos/>

“Stewardship Calling” podcast: <http://stewardshipcalling.com/podcasts/>



OCN
ORTHODOX CHRISTIAN
NETWORK

**Stewardship
Calling**

*hosted by
Bill Marianes*





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Bringing the Ancient Christian Faith to the Modern World

Ancient Faith Ministries

BILL MARIANES

REVITALIZE STEWARDSHIP IN
YOUR PARISH AND PERSONAL LIFE

A STEWARDSHIP CALLING

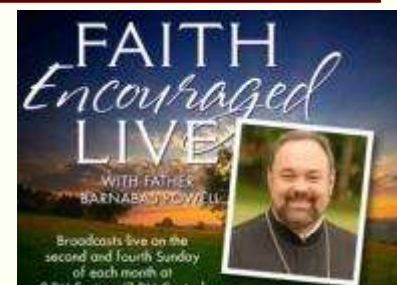


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**Tune in every month
that has a 5th Sunday
for a live call-in
program “Stewardship
Calling with Bill
Marianes”**

Next: November 29, 2015

November 23, 2014 Ancient Faith Radio program:
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THE METROPOLIS OF ATLANTA
STRATEGIC



PLAN

*"Where there is no vision,
the people will perish."*

PROVERBS 29:18

STRATEGIC
PLAN
— FOR THE —
GREEK
ORTHODOX
METROPOLIS
OF ATLANTA



METROPOLIS OF ATLANTA

[www.
atlstrategicplan
.org](http://www.atlstrategicplan.org)



AND NOW BACK TO
OUR REGULARLY
SCHEDULED
PROGRAMMING



Part 2

WHAT ?

Parish Strategic Planning



Strategic planning is described in: Alice in Wonderland





*ALICE stands at
the fork in the
road and asks the
CHESHIRE CAT.*





Alice: Which road should I take?



Cheshire Cat:

Where do you want
to go little girl?

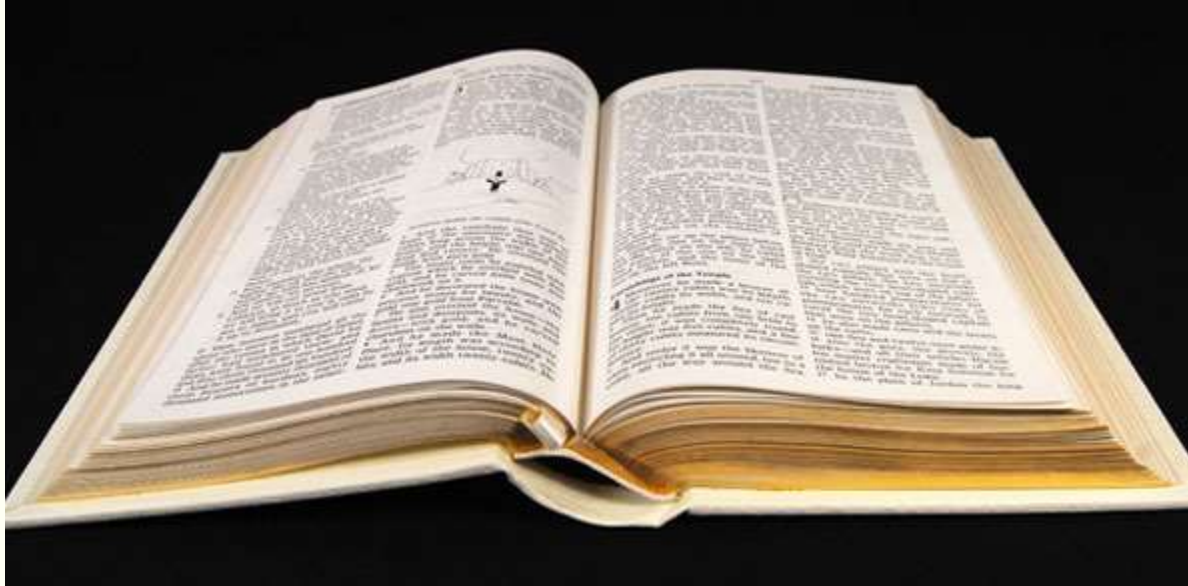


Alice: I don't know.

Cheshire Cat : Then it makes no difference...



Strategic Planning is Biblical





Proverbs 29:18

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



Jeremiah 29:11-12

“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.

When you call out to me and come and pray to me, I’ll hear you.”



Church Strategic Planning is:

*A process to help manage the
“business” of our Parish
without turning the Parish
into a “business.”*



What is Strategic Planning

- A process for defining our strategy to allocate our resources to achieve our vision
- **A Strategic Plan must answer 4 fundamental questions:**
 1. Why do we exist?
 2. Where are we now?
 3. Where do we want to be?
 4. How will we get there?



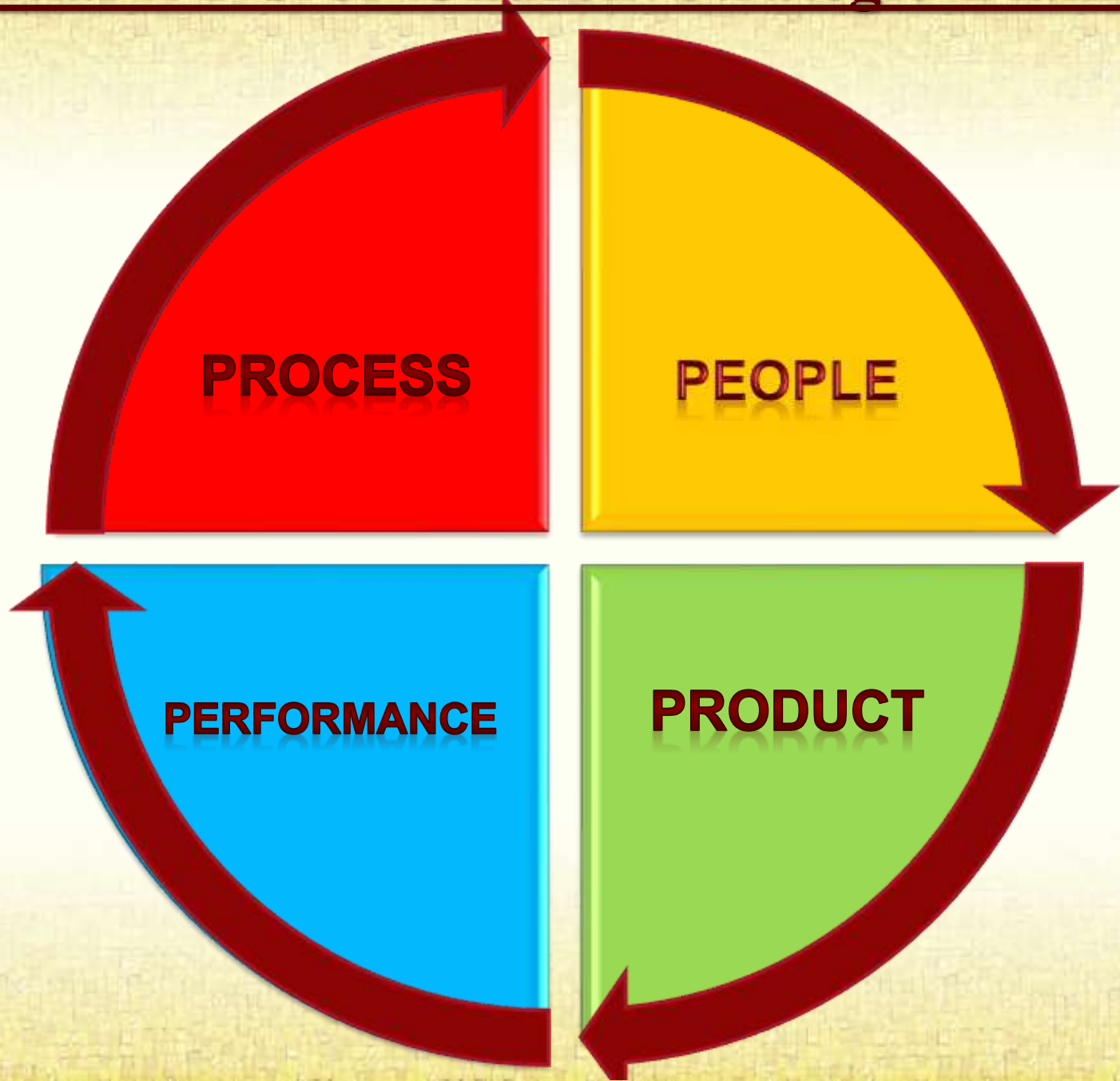
The 4 P's of Strategic Planning

and

The C² P² Strategic Planning Parish Model



Essential 4 P's of Church Strategic Planning

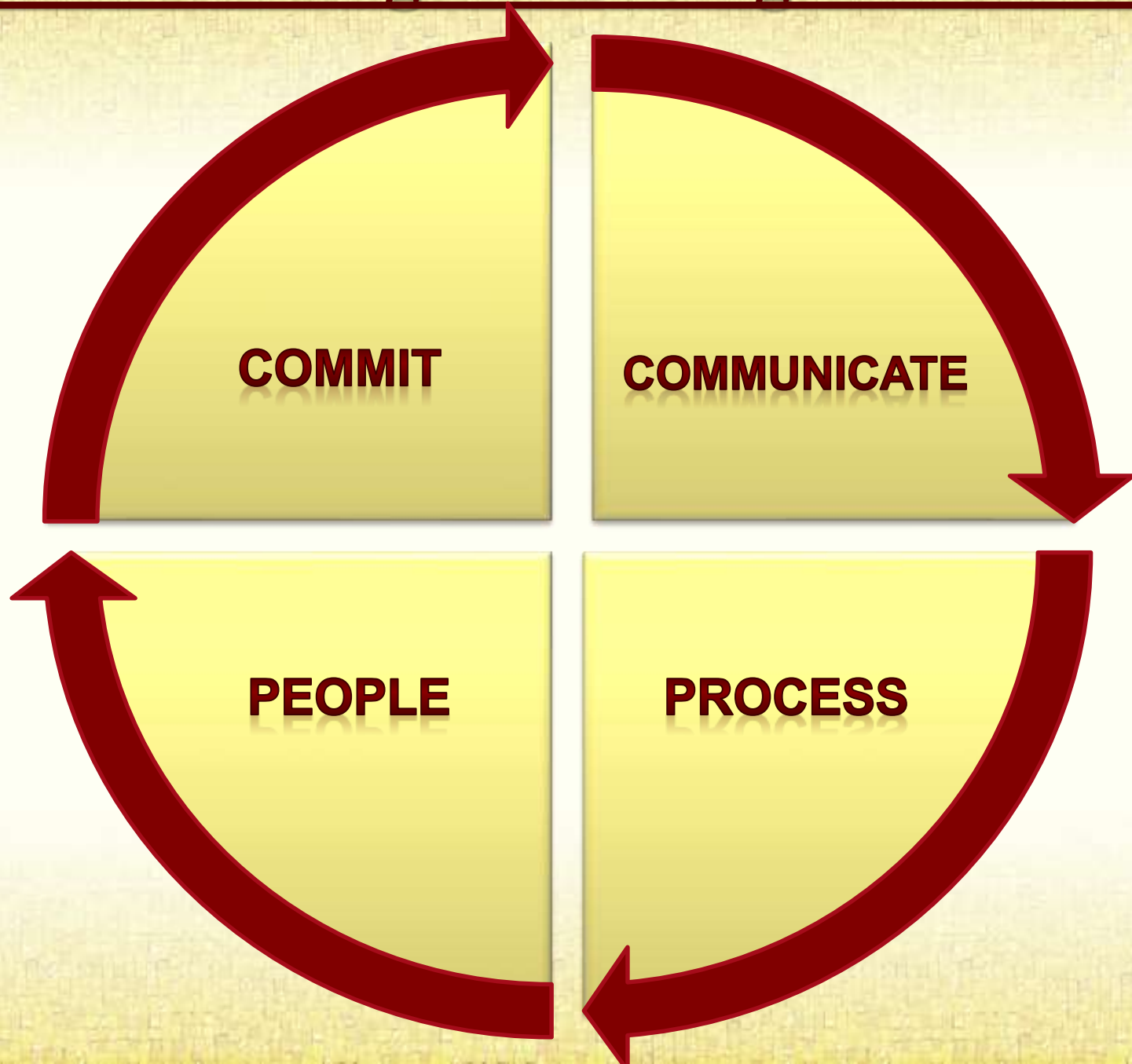




The Essential 4 P's of Church Strategic Planning

1. PROCESS - A comprehensive, inclusive and methodical process and schedule
2. PEOPLE - The right people leading, developing and implementing the process, with input from everyone along the way
("You have to get the 'right people' on the bus and the 'wrong people' off the bus."
Jim Collins - Good To Great)
3. PRODUCT - A comprehensive strategic plan with a detailed implementation plan and timeline
4. PERFORMANCE - More non-profit strategic plans fail in this step than for any other reason (must be well-managed and persistent)

The C² P² Strategic Planning Parish Model





The C² P² Strategic Planning Parish Model

1. COMMIT - The Parish leadership (clergy and laity) and the Parishioners must commit and be diligent
2. COMMUNICATE – Constantly inform, implement multiple feedback loops and numerous volunteer on-ramps (you cannot over communicate)
3. PROCESS – Reach consensus around the exact process, schedule and plan
4. PEOPLE - Pick the right team, keep growing the team and keep them dedicated and motivated



The C² P² Strategic Planning Parish Model

- 1. COMMIT - The Parish leadership (clergy and laity) and the Parishioners must commit and be diligent**
 - a. If the Clergy is not on board, stop the train**
 - b. If the Lay leadership is not on board, stop the train**
 - c. The timetable must be clear and agreed-upon from the beginning (strategic planning is a long term and sustainable solution not a quick fix for the “tyranny of the urgent”)**
 - d. The schedule must be enforced**



The C² P² Strategic Planning Parish Model

- 2. COMMUNICATE – Implement multiple “*feedback loops*” and constant “*on-ramps*” to add new talent (you cannot over communicate)**
 - a. Everyone within the SPT (Strategic Planning Team) must know what’s going on every step of the way**
 - b. Everyone in the Parish and Leadership (not on the SPT) must know what’s going on every step of the way**
 - c. “Feedback Loops” are events where Parishioners provide feedback / input and build consensus**
 - d. “On-Ramps” are opportunities for Parishioners to either join the SPT or work on the Plan**



The C² P² Strategic Planning Parish Model

- 3. PROCESS – Reach consensus around the exact process and schedule**
 - a. The Process is almost as important as the Product**
 - b. If the process is not open, inclusive, participatory, consensus-driven, welcoming of diversity, thoughtful, diligent and strategic you will FAIL**
 - c. The process must include a methodical implementation strategy – (most strategic plans in non-profits fail in the implementation phase, not due to bad people, process or plan)**
 - d. Use a proven strategic planning process and include all elements of it (no shortcuts)**
 - e. 3 D's = be Diligent and Determined and Dedicated**



The C²P² Strategic Planning Parish Model

4. PEOPLE - Pick the right team and keep adding more talent
 - a. You cannot just pick the “usual suspects”
 - b. You must be diverse (all major constituencies and perspectives must be included / represented)
 - c. You must pick strategic thinkers and visionaries (not petty/narrow-minded people or “scarcity-mongers”)
 - d. Everyone must be able to “play nice in the sandbox” and work well with diverse teams and a consensus process (no majority voting)
 - e. No personal agendas
 - f. Everyone must be smart and intellectually honest
 - g. Everyone must have, and dedicate, the necessary time



The C²P² Strategic Planning Parish Model

4. PEOPLE – Two Teams and Different Jobs

a. Strategic Planning Team (SPT)

- i. “OZ”
- ii. Core Planning Leadership Team
- iii. SPT (Strategic Planning Team) Members

b. Implementation Team

- i. “OZ”
- ii. Head Coach(s)
- iii. Task Force Coordinator
- iv. Goal Captain
- v. Writer
- vi. Graphics
- vii. Marketing / Communications
- viii. Web/ Technology / IT





The C²P² Strategic Planning Parish Model

4. PEOPLE – Two Teams and Different Jobs
 - a. SPT- STRATEGIC PLANNING TEAM – the most diverse strategic thinkers responsible for building a consensus around SWOT, Statement of Why, Mission, Vision, Core Values, Strategic Areas of Focus (Task Forces), Strategic SMART Goals, Action Plans
 - b. IMPLEMENTATION TEAM – the team to implement the Action Plans and achieve the Strategic SMART Goals
 - c. “OZ” – the all-knowing, all powerful, final authority czar responsible for the entire process until implementation begins (the buck stops with OZ)



The C²P² Strategic Planning Parish Model

4. PEOPLE – Implementation Jobs

- d. HEAD COACH(ES) - the individuals(s) who have overall leadership responsibility to ensure that the entire Strategic Plan is achieved (take over from OZ)
- e. TASK FORCE COORDINATOR – the individual leader of each Strategic Task Force responsible for managing all Goals Captains within that Task Force's area
- f. GOAL CAPTAIN(s) – each Strategic SMART Goal will have a Captain(s) whose job it is to ensure that each step of the Action Plan for that Strategic SMART Goal is achieved on time



The C²P² Strategic Planning Parish Model

4. PEOPLE – Tactical Jobs

- g. **WRITER** – an exceptional writer who makes sure the final written Strategic Plan is the most compelling and persuasive document it can be
- h. **GRAPHICS** – someone who can make the final strategic plan (and other graphics in the strategic plan marketing, documents, website, etc. look great and appealing
- i. **MARKETING / COMMUNICATIONS** – at least one person in Parish and each ministry responsible for ensuring that all aspects of the strategic plan and process is communicated to all constituencies



2 Process Keys

Consensus



*Rules of
Engagement*



2 Process Keys

Consensus

***Rules of
Engagement***



Consensus

1. “Consensus” means seeking the “common mind” through a process of respectful dialogue with **NO** formal votes
2. “Consensus” means an agreement that everyone can “live with” (even it is not their first choice)
3. Consensus is achieved once everyone explains their issues and alternatives, and the discussion continues until all agree that:
(a) the discussion has been full and fair; and
(b) they do not object to the modified proposal.



2 Process Keys

Consensus

*Rules of
Engagement*



Rules of Engagement

1. ROEs apply equally to all and keep the process move efficiently
2. ROEs help avoid hijacking
3. ROEs ensure confidentiality + no consequences
4. ROEs ensure fairness for all
5. ROEs everyone commits to them (helps exit volunteers who violate them)
6. ROEs keeps the project on task



**See Appendix For Bill's
15 Rules of Engagement**



The Elements of Strategic Planning





What is Strategic Planning

The Strategic Plan must answer four fundamental questions:

- 1. Why do we exist?**
- 2. Where are we now?**
- 3. Where do we want to be?**
- 4. How will we get there?**



STATEMENT OF WHY

WHY?



QUESTION 1 - Why?

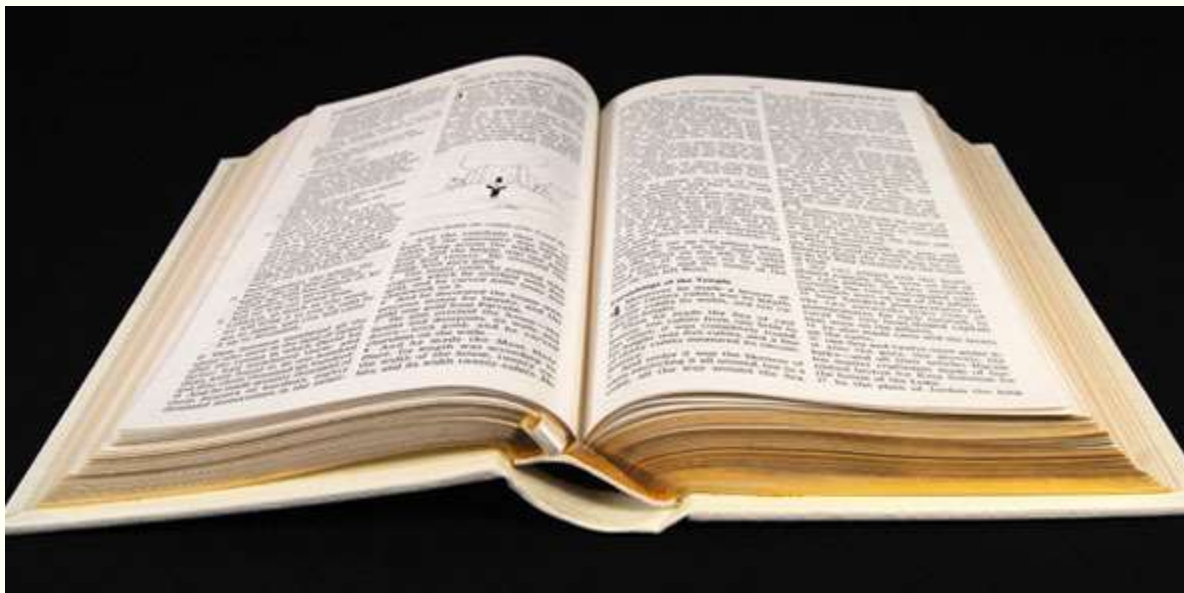
1. Why do we exist?

- a) Why does our Parish exist?
- b) We must be able to articulate why should anyone want to be a part of our Parish and ministries?



WHY?

A Statement of Why is Biblical





“But when the apostles Barnabas and Paul heard this they tore their clothes and ran in among the multitude, crying out and saying, ‘Men, WHY are you doing these things? We are also men with the same nature as you and preach to you that you should turn from these useless things to the living God’

Acts 14:14-15



“Therefore I speak to them in parables, because seeing they do not see, and hearing they do not hear, nor do they understand.”

Matthew 13:13



***The Greek Orthodox
Metropolis of Atlanta:***

***welcomes all people seeking
salvation, love, truth
and fulfillment.***



QUESTION 2 - Where are we now? (Current State)

2. Where are we now?

- a) This requires a "brutal facts" assessment of current strengths and weaknesses
- b) Assess programs/ministries, talent/teams and finances
- c) Must evaluate interest in the Parish and its ministries from all stakeholders (and those you wish were stakeholders)



SWOT ANALYSIS

	Helpful to achieving the objective	Harmful to achieving the objective
Internal origin (attributes of the organization)	S Strengths	W Weaknesses
External origin (attributes of the environment)	O Opportunities	T Threats



Internal factors

Strengths and Weaknesses

- (a) Strengths include things we do well and characteristics that give us advantages

- (b) Weaknesses include problems we must overcome and characteristics that place at a disadvantage



External factors

Opportunities and Threats

- (a) Opportunities include external chances to improve our performance in our environment
- (b) Threats include external elements in our environment that could cause trouble for us



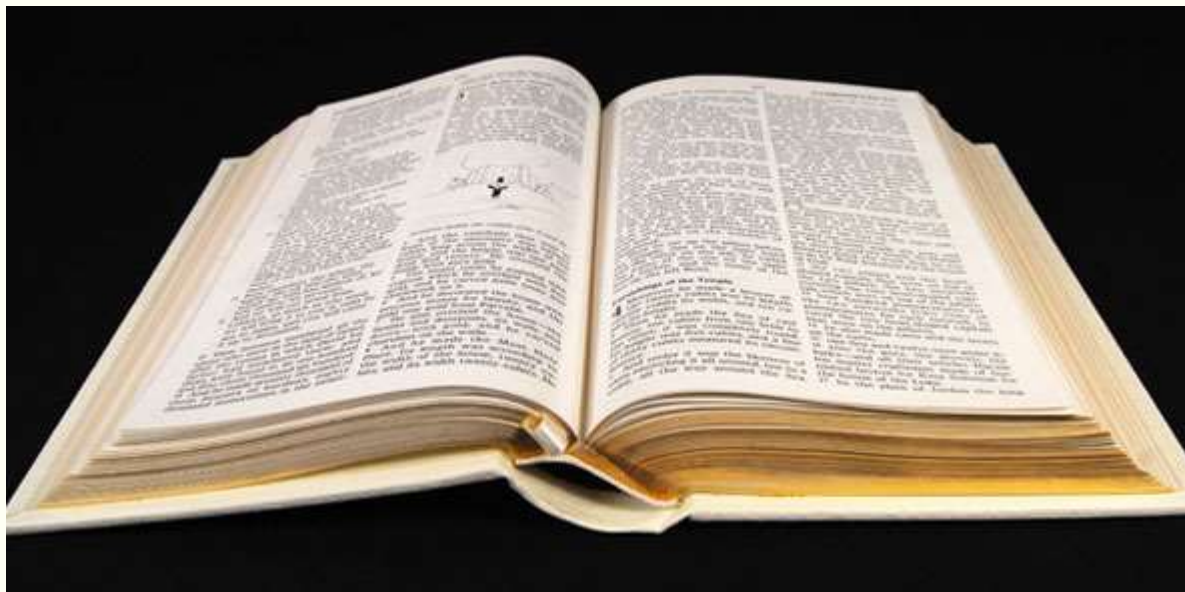
SWOT Process

- A SWOT analysis seeks to honestly assess where the Parish and ministries are now
- Invite as many stakeholders from as many different constituencies (not just the parish council, SPT or “usual suspects”)
- Before the first retreat, compile all SWOT submissions and identify the number of times the same/similar item is identified as either a S. W. O. or T. (repeated items deserve attention)
- At first retreat, assign separate SWOT teams (based on their preferences) to review all submissions and reach a consensus of the S. W. O. and T.



SWOT

A SWOT Analysis is Biblical





***“Examine yourselves
as to whether you are
in the faith.***

Test yourselves!”

2 Corinthians 13:5



See Appendix For Examples of SWOT Analysis for the Metropolis of San Francisco and Metropolis of Atlanta

(The entire Metropolis of San Francisco Strategic Plan, and the Metropolis of Atlanta DRAFT Strategic SMART Goals and Action Plans, are available at www.stewardshipcalling.com under the Strategic Planning tab.)



CORE VALUES





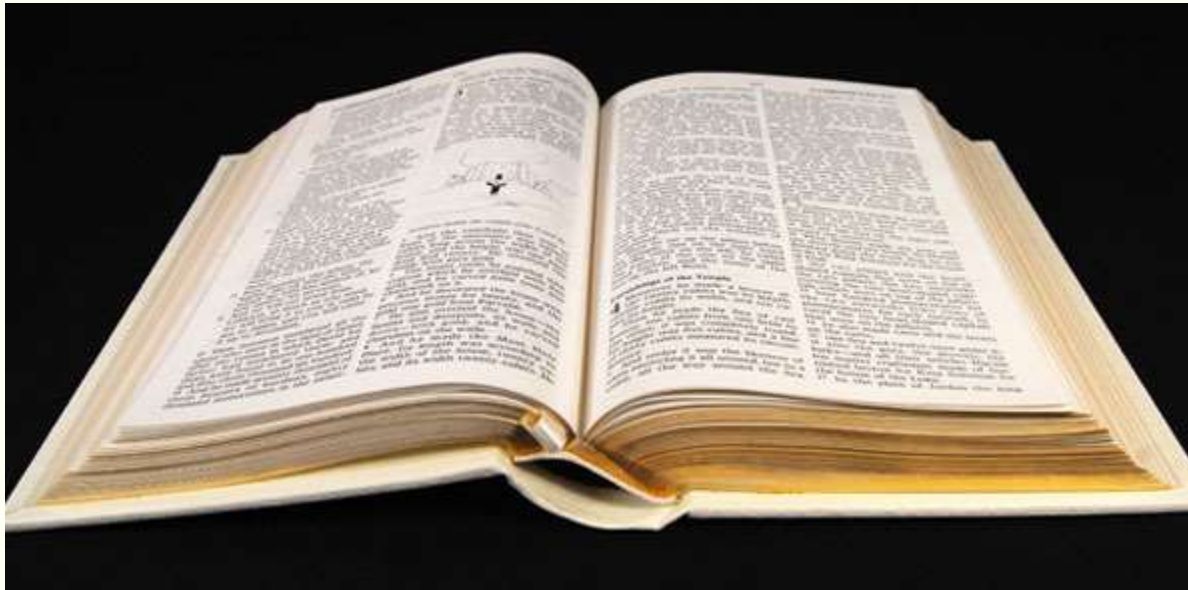
Core Values:

- 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.



Metropolis of Atlanta Core Values

- ***Christ-centered***
- ***Love***
- ***Sacred Apostolic tradition***
- ***Education, training and leadership development***
- ***Outreach and evangelism***
- ***Integrity, accountability and transparency***
- ***Family***
- ***Service and philanthropy***
- ***Stewardship***
- ***Hospitality, acceptance, welcoming and embracing***
- ***Spiritual growth***



Core Values

1. Christ-centered
2. Active participation in sacramental life
3. Education
4. Integrity, transparency and accountability
5. Stewardship
6. Outreach and evangelism
7. Inclusiveness and engagement
8. Courage
9. Communications using all media
10. Minister to all generations and strengthen our families and relationships
11. Financial responsibility



A Strategic Plan answers four questions:

1. Why do we exist?
2. Where are we now?
3. Where do we want to be?
4. How will we get there?



MISSION





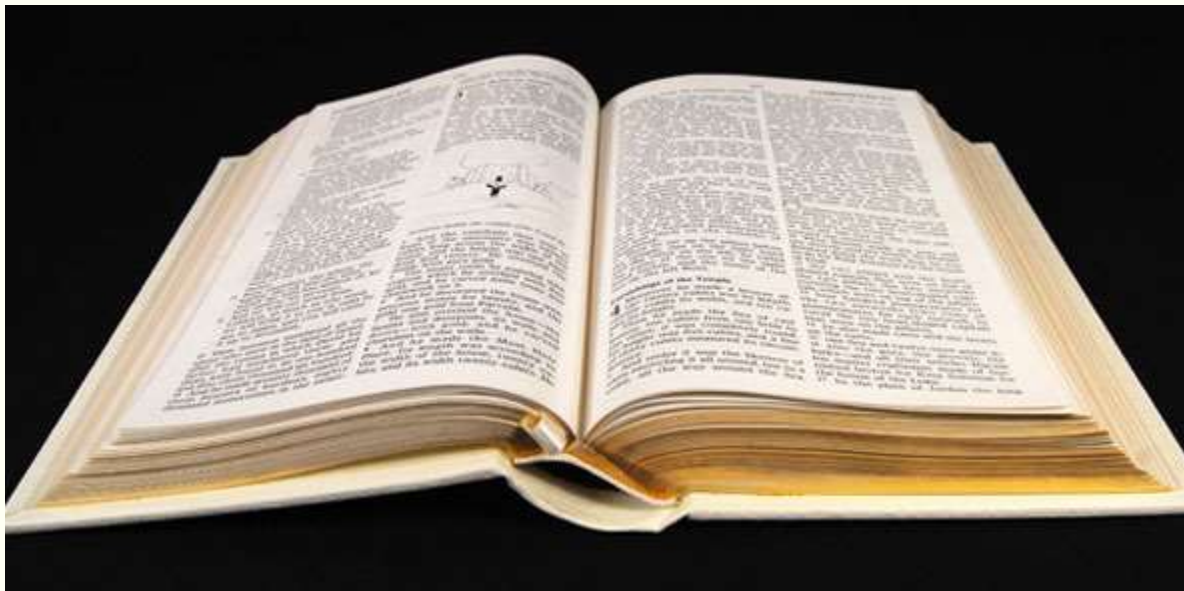
Mission:

- A clear description of the fundamental purpose for which an organization exists and what it does to achieve its Vision.
- Mission answers the question: "**What do we do?**"



MISSION

A Mission Statement is Biblical





The Great Commission (Mission – Part 1) Matthew 28:18-20

“And Jesus came up and spoke to them, saying, ‘All authority has been given to Me in heaven and on earth.

‘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 lo, I am with you always, even to the end of the age.’”



Metropolis of Atlanta Mission Statement (based on Archdiocese Mission Statement)

**The Metropolis of Atlanta's mission is
to:**

Energize, cultivate and guide the faithful in the Southeastern United States by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.



VISION

Vision Statement



Desired Future State

3. 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 comprehensive vision of our Parish at that time



Vision

- **Defines what the organization hopes to do in the future.**
- **Vision is a long-term view.**
- **Vision focuses on:**
 - **“What do we want to accomplish?”**
 - **“Where are we going?”**



Vision

- 1. inspires people to accomplish the goal**
- 2. comes from the heart (whereas Mission comes from the head)**
- 3. supplies passion**
- 4. has narrow focus**
- 5. has to be caught (whereas a Mission can be taught)**



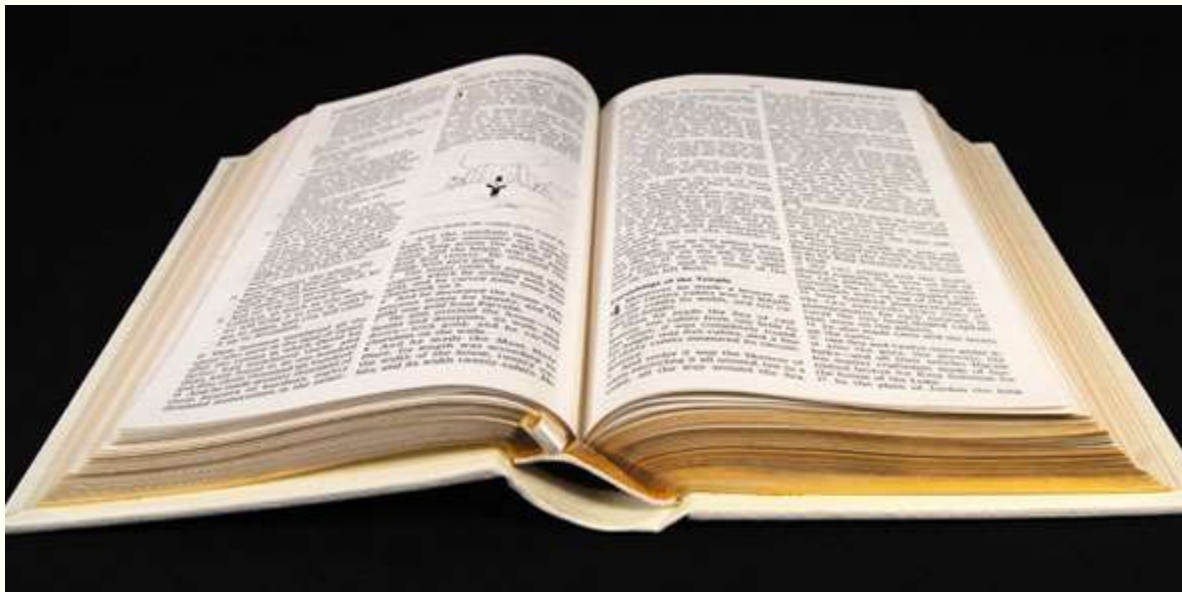
A Vision must:

1. be clear (easy to understand)
and concise (easy to share)
2. be compelling and inspiring
3. paint a picture of where you're
going
4. be about the future of the
Parish or ministry
5. be possible...



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.”*



(Vision – Part 2) Acts 1:8

“But you shall receive power when the Holy Spirit has come upon you; and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the ends of the earth.”



Metropolis of Atlanta Vision

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

*worship,
education,
stewardship,
philanthropy, and
fellowship.*



Our SWEEPing Vision

We will grow the Orthodox Christian Church in the Western United States through Christ-centered:

Stewardship

Worship

Education

Evangelism

Philanthropic outreach



See Appendix For Examples of Other Parish Vision Statements (HINT: not all of them are good)

(The entire Metropolis of San Francisco Strategic Plan, and the Metropolis of Atlanta DRAFT Strategic SMART Goals and Action Plans, are available at www.stewardshipcalling.com under the Strategic Planning tab.)



A Strategic Plan answers four questions:

1. Why do we exist?
2. Where are we now?
3. Where do we want to be?
4. How will we get there?



STRATEGIC GOALS





Action Plan

4. How will we get there?

- This is where the "rubber hits the road" and where very specific activities for each period are outlined in great 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 a **roadmap** of how to implement the vision and achieve the organization's goals.
- It keeps the organization going in the right direction.



Strategic Goals

Strategic Goals are only as effective as the process of achieving them.

The “**SMART**” goal process helps ensure our Strategic Goals are achieved.



SMART Strategic Goals

Specific: Is the goal specific enough for clarity so that everyone will understand it?

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

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

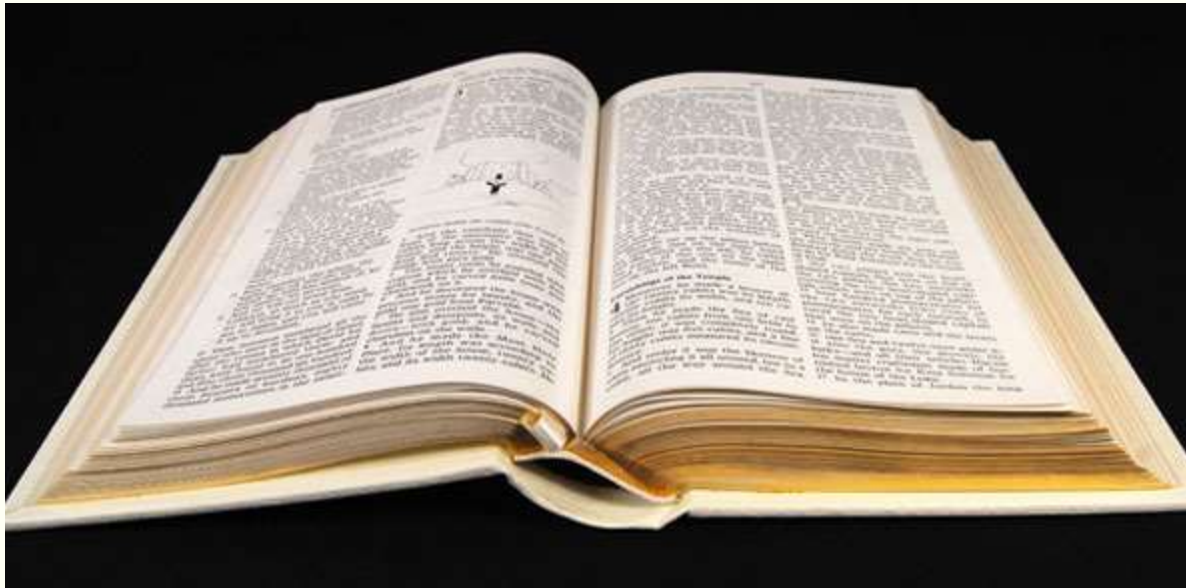
Realistic: Is the goal realistically written?

Timeline: Is there a timeline associated to the goal to ensure completion and accountability?



STRATEGIC GOALS

**Strategic Goals
are Biblical**





“At that time, Jesus called to him his twelve disciples and gave them authority over unclean spirits, to cast them out, and to heal every disease and every infirmity. 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



“Let your light so shine before men, that they may see your good works and glorify your Father in heaven.”

Matthew 5:16



“A new commandment I give to you, that you love one another as I have loved you...

By this all will know that you are my disciples, if you love one another.”

John 13:34-35



Example of a Strategic Plan Book

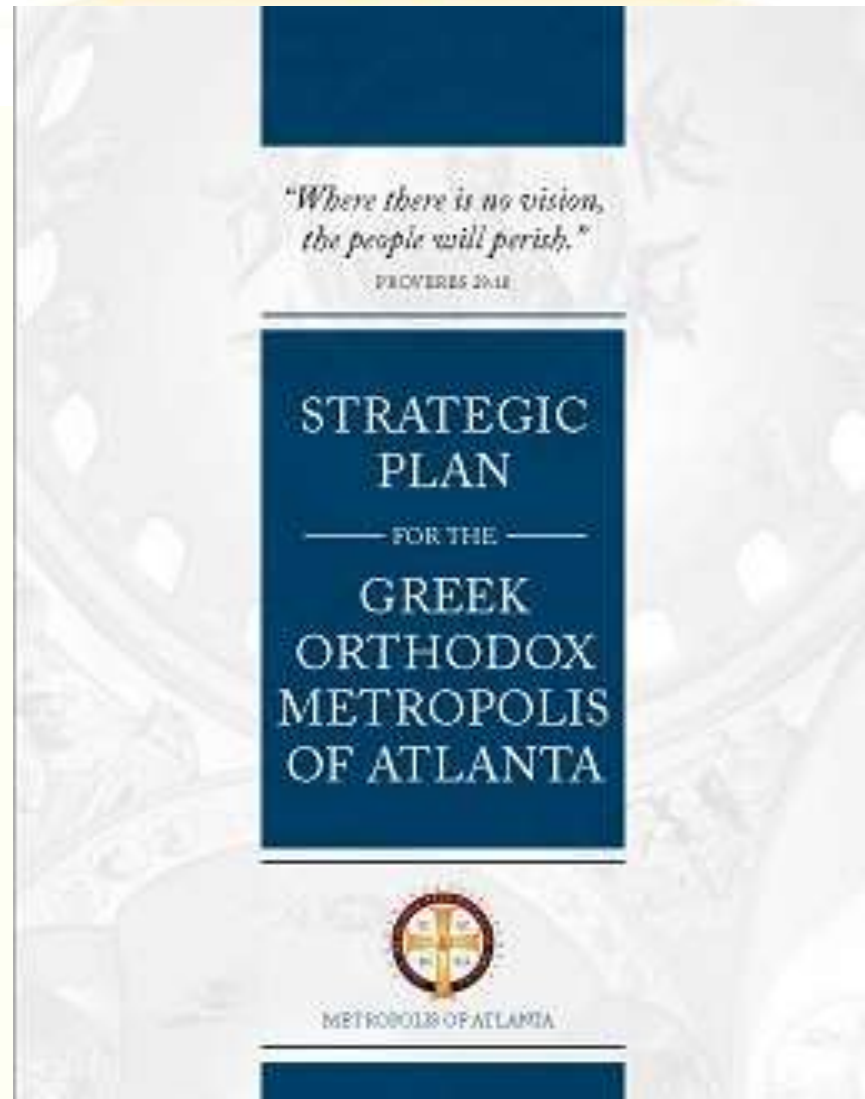
(Examples of Strategic Plan Books for the Metropolis of San Francisco and the Metropolis of Atlanta are available at www.stewardshipcalling.com under the Strategic Planning tab.)

THE METROPOLIS OF ATLANTA
STRATEGIC



PLAN

www.atlstrategicplan.org



THE METROPOLIS OF ATLANTA

STRATEGIC



PLAN

11 Strategic Task Forces and 34 Goals (Strategic Plan p. 17)

1. Administration (5)
2. Clergy (3)
3. Communication (3)
4. Education (2)
5. Family (4)
6. Finance (3)

7. Outreach, Evangelism & Philanthropy (2)
8. Spiritual Growth (2)
9. Stewardship (3)
10. Technology (3)
11. Youth (4)



Strategic Plan Book Tour

The Atlanta Metropolis Strategic Plan has 4 sections

- **Executive Summary (pages 6-7)**
- **Part 1: describes our process, Mission, SWOT, Core Values, Vision and Strategic Goals (pages 10-23)**
- **Part 2: sets out our very specific action plans to achieve all 34 SMART Strategic Goals (pages 26-73)**
- **Part 3: provides some of the background data we considered (pages 76-89)**



3 Key Things To Know About Our Strategic Plan

1. **It's all about the Parishes (28 out of 34 Strategic Goals focus on the Parish or Parish ministries)**
2. **We have a step-by-step implementation strategy and separate team (s)**
3. **THREE Transformational Elements**
 - a. **Best Practices Resource Portal**
 - b. **Faith Forums**
 - c. **Parish Champions**



Example of Strategic Goals and Action Plans

(Many more examples of Strategic Goals, Action Plans, and the final Strategic Plans for the Metropolises of San Francisco and Atlanta are available under the Strategic Planning tab at www.stewardshipcalling.com.)



STEWARDSHIP Goal 9.1

Comprehensive Stewardship Program

Within 3 years, each Parish will begin to implement our Metropolis' comprehensive *Igniting The Flame Of Stewardship* program, including a youth stewardship program, adapted to the needs of the Parishes.



Stewardship Goal 9.1 Action Plan

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



Stewardship Goal 9.1 Action Plan

Specific Key Actions Necessary To Achieve Stewardship Goal 9.1	Who Must Do Each Action	Timetable: How Many Months or Days To Finish Action From Previous Action	How Will We Know When This Action Has Been Completed
5. Clergy Skype-type sessions (and Clergy retreat sessions) will build a consensus as to the nature of Parish stewardship challenges, the proposed solution and their support	STF1 Clergy leader	Simultaneously with steps 2 - 4	All Clergy have participated in a Skype-type (and Clergy retreat) session
6. Recruit Stewardship Trainers (the “Stewardship Trainers”) for the Metropolis Igniting The Flame of Stewardship Program	STF1 and Stewardship Trainers	Simultaneously with steps 2 - 4	Stewardship Trainers have accepted responsibility
7. Recruit a team (the “Stewardship Support Team”) to assist Parishes that have received stewardship training with ongoing support to help address their stewardship challenges and fully implement the Metropolis Igniting The Flame of Stewardship Program	STF1 and Stewardship Support Team	Simultaneously with steps 2 – 4	Stewardship Support Team have accepted responsibility
8. Develop a support process by which Parishes that have received stewardship training can receive ongoing support to help address their stewardship challenges and fully implement the Metropolis Igniting The Flame of Stewardship Program	STF1 and Stewardship Support Team	2 months after step 4	Parish Stewardship Support Process has been developed



Stewardship Goal 9.1 Action Plan

Specific Key Actions Necessary To Achieve Stewardship Goal 9.1	Who Must Do Each Action	Timetable: How Many Months or Days To Finish Action From Previous Action	How Will We Know When This Action Has Been Completed
<i>TEACH THE STEWARDSHIP PROGRAM</i>			
9. Conduct a Train the Trainers program for both the Stewardship Trainers and Stewardship Support Team (both in person and via webinar/Skype-type sessions)	STF1, Stewardship Trainers, and Stewardship Support Team	2 months after steps 5 -7	Training programs have been completed
10. Communicate to the Parishes the availability of the Metropolis Igniting The Flame of Stewardship Program to the Parishes and schedule stewardship training programs between the Stewardship Trainers and the Parishes	STF1 together with Stewardship Trainers and Stewardship Support Team	1 month after step 8	Each Parish has been contacted to schedule its Metropolis Stewardship Training
11. Create an overall schedule that ensures each Parish can receive specific and personalized training in the Metropolis Igniting the Flame of Stewardship program (both in person and via webinar/Skype-type sessions)	STF1 and Stewardship Trainers	2 months after step 9	Each Parish has a scheduled Metropolis Igniting the Flame of Stewardship program



Stewardship Goal 9.1 Action Plan

<u>Specific Key Actions Necessary To Achieve Stewardship Goal 9.1</u>	<u>Who Must Do Each Action</u>	<u>Timetable: How Many Months or Days To Finish Action From Previous Action</u>	<u>How Will We Know When This Action Has Been Completed</u>
<i>SUPPORT THE STEWARDSHIP PROGRAM</i>			
12. Establish Portal location and process for Parishes and STF1 to share new stewardship best practices and results	STF1 and TTF	Simultaneously with step 3	Best practices sharing has been enabled on the Portal
13. Follow-up each Parish training program with Stewardship Support Team process and regularly scheduled (weekly or monthly) follow-up conference call/webinar/Skype-type sessions to deal with specific Parish issues and challenges	Stewardship Support Team	Beginning immediately after each Parish receives Stewardship Training	Each Parish has a Support Schedule tailored to its needs
14. Conduct follow-up assessment with Parishes of Stewardship Trainers and Stewardship Support Team process, successes, challenges and revise the Metropolis Igniting the Flame of Stewardship program and Stewardship Support Process and make necessary improvements	STF1 (in conjunction with Training Team and Stewardship Support Team)	Each Parish receives follow-up within 6 months of Training and at least semi-annually thereafter	Each Parish has received follow-up assessment and Metropolis Igniting the Flame of Stewardship program and Stewardship Support Process has been improved



Part 3

HOW ?

Parish Strategic Planning



OK, So How Do We Do All This?

Bill's 6-Step Parish Strategic Planning Process



(Feel free to customize the steps and process to meet the needs or resources of your Parish)

Bill's Sample Six Step Work Plan

- STEP ONE** – Strategic Planning Opening Retreat (SWOT, Why, Mission, Vision, Core Values, Areas of Focus)
(See Appendix for sample agenda for 1st retreat)
- STEP TWO** – Task Force meetings and conference calls
- STEP THREE** – Presentation of the Draft Strategic Goals and Action Plans at Parish public meeting(s) for feedback and consensus building (followed by more Task Force meetings/calls to synthesize comments)
- STEP FOUR** – Strategic Planning Closing Retreat to finalize SMART Goals and Action Plans
- STEP FIVE** – Finalize writing and preparation of Strategic Plan
- STEP SIX** – Implementation (and continual communication)



**See Appendix For Details About
What Happens In Each Step of
Bill's 6-Step Process**



How Do You Ensure Accountability and Achievement of Your Strategic SMART Goals

**Start and End Date
Tracking**



Ensuring Accountability

- Each Goal has a start date (determined by Head Coaches, Coordinators and Goal Captains)
- Once the start date is set, the end date can be calculated using the Action Plan deadline column
- The Start / End Dates are published and constant communication as to progress toward achievement is made public
- Red - Yellow - Green published to keep track

Off track



Caution



On track

THE METROPOLIS OF ATLANTA

STRATEGIC



PLAN

Strategic Goal Start and End Dates

Strategic Goal Start and End Dates

GREEN = start date

RED = end date

1. ADMINISTRATION

1.1 Parish Strategic Planning **8-1-15** (a) **8-1-16**
(b) **8-1-18**

1.2 Ministry Accountability and Performance
9-1-15 **3-1-17**

1.3 Risk Management **8-1-15** **8-1-16**

1.4 Metropolis Administration **9-1-15** **3-1-17**

1.5 Council of Ministries **9-1-15** **9-1-17**

Strategic Goal Start Dates

Goal Start Date	Goal	34# 100%
May 1, 2015	3.3	1 (3%)
August 1, 2015	1.1 - 1.3 - 2.1 - 2.2 - 3.1 3.2 - 4.1 - 6.1 - 6.3 - 7.1 8.1 - 9.1 - 9.2 - 10.1 - 10.3	15 (44%)
August 15, 2015	4.2 - 5.1 - 8.2	3 (9%)
September 1, 2015	1.2 - 1.4 - 1.5 - 2.3 - 5.2 - 7.2 10.2 - 11.1 - 11.2 - 11.4	10 (29%)
October 1, 2015	5.3 - 5.4 - 6.2 - 9.3 - 11.3	5 (15%)

Strategic Goal End Dates

Goal Latest End Date	2016 Sub-Goal	#22 (46%)
February 1, 2016	3.1(a) - 10.1(a) - 10.3(a)	3 (6%)
April 1, 2016	2.2(a)	1 (2%)
May 1, 2016	3.3(a)	1 (2%)
June 1, 2016	5.2(a)	1 (2%)
August 1, 2016	1.1(a) - 1.3 8.1(a) - 10.1(b)	4 (8%)
August 15, 2016	5.1(a) - 8.2	2 (4%)
September 1, 2016	2.3(a) - 7.2 - 10.2(a) 11.1 - 11.2 - 11.4(a)	6 (13%)
October 1, 2016	5.4(a)	1 (2%)
November 1, 2016	3.1(b) - 3.3(b)	2 (4%)
December 1, 2016	5.3	1 (2%)

Today's Goal



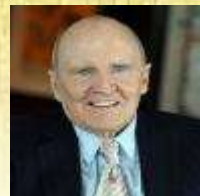
The Bottom Line (review)

- **WE ARE LIVING IN EXPONENTIAL TIMES**
- **Church membership is declining**
- **Church sacraments are declining**
- **Church contributions are declining**
- **Church member spirituality is declining**
- **Church relevance is declining**
- **Church stewardship is declining**
- **Church disengagement by youth is increasing**
- **Church member deaths are increasing**
- **Church dependence on Festivals is increasing**



Jack Welch

Chairman & CEO - General Electric



“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.”





**“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”**

The Great Commission (Calling) 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...”

**“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

7 Steps in the 4-P Process

1. Recruit leadership Core Team (People)
2. Agree on the your Strategic Plan Process (Process)
3. Recruit Strategic Planning Team (People)
4. Set timetable for retreats, parish information sessions, plan finalization delivery) (Process)
5. Develop your Strategic Plan and build a parish consensus (Product)
6. Implement, implement, and relentlessly implement (and make changes as necessary) (Performance)
7. Remember your WHY and have fun!



**"Your life does not get better
by chance, it gets better by
change."**

- Jim Rohn

diagnosticwarrior.com

“A dream is just a dream.

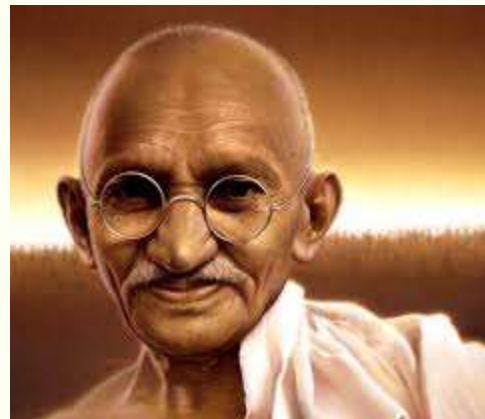
A goal is a dream with a plan and a deadline.”

Harvey Mackay



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

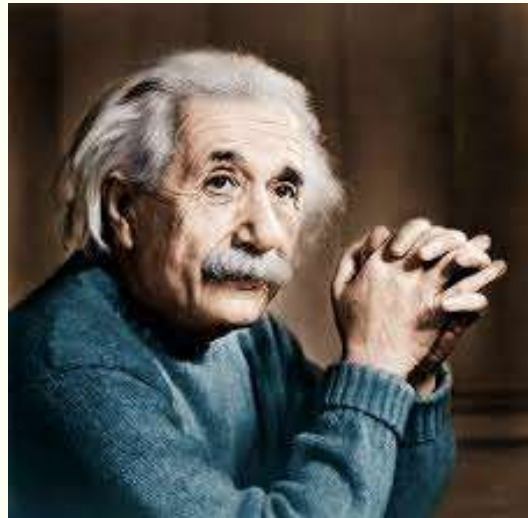
Mahatma Gandhi



“Logic will get you from A to B.

**Imagination will take you
everywhere.**

**Imagination is more important than
knowledge.”**



Albert Einstein

***“The best time to
plant a tree was
20 years ago.***

***The second best
time is today.”***



Old Chinese Proverb

**“Either lead, follow
or get out of the way.”**



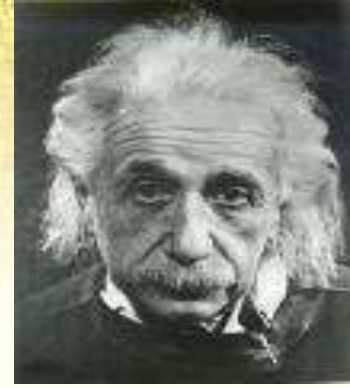
- Ted Turner
- General George S. Patton
- Lee A. Iacocca
- Thomas Paine
- Bill Marianes



What Will You Do To Make Disciples In Your Personal Jerusalem (your sphere of influence)?



Albert's Insight



❖ What was Albert Einstein's greatest contribution?

❖ ~~$E=mc^2$~~

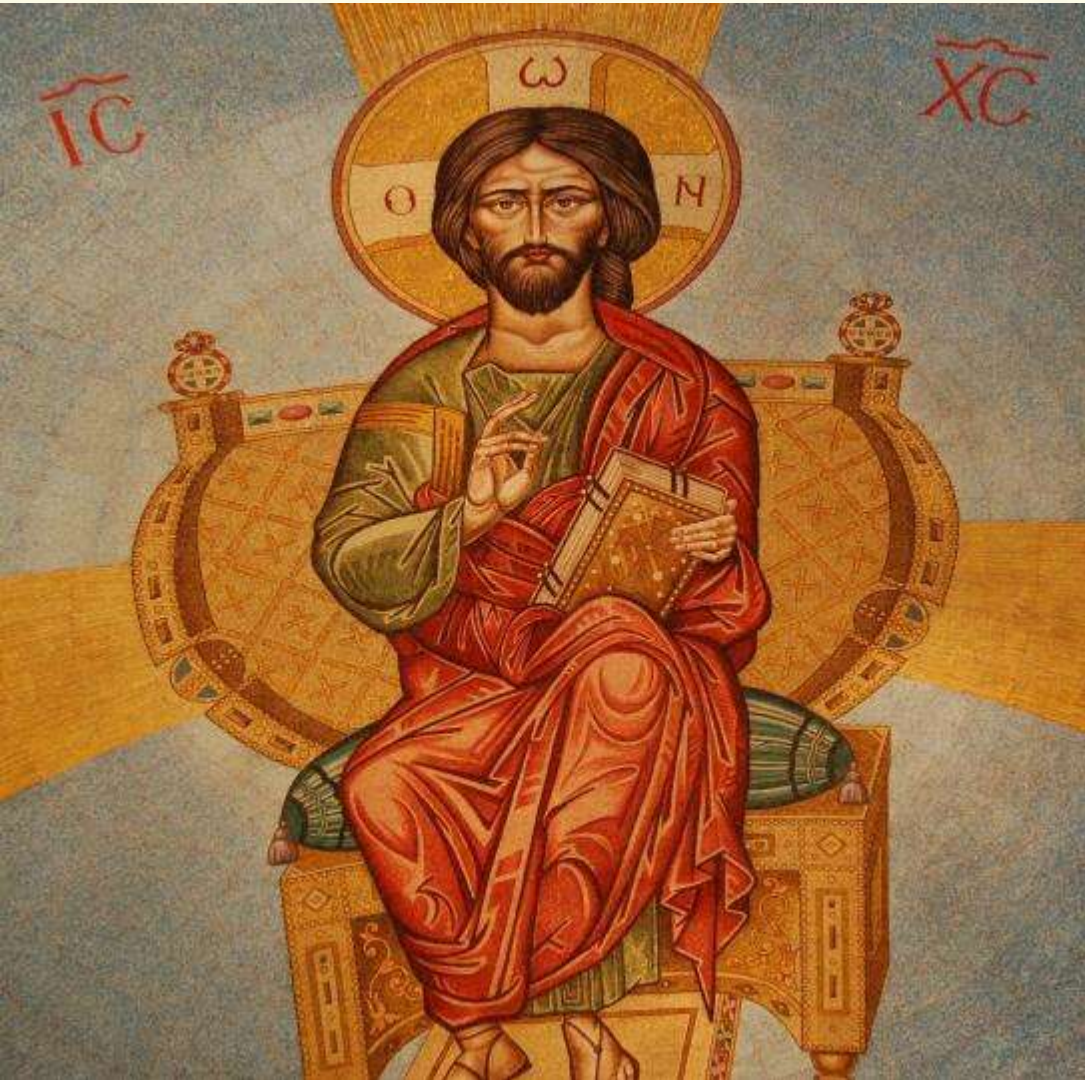
“NOTHING HAPPENS UNTIL SOMETHING MOVES”

The Marianes Corollary



**“NOTHING HAPPENS UNTIL
SOMEBODY MOVES”**

Why Are We Doing This?



“That the end of our lives may be Christian, without pain, blameless and peaceful, and for a good account at the awesome judgment seat of Christ.”

At that time, Jesus lifted up his eyes to heaven and said,

"As you, Father, did send me into the world, so I have sent them into the world."

John 17:18-19



I Send You Out...

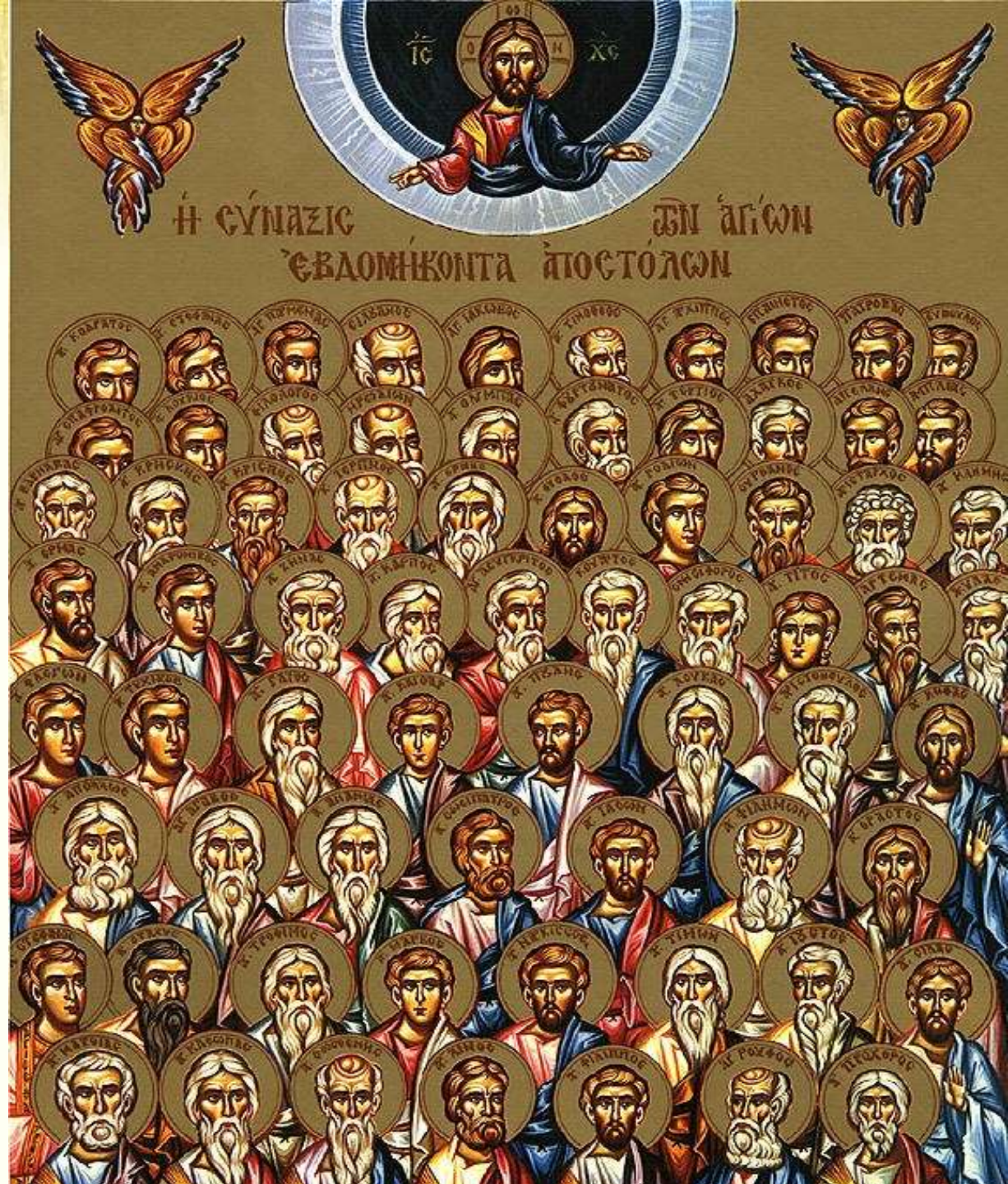


Walking in
Faith



***You have
now been
called as
one of
the 70
Disciples***

Luke 10:1





APPENDICES



Appendix

Bill's 15 Rules of Engagement



Bill's Rules of Engagement

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 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.
5. Tangential / side issues will be parked.



Bill's Rules of Engagement

6. No side discussions / texting / emailing / tweeting / facebooking / (mute phones).
7. All decisions will be made by consensus.
8. Bill's 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.
9. Everyone MUST participate. ("get in the game, or go home")
10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Parish/Metropolis, and not just what you want. (It's not about you)



Bill's Rules of Engagement

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 meals.)
15. We are all members of the Body of Christ, our Holy Archdiocese, Metropolis and Parish and made in the image and likeness of God. Let’s interact with each other as if we were interacting with our Maker. Let us treat one another with love and respect and allow the Holy Spirit to participate freely.



SWOT Analysis for the Metropolis of San Francisco and Metropolis of Atlanta



GREEK ORTHODOX METROPOLIS OF SAN FRANCISCO

ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΑΓΙΟΥ ΦΡΑΓΚΙΣΚΟΥ

METROPOLIS OF SAN FRANCISCO SWOT SUMMARY



Strengths

Programs/Ministries

Youth Programs

**Established Institutions (Ranch,
Monasteries, Camps)**

**Clergy Programs (retreats, wellness, clergy
couples)**

Philoptochos (outreach)



Strengths

Talent

Clergy (youthful, well-educated, progressive)

Laity (intelligent, leaders, tech-savvy)

Metropolitan (servant leader, visible, hard working)

Synergies between clergy, laity and Metropolitan

Music / Choir - sophisticated



Strengths

Finance

Endowment for Seminarians

**Self-sustaining programs (Ranch,
Monasteries, FDF)**

**Clergy compensation is at Archdiocese
scale**

Wealth of laity (across many industries)



Strengths

Other

West coast attitude

Pan-Orthodox cooperation

Strong tradition of Orthodoxy in the West

Largely assimilated parishioners

Strong Hellenic culture (FDF, Hellenic studies)



Weaknesses

Programs/Ministries

Youth ministries (both under 18 and 18-30 who are not totally connected to their faith)

Inadequate resources (both human and financial)

Gaps in programs that are needed

Inadequate communications (between Metropolis and parish and among parishes)

No method to measure spiritual development (from top down)



Weaknesses

Talent

Inadequate resources (both human and financial)

Lack of spiritual development

Significantly understaffed clergy and undeveloped lay leaders

Inadequate continuing clergy education and ongoing development and continuous learning opportunities

Inconsistent lay leadership and education

Disengagement from, and nominal attitude toward, the sacramental life leads to vulnerability (e.g., marriage)



Weaknesses

Finance

Inadequate finances for staff and ministries

Lack of effective Christian stewardship



Weaknesses

Other

Size and shape of the Metropolis

Clinging to Greek language and culture

- 1. liturgical challenge;**
- 2. communications challenge;**
- 3. other cultural acceptance challenge**



Opportunities

Programs/Ministries

Movement toward Orthodox unity and recognition of the value of the vast number of diverse Orthodox experiences and institutions (beyond GOA) to facilitate better communication and cooperation and from which we can learn both faith and ministries

Large number of College/universities (better communications)

Public school deficiencies (possible parochial school opportunities)

Partnering with others (Pan-Orthodox, governmental or international agencies/groups)

Large number of un-churched



Opportunities

Talent

Hispanic influx (seeking to join a church)

Large number of Asians

Intermarriage

College kids

Serious Christians seeking a deeper faith experience

Senior living facilities

Many economically disadvantaged



Opportunities

Finance

Many affluent persons

Movement of people within Metropolis for
tax and other financial reasons

Charitable foundations looking for donees



Opportunities

Other

We have the “right product” in the form of our great faith/religion

Technology

Large region with lots of resources

Large numbers of socially dislocated individuals

Large numbers of religiously estranged



Threats

Programs/Ministries

Exclusive club perception

Competition from other activities (sports, extra curricular that interfere with any church services)

Other religions who are perceived to “do things better”



Threats

Talent

Changing demographics (interfaith marriage)

Language and cultural impediments

Alternative role/cultural models for youth

Secularization of society

Moral failures of other churches that affect us



Threats

Finance

Economic threats due to economic circumstances

Lack of resources for programs

Competition due to proliferation of other non-profits

Perceptions that we are wealthy



Threats

Other

Secularization and humanism

Religious polarization politically

Demographics



Strengths - Metropolis of Atlanta

- 2000 Year old unwavering faith (liturgical and sacramental traditions)
- Diakonia Retreat Center facility
- Parish / Community Facilities
- Youth Programs (Hellenic Dance Festival, St. Stephen's summer camp, Winter Youth Rally, Retreats)
- Philoptochos / Philanthropy
- Family Life Ministries
- Metropolitan Alexios
- Great Clergy
- Effective lay leadership
- Archangel Michael Honors weekend
- Plentiful resources
- Wealth
- Balanced Metropolis budget
- Transparency and accountability
- Attractive geography



Weaknesses - Metropolis of Atlanta

- **Clergy** (need for more training and mentoring; evaluation & feedback)
- **Youth** (we don't understand how best to reach them; they don't see the relevance of Church; ineffective tools for listening to them; low participation in programs and the life of the Church)
- **Young Adult Ministries** (OCF, etc.)
- **Parents & Family Participation**
- **Financial DRC debt**
- **Stewardship inadequacy**
(reliance on festivals and failure to understand it is more than just money)
- **Misunderstanding relationship between Parish, Metropolis, Archdiocese and Patriarchate**
- **Communications/PR** (ineffective communication of Vision and inefficient or inadequate use of new technology, especially to reach youth)
- **Metropolis Administration** (lack of sufficient responsiveness and resources)
- **Parish Governance** (role and responsibilities of clergy and laity, lack of understanding regarding consensus and leadership succession planning, lack of institutional memory)
- **Education** (lack of faith development and culture awareness— youth and adults – lack of collecting and sharing best practices—religious and Greek education—parish council training)
- **Identity Confusion** (as a religious organization- with regard to Orthodox faith, Hellenic culture, Greek language, etc.)
- **Ministries/Programs do not reach everyone**
- **Program evaluation process**
- **Worship** (lack of engagement Sunday and other times)



Opportunities - Metropolis of Atlanta

- **Technology** (data management, web)
- **Best Practices** (personal ministries / services / counseling in Parish, stewardship, studying and adapting what others do, “benchmarking”)
- **Parochial Schools** (youth educated in faith are more likely to stay in the faith)
- **Talented Laity and Clergy** we can harness
- **Outreach to Non-Orthodox and Unchurched and Lapsed** (evangelism, interfaith marriages)
- **Underutilized young professionals**
- **Advocacy on critical issues** (Christian rights & freedom—and strengthen relationships)
- **Gather beauty and knowledge wherever it is** (don't merely look internally within Metropolis)



Threats - Metropolis of Atlanta

- Time challenges of external activities (significant number of external youth activities)
- Other Faiths better explain their relevancy and witness / live their faith
- Purposeful erosion of Christian faith in society
- Special time constraints on working families (two parents working—single parents)
- Changing moral values
- Changing family values
- Competition from other charities
- Assimilation of Interfaith marriages
- Current economy
- Change in demographics (we are not as close to our church)
- Other Faiths recruit better and address needs better



Appendix
**of Examples of Other
Parish Vision Statements**



Vision Statement Examples

It is our vision that ____ Greek Orthodox Church will have a comprehensive state of the art campus that is fully sustained by successful stewardship and an abundance of programs that meet the needs of parishioners of all ages.



Vision Statement Examples

It is our vision that ____ Greek Orthodox Church will have:

- (1) a comprehensive state of the art campus
- (2) that is fully sustained by successful stewardship and
- (3) an abundance of programs that
- (4) meet the needs of parishioners of all ages.



Vision Statement Examples

Our vision at _____ Greek Orthodox Church is to manifest in the _____ area the Body of Christ, the fellowship of all Orthodox Christian believers, by learning and living the teachings of Jesus Christ and His Church. We do this by worshipping (liturgia), witnessing (martyria), servicing (diakonia) and socializing (koinonia) together.

We do this by caring for family, friends and others, by comforting those in need and encouraging one another toward a strong moral and spiritual life. By striving for personal sanctification, to make real the image and likeness of God in our own lives, we seek to make God's Kingdom real in our community.



Vision Statement Examples

Our vision...is to

- (1) manifest the Body of Christ, the fellowship of all Orthodox Christian believers
- (2) by learning and living the teachings of Jesus Christ and His Church.
- (3) We do this by:
 - (1) worshipping (liturgia),
 - (2) witnessing (martyria),
 - (3) serving (diakonia) and
 - (4) socializing (koinonia) together
 - (5) caring for family, friends and others,
 - (6) comforting those in need and
 - (7) encouraging one another toward a strong moral and spiritual life
 - (8) striving for personal sanctification,
 - (9) making real the image and likeness of God in our own lives...seek to make God's Kingdom real in our community.



Vision Statement Examples

The vision of the _____ during the next five years:

1. Increase Congregational Involvement
2. Train & Develop Leaders
3. Improve Communication/Trust
4. Attract & Welcome New Members
5. Expand Relational Groups & Our System of Caring
6. Make Better Use of Our Resources



**To See Examples of all 37
Metropolis of San Francisco
Strategic SMART Goals and
all 34 Metropolis of Atlanta
Strategic Smart Goals go to
the Strategic Planning Tab at:**

www.stewardshipcalling.com



APPENDIX

Sample First Strategic Planning Retreat Agenda (from Metropolis of Atlanta)



GREEK ORTHODOX METROPOLIS OF ATLANTA

#	Time	Speaker/ Team	Activity
			A. The Opening
1	6:00-6:30	HEMA	Opening Prayer and Metropolitan's welcome
2	6:30-7:45	Bill	Meet the team and review strategic planning process, goals, agenda, rules of engagement, facts and statistics and brain stimulation exercises
			B. Metropolis SWOT
3	7:45-8:45	SWOT Teams	Each SWOT sub-committee team develops a consensus list of either Strengths, Weaknesses, Opportunities or Threats <u>ONLY IN THEIR AREA</u> based on the results from the assigned homework depending on to which SWOT team they have been assigned based on their preferences
4	8:45 - 9:45	Full Group	Each SWOT team has up to 15 minutes to present their consensus Metropolis S, W, O or T
5	9:45 - 10:45	Full Group	The full group will discuss and reach consensus agreement on the Metropolises' Strengths, Weaknesses, Opportunities and Threats
6	10:45 -11:00	Full Group	Review, closing prayer and dismissal



#	Time	Speaker/ Team	Activity
			C. Statement of WHY, Mission, Values and Vision
7	9:00 - 9:15	HEMA	Opening prayer and Metropolitan's remarks
8	9:15 - 10:15	Full Group	<u>Start With Why</u> – Develop Metropolis Statement of Why
9	10:15 - 11:00	Full Group	Discuss <u>Archdiocese Mission</u> and what it means
10	11:00 - 12:30	Constituency Teams	Each Constituency Team discusses and determines by consensus: (1) Metropolis' Proposed <u>Core Values</u> (from homework); and (2) Metropolis' Proposed <u>Vision</u> based on consensus Statement of Why, Core Values and Mission
11	12:30 - 1:15	Full Group	<u>Lunch</u>
12	1:15 - 2:15	Full Group	<u>Each team</u> has up to 15 minutes to present their proposed consensus Metropolis <u>Core Values and Vision</u>
13	2:15 - 4:00	Full Group	<u>Group discussion</u> , development and agreement on <u>consensus Metropolis Core Values and Vision</u>
14	4:00 - 4:15	Full Group	Break



GREEK ORTHODOX METROPOLIS OF ATLANTA

#	Time	Speaker/ Team	Activity
			E. Strategic Objectives
15	4:15 - 5:15	Constituency Teams	<u>Each Constituency Team</u> builds a consensus as to the <u>prioritized strategic goals for their constituency</u> and identifies the various categories of strategic goals and Task Forces they believe should be implemented in the Metropolis strategic plan
16	5:15 - 6:15	Full Group	<u>Each of the Constituency Teams presents their consensus</u> of the prioritized Strategic Goals for their constituency and proposes the various categories of strategic goals and Task Forces they believe should be implemented in the Metropolis strategic plan
17	6:15 - 7:00	Full Group	<u>DINNER</u>
18	7:00 - 8:15	Full Group	<u>Group brain storming of additional possible strategic objectives</u> and categories of Task Forces for the Metropolis (based upon SWOT, Statement of Why, Mission, Core Values, Vision and Constituency Team recommendations)
19	8:15 - 9:30	Full Group	<u>Group discussion, development and consensus agreement on splitting Metropolis Strategic Goals into Strategic Goal Task Forces</u>
20	9:30 - 10:00	Full Group	<u>Divide Strategic Planning Team into Strategic Goal Task Forces and discuss next steps</u>
21	10:00	Full Group	Closing prayer and dismissal



GREEK ORTHODOX METROPOLIS OF ATLANTA

#	Time	Speaker/ Team	Activity
22	9:00 - 9:10	HEMA	Opening prayer and Metropolitan's remarks
23	9:10 - 9:30	Full Group	Review Metropolis SWOT, Statement of Why, Mission, Core Values and Vision and Strategic Goal Task Forces



#	Time	Speaker/ Team	Activity
			F. Strategic Goal Task Forces
24	9:30 - 11:00	Strategic Goal Task Forces	Strategic Goal Task Forces are formed and meet to specifically identify the work plan for refining all the Strategic Goals identified by the Full Group up to 5 Strategic Goals. Each Strategic Goal Task Force selects Co-Chairs and a Secretary and then identifies Task Forces' Goals, Deliverables, Resource Needs, Meeting Schedule and Deadlines
25	11:00 - 11:45	Full Group	A full group discussion and review of Task Force Work Plans and discuss next steps, timetable and final retreat in 2015
26	11:45 - 12:00	HEMA	Closing Prayer and Metropolitan's final comments and dismissal



APPENDIX

**Details About What Happens In
Each Step of Bill's 6-Step
Process**



- **Step ONE – Strategic Planning opening retreat**
 - **Before retreat**
 - **The Strategic Planning Team (SPT) identifies your Parish's Strengths, Weaknesses, Opportunities and Threats (compile them into top answers)**
 - **At retreat**
 - **Reach CONSENSUS on the key SWOT items**
 - **Reach CONSENSUS on Statement of Why, Mission, Vision and Core Values**
 - **Brain storm ideas that address SWOT issues and are consistent with Statement of Why, Mission, Vision and Core Values**
 - **Group brain stormed ideas into categories of like or similar items**
 - **Form a Task Force for each category of like/similar items**
 - **SPT members select/assigned on which Task Forces they wish to work**



- **Step TWO – Strategic Task Force conference calls**
 - Each Task Force has regular meetings or calls
 - Recruit (on-ramp) new members into Task Forces
 - Invite thought leaders from the Parish, Metropolis, Archdiocese, community, other faith-based groups
 - Start with first retreat brain stormed ideas and add and delete other ideas
 - Prioritize, prioritize, prioritize... based on SWOT and Vision
 - Focus on top 2-5 specific ideas that are most critical and address Weaknesses or root cause issues
 - Discuss SMART Goal for each idea
 - By consensus, write SMART Goals
 - Reconvene after receiving Community Input (Step 3)



- **Step THREE – Present Draft Strategic Plan at Community event for feedback and consensus building**
 - **Gather the community and present:**
 - **SWOT**
 - **Statement of Why**
 - **Mission**
 - **Vision**
 - **Core Values**
 - **Strategic Areas of Focus**
 - **SMART Goals draft Action Plans**
 - **Receive feedback and answer questions**
 - **(Reconvene Task Forces to consider input)**



- **Step FOUR – Strategic Planning 2nd retreat**
(finalize Strategic SMART Goals and detailed Action Plans)
 - **At retreat, each Task Force:**
 - **presents each all SMART Goals**
 - **presents Action Plan for each SMART Goal**
 - **receives feed back and questions from entire Strategic Planning Team**
 - **reaches a consensus on final changes to the SMART Goals and Action Plans**



- **Step FIVE – Finalize, writing and graphic design of the Strategic Plan and begin advance communication**
 - Final edits to Action Plans
 - Write good looking Strategic Plan to include:
 - SWOT
 - Statement of Why
 - Mission
 - Vision
 - Core Values
 - Strategic Areas of Focus
 - SMART Goals and Action Plans
 - Begin communication of Strategic Plan to all constituencies and using all kinds of media



- **Step SIX** – **Implementation of the Strategic Plan**
 - **AND NOW THE FUN (and hard work) BEGINS**
 - **Head Coaches** = person(s) leading the whole strategic plan implementation
 - **Task Force Coordinators** = person(s) responsible for all goals within that Task Force's area
 - **Goal Captains** = person(s) in charge of achieving each **SMART** Goal and implementing Action Plan
 - **IHQ** “**Implementation Head Quarters**” = Priest + **Head Coaches** + **OZ** (to keep entire project on track)
 - Regular meetings among and between all levels and constant coordination to stay on the schedule
 - Constant communications with Parish and all constituencies
 - Relentless follow-up and follow-through
 - Make changes and adapt as necessary

*You have
now been
called as
one of the
70
Disciples*

Luke 10:1

