



St. Mark / St. Mary & St. Philopater Coptic Orthodox Church, Troy Michigan



Strategic Planning Retreat #2



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

Proverbs 29:18

Bill Marianes – July 14, 2020



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TODAY, is the day we...



...and do something
“they” said could
not be done!



Because...

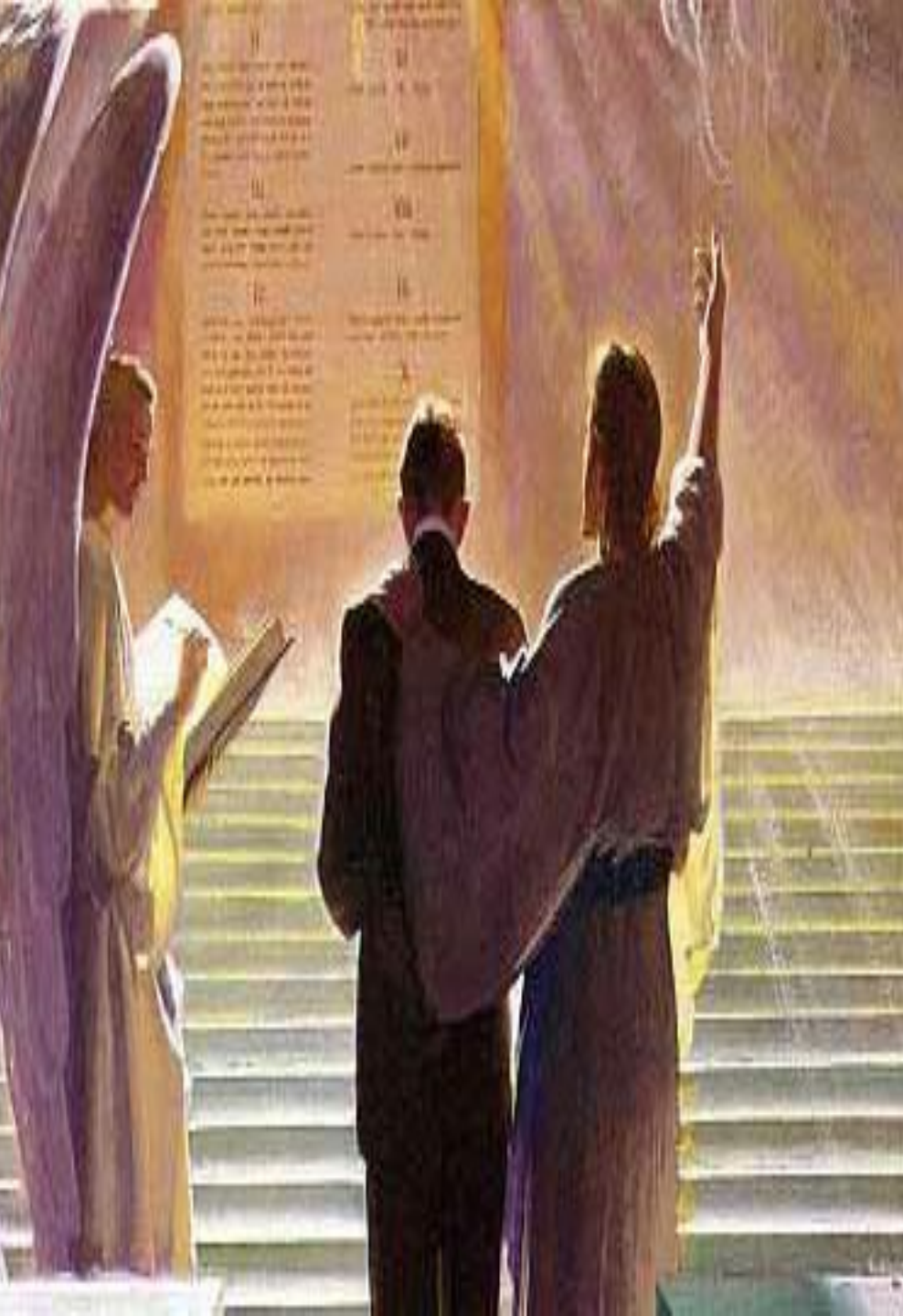


**Every great achievement was
once considered impossible.**



WHY
are you here?





**“That the end of
our lives may be
Christian, without
pain, blameless
and peaceful,
and for a
GOOD ACCOUNT
BEFORE THE
AWESOME
JUDGMENT SEAT
OF CHRIST”**

2 Corinthians 5:10

Orthodox Divine Liturgy

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

***The second best
time is today.”***

Old Chinese Proverb





Stewardship Calling Six Step Work Plan



- Step One** Opening Retreat to determine SWOT, Statement of Why, Mission, Vision, Core Values, Strategic Areas of Focus
- Step Two** Task Force Meetings to draft Strategic Goals and Action Plans
- Step Three** Public Presentations of draft Strategic Goals and Action Plans for feedback and consensus-building (Task Forces synthesize comments)
- Step Four** Closing Retreat to finalize SMART Strategic Goals and Action Plans
- Step Five** Finalize Strategic Plan + Parish Roll Out
- Step Six** Implementation with continual communication





St. Mark / St. Mary & St. Philopater Coptic Orthodox Church, Troy Michigan



Final Statement of Why, Strengths, Weaknesses, Opportunities, Threats, Core Values, Mission Statement & Vision Statement



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

Proverbs 29:18



Bill Marianes – November, 2019

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“If you don’t know WHY you do what you do, how will you inspire others to believe what you believe or do what you do.”



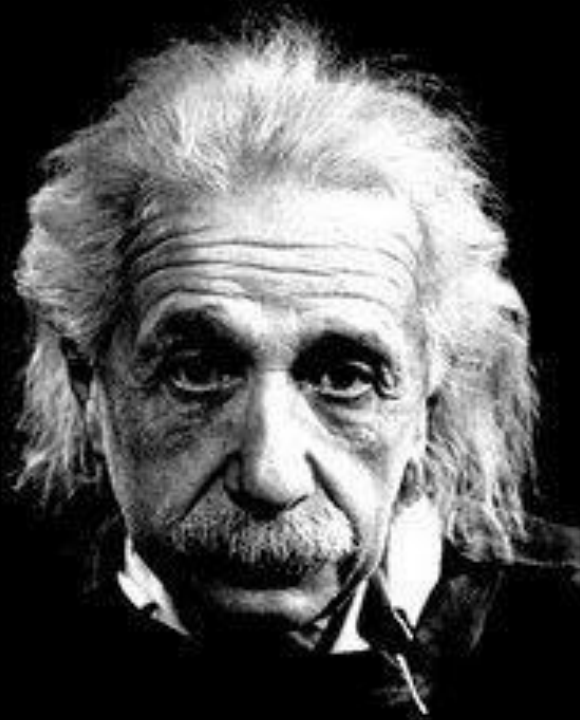
Simon Sinek
“Start with WHY”



Statement of WHY

**To embrace and serve all in a
Christ-centered and loving
environment, so that we may
empower each other to be the light
of the world and be eternally
united with Christ**

"WE CANNOT
SOLVE OUR
PROBLEMS
WITH THE SAME
THINKING WE
USED WHEN WE
CREATED THEM"

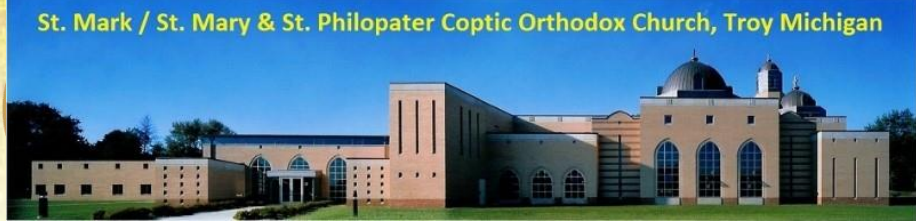




Strengths



- ~ **History, traditions, clergy and opportunity to lead a spiritual life**
- ~ **Large number of diverse church services**
- ~ **Congregation that has diverse skill sets and ages**
- ~ **New audio visual technology improvements**
- ~ **Quality and execution of certain parish initiated events**



Weaknesses



- ~ **Lack of engagement in serving and financially**
- ~ **Leadership, management & effective and complete communications**
- ~ **Youth & Emerging Adult ministries and engagement**
- ~ **Diversity and welcoming**
- ~ **Education (spiritual, religious, developmental, mental health, family)**
- ~ **Inreach, Outreach and Evangelism**



Opportunities



- ~ **Community and Ecumenical outreach and involvement**
- ~ **Available external financial and other resources and other non-profit best practices**
- ~ **Technology and communications**



Threats



- ~ **Shifting social values**
- ~ **Secularism, Atheism and other Religions**
- ~ **Addictions**
- ~ **Economy**
- ~ **Security**
- ~ **External political influences**

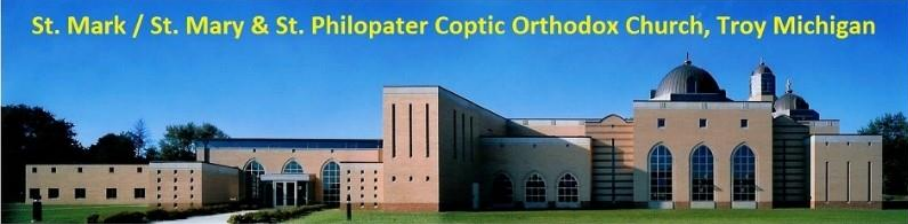
“Your reputation is what you’re perceived to be.

Your character is what you really are.”

**UCLA Coach
John Wooden**



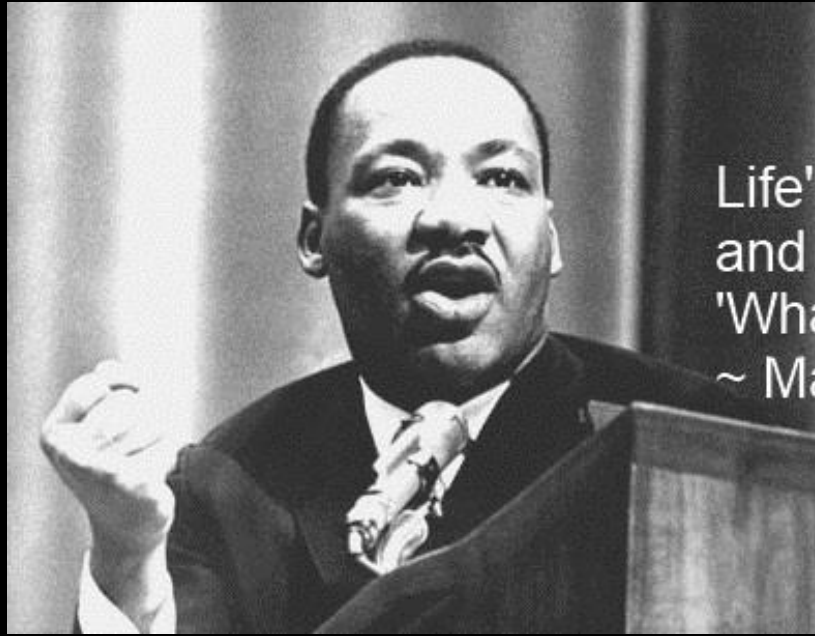
**Won 10 NCAA
national basketball
championships in 12
years – 7 in a row**



Core Values



- ~ **Christ-centered**
- ~ **Loving & hospitable**
- ~ **Dedicated to the Orthodox
Christian Faith and spiritual
growth and education**
- ~ **Committed to a life of service and
generosity**
- ~ **Evangelistic**
- ~ **Future-focused**



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



Mission Statement

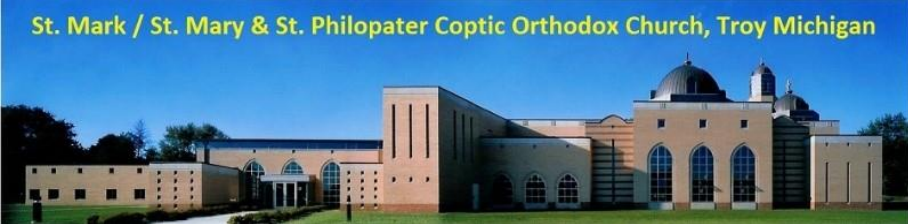


The mission of St. Mark, St. Mary St. Philopater Coptic Orthodox Church is to welcome all to experience the transformative love of Christ through Orthodox Christian worship, education and service.

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



**Pastor Rick
Warren**



Vision Statement



Within 3 years, St. Mark, St. Mary & St. Philopater Coptic Orthodox Church will become a more dynamic Christ-centered FAMILY through increased and more effective:

Fellowship, outreach & evangelism

Altruism, generosity & stewardship

Ministries & education

Innovative communications & operations

Leadership development

Youth & Emerging Adult initiatives



Final Strategic Goals and Action Plans

~ ~ ~ ~ ~

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

Proverbs 29:18

~ ~ ~ ~ ~



Stewardship
Calling

June, 2020



Stewardship
Calling



Goals



1. EDUCATION

1.1 Education Program

2. ENGAGEMENT

2.1 Engagement in Service and Finances

2.2 Youth & Emerging Adult Ministries and Engagement

3. OPERATIONS & ADMINISTRATION

3.1 Enhanced Communications & Technology Platform

3.2 Operational & Organizational Excellence

3.3 Leadership Development

4. WELCOMING & WITNESS

4.1 Welcoming Ministry

4.2 In-Reach Outreach and Evangelism Ministry Goal



EDUCATION Goal 1.1



Education Program

Within 23 months, we will fully research, develop, improve and implement best practices for religious, spiritual, social development, mental health and family education programs that will drive a measurably more proficient level of knowledge of the Orthodox Faith and its practices to better live a Christ-centered life for all:

- (a) Children and youth under 18;**
- (b) college-age and emerging adults between 18 and 30; and**
- (c) adults over 30.**



Education Goal 1.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 1.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Form Education Goal 1.1 Task Force (“ETF1.1”) to include those with requisite education expertise.	Strategic Planning Team, Goal Captain and Clergy	1 month from Start Date	ETF1.1 team members agree to serve
2. Conduct comprehensive research from all available sources (Orthodox and non-Orthodox) to collect best in class religious, spiritual, social development, mental health and family education content, programs and materials (learning standards, content, curricula, delivery methods, language delivery options, servant development programs, etc.) for each of the identified “Three Age Groups” (children and youth under 18; college-age and emerging adults between 18 and 30; and adults over 30), and specifically identify objective evidence of the effectiveness of each.	ETF1.1	5 months after step 1	Research report compiled from all sources including objective evidence of effectiveness
3. Develop and implement data collection methods and tools (e.g. surveys/polling, personal interviews, etc.) to effectively capture parish input as to what religious, spiritual, social development, mental health and family education topics and delivery methods and languages are desired by parishioners in the Three Age Groups.	ETF1.1	Simultaneous with step 2	Surveys are returned from statistically significant sampling and responses are compiled
4. Compile research and data from steps 2 and 3 and qualitatively analyze and assess: (a) all researched and collected educational and other materials and objective evidence of their success and applicable target goals; (b) Three Age Group parishioner survey data of needed religious, spiritual, social development, mental health and family education content and programs and desired delivery and language options; (c) all existing parish religious, spiritual, social development, mental health and family educational content/programs; and (d) best methods for delivery of education materials for each of the Three Age groups.	ETF1.1	6 months after steps 2 and 3	Comprehensive report of qualitative analysis and best practices is completed



Education Goal 1.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 1.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
5. Develop an outline of a comprehensive best practices religious, spiritual, social development, mental health and family education program (the “Education Program”) tailored to the needs of the Three Age Groups with a delivery schedule and proposed methods of delivery, and definition of measurable metrics, goals and key performance indicators (“KPIs”).	ETF1.1	3 months after step 4	Outline of elements of comprehensive Education Program is finalized
6. Develop, improve or modify materials needed to create a best practices comprehensive Education Program for the Three Age Groups and training program for all the required servants and others who will teach -the new Education Program (“Teachers”).	ETF1.1	4 months after step 5	Education Program is completed and developed
7. Recruit and begin training and establish the various delivery methods for the Education Program Teachers as determined in steps 4, 5 and 6.	ETF1.1	3 months after step 6	Teachers are recruited and trained, and delivery methods are established
8. Measure baseline proficiency of the parishioners regarding the elements of the Education Program and then begin implementation of the comprehensive Education Program.	ETF1.1 and Teachers	1 month after step 7	Education Program delivery begins
9. At least annually review, evaluate, eliminate or improve and adjust materials, Teachers and the entire Education Program to ensure that all materials represent the most effective best practices available and the Teachers are most effective so that the KPIs are achieved.	ETF1.1 and Teachers	At least annually after step 8 and continuously thereafter	At least annual review takes place and improvements are implemented



Engagement Goal 2.1

Engagement in Service and Finances

Within 23 months, we will research, develop and implement a faith-based comprehensive Engagement Ministry that, within 12 months after implementation will:

- (a) increase number of church parishioners engaged in Ministry programs and church services by 25%;
and**
- (b) increase annual financial contributions to the Parish by 15%, and with a 20% increase in the number of parishioner donors.**



Engagement in Services & Finance

Goal 2.1 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.1</u>	Responsible <u>Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Form Engagement in Services & Finance Task Force 2.1 Task Force (“ES&FTF2.1”).	Strategic Planning Team and Goal Captain	1 month from Start Date	ES&FTF2.1 team members agree to serve
2. ETF 2.1 meets, allocates, and completes research to: (a) Gather comprehensive historical and current data on: 1. Attendance at liturgies, praises, and services; 2. Church member levels of ministry involvement and engagement in services and ministries; and 3. Financial contributions. (b) Identify at least five successful stewardship and engagement programs (both Orthodox and non-Orthodox) and identify: 1. Effective, comprehensive strategies and best practices for increasing engagement in attendance and service, as well as ministry involvement and financial contributions; 2. Best practices for the organization and structure of the new “Engagement” Ministry; and 3. Specific methods and metrics to best assess engagement in services, ministries and finances.	ES&FTF2.1	5 months after step 1	Research is completed, summarized and shared with all ES&FTF2.1 team members



Engagement in Services & Finance

Goal 2.1 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.1</u>	Responsible <u>Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
3. Develop and implement data collection methods and tools (e.g. surveys, personal interviews, web solicitations) to effectively capture worship, ministry and financial engagement barriers and issues data from the widest possible spectrum of parishioners, including both those who attend services and are engaged in ministries and financially, and those who have stopped or minimized their services, ministry or financial engagement (the “Feedback”).	ES&FTF2.1	4 months after step 2	Feedback is obtained, summarized and shared with all ETF 2.1 team members
4. Compile research and data from steps 2 and 3 and: (a) Review and analyze data, results, trends, Feedback and current levels of engagement; (b) identify most effective methods to address barriers and increase levels of worship, ministry and financial engagement ; and (c) identify new programs, ministries and services to maximize engagements in services, ministry and finances.	ES&FTF2.1	3 months after step 3	All data and research is analyzed, and trends, and new services or the modification of existing services are identified and summarized.

Engagement in Services & Finance

Goal 2.1 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.1</u>	Responsible Party	<u>Timetable</u>	<u>Completion Confirmation Test</u>
<p>5. Develop the “Engagement Ministry Plan” to be deployed in the parish that will include:</p> <ul style="list-style-type: none"> (a) a strategy and detailed implementation plan and timeline that addresses the most effective ways to increase parishioner worship, ministry and financial engagement; (b) Identifying which existing ministries need to be enhanced and which need to be replaced, as well as a detailed and specific action plan as to how they will be enhanced or replaced, as the case may be; (c) a process and timeline to train the servants, and any ministries that will be retained and enhanced, on the specifics of the Engagement Ministry Plan; (d) the specifics of how parishioners will be better communicated with to increase their financial contributions to the target level; (e) any necessary budget and resources (financial or other) to fully implement the Engagement Ministry Plan; and (f) the metrics to be used to measure its success and conformity to best practices. 	ES&FTF2.1	6 months after step 4	Engagement Ministry Plan is developed, completed and approved by all required constituents



Engagement in Services & Finance

Goal 2.1 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.1</u>	Responsible <u>Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
6. Meet with all existing ministries to be retained and enhanced and start to implement the detailed Engagement Ministry Plan for their enhancement.	ES&FTF2.1	3 months after step 5	Any feedback is collected, summarized.
7. Educate whole congregation about new Engagement Ministry Plan in order to recruit servants into all ministries and programs that are part of the Engagement Ministry Plan and thereafter train them.	ES&FTF2.1	Simultaneous with step 6	At least 25% of servants agree to be part of a ministry or program as a part of the Engagement Ministry Plan and are trained.
8. Begin official implementation of Engagement Ministry Plan.	ES&FTF2.1	1 month after step 7	Engagement Ministry Plan implementation begins



Engagement in Services & Finance

Goal 2.1 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.1</u>	Responsible <u>Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
9. Conduct at least a semi-annual assessment of the effectiveness of the new Engagement Ministry Plan to ensure that it meets the target 25% increase in church member engagement and 15% increase in financial contributions, and with a 20% increase in the number of parishioner donors.	ES&FTF2.1	Beginning at least 6 months after step 9 and at least semi-annually thereafter.	Engagement Ministry Plan is evaluated and improved at least semi annually and the target goals are met.



Engagement Goal 2.2

Youth and Young Adult Ministries and Engagement

Within 17 months, we will assess current services and further develop comprehensive youth and young adult ministries that will measurably increase and enhance engagement, service, and community belonging, over the next 12 months thereafter.



Youth and Young Adult Ministries and Engagement Goal 2.2 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.2</u>	Responsible <u>Party</u>	<u>Timetable</u>	Completion <u>Confirmation Test</u>
1. Form Youth & Young Adult Ministries & Engagement Task Force 2.2 ("Y&YAM&ETF2.2").	Strategic Planning Team and Goal Captain	1 month from Start Date	Y&YAM&ETF2.2 team members agree to serve
2. Research best practices in most effective youth and young adult programs from other organizations (including effective Orthodox and non-Orthodox youth ministries) and identify specific goals and success metrics and methods to evaluate success.	Y&YAM&ETF2.2	4 months after step 1	Best practices research completed and summarized in a report
3. Develop and distribute a comprehensive survey of youth and young adults to ascertain their needs and desires and the effectiveness of existing parish ministries and programs to meet those needs.	Y&YAM&ETF2.2	3 months after step 2	Comprehensive survey of youth and young adults is designed, executed and evaluated
4. Evaluate and summarize current parish youth and young adult programs and ministries based on previously collected SWOT data (strengths, weaknesses, opportunities and threats), and research compiled in steps 2 and 3.	Y&YAM&ETF2.2	3 months after step 3	Current youth and young adult ministries and programs are evaluated and a report is compiled



Youth and Young Adult Ministries and Engagement

Goal 2.2 Action Plan



Key Actions Necessary To Achieve <u>Strategic Goal 2.2</u>	Responsible <u>Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
5. Based on data collected from steps 2 and 3 and the evaluation and analysis from step 4, create the most effective youth and young adult ministry and programs to increase and enhance engagement, service, and community belonging among parish youth and young adults (the “Y2A Ministry”).	Y&YAM&ETF2. 2	3 months after step 4	Comprehensive best practices Y2A Ministry is finalized outlined in a report.
6. Conduct appropriate training for all individuals associated with youth and young adult ministry on the new Y2A Ministry (“Youth Servants”).	Y&YAM&ETF2. 2	2 months after step 5	Training of all Youth Servants on the Y2A Ministry is completed
7. Start to implement the Y2A Ministry.	Y&YAM&ETF2. 2 and Youth Servants	1 month after step 6	Y2A Ministry implementation begins
8. Semi-annually review, evaluate and assess the effectiveness of entire Y2A Ministry against the metrics of success determined in step 2 and objectives in step 5 to ensure that all programs, materials and ministries are the most effective best practices available and specific goals and success metrics are achieved, and make necessary changes and adjustments.	Y&YAM&ETF2. 2 and Youth Servants	Beginning 6 months after step 7 and every 6 months thereafter.	Y2A Ministry is evaluated and assessed and revised as needed.



Operations & Administration

Goal 3.1



Enhanced Communications & Technology Platform

Within 24 months, we will develop and implement a comprehensive strategy and platform that uses the most effective best-practices technological and communication tools that will measurably improve both internal and external communications and better serve our parishioners and share Orthodox Christianity in the community where:

- (a) at least 45% of our parishioners/stewards make their contributions online;**
- (b) at least 60% of our parishioners rate our communications and technology platform in the top two rating categories 6 months after they are implemented;**
- (c) at least 75% of our parishioners receive all parish communications through the new platform; and**
- (d) achieve an agreed-upon increase in the effectiveness of our external communications.**



Enhanced Communications & Technology Platform Goal 3.1 Action Plan

<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Form Enhanced Communication and Technology Platform Goal 3.1 Task Force (“EC&TPTF 3.1”).	Strategic Planning Team and Goal Captain	1 month from Start Date	EC&TPTF 3.1 team members agree to serve
2. Research most effective church communications, branding strategies and technology resources, software, information, tools and best practices that churches and other non-profit organizations use to connect with and communicate to their parishioners and stakeholders.	EC&TPTF 3.1	4 months after step 1	Report of the most effective church communications and technology resources, information, tools and best practices is completed
3. Create survey and collect: (a) parishioner feedback regarding Parish branding options; and (b) a baseline for the effectiveness of our external communications; and (c) metrics to measure parishioner use of and satisfaction with current website, online engagement, online contribution processes, communication channels (including email and texting) and other desirable ways to access our Parish and other services, information, processes and ministries.	EC&TPTF 3.1	Simultaneous with step 2	At least 20% of Parishioners respond to survey and report of survey results is summarized



Enhanced Communications & Technology Platform Goal 3.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
4. (a) Analyze survey results from step 3; (b) Finalize branding and begin developing branding materials; and (c) audit all current technology, communications process and software capabilities (including website, online streaming, social media accounts) compared against best practices established in step 2 and parishioner feedback in step 3.	EC&TPTF 3.1	4 months after step 2	Report summarizing status of capabilities of current resources and processes and preliminary branding materials is produced
5. Interview stakeholders (clergy, office staff, boards member, ministry leaders and all demographics of parishioners) that produce or consume Parish services, communications and technology resources and deploy appropriate individuals to research and identify the capabilities and deficiencies of our existing software and how our engagement and online contributions are processed.	EC&TPTF 3.1	Simultaneous with step 4	Report summarizing stakeholder interviews and giving processes and any underutilized software features and gap analysis is produced



Enhanced Communications & Technology Platform

Goal 3.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
<p>6. Based on all data and information gathered from steps 2-5, finalize the “Communication & Technology Plan” consisting of:</p> <ul style="list-style-type: none">(a) branding materials;(b) research and identification of potential alternative technology solutions enabling broadcast and dissemination of church services and creation of a communications hub to allow for content creators (clergy, office staff, boards member, ministry leaders) to create, target and deliver communications to parishioners through all channels;(c) comprehensive recommendations, budget and implementation timeline in all areas of communications, online engagement, online contributions processes and technology (including appropriate metrics to evaluate and determine success); and(d) Establish the goal of agreed-upon increase in the effectiveness of our external communications	EC&TPTF 3.2	4 months after step 5	Communication & Technology Plan is finally developed



Enhanced Communications & Technology Platform Goal 3.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
7. Obtain: (a) any necessary budgetary, Church Board, General Assembly or other approvals for Communication & Technology Plan recommendations; and (b) any necessary funding.	EC&TPTF 3.1, Clergy and Church Board	6 months after step 6	Necessary approvals and budget are obtained
8. Establish governance, guidelines and monitoring processes for proper operation and use of all communications and engagement technology solutions.	EC&TPTF 3.1, Clergy and Church Board	Simultaneously with step 7	Governance, guidelines and monitoring processes document is created and approved
9. Procure the products, systems, technical and facility resources, human resources necessary to implement the Communications & Technology Plan.	EC&TPTF 3.1, Clergy and Church Board	1 month after steps 7 and 8	Procurement and pre-implementation checklist is fully acquired and complete
10. (a) Develop a parishioner training plan of the selected tools, designed for age appropriate parishioners and technological abilities that will provide basic instruction and effective usage. (b) Recruit trainers (both Arabic and English speakers) (the “Trainers”)	EC&TPTF 3.1	3 months after step 9	Training Plan developed, and Trainers recruited.



Enhanced Communications & Technology Platform Goal 3.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
11. Begin execution of training parishioners on the tools included in the Communication & Technology Plan.	EC&TPTF 3.1 & Trainers	1 month after step 10 and continuously on-going as needed	Training parishioners begins
12. Begin implementation of Communication & Technology Plan based on implementation timeline, including enhanced online engagement and giving and access to other church ministries and self-service communications hub (“Communications Hub”) to allow parishioners to subscribe to the communications channels.	EC&TPTF 3.1	1 months after step 11	Communication & Technology Plan and Communications Hub roll out begins
13. Quarterly assess on-going efficacy of Communication & Technology Plan and Communications Hub and communications and technology tools to ensure constant alignment with predetermined best practices and achievement of Goal targets.	EC&TPTF 3.1	Beginning quarterly after step 12	Communication & Technology Plan and Communications Hub solutions, tools, programs are assessed.



Enhanced Communications & Technology Platform

Goal 3.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
<p>14. Create and distribute a semi-annual parishioner survey and independent review, evaluation, update and changes in Communication & Technology Plan and Communications Hub to ensure that all elements are the most effective best practices available and ensure achievement of the targets:</p> <p>(a) at least 45% of parishioners/stewards make their contributions online;</p> <p>(b) at least 60% of parishioners rate our communications and technology platform in the top two rating categories 6 months after they are implemented;</p> <p>(c) at least 75% of parishioners receive all parish communications through the new platform; and</p> <p>(d) for agreed-upon increase in the effectiveness of our external communications.</p>	EC&TPTF 3.1	Beginning 6 months after step 12 and every 6 months thereafter	Semi-Annual assessment of Communication & Technology Plan and Communications Hub is completed at least every 6 months and appropriate changes are implemented
<p>15. Update Communication & Technology Plan and Communications Hub strategies, tools, training based on assessment results from steps 11 and 12.</p>	EC&TPTF 3.1	Beginning at least annually after step 12 and continuously thereafter	Revise strategies, tools and training as needed.



Operations & Administration

Goal 3.2



Operational & Organizational Excellence

Within 20 months, we will:

- (a) Research best practices in the areas of Parish administration, organizational structure, staffing/recruiting, operations, leadership and performance management and assess our current operations against this standard; and**
- (b) Use this information to develop and implement within the above timeframe a best-practices “Operations Excellence Plan” with emphasis on continued improvement and evolution of a new organizational structure with defined roles, responsibilities and performance metrics.**



Operational & Organizational Excellence

Goal 3.2 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.2</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Form Operational & Organizational Excellence Task Force Goal 3.2 Task Force (“O&OETF 3.2”).	Strategic Planning Team and Goal Captain	1 month from Start Date	O&OETF3.2 team members agree to serve
2. Obtain and review existing documentation about our current operations, process/performance management, organization design, and staffing of the Parish and its ministries and key operations (including the previously built Spider Org. Chart, and current work done by the Board).	O&OETF 3.2	5 months after step 1	Complete review of current operations, processes and management and compile report of key findings
3. Research best practices for church administration, organizational structure, staffing/recruiting, operations, leadership and performance management, from other religious (Orthodox and non-Orthodox) and non-profit organizations.	O&OETF 3.2	Simultaneous with step 2	Research of best practices is completed, and report of key elements is compiled
4. Create, distribute and analyze the results of a survey of our Parish community regarding their assessments of our operating performance in key identified areas and solicit their suggestions for improvement.	O&OETF 3.2	4 months after step 3	Survey completed and analyzed and report of key findings is compiled



Operational & Organizational Excellence

Goal 3.2 Action Plan



Key Actions Necessary To Achieve Strategic Goal 3.2	Responsible Party	Timetable	Completion Confirmation Test
5. Identify and interview all key (clergy and non-clergy) employee staff and volunteers and: (a) discuss their skills, experiences, challenges; (b) what they believe would help improve their performance and the Parish; (c) conduct risk assessment of organization structure and identify key roles and any gaps in bench strength or succession planning that place the viability of major church initiatives at risk; and (d) identify a best practices annual review process for key laity roles and evaluate progress in implementing succession plan recommendations.	O&OETF 3.2	Simultaneous with step 4	Key interviews are completed and report of summary of key findings is compiled
6. 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; and (c) achievable desired percentage performance KPIs improvements; and (d) timeline to achieve them (the "Operational Metrics Plan").	O&OETF 3.2	3 months after step 5	Operational Metrics Plan is completed



Operational & Organizational Excellence

Goal 3.2 Action Plan



Key Actions Necessary To Achieve Strategic Goal 3.2	Responsible Party	<u>Timetable</u>	<u>Completion Confirmation Test</u>
<p>7. From all available resources, materials, research, surveys and interviews (including the work done in steps 2-6) create “Operations Improvement Plan” to include at least:</p> <p>(a) finalized organizational chart; (b) finalized Operational Metric Plan; (c) employee and volunteer staffing job descriptions, development, training, succession and needs plan (the “Staffing Plan”); (d) other key recommendations to improve our operations and service of parishioners; (e) a shared dashboard (the “Dashboard”) with regular cadence for reporting the KPIs for each area.</p>	O&OETF 3.2	4 months after step 6	Draft Operations Improvement Plan is completed
<p>8. Submit draft Operations Improvement Plan and obtain approval of the Church Board and work with the Church Board to reach consensus on final Operations Improvement Plan.</p>	O&OETF 3.2 and Church Board	2 months after step 7	Final Operations Improvement Plan is approved by Church Board
<p>9. Begin implementation of Final Operations Improvement Plan, including:</p> <p>(a) regular public reporting of Dashboard of KPIs; and (b) at least annually conduct talent performance development assessments privately for employees and volunteers.</p>	O&OETF 3.2, Church Board and other identified stakeholders	Beginning 1 month after step 8 and continuously thereafter	Implementation begins, Dashboard KPIs are regularly publicly reported and annual private talent assessments are completed
<p>10. At least annually assess the Operations Improvement Plan against actual experience and evolving best practices and make necessary adjustments and improvements.</p>	O&OETF 3.2 and Church Board	1 year after step 9 and annually thereafter	Annual assessment of Operations Improvement Plan is completed and improvements are implemented



Operations & Administration

Goal 3.3

Leadership Development

Within 16 months, we will develop and implement a comprehensive Leadership Development training program for servants, board members, parish staff, and future leaders (the “Servant Leadership Program”) that within 1 month thereafter, will be mandatory for all Church Board members, Ministry Leaders, Educators and other elected and appointed Leaders in the Parish.



Leadership Development Goal 3.3 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.3</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Form Leadership Development Task Force -3.3 (“LDTF 3.3”).	Strategic Planning Team & Goal Captain	1 month from Start Date	LDTF 3.3 team members agree to serve
2. Research and identify: (a) best practices in Servant Leadership (both inside and outside the Orthodox church, including the current Servants Preparation Program; (b) key leadership skill elements and gaps which need to be filled for all four constituents of Church Board, Ministry Leaders, Educators, and future leaders (the “Four Constituents”); and (c) how to properly benchmark and measure the effectiveness of leadership training for all Four Constituents.	LDTF 3.3	5 months after step 1	Research is completed and best practices summary report generated
3. Develop data collection methods, survey questions tools, metrics and targets that will effectively capture information from a diverse group of Orthodox and non-Orthodox to identify needed lay leadership skills and content for all Four Constituents (the “Data Collection Plan”).	LDTF 3.3	Simultaneous with step 2	Full Data Collection Plan is finalized
4. Implement Data Collection Plan among all targeted individuals identified in step 3.	LDTF 3.3	3 months after steps 2 and 3	Data Collection Plan is completed consistent with guidelines set in step 3



Leadership Development Goal 3.3 Action Plan



Key Actions Necessary To Achieve Strategic Goal 3.3	Responsible Party	Timetable	Completion Confirmation Test
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 Four Constituents; (b) strengths, weaknesses, skills and gaps in current lay leadership programs for all Four Constituents; and (c) specific information on how to best reach and train all Four Constituents and measure effectiveness of such training.	LDTF 3.3	4 months after step 4	Data analysis report is completed with all findings and recommendations
6. From all available research, resources and materials (including the work done in steps 2-5, and current programs in place), develop “Servant Leadership Program” training for all Four Constituents that at least includes core management and leadership skills determined in step 2(a) (which may include planning, process, people, budgets, reporting, team building, coaching and visioning, negotiation, conflict resolution, communication, etc.).	LDTF 3.3	2 months after step 5	Training program created for all Four Constituents of Servant Leadership Program



Leadership Development Goal 3.3 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 3.3</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
7. Recruit and train a team to help train and support the parish in the implementation of the Servant Leadership Program (“the Training and Support Team”). Additionally, develop a training and support strategy, program, and schedule with a detailed rollout action plan and timeline.	LDTF 3.3	Simultaneous with step 7	At least four Training and Support Team members agree to serve and the Training and Support Program is finalized
8. Begin conducting and delivering the Servant Leadership Program to all Four Constituents.	LDTF 3.3	1 month after steps 7 & 8	Training programs begin for Four Constituents
9. After every Servant Leadership Program perform an assessment of its effectiveness and identify areas for improvement and make necessary course corrections.	LDTF 3.3	After each program	Assessments are completed after every program and improvements are implemented
10. At least annually, comprehensively assess the effectiveness of the entire Servant Leadership Program for all Four Constituents to ensure that all materials are the most effective best practices available and the target level of mandatory training is achieved.	LDTF 3.3	Beginning annually after step 9	At least annual assessment of Servant Leadership Program is completed, improvements are implemented and training targets are achieved



Welcoming Ministry Goal 4.1

Within 18 months, we will research, develop and implement a Welcoming Ministry that ensures all newcomers, returning parishioners, absent parishioners, and visitors are welcomed and embraced fully in our Christ-centered and loving parish.



Welcoming Ministry Goal 4.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 4.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Recruit Welcome Ministry Task Force (“WMTF4.1”).	Strategic Planning Team and Goal Captains	1 month from Start Date	WMTF4.1 team members agree to serve
2. Research most effective, best practices concerning church welcoming, hospitality and newcomer ministries from both non-Orthodox and Orthodox churches (including visiting other successful churches), and determine appropriate welcoming best practices and most effective hospitality metrics to collect and analyze.	WMTF4.1	6 months from Step 1	Create and finalize research analysis report of welcoming, hospitality and newcomer best practices
3. Develop Parish data collection process and tools (e.g., surveys, personal interviews, web solicitations, etc.) to effectively capture: (a) most complete database of church parishioners and identify demographic subgroup involvement for parishioners; and (b) existing church welcoming practices, the effectiveness of the current Engage Information Desk, and hospitality and engagement barriers data. This process will include gathering input from the widest possible spectrum of our Parish body and beyond (including those who do and do not currently attend our parish, those who have only visited once, immigrants, youth, seniors, converts, cradle Orthodox (born into our faith), young families, newly married couples, and college students, etc. Orthodox, non-Orthodox, friends that have never attended, etc.).	WMTF4.1	Simultaneous with Step 2	Create and finalize Parish involvement database and data collection processes and tools



Welcoming Ministry Goal 4.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 4.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
4. Execute step 3 data collection processes and tools, and compile and process survey data to determine effectiveness of current welcoming approaches. Determine current barriers to better welcoming and interacting with visitors/church parishioners.	WMTF4.1	3 months after completion of Step 3	Create and finalize a report with survey results on current barriers.
5. Compile research data from steps 2-4 and create and design the final new “Welcoming Ministry” plan, which will include the best practices metrics to determine success and effectiveness of the Ministry.	WMTF4.1	4 months after completion of Step 4	Create and finalize welcome/newcomer plan
6. Recruit and train the “Welcoming Team” necessary to fully implement the Welcoming Ministry, including representatives from all Parish constituencies.	WMTF4.1	3 months after completion of Step 5	Welcome Team is trained and prepared to commence Ministry.



Welcoming Ministry Goal 4.1 Action Plan



<u>Key Actions Necessary To Achieve Strategic Goal 4.1</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
7. Begin Implementation of Welcoming Ministry	WMTF4.1	1 month after completion of step 6	Welcoming Ministry implementation begins
8. Conduct a review and assessment of the success of the Welcome Ministry on at least a semi-annual basis and compare to the best practices elements and metrics of success identified in step 5, while continuing to refine the Welcoming Ministry to achieve agreed-upon goals.	WMTF4.1	Beginning 6 months after completion of Step 7 and semi-annually thereafter	Assessment is completed and improvements to the Welcoming Ministry are implemented.



In-Reach Outreach and Evangelism Ministry Goal Goal 4.2

Within 16 months, we will research and develop an effective In-reach, Outreach, and Evangelism Ministry that will measurably improve outreach and growth, by developing, planning, and implementing:

- A. Specific local and regional Parish Outreach and Evangelism Ministry events at least every 4 months (“Outreach & Evangelism Activity”);**
- B. A program to establish and enrich an ongoing relationship with fellow Orthodox parishes at least every 12 months (“Pan-Orthodox Activity”); and**
- C. At least one large annual In-reach social event for the congregation that will involve at least 20% of the congregation (“In-Reach Activity”).**



In-Reach Outreach and Evangelism Ministry Goal 4.2



Action Plan

<u>Key Actions Necessary To Achieve Strategic Goal 4.2</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
1. Recruit In-reach, Outreach & Evangelism Ministry Task Force (“IO&EMTF4.2”)	Strategic Planning Team and Goal Captains	1 month after Start Date	IO&EMTF4.2 team members agree to serve
2. Conduct comprehensive research and compile research report of best-in-class and most effective In-reach, Outreach and Evangelism methods, programs, activities, structures, success factors, volunteer recruitment strategies, and effectiveness assessment tools from Orthodox and non-Orthodox churches.	IO&EMTF4.2	5 months after completion of Step 1	Create and finalize best practices In-reach, Outreach & Evangelism research report
3. Develop a baseline inventory to identify: (a) all current and past parish In-reach, Outreach and Evangelism Ministry Programs (“IOEMPs”) and empirical evidence of the success of same; (b) identify IOEMPs from other Christian or non-profit organizations which can either be copied or adapted or with whom partnerships can be established to pursue Parish IOEMPs; (c) Outreach and Evangelism-minded parishioners to help coordinate IOEMPs; and (d) determine how to measure and ensure the maximum effectiveness of each IOEMP (“Effectiveness Assessment Tool”).	IO&EMTF4.2	Simultaneous with Step 2	O&E baseline inventory is completed



In-Reach Outreach and Evangelism Ministry Goal 4.2 Action Plan

<u>Key Actions Necessary To Achieve Strategic Goal 4.2</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
4. From among the extensive research generated during steps 2-3, determine what areas of IOEMPs activities and partnerships are most important to the Parish and will yield the greatest participation and positive results.	IO&EMTF4.2	3 months after the completion of Step 3	Finalize research report to include IOEMP that is most impactful and important.
5. Finalize the development of a best practices In-reach, Outreach & Evangelism Ministry Program (“IOEMP”), incorporating the most attractive ongoing Parish IO&E programs, which at a minimum includes: (a) a quarterly schedule of IOEMP events to be implemented by the parish either alone or in partnership with another entity (the “Outreach & Evangelism Activity”); (b) a program to establish and enrich an ongoing relationship with fellow Orthodox parishes at least every 12 months (the “Pan-Orthodox Activity”); (c) at least one large annual social event for the congregation that will involve at least 20% of the congregation (the “In-Reach Activity”); and (d) the strategy, budget, fundraising, mechanism, communications and implementation plan for all such IO&E programs, including specific schedules, dates, times and goals for each.	IO&EMTF4.2	6 months after the completion of Step 4	IOEMP is completed



In-Reach Outreach and Evangelism Ministry Goal 4.2 Action Plan

<u>Key Actions Necessary To Achieve Strategic Goal 4.2</u>	<u>Responsible Party</u>	<u>Timetable</u>	<u>Completion Confirmation Test</u>
6. Begin to implement: (a) at least one Quarterly Outreach & Evangelism Activities; (b) at least one annual In-reach Activity in which at least 20% of servants participate; and (c) at least one annual Pan-Orthodox Activity.	IO&EMTF4.2	Beginning 1 month after completion of step 5, and continuing thereafter under the schedule established in step 5	Confirmation of: (1) at least one quarterly Outreach & Evangelism Activities; (2) at least one annual In-reach Activity; and (3) at least one annual Pan-Orthodox Activity, based on the approved schedule
7. Implement the Effectiveness Assessment Tool to: (a) Manage ongoing effectiveness of all IOEMPs; (b) Assess the effectiveness of each IOEMP; and (c) Make improvements in each IOEMP to achieve stated objectives and best-practices thresholds.	IO&EMTF4.2	After every IO&E Event and ongoing parish IO&E activities, and at least annually continuing thereafter.	Each New IO&E Activity is evaluated and improved after it occurs and the entire IOEMP is evaluated and improved at least annually.





Transition from Strategic Planning to Implementation



Four New Big Themes



1. “None of us can do as much as all of us can do together.”
2. “None of us is as smart as all of us are together.”
3. “No more business as usual.”
4. “We have a great plan that addresses some of our most critical needs.”



Four New Big Messages



- 1. This is about the whole Parish coming together to work on addressing our most critical challenges**
- 2. We have a great strategic plan**
- 3. We have a comprehensive implementation plan that ensures success**
- 4. We want you to join us and become part of the team**



Next Steps For Success



The Implementation Management Team

- ~ All 8 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

- ~ 2 Head Coaches coordinate all Goal Captains and, together with Clergy, form the IHQ (Implementation Headquarters) to manage the entire process of implementation



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



Next Steps For Success



WE WANT YOU



- We want YOU to complete the Implementation Volunteer Form
- Tell us on which Goal you want to work and if you're willing to be a Goal Captain
- Rat out (recruit) your talented friends to work on these Goals



WE WANT YOU



Please Download and Fill Out The Volunteer Form here:

<https://stewardshipcalling.com/sts-markmaryphilopater-coptic-troy-mi/>

**and email it to:
Andrew Bishay at
andrewbishay@gmail.com**

St. Mark/Mary/Philopater Strategic Plan

Implementation Volunteer Form

PLEASE PRINT LEGIBLY

1. Full Name: _____

2. Full Mailing Address: _____

3. Email: _____

4. Phone number: _____

5. I agree to give my time and talents to work on the following Strategic Goal(s) (see page 2 and identify the **specific** Goal full number(s) upon which you would like to work):

Goal Number ____.

Goal Number ____.

6. I am willing to volunteer to be considered to co-lead the implementation of a Goal (identify the **specific** Goal full number which you are willing to lead):

I am willing to be considered to serve as Goal Co-Captain for Goal Number ____.

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

8. Any other comments / suggestions: _____



Next Steps For Success



Strategic Planning Roll Out

~ What can you do?

- Complete the Volunteer Form at:
- <https://stmarkmi.ccbchurch.com/goto/forms/15/responses/new> and identify on which Implementation Task Force you'd like to work and if you'd be willing to be a Goal Co-Captain,
- Talk it up (Parish, friends)
- Be positive
- Repeat the Why, Mission, Vision...
- Recruit others to specific Goals
- Get people to the Strategic Plan Rollout

**QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES**



QUESTIONS



ANSWERS



**WE'RE ON A
MISSION
FROM GOD**



She's warming up...

It's almost over



Special Thanks



- **Clergy, Core Team Strategic Area of Focus Co-Captains and Secretaries, Final Action Plan Drafting Team for being visionary leaders to undertake this process**
- **Andrew Bishay for organizing every aspect of this process**
- **All of you for dedicating your most valuable assets - your time and love**

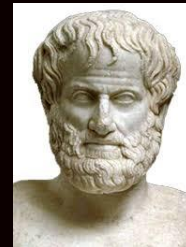
Why Are We Doing This?



“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.**”

We are what we
repeatedly DO.

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



~ Aristotle

“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”



Sun Tzu

**“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.”**



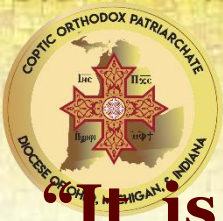
**Pastor
Rick
Warren**

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



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





Persistence



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



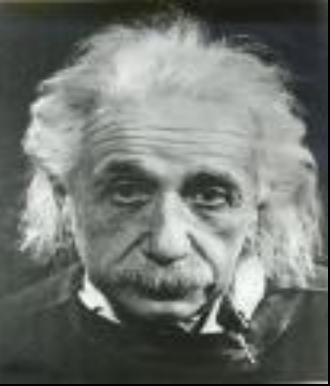
The Holy Spirit and Boldness



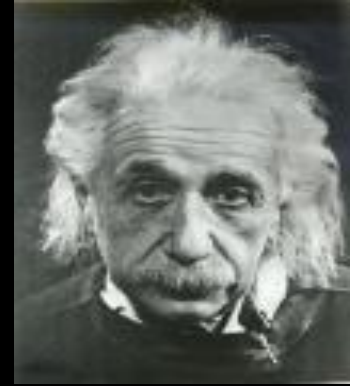
“Until one is committed, there is hesitancy, the chance to draw back... there is one elementary truth that ignorance of which kills countless ideas and splendid plans:

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



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”**

**Do Something
Today That
Your Future
Self Will
Thank You For**

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

Luke 10:1

