



The Stewardship Calling Consensus Vision and Strategic Planning Process

“For everyone to whom much is given, from him much will be required.”
Luke 12:48

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Key Elements

- 1. SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)**
- 2. Statement of Why**
- 3. Core Values**
- 4. Mission Statement**
- 5. (a) Vision Statement and/or
(b) WIGs (Wildly Important Goals)**
- 6. Lag and Lead Measures**
- 7. Compelling Scoreboard**
- 8. Cadence of Accountability**



Steps in Modified Process

1. SPT is selected and receives invitation
2. SPT acceptances are finalized
3. SPT receives and returns homework (Core Values and Why that is then heat-mapped)
4. SPT GROUP ZOOM 1
 - a) Consensus Core Values determination
 - b) Why Discovery
 - c) 4 Disciplines of Execution process description
 - d) Presentation of basis of 5 Pillars
 - e) Divide into separate Area of Focus Teams (if SPT is not already recruited by Area of Focus)
5. Area of Focus Teams decide WIG, Lag and Lead Measures, Compelling Scoreboard
6. SPT GROUP ZOOM 2 to finalize plan
7. Implementation Teams formed and work begins



Next Steps

- 1. Select SPT invitees (do you want to do it generically and let them pick which pillar to work on or do you want to select people by pillar?)**
- 2. Get invitation finalized and delivered**
- 3. Schedule Core Team Follow Up Calls for recruitment**
- 4. Schedule First Group ZOOM Retreat Date**
- 5. Schedule Final Group Zoom Retreat Date**



Diocese Strategic Plan Proposed Timeline

TASK	TIME
Finalize SPT invitation list	15 days
Prepare and send SPT invites	15 days
Response time for SPT	15 days
Follow-up SPT calls and finalize	15 days
Prepare and send homework	15 days
Homework due	30 days
Process homework	30 days
First retreat	4.5 months after start
Refine WIGs, Lead/Lag Measures, Compelling Scoreboard	2.5 months
Second retreat	7 months after start
Finalize Strategic Plan	30 days
Public Rollout event	8 months after start



SPT Criteria



YES:

- ~ Who must be a part of the team
- ~ Many different perspectives
- ~ Many diverse gifts
- ~ All major constituencies
- ~ Team-players
- ~ Intelligent
- ~ Strategic thinkers and not small thinkers
- ~ Creative
- ~ Visionaries + futurists not rooted in the past
- ~ Articulate
- ~ Engaged
- ~ Faithful
- ~ Intellectually honest
- ~ Well-adjusted
- ~ Genuinely care about doing the right thing
- ~ Can leave their egos at the door
- ~ Must represent all areas and all different constituencies (young/old, non-ethnic/ethnic, urban/rural, professional/non-professional, convert/cradle, men/women, incidental/intentional, etc.)

SPT members must be willing to dedicate a fair amount of time over the next 9 months

NO:

- ~ serial arsonists
- ~ “know-it-alls”
- ~ non-team players
- ~ mean-spirited folks
- ~ inarticulate thinkers or talkers
- ~ people who say nothing
- ~ people who can't stop talking
- ~ malcontents
- ~ people who are so sad/mad/angry/hostile that they cannot see beyond their own circumstances.
- ~ not just the same “usual suspects”

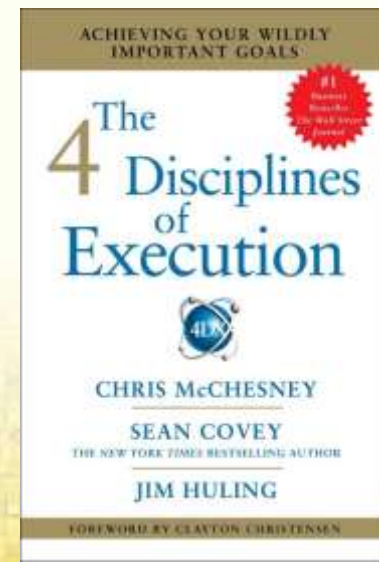


5 Pillars Building Up The Body of Christ

- 1. Education & Formation**
- 2. Creating Ministries & Ministers**
(Equipping Saints)
- 3. Liturgical Engagement** (Holy Badarak)
- 4. Christian Service**
- 5. Structure & Operations**

The 4 Disciplines of Execution¹

1. Surveyed over 200,000 leaders to understand why they routinely failed on their good ideas and goals
2. Biggest reason was the “Whirlwind” – the chaos of day to day life (“tyranny of the urgent”)
3. Failure to focus disproportionate effort on performing the right things to achieve the most important goals

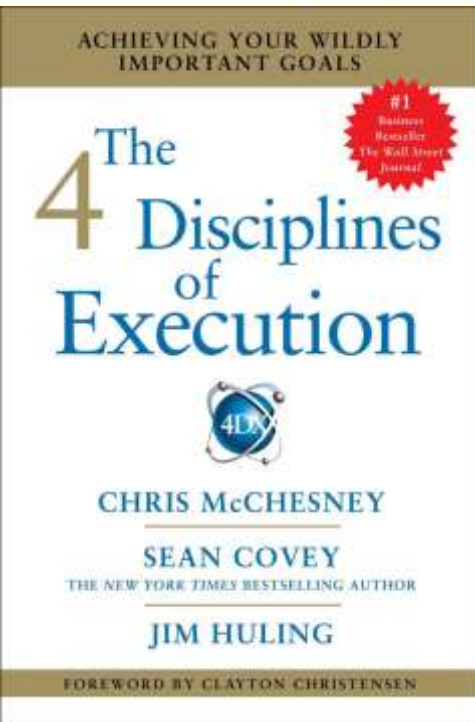




The 4 Disciplines of Execution



The 4 Disciplines of Execution



1. Determine your WIG(s) (Wildly Important Goals)

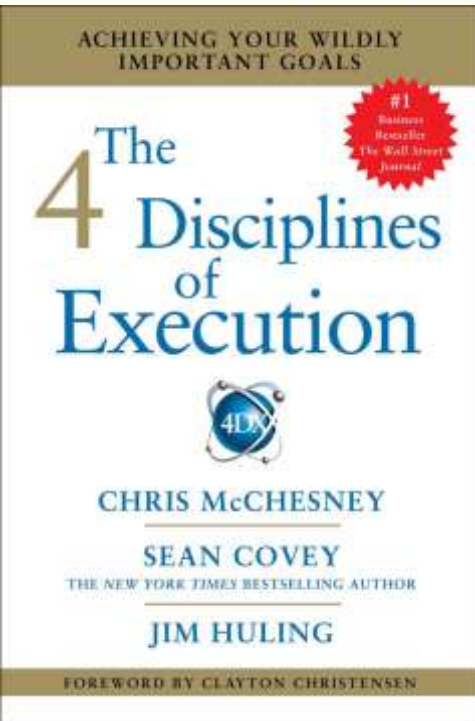
- The most important objectives that won't be achieved without special attention



The 4 Disciplines of Execution



The 4 Disciplines of Execution



2. Act on Lead Measures

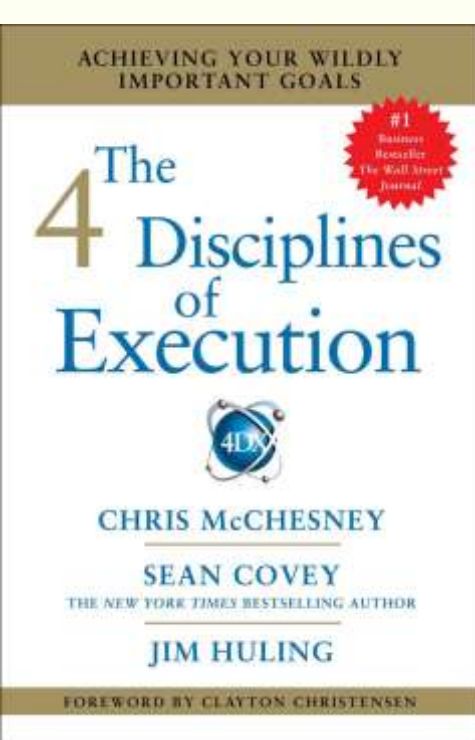
- Lag Measures track the ultimate success of the WIG
- Lead Measures track the specific activities that drive a lag measure



The 4 Disciplines of Execution



The 4 Disciplines of Execution



3. Create a compelling scoreboard

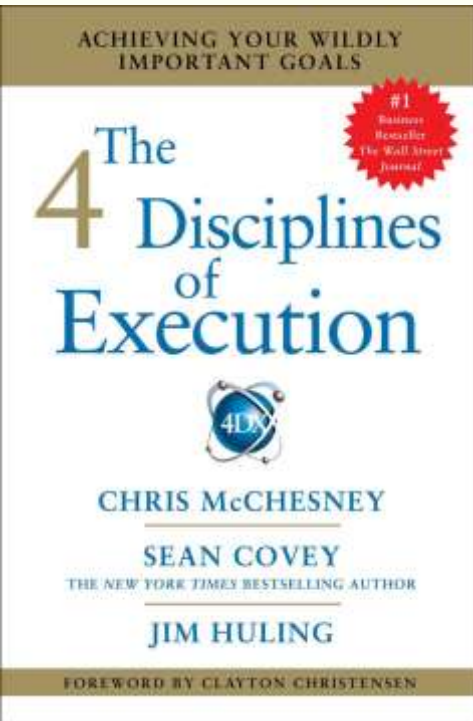
- Highest engagement comes when people know the score
- The best scoreboard is designed for and by the players



The 4 Disciplines of Execution



The 4 Disciplines of Execution



4. Create a cadence of accountability

- Regular and frequent team meetings that solely focus on the WIGs
- Team members hold each other accountable for their commitments



Ministries and Operations Task Force 3 WIGS, Lag and Lead Measures and Compelling Scoreboard

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Luke 12:48

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**Stewardship
Calling**

*Helping people and parishes discover and
live their stewardship callings so that
they may have a good account before
the awesome judgment seat of Christ*

www.stewardshipcalling.com



**ORTHODOX
MINISTRY
SERVICES**

Ministries Team – WIG 2

Parish Ministry & Liturgical Life Engagement

- ~ **WIG wording = from X to Y by when**
- ~ **X = “define, research & develop an effective Parish Ministry & Liturgical Life Engagement Program and train the parish trainers”**
- ~ **Y = “deliver the Parish Ministry & Liturgical Life Engagement Program to at least 14 of the Diocese parishes”**
- ~ **BY = “all within 24 months from start”**

Ministries Wildly Important Goal 2

Develop and implement an effective Parish Ministry & Liturgical Life Engagement Program in at least 14 ($\approx 50\%$) of the Diocese parishes within 24 months.

Prelim Lag Measures WIG 2

- **LAG 1:** Define, research the most effective Parish Ministry & Liturgical Life Programs (the “Engagement Program”) within 3 months
- **LAG 2:** Develop the most effective Engagement Program within 3 months
- **LAG 3:** Recruit and train the parish trainers within 2 months
- **LAG 4:** Recruit, deliver and implement the Engagement Program in at least 14 of the Diocese parishes within 12 months
- **LAG 5:** Compile the results of the Engagement Program and provide a report within 4 months

Ministries WIG 2:

“Develop and implement an effective Parish Ministry & Liturgical Life Engagement Program in at least 14 of the Diocese parishes within 24 months.”

Prelim Lead Measures WIG 2

- **LEAD 1:**

- A: recruit team

- B: define “parish ministry engagement” and “liturgical life engagement” and develop process plan

- C: ID at least 5 similar Engagement Programs to consider

- **LEAD 2:**

- A: evaluate Engagement Programs for effectiveness / validity

- B: modify Engagement Program for use in our Diocese

- C: finalize Engagement Program

- **LEAD 3:**

- A: identify number and names of potential trainers

- B: develop training program

- C: implement training program

- **LEAD 4:**

- A: identify & recruit at least 14 parishes of various characteristics to implement the Engagement Program

- B: assign trainers to respective parishes

- C: schedule and implement an Engagement Program training for all 14 parishes

- **LEAD 5:**

- A: obtain data from parish Engagement Program implementation assessments

- B: compile all data

- C: finalize and deliver Engagement Program report

- **LAG 1:** Define, research the most effective Parish Ministry & Liturgical Life Program (the “Engagement Program”) within 3 months

- **LAG 2:** Develop the most effective Engagement Program within 3 months

- **LAG 3:** Recruit and train the parish trainers within 2 months

- **LAG 4:** Recruit, deliver and implement the Engagement Program in at least 14 of the Diocese parishes within 12 months

- **LAG 5:** Compile the results of the Engagement Program and provide a report within 4 months

Ministries Wildly Important Goal 2

Develop and complete an effective Parish Ministry & Liturgical Life Engagement Program in at least 14 (~50%) of the Diocese parishes within 24 months.

Ministries Wildly Important Goal 2 Action Plan

Key Actions Necessary To Achieve Strategic WIG 2	Responsible Party	Deadline Timetable	Completion Confirmation Test
1. Form Diocese of New England Wildly Important Goal Team 2 (Ministry Team 2).	Strategic Planning Team and Goal co-Captains	Prior to Start Date	Ministry Team 2 team members agree to serve
<u>LAG 1: Research the most effective parish ministry engagement and liturgical life engagement program within 3 months</u>			
2. Define “parish ministry engagement” and “liturgical life engagement” and develop roll out process plan and determine how success will be measured.	Ministry Team 2	1 month after start date	Definitions and process plan and determination of success metrics are completed
3. Research and identify at least 5 Parish Ministry & Liturgical Life Programs (an “Engagement Program”) to evaluate and consider from both inside and outside the Orthodox ecosystem).	Ministry Team 2	2 month after step 2	At least 5 Engagement Programs are identified for study
<u>LAG 2: Develop the most effective Engagement Program within 3 months</u>			
4. Evaluate and study all Parish Engagement Programs to determine their effectiveness and validity to DNE parishes based on criteria of success determined in step 2.	Ministry Team 2	2 months after step 3	Evaluation of alternative Engagement Programs is completed
5. Modify as necessary and finalize the creation of official DNE Engagement Program for use	Ministry Team 2	1 months after step 4	Engagement Program is finalized

Ministries Wildly Important Goal 2 Action Plan

Key Actions Necessary To Achieve <u>Strategic WIG 2</u>	Responsible <u>Party</u>	Deadline <u>Timetable</u>	Completion <u>Confirmation Test</u>
<u>LAG 3: Recruit and train the parish trainers within 2 months</u>			
6. Identify the number and names of potential trainers (“Trainers”) who can teach the Engagement Program in the parishes and recruit trainers and schedule training.	Ministry Team 2	1 month after step 5	Trainers are recruited
7. Develop training program for Trainers and train the Trainers selected in step 6.	Ministry Team 2	1 month after step 6	Trainers are trained in training program
<u>LAG 4: Recruit, deliver and complete the Engagement Program training in at least 14 of the Parishes within 12 months</u>			
8. Provide notice of availability of Engagement Program to all parishes with the goal of eventually recruiting at least 14 parishes of all types and geographies and various demographics and characteristics (the “Parishes”) and begin training for Parishes as they are ready.	Trainers and Ministry Team 2	3 months after step 7	Availability of Engagement Program is announced and promoted
9. (a) Recruit, train and implement Engagement Program in at least 5 Parishes; (b) Recruit, train and implement Engagement Program in at least 5 additional Parishes;	Trainers and Ministry Team 2	9(a) 3 month after step 8 9(b) 3 months after step 9(a) 9(c) 3 months after	Engagement Program is implemented in at least all 14 Parishes on the outlined 3 month staggered schedule

Ministries Wildly Important Goal 2 Action Plan

Key Actions Necessary To Achieve <u>Strategic WIG 2</u>	Responsible <u>Party</u>	Deadline <u>Timetable</u>	Completion <u>Confirmation Test</u>
<u>LAG 5: Compile the results of the Parish Engagement Program assessment and provide a report within 4 months</u>			
10. Obtain and compile data from all Parish Engagement Program implementations as to the effectiveness and success of the Engagement Program and areas for improvement.	Trainers and Ministry Team 2	3 months after step 9	Parish Engagement Program implementation assessments are compiled
11. Finalize and deliver comprehensive Parish Engagement Program implementation assessment report (including all refinements necessary to make the Engagement Program more effective) to Hierarch and all Diocese Parishes.	Ministry Team 2	1 month after step 10	Parish Engagement Program implementation assessment report is completed and delivered

Ministries Wildly Important Goal 2

Compelling Scoreboard

Lead Measure Action	Deadline Date	Status: Percent Complete and Date
1. Form Ministry Team 1	Start date _____	
2. Develop Process Plan	1 month _____	
3. Research Engagement Programs	2 month _____	
4. Evaluate Engagement Programs	2 month _____	
5. Finalize Diocese Engagement Program	1 month _____	
6. Identify Trainers	1 month _____	
7. Train Trainers	1 month _____	
8. Recruit 14 Parishes	3 months _____	

Ministries Wildly Important Goal 2 Compelling Scoreboard

Lead Measure Action	Deadline Date	Status: Percent Complete and Date
9(a). Implement Engagement Program in at least 5 Parishes	3 months _____	
9(b). Implement Engagement Program in at least 5 Parishes	3 months _____	
9(c). Implement Engagement Program in at least 4 Parishes	3 months _____	
10. Obtain Data From Engagement Plan Implementation	3 months _____	
11. Deliver Comprehensive Parish Engagement Program Implementation Assessment Report	1 month _____	

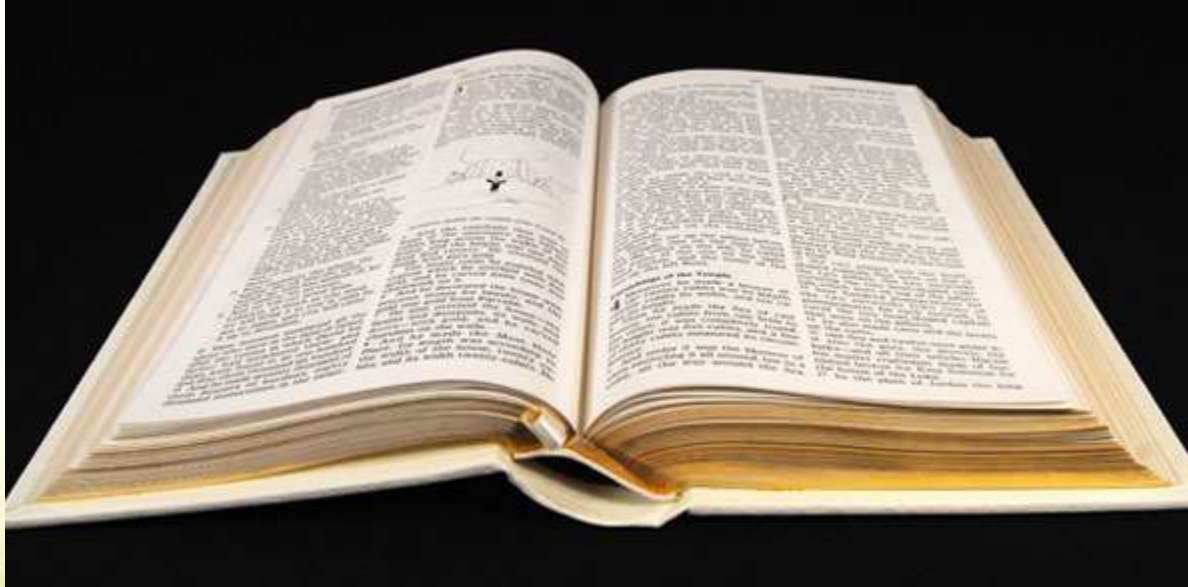
Ministries Wildly Important Goal 2 Compelling Scoreboard Parish Assignments

Parish	Trainer	Parish Implementation Start Date	Percent Complete and Date
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
12			
14			





Strategic Planning is Biblical





Proverbs 29:18

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



Church Strategic Planning is:



**A process to help manage the
“busyness” of our Church
without turning the Church
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





The Essential 4 P's of Church Strategic Planning



- 1. Process** - A comprehensive and methodical process and schedule
- 2. People** – A diverse and inclusive group of strategic thinkers leading, developing and implementing the process, with input from everyone
- 3. Product** - A comprehensive strategic plan with a detailed implementation plan and timeline
- 4. Performance** – The most critical step of performance and implementation of the Strategic Plan which must be well-managed and diligent



2 Process Keys (both Plan A & Plan B)



Consensus

*Rules of
Engagement*



2 Process Keys



Consensus





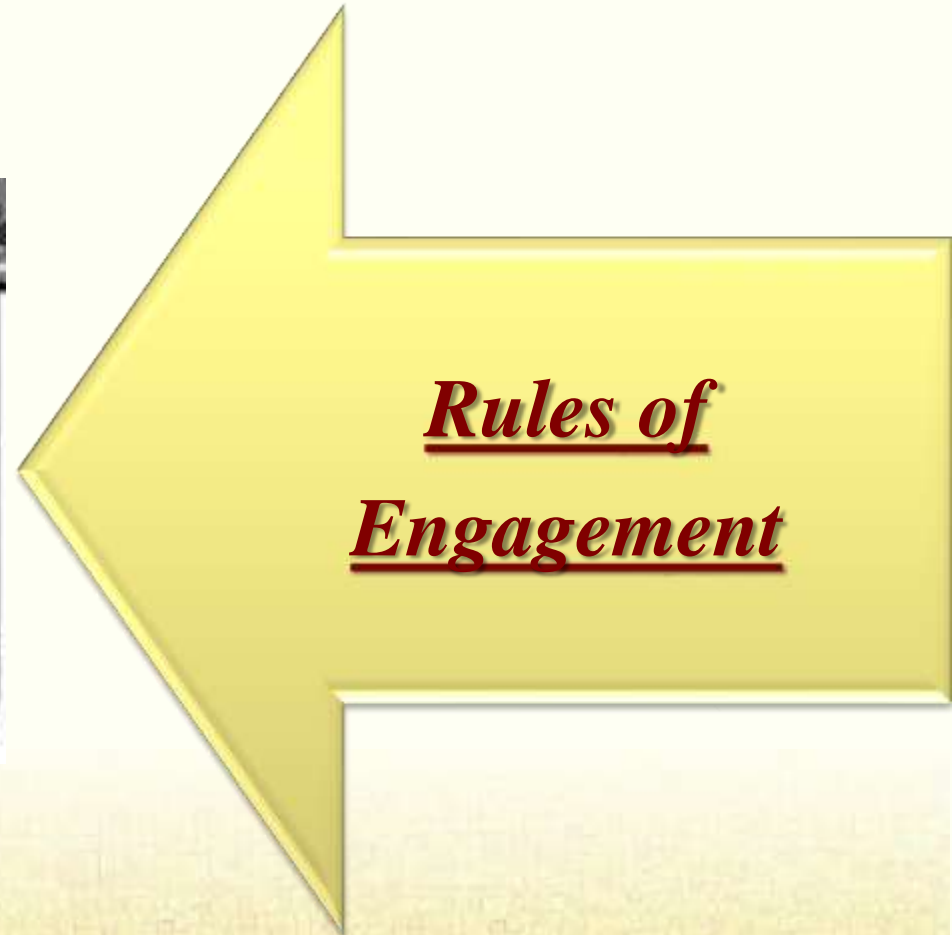
Consensus



- 1. “Consensus” means seeking the “common mind” through a process of respectful dialogue without formal votes**
- 2. “Consensus” means an agreement that everyone can “live with” (even if it is not their first choice)**
- 3. Consensus is achieved once everyone explains their issues and alternatives, and the discussion continues until all agree that:**
 - (a) the discussion has been full and fair;**
 - and**
 - (b) they do not object to (or can live with) the modified proposal**



2 Process Keys



*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 fairness for all
4. ROEs everyone commits to them (helps exit volunteers who violate them)

(See Appendix for Bill's 15 suggested ROEs)



Our 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 speak and interact confidentially. There can be NO repercussions for anything said. (“What happens in our meetings, stays in our meetings”).**
- 4. Ask questions if you don’t understand, because no idea or question is dumb (unless it has already been asked and answered).**
- 5. Tangential / side issues will be parked.**



- 6. No texting / emailing / tweeting / Facebooking / private conversations / phone calls during retreat. Stay focused.**
- 7. All decisions will be made by consensus. We will not be voting. Majority does not rule. Consensus will prevail.**
- 8. Bill's 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus only Buckets 1 and 2 issues (not on Bucket 3 issues).**
- 9. Everyone **MUST** participate. ("get in the game, or stay home")**
- 10. Be honest and "no spin." No party lines. Think about what will really make a difference in this ministry of Christ's Church, and not just what you want.**



11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. (“Seek first to understand, and then to be understood.”)

12. Absolutely NO “Discussion Killers.” (e.g., “we tried that once,” “it won’t work,” “you don’t know what you’re talking about,” etc.) Be positive / encouraging.

13. Think strategically, creatively and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny or personal stories for personal time.)

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



It Takes 2 Teams





It Takes 2 Teams



- **SPT = Strategic Planning Team**
 - A diverse, representative cross-section of Church strategic thinkers who develop the Strategic Plan
- **IT = Implementation Team**
 - A larger diverse group of parishioners (and other experts) who implement all of the Strategic Goals and Action Plans and who are accountable for the achievement of the Strategic Plan



Romans 12:5

*“So we, being many,
are one body in Christ,
and every one members
one of another.”*

**One One
Team Dream**



**ONE
TEAM
ONE
DREAM**



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

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

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

Ecclesiastes 4:9-10



The 4 Things You Get When You Do Church Strategic Planning Properly



1. A Comprehensive Strategic Plan
 - ❖ Consensus SWOT, WHY Statement, Core Values, Mission, Vision, Specific Strategic Goals with detailed Implementation Plans
 - ❖ See examples under the Church Strategic Plan tab at: www.stewardshipcalling.com
2. Inspired and dedicated Teams
3. Parishioners comfortable making decisions by Consensus
4. An energized and improved Church Culture



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