



# ***OCA Diocese of the Midwest Strategic Plan***

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

**Bill Marianes**

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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](http://www.stewardshipcalling.com)**



**ORTHODOX  
MINISTRY  
SERVICES**



## **Statement of WHY**

**To be transformed in  
Christ's joy, peace and  
sacrificial love, so that  
all may become one  
with God and others.**



## Strengths

- ~ **Diocese Leadership & Hierarch**
- ~ **Fiscal Solvency & Parish Percentage Giving**
- ~ **Orthodoxy**
- ~ **Use of English & Less Emphasis on Ethnicity**
- ~ **Diocese Size & Quality**



## **Weaknesses**

- ~ Lack of Engagement in Ministries**
- ~ Stewardship & Fundraising**
- ~ Clergy Support & Development**
- ~ Diocese Resources & Size**
- ~ Resistance / Reluctance To Change**
- ~ Lack Of Strategic Plan**



# Opportunities

~ **Many Seekers**

~ **Technology And Communications**



## Threats

- ~ **Covid & Other Crises**
- ~ **Political Divisiveness**
- ~ **Secularism & Hostility To Churches & Christianity**
- ~ **Cultural Antagonisms**



## Core Values

- ~ **Christ-Centered & Welcoming & Loving**
- ~ **Generous Stewards**
- ~ **Outreach & Evangelism**
- ~ **Integrity, Transparency & Accountability**
- ~ **Faithful to Orthodox & Liturgical Tradition**



## Mission Statement

**Uniting the faithful of the Diocese  
of the Midwest to discover a  
Christ-centered life  
welcoming all to worship in  
the Orthodox Christian Faith.**





# **Wildly Important Goal Categories**

**1. Clergy Formation**

**2. Laity Engagement, Stewardship & Education**



## Submitted Questions

- 1. Do we want to call it Clergy Formation or Clergy Professional Development?**
- 2. Is it realistic that we can find 5 examples of alternative programs for both Clergy and Laity Task Forces?**
- 3. Do we need a minimum survey response rate in order to move forward? (i.e., are the survey results statistically significant?)**
- 4. Should we focus on a Parish Ministry Engagement Program before tackling a Liturgical Life Engagement Program?**
- 5. For Goal 2, should we also do a parish survey to identify the parish Engagement needs and desires?**
- 6. How will we explain to someone who did not participate in the sessions why the two WIGs were chosen as the biggest opportunities?**
- 7. Training may not necessarily be the (only/first) solution for all of the programs. So should each Task Force explore all implementation options and determine the best alternatives?**



THE DIOCESE OF THE MIDWEST



ORTHODOX CHURCH IN AMERICA

# **Clergy Formation WIG 1**

## **Lead & Lag Measures**



# Clergy Wildly Important Goal 1



**Develop and implement an effective Clergy Formation Program (“CFP”) in which all Diocese clergy participate in at least one CFP activity within 20 months.**



# Lag Measures Clergy WIG 1



- **LAG 1:** Research the most critical elements of an effective Clergy Formation Program (CFP) and survey clergy regarding their CFP needs within 5 months
- **LAG 2:** Develop the most effective CFP for DOM within 3 months
- **LAG 3:** Recruit the trainers for each CFP activity within 3 months
- **LAG 4:** Each clergy participates in at least one CFP activity within 7 months
- **LAG 5:** Compile the results of each CFP activity and complete improvements to CFP within 2 months

**WIG 1 – Clergy Formation**  
Develop and implement an effective Clergy Formation Program (CFP”) in which all Diocese clergy participate in at least one CFP activity within 20 months.



# Lead Measures Clergy WIG 1



- **LEAD 1:**

- A: recruit team and allocate work**

- B: ID at least 5 existing CFPs to consider**

- C: develop, distribute and process clergy survey**

- **LEAD 2:**

- A: evaluate researched CFP programs and survey results**

- B: identify principal goals of CFP, specific activities to be included and metrics that define successful achievement of each activity**

- C: develop each CFP activity program**

- **LEAD 3:**

- A: identify and recruit internal and external DOM resources that can train CFP activities**

- B: coordinate the formation of training for each CFP activity**

- **LEAD 4:**

- A: announce schedule of each CFP activity and recruit clergy to participate**

- B: Complete all CFP activities for which clergy have signed up**

- **LEAD 5:**

- A: compile assessment data from each CFP activity**

- B: make any necessary improvements to CFP**

- **LAG 1:** Research the most critical elements of an effective Clergy Formation Program (CFP) and survey clergy regarding their CFP needs within 5 months
- **LAG 2:** Develop the most effective CFP for DOM within 3 months
- **LAG 3:** Recruit the trainers for each CFP activity within 3 months
- **LAG 4:** Each clergy participates in at least one CFP activity within 7 months
- **LAG 5:** Compile the results of each CFP activity and complete improvements to CFP within 2 months



# Clergy Wildly Important Goal 1 Action Plan



**Key Actions Necessary To Achieve  
Strategic WIG 1**

**Responsible  
Party**

**Deadline  
Timetable**

**Completion  
Confirmation Test**

**LAG 1: Research the most effective parish Clergy Formation Program within 5 months**

**1. Recruit Diocese of Midwest Wildly Important Goal Team 1 (Clergy Team 1) and allocate work.**

**Strategic Planning Team and Goal Co-Captains**

**1 month after start date**

**Clergy Team 1 team members agree to serve and work is allocated**

**2. Identify at least 5 Clergy Formation Programs (“CFP”) to evaluate and consider from both inside and outside the Orthodox ecosystem.**

**Clergy Team 1**

**2 months after step 1**

**At least 5 CFPs are identified for study**

**3. Develop, distribute and process clergy survey to identify clergy formation needs and desires.**

**Clergy Team 1**

**2 months after step 2**

**Clergy survey is developed, distributed and returned**

**LAG 2: Develop the most effective Clergy Formation Program within 3 months**

**4. Evaluate and study the identified CFPs and clergy survey results to determine the most critical needs for DOM clergy.**

**Clergy Team 1**

**2 months after step 3**

**Evaluation of alternative CFPs and clergy survey results is completed**

**5. Identify principal goals of CFP and specific activities to be included and metrics that define successful achievement of each activity.**

**Clergy Team 1**

**1 month after step 4**

**CFP goals, activities and metrics are determined**



# Clergy Wildly Important Goal 1 Action Plan



Key Actions Necessary To Achieve <u>Strategic WIG 1</u>	Responsible <u>Party</u>	Deadline <u>Timetable</u>	Completion <u>Confirmation Test</u>
<b><u>LAG 3: Recruit the trainers for each CFP activity within 3 months</u></b>			
<b>6. Recruit the necessary internal and external DOM potential trainers (“Trainers”) who can teach the CFP activities.</b>	Clergy Team 1	1 month after step 5	Trainers are recruited
<b>7. Develop and complete training program for all Trainers for all CFP activities.</b>	Clergy Team 1	2 months after step 6	Training program is developed and Trainers are trained in assigned CFP activities
<b><u>LAG 4: Each clergyman participates in at least one CFP activity within 7 months</u></b>			
<b>8. Announce schedule of each CFP activity and recruit all clergy to sign up to participate in at least one CFP activity.</b>	Trainers and Clergy Team 1	2 months after step 7	All clergy have signed up to participate in at least 1 CFP activity
<b>9. Complete all CFP activities for which clergy have signed up.</b>	Trainers	5 months after step 8	All clergy have participated in at least 1 CFP activity






# Clergy Wildly Important Goal 1 Action Plan



<b>Key Actions Necessary To Achieve <u>Strategic WIG 1</u></b>	<b>Responsible <u>Party</u></b>	<b>Deadline <u>Timetable</u></b>	<b>Completion <u>Confirmation Test</u></b>
<b><u>LAG 5: Compile the results of each CFP activity and complete improvements to CFP within 2 months</u></b>			
<b>10. Obtain and compile activity assessment data from all CFP activities and identify improvements to all CFP activities.</b>	<b>Trainers and Clergy Team 1</b>	<b>1 month after step 9</b>	<b>CFP activity assessments are compiled and improvements identified</b>
<b>11. Finalize improvements to all CFP activities based on assessment results.</b>	<b>Clergy Team 1</b>	<b>1 month after step 10</b>	<b>All CFP activities have been improved</b>



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# **Clergy WIG 1**

## **Compelling Scoreboard**



# Clergy Wildly Important Goal 1 Compelling Scoreboard



Lead Measure Action	Deadline Date	Status: % Complete and Date
1. Form Clergy WIG 1Team and allocate work	_____	
2. Research Clergy Formation Programs	_____	
3. Complete clergy survey	_____	
4. Evaluate CFPs and survey results	_____	
5. Finalize CFP goals and metrics	_____	
6. Develop each CFP activity	_____	
7. Recruit CFP Trainers	_____	
8. Develop training program for each CFP activity	_____	
9. Clergy participate in CFP activities	_____	
10. Compile assessment data from each CFP activity	_____	
11. Improve CFP based on assessment data	_____	



# Clergy Wildly Important Goal 1

## Compelling Scoreboard Parish Assignments



<u>Clergyman</u>	<u>CFP Activities</u>	<u>Start Date</u>	<u>Completion Date</u>
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
12			
Continue for all clergy			



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ORTHODOX CHURCH IN AMERICA

**Laity Parish Ministry and  
Liturgical Life Engagement  
Program - WIG 2  
Lead & Lag Measures**



## Laity Wildly Important Goal 2



**Develop and implement an effective Parish Ministry & Liturgical Life Engagement Program in at least 17 of the Diocese parishes within 24 months.**



# Lag Measures Laity WIG 2



- **LAG 1:** Define, research the most effective Parish Ministry & Liturgical Life Programs (the “Engagement Program”) within 6 months
- **LAG 2:** Develop the most effective Engagement Program within 4 months
- **LAG 3:** Recruit and train the parish trainers within 2 months
- **LAG 4:** Recruit, deliver and implement the Engagement Program in at least 17 of the Diocese parishes within 9 months
- **LAG 5:** Compile the results of the Engagement Program and improve it accordingly within 3 months

## Laity WIG 2:

“Develop and implement an effective Parish Ministry & Liturgical Life Engagement Program in at least 17 of the Diocese parishes within 24 months.”



# Lead Measures Laity 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 17 of 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 recruited parishes
  - **LEAD 5:**
    - A: obtain data from parish Engagement Program implementation assessments
    - B: compile all data
    - C: improve Engagement Program based on data
- **LAG 1:** Define, research the most effective Parish Ministry & Liturgical Life Program (the “Engagement Program”) within 6 months
  - **LAG 2:** Develop the most effective Engagement Program within 4 months
  - **LAG 3:** Recruit and train the parish trainers within 2 months
  - **LAG 4:** Recruit, deliver and implement the Engagement Program in at least 17 of the Diocese parishes within 9 months
  - **LAG 5:** Compile the results of the Engagement Program and improve it accordingly within 3 months





# Laity Wildly Important Goal 2 Action Plan



Key Actions Necessary To Achieve Strategic WIG 2	Responsible Party	Deadline Timetable	Completion Confirmation Test
<b><u>LAG 1: Research the most effective parish ministry engagement and liturgical life engagement program within 6 months</u></b>			
1. Form Diocese of Midwest Wildly Important Goal Team 2 (Laity Team 2).	Strategic Planning Team and Goal co-Captains	1 month after start date	Laity Team 2 team members agree to serve
2. Define “parish ministry engagement” and “liturgical life engagement” and preliminarily determine how success will be measured.	Laity Team 2	2 months after step 1	Definitions and process plan and determination of success metrics are completed
3. Research and identify at least 5 parish ministry & liturgical life engagement programs (an “Engagement Program”) to evaluate and consider from both inside and outside the Orthodox ecosystem.	Laity Team 2	3 months after step 2	At least 5 Engagement Programs are identified for study
<b><u>LAG 2: Develop the most effective Engagement Program within 4 months</u></b>			
4. Evaluate and study all Engagement Programs to determine their effectiveness and validity to DOM parishes based on criteria of success determined in step 2.	Laity Team 2	2 months after step 3	Evaluation of alternative Engagement Programs is completed



# Laity 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>
5. Modify as necessary and finalize the creation of official DOM Engagement Program for use.	Laity Team 2	2 months after step 4	Engagement Program is finalized
<b><u>LAG 3: Recruit and train the parish trainers within 2 months</u></b>			
6. Recruit the number and names of potential trainers (“Trainers”) who can teach the Engagement Program in the parishes and recruit trainers and schedule training.	Laity Team 2	1 month after step 5	Trainers are recruited
7. Develop training program for Trainers and train the Trainers selected in step 6.	Laity Team 2	1 month after step 6	Trainers are trained in training program
<b><u>LAG 4: Recruit, deliver and complete the Engagement Program training in at least 17 of the parishes within 9 months</u></b>			
8. Provide notice of availability of Engagement Program to all parishes with the goal of recruiting at least 17 parishes of all types and geographies and various demographics and characteristics (the “Parishes”) and begin training for Parishes as they are ready.	Trainers and Laity Team 2	2 months after step 7	Availability of Engagement Program is announced and promoted



# Laity 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>
<p><b>9. (a) Recruit, train and implement Engagement Program in at least <u>10%</u> Parishes;</b>  <b>(b) Recruit, train and implement Engagement Program in at least <u>15%</u> additional Parishes;</b>  <b>(c) Recruit, train and implement Engagement Program in at least <u>25%</u> additional Parishes.</b></p>	<p>Trainers and Laity Team 2</p>	<p>9(a) 2 months after step 8</p> <p>9(b) 2 months after step 9(a)</p> <p>9(c) 3 months after step 9(b)</p>	<p>Engagement Program is implemented in at least the stated percent of Parishes on the outlined 7-month staggered schedule</p>
<p><b><u>LAG 5: Compile the results of the Engagement Program assessment and improve Engagement Program within 3 months</u></b></p>			
<p><b>10. Obtain and compile data from all Engagement Program implementations as to the effectiveness and success of the Engagement Program and areas for improvement.</b></p>	<p>Trainers and Laity Team 2</p>	<p>2 months after step 9</p>	<p>Engagement Program implementation assessments are compiled</p>
<p><b>11. Improve Engagement Program based on all experiential data and prepare it for further implementation.</b></p>	<p>Laity Team 2</p>	<p>1 month after step 10</p>	<p>Engagement Program is improved based on data</p>



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**Laity Parish Ministry and  
Liturgical Life Engagement  
Program  
WIG 2  
Compelling Scoreboard**



# Laity Wildly Important Goal 2 Compelling Scoreboard



Lead Measure Action	Deadline Date	Status: Percent Complete and Date
<b>1. Form Laity Team 2</b>	_____	
<b>2. Develop Process Plan</b>	_____	
<b>3. Research Engagement Programs</b>	_____	
<b>4. Evaluate Engagement Programs</b>	_____	
<b>5. Finalize Diocese Engagement Program</b>	_____	
<b>6. Identify Trainers</b>	_____	
<b>7. Train Trainers</b>	_____	
<b>8. Recruit 17 Parishes</b>	_____	



# Clergy Wildly Important Goal 2 Compelling Scoreboard



Lead Measure Action	Deadline Date	Status: Percent Complete and Date
<b>9(a). Implement Engagement Program in at least <u>10%</u> of Parishes</b>	_____	
<b>9(b). Implement Engagement Program in at least <u>15%</u> of Parishes</b>	_____	
<b>9(c). Implement Engagement Program in at least <u>25%</u> of Parishes</b>	_____	
<b>10. Obtain &amp; Compile Data From Engagement Plan Implementation</b>	_____	
<b>11. Improve Engagement Program Based on Experiential Data and Improve Program for further implementation</b>	_____	



# Laity 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			
13			
14			
15			
16			
17			



## **Special Announcements**

- ~ His Eminence has decided to keep the St. Andrew of Crete Music Ministry separate from Goal Team 2, although they will be a part of that team and share their research and work to develop the best results**
- ~ To address the Stewardship Goal that did not make the final WIG list, the OCA Midwest Diocese will roll out the 6-part ZOOM Igniting The Flame of True Stewardship Program for all parishes**
- ~ Fr. Jacob Van Sickle will lead the team to write the Strategic Plan book - other volunteers?**



**QUESTIONS  
ANSWERED  
HERE  
EVEN THE  
SILLY ONES**



**QUESTIONS**



**ANSWERS**



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



# **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 and we want you to join us and become part of the team.”



# Next Steps For Success



## The Implementation Management Team

- ~ **Both 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**
  
- ~ **Head Coach (Fr. Paul) coordinates all Goal Co-Captains and, together with Co-Captains and Archbishop Paul form the IHQ (Implementation Head Quarters) 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



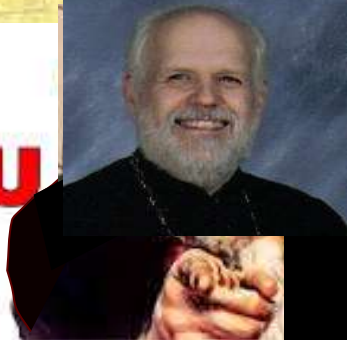
**WE WANT YOU**



- 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 The  
Volunteer Form  
<https://stewardshipcalling.com/oca-diocese-of-the-midwest-strategic-plan/>**

**Please complete and  
return to: Fr. Herman  
Kincaid:  
[frherman@orthodoxssp.org](mailto:frherman@orthodoxssp.org)  
org**



**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 #1 - Clergy Formation  
 Goal #2 - Laity Parish Ministry and Liturgical Life Engagement
6. I am willing to volunteer to be considered to co-lead the implementation of a Goal (identify the **specific** Goal number which you are willing to lead): \_\_\_\_\_
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: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Please complete and return to: Fr Herman Kincaid: frherman@orthodoxssp.org**

# Next Steps For Success

## ~ Strategic Planning Roll Out - what can you do?

- Complete the Volunteer Form at:  
<https://stewardshipcalling.com/oca-diocese-of-the-midwest-strategic-plan/>  
and identify on which Implementation Task Force you'd like to work and if you'd be willing to be a Goal Co-Captain and send it to: [frherman@orthodoxssp.org](mailto:frherman@orthodoxssp.org)
- Positively talk it up (Parish, friends)
- Repeat the Why: **To be transformed in Christ's joy, peace and sacrificial love, so that all may become one with God and others.**
- Recruit others to specific Goals



**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



- **His Eminence Archbishop Paul for being a visionary leader to undertake 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



**“Strategy without tactics is the slowest route to victory.**

**Tactics without strategy is the noise before defeat.”**



**Sun Tzu**

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



**Pastor  
Rick  
Warren**



# 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!**

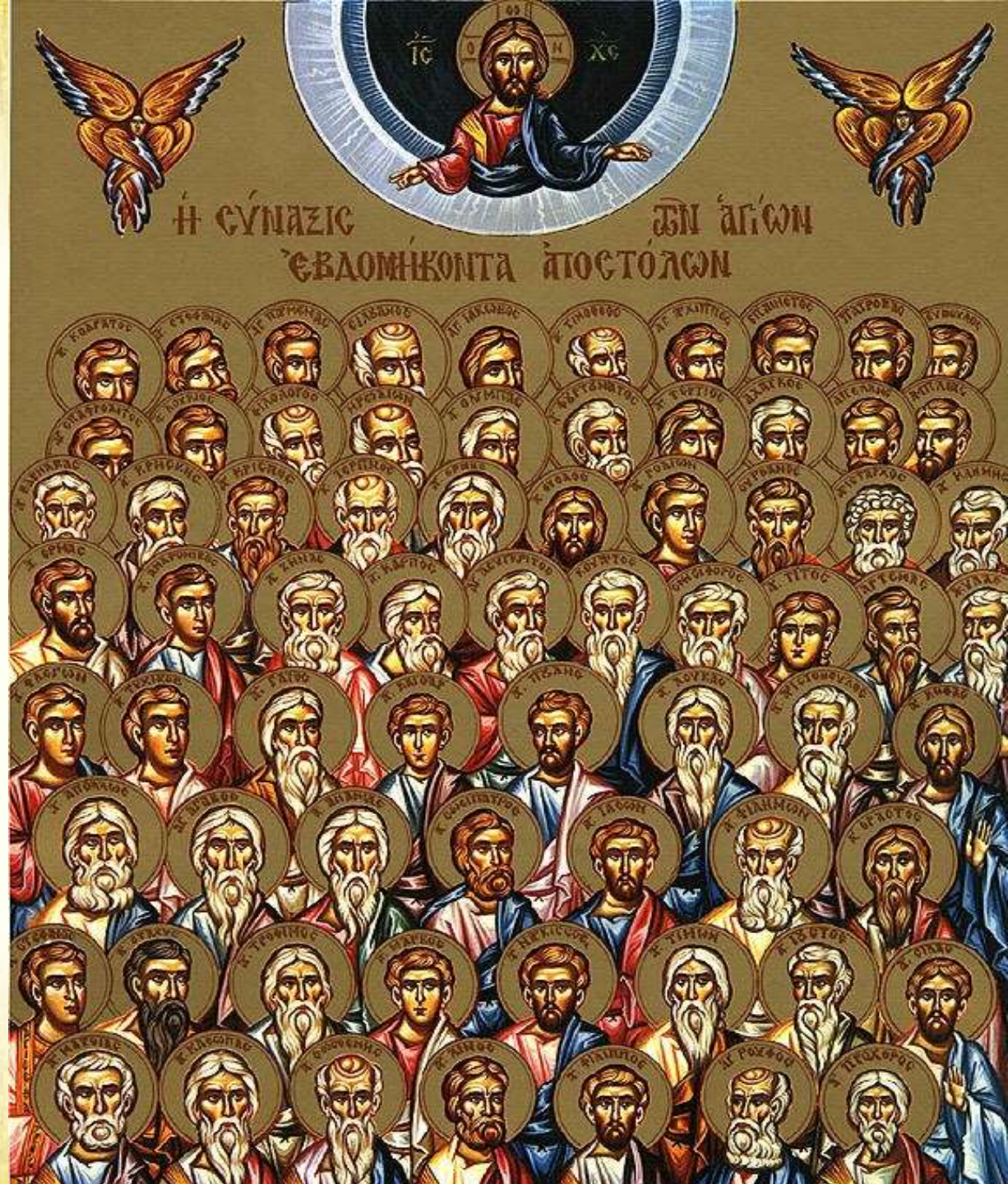
**Goethe - William Hutchinson Murray**

**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*





# ***OCA Diocese of the Midwest Strategic Plan***

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

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