

***Vision & Parish
Strategic
Planning
and the
Effective Parish
Assessment
Part 1***



Bill Marianes



The most critical
question each
person, parish
and ministry
must answer.



Μετάνοια

Metanoia



“a transformative change of heart”

Your
Comfort
Zone



Where
the Magic
Happens



SESSION ONE – WHY DO WE NEED VISION AND PLANNING?

10:30 - A. The 4 Critical Vision and Planning Questions and the 10 Deliverables for a Good Parish Vision and Strategic Plan

1. WHY does our parish exist? = WHY Statement and Core Values
2. Where are we now? = Effective Parish Assessment/SWOT Analysis
3. Where do we want to be? = Mission and Vision
4. How will we get there? = S.M.A.R.T. Goals, Interim Goals, Interim Actions, Action Plans, Success Timeline, SMART Goal Accountability Process (“SMART GAP”)

11:15 - Questions

11:30 - Small Group Breakout

1. Which of the 4 Critical Questions and 10 Deliverables does your parish have in place?
2. What benefits do you see from being able to answer the 4 Critical Vision and Planning Questions:
 1. WHY does our parish exist?
 2. Where are we now?
 3. Where do we want to be?
 4. How will we get there?

Your Strategic Planning Page

Stewardship Calling
What are you doing with all of the gifts God has given you?

www.stewardshipcalling.com

The screenshot shows the website's navigation menu. The 'STRATEGIC PLANNING' tab is circled in red, with a red arrow pointing to it from the right. Below it, the 'BOSTON METROPOLIS - THRIVING CONGREGATIONS STRATEGIC PLANNING' link is also circled in red, with a red arrow pointing to it from the right. The main content area features a large image of a church dome with the text 'opolis of Boston's response to the that churches a face today.' Below this, there is a 'Subscribe to Blog via Email' section with a text input field and a 'SUBSCRIBE' button.

This presentation can be found under the [Strategic Planning](#) tab at the page for: [Boston Metropolis Thriving Congregations Strategic Planning](#)

<https://stewardshipcalling.com/boston-metropolis-thriving-congregations-strategic-planning/>



Who's helping who today?



A journey ...

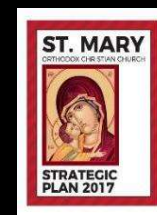
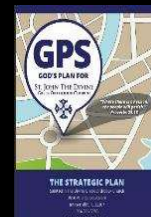
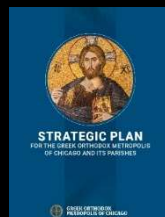
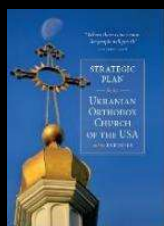
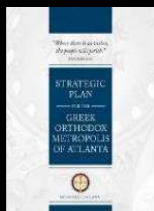
... 385,000+ airlines miles over 20 years

*...presentations to over 600 Parishes of
all Orthodox jurisdictions*

*...a financial stewardship analysis for
over 275+ Parishes*



The Stewardship Calling Process has been used to complete Strategic Plans covering over **26%** of Orthodox Christians



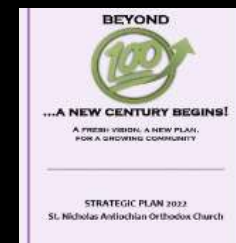
**GOA
Metropolis
of San
Francisco**

**GOA
Metropolis
of Atlanta**

**Ukrainian
Orthodox
Church of
the USA**

**GOA
Metropolis
of
Chicago**

**Orthodox
Christian
Prison
Ministry**



Additional Recently Completed Strategic Plans:

OCA Diocese of New England

OCA Diocese of Midwest

St. Demetrios (Saginaw, MI)

Holy Trinity (Indianapolis, IN)

St. John The Divine (Jacksonville FL)

St. Mary (Wichita, KS)

St. John The Baptist (Beaverton, OR)

St. Nicholas (Ann Arbor, MI)

Sts. Mark, Mary, Philopater (Troy, MI)

Annunciation Cathedral (Atlanta, GA)

St. Nicholas (Grand Rapids, MI)

Additional Strategic Plans In Progress:

ZOE for Life (Cleveland, OH)

Christ The Savior (Harrisburg, PA)

St. Raphael (Iowa City, IA)

St. Sophia (Miami, FL)

Holy Trinity (Grand Rapids, MI)

St. Sophia (San Antonio, TX)

Why Are Here Today?

“Live as if you were to die tomorrow. Learn as if you were to live forever.”

~ Mahatma Gandhi

“Discipleship is the life of learning, growing, self-sacrifice, and commitment required of every Christian.”

~ Orthodox Study Bible

Find Your



“I beg you to walk worthy of the calling to which you have been called.”

Ephesians 4:1

“... to each one of us grace was given according to the measure of Christ’s gift... some to be apostles, some prophets, some evangelists, and some pastors and teachers for the equipping of the saints for the work of ministry...”

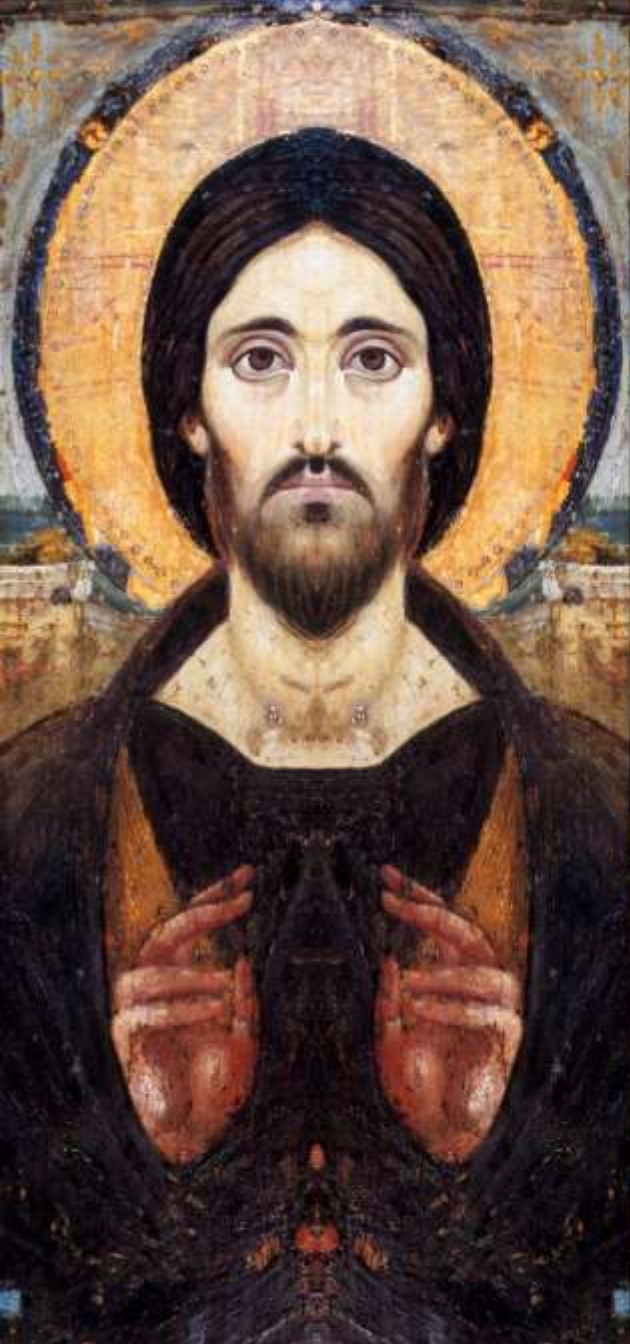
Ephesians 4:7-13



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.”

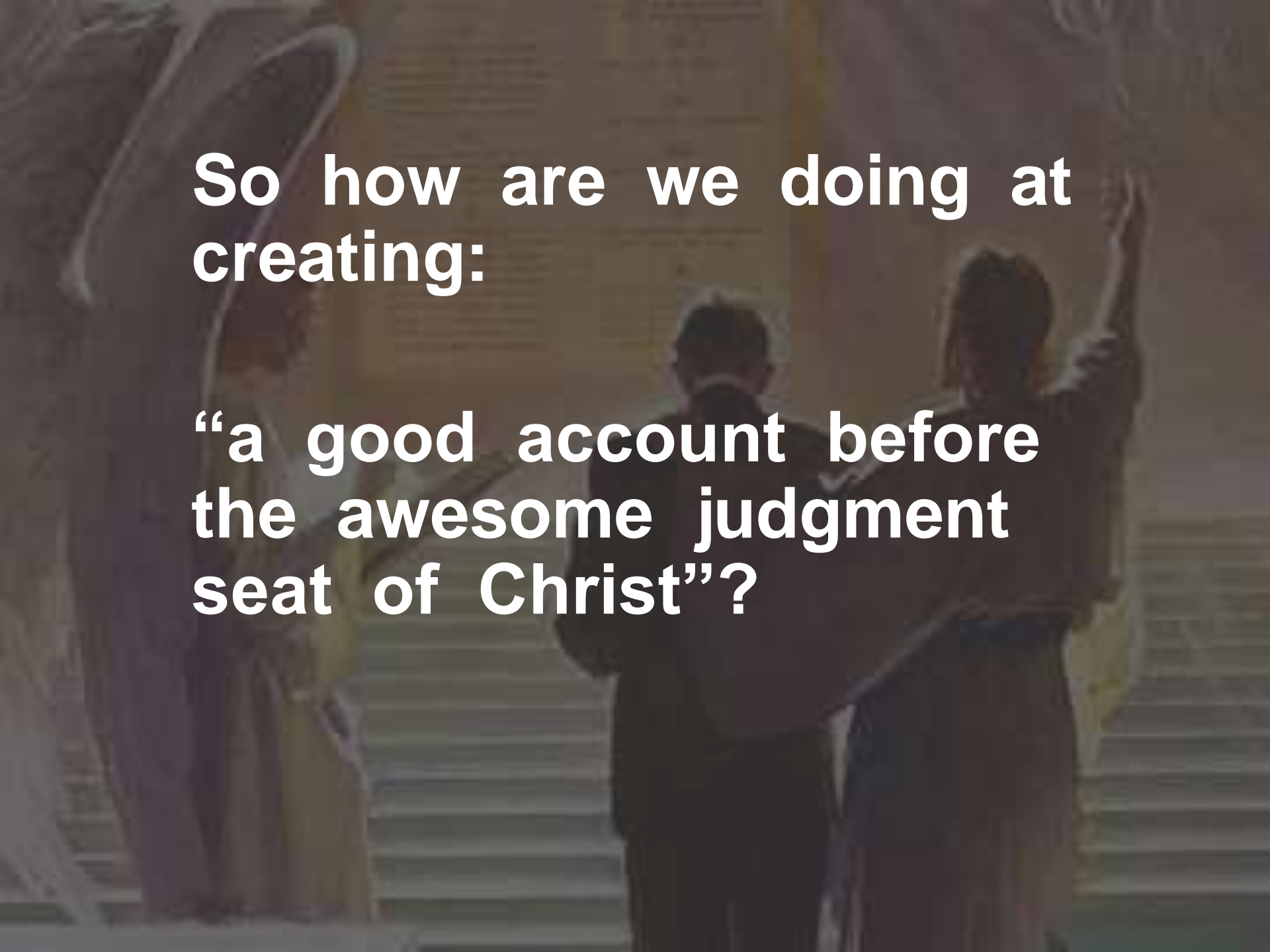
Orthodox Divine Liturgy
II Corinthians 5:10



**Christ's
possible
very
difficult
question**



What did **you** do,
for **My** church and **My** people,
under **your** watch,
given all of the gifts **I** gave **you** ?



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

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

**So, why
should your
hair be on
fire?**

**What keeps
me up at
night.**



OUR CHALLENGE

47%

of cradle
Orthodox
have left the
Church

64%

of young
people fall
away from
the Church

21%

of Greek Orthodox
Christians regularly
attend Church

99%

of Orthodox Parishes
are dependent on
festivals and
fundraisers to fund their
needs

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

PRE-COVID Giving Facts¹

U.S. Orthodox Christians are in:

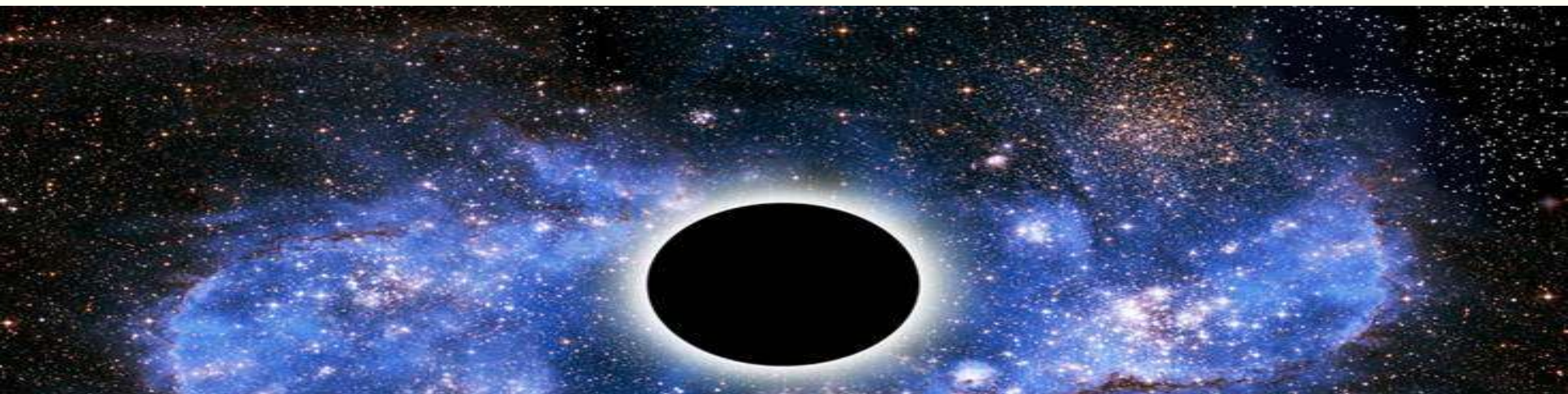
~ top 1/3 in annual income

~ bottom 1/3 in church stewardship

¹ Pew Forum income data compared against Financial Stewardship Analysis of over 275 U.S. Orthodox Parishes conducted by Stewardship Calling ministry



We are living in exponential times...
... the speed of change is
unimaginable and accelerating



'The following is based on the pioneering YouTube video "Did You Know?" Licensed by Karl Fisch, Scott McLeod, and XPLANE. (Selected statistics have been updated, as much as reasonably possible, from available sources.)

Years it took to reach 50 million users:

Telephone - 75 years



Radio - 38 years



TV - 13 years



Internet - 4 years



Pokémon GO - 19 days





8.3 hours of video content
is uploaded to YouTube
every second of every day

97% of American adults text.



Text messages have a 98% open rate versus only 20% for email.

95% of all text messages are read in under 3 minutes.



~ In 2022, 39% of couples
in the U.S. met online



The top 10 in-demand jobs in 2010 did not even exist in 2004.

We are living in
exponential times...

So, what does this mean
for your parish?



"The rate of technological change associated with this information explosion has created an environment intolerant of the status quo."

"..without another kind of fundamental change in the organizational culture, there is little hope of enduring improvement in organizational performance." ¹



Leaders of a Church will either be risk takers or caretakers that will eventually become undertakers.



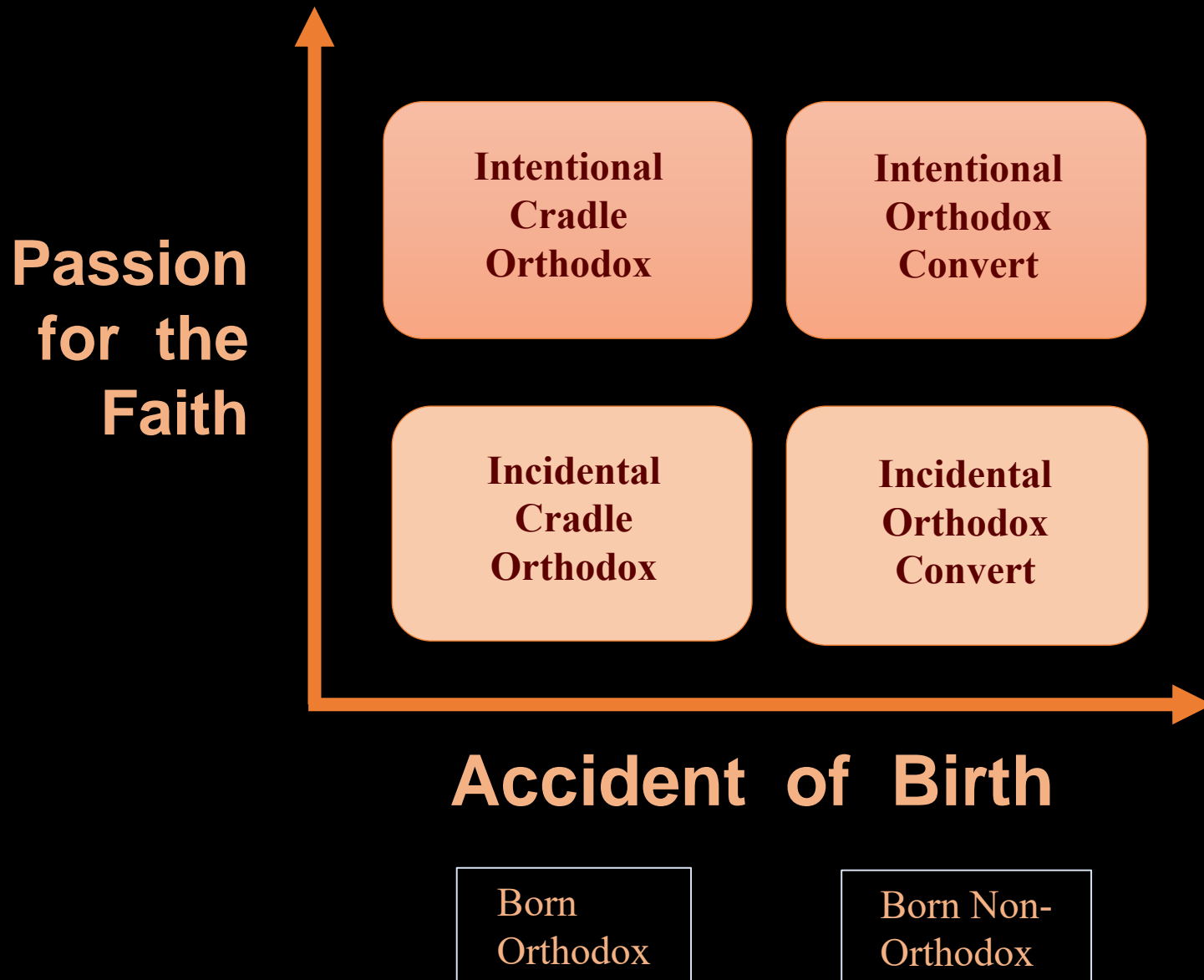
If your parish ceased to exist, would anyone in your community notice?

(other than missing your festival)

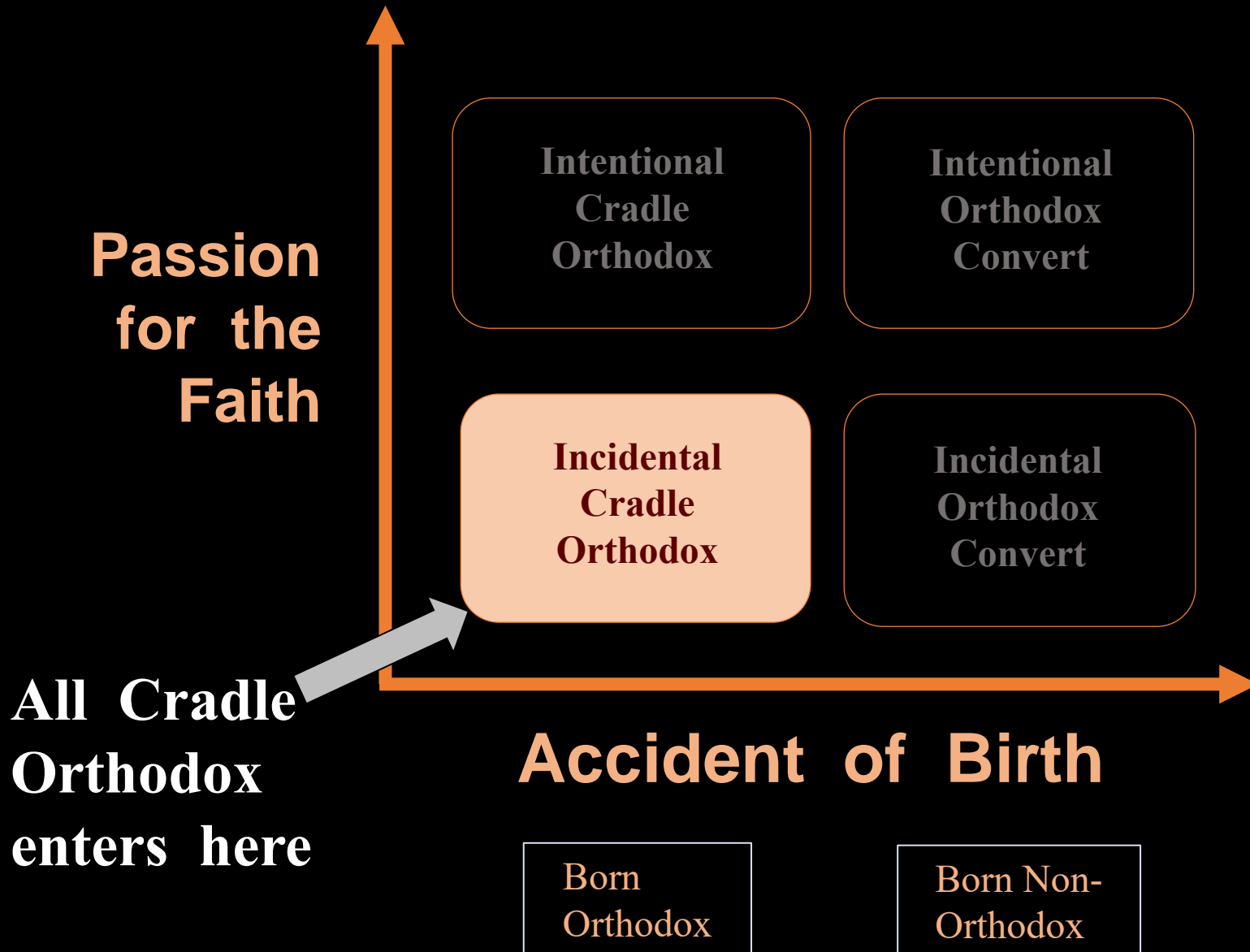
The Orthodox Church
Demographics Have
Changed Significantly
The Last 15 Years



4 Kinds of U.S. Orthodox Christians



4 Kinds of U.S. Orthodox Christians



4 Kinds of U.S. Orthodox Christians

Few Cradle
Orthodox
move here

Passion
for the
Faith

Intentional
Cradle
Orthodox

Intentional
Orthodox
Convert

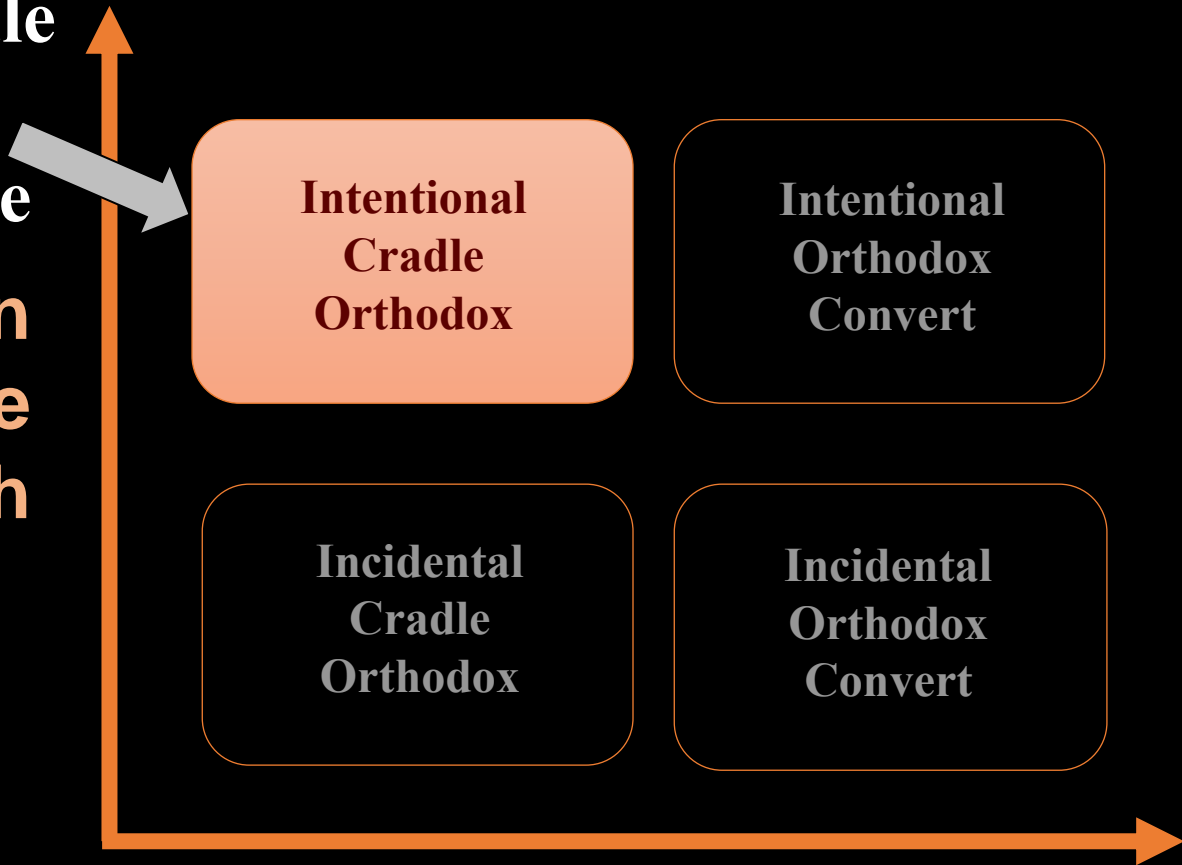
Incidental
Cradle
Orthodox

Incidental
Orthodox
Convert

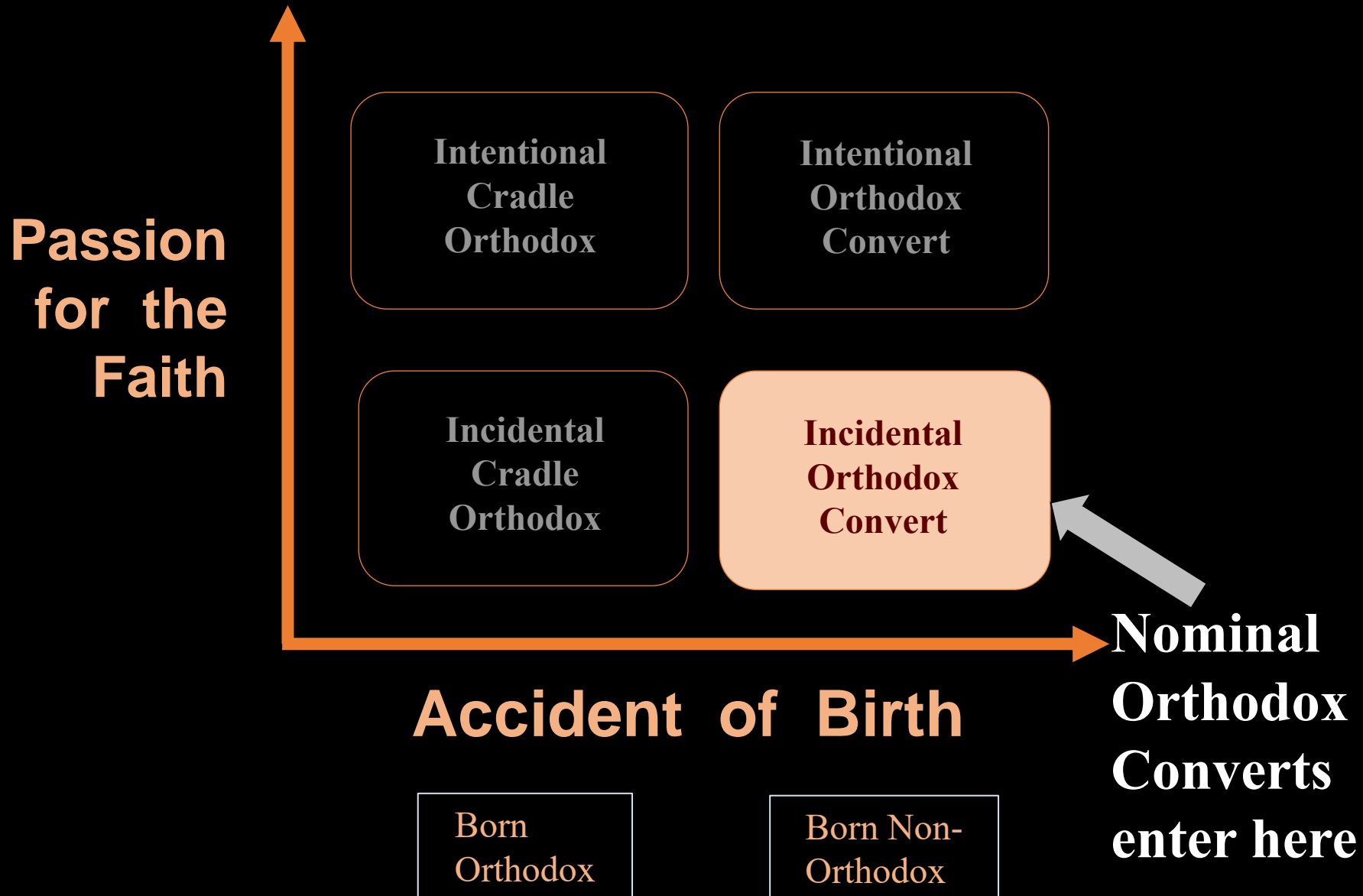
Accident of Birth

Born
Orthodox

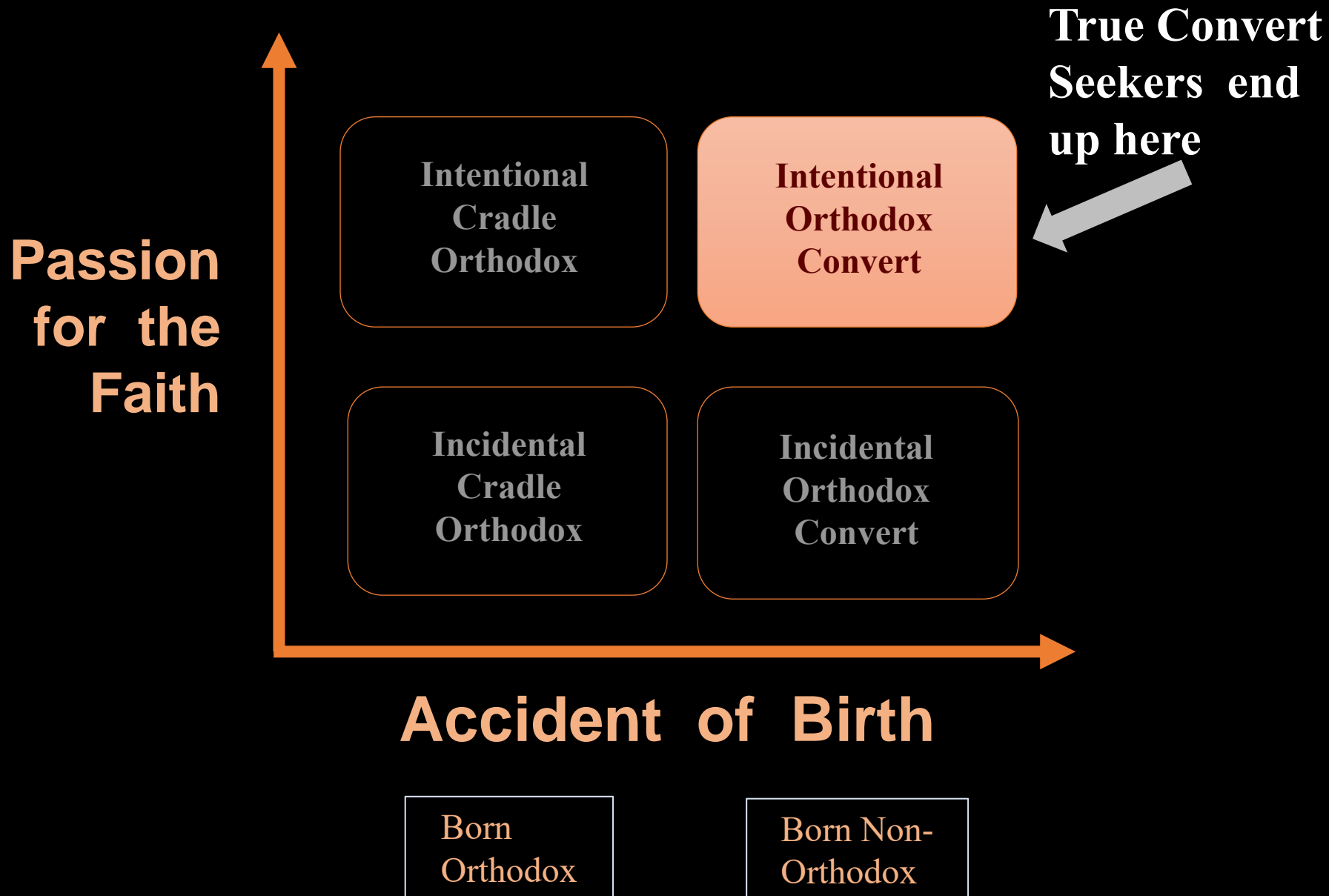
Born Non-
Orthodox



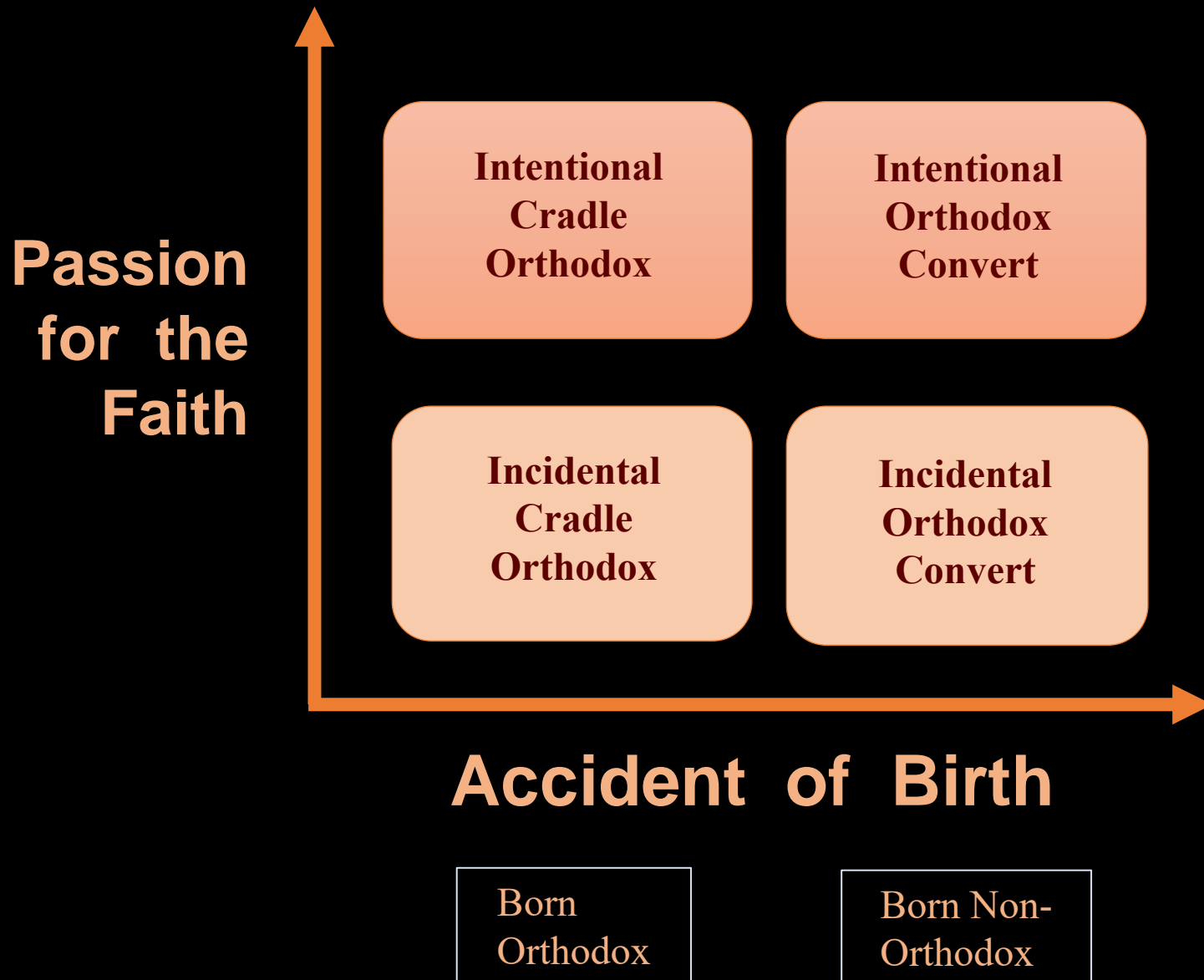
4 Kinds of U.S. Orthodox Christians



4 Kinds of U.S. Orthodox Christians



4 Kinds of U.S. Orthodox Christians



3 Fundamental Rules



1. Since change is the only constant, you must constantly change.

2. You cannot master what you do not measure.

3. If you're not measuring you can't know if you're effective.





**Consensus Vision and
Strategic Planning**

Strategic Planning is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18



A process to:

1. manage the “busyness” of our Church without turning our Church into a “business”
2. define our strategy to allocate our resources to achieve our vision



**Must answer
4 questions:**

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

1. SWOT (EPA) Analysis
2. Statement of Why
3. Core Values
4. Mission Statement
5. S.M.A.R.T. Goals
6. Vision Statement
7. Interim Goals & Interim Actions
8. Success Timeline
9. SMART Goal Accountability Process (“SMART GAP”)
10. Strategic Plan



10 Strategic Plan Deliverables





Date your:
Vision



Marry your:
Values & Mission



Die with your:
WHY



Question 1:

WHY do we
exist?

WHY Statement

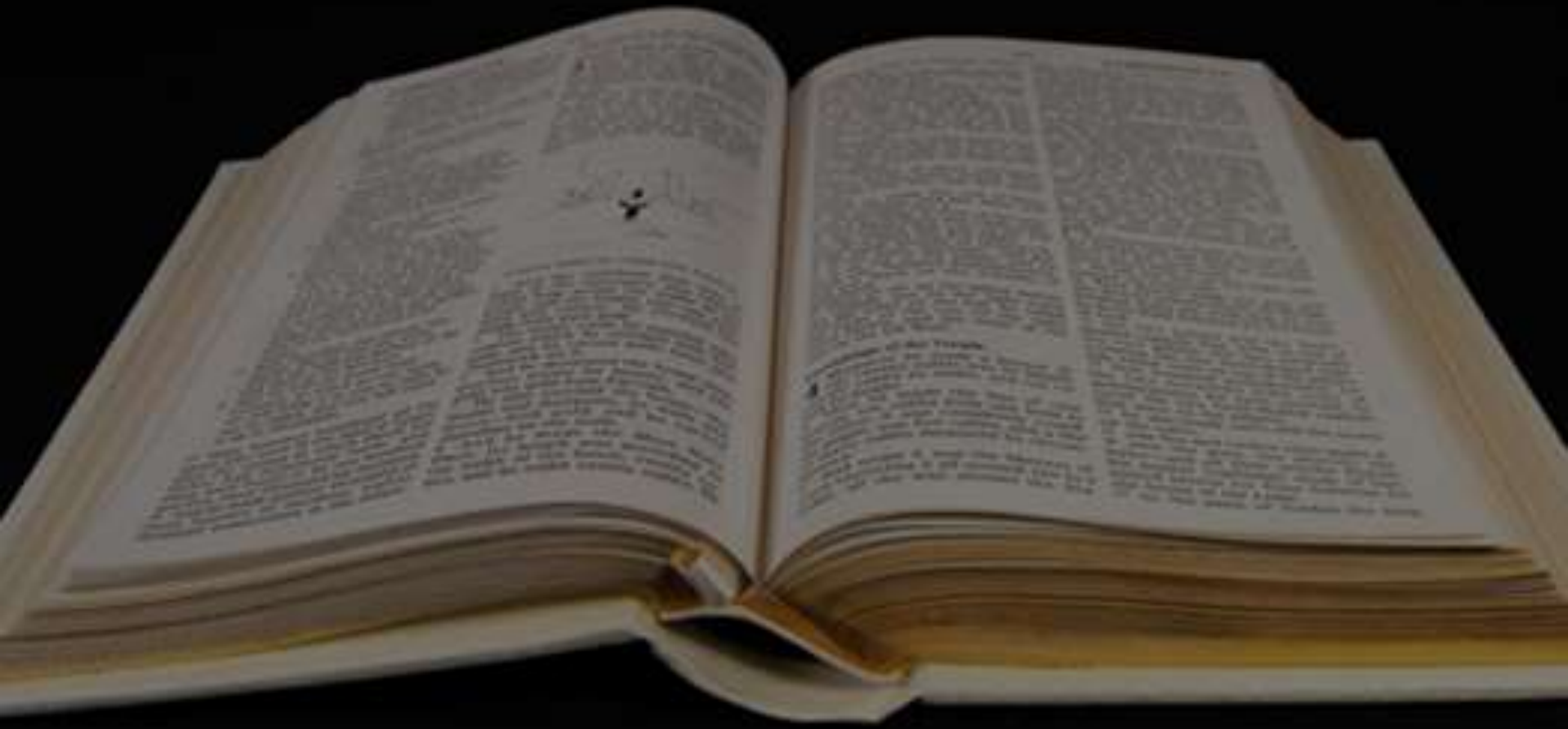
Answers strategic planning question #1:

Why are we here?

~ An articulate, compelling and inspirational reason why our parish exists and why anyone should care, or want to join us.



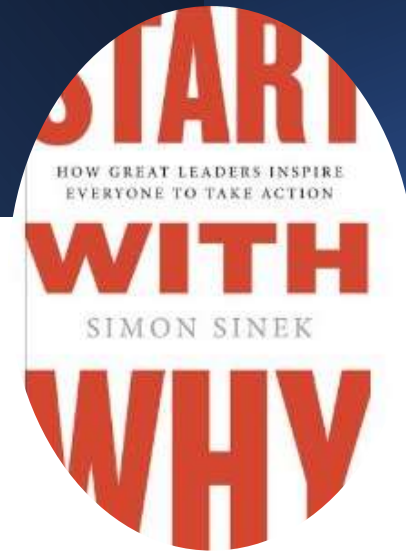
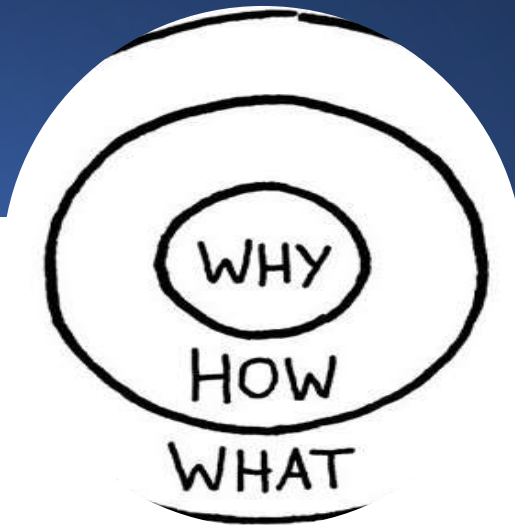
A Statement of Why is Biblical



***“Friends, WHY
are you doing
these things?”***

Acts 14:15

Start With Why - How Great Leaders Inspire Everyone To Take Action

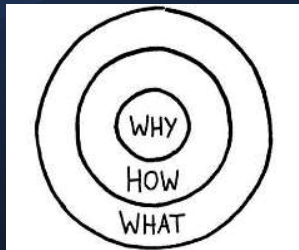
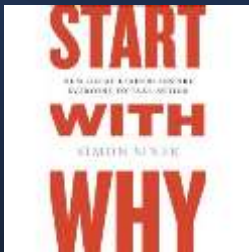


Over 54,212,375 views

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

Start With Why - How Great Leaders Inspire Everyone To Take Action

**Start With
Why - How
Great
Leaders
Inspire
Everyone To
Take Action**

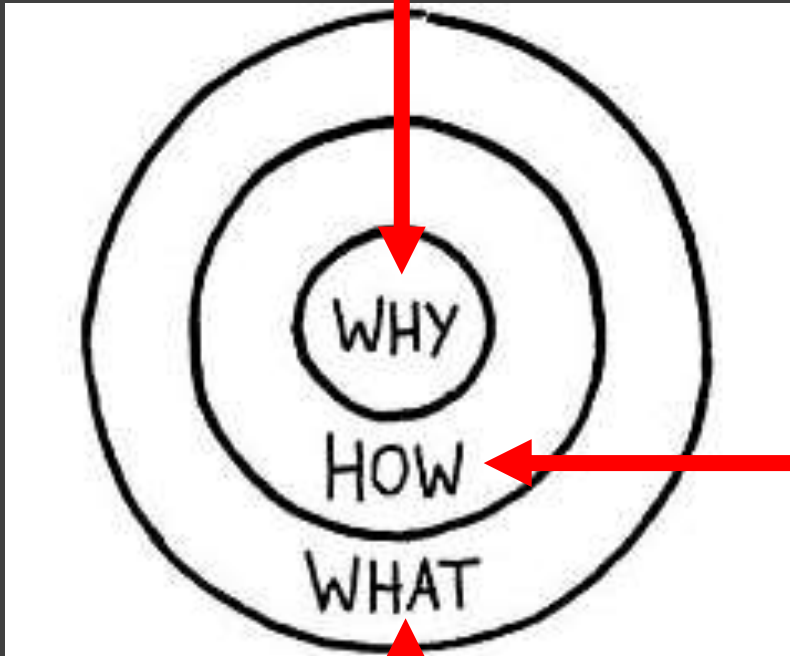


- ~ “How do you explain why some people are able to achieve things that defy all of the assumptions ...or what other similar organizations can do?”
- ~ People don’t buy (into) what you do, they buy (into) why you do it, and what you do simply proves what you believe.”
- ~ “If you don’t know why you do what you do, how will you inspire others to understand why you do what you do or to want to join you or your organization.”
- ~ “The goal is not to attract people who need what you have. The goal is to attract people who believe what you believe.”

WHY

Why do we exist and do what we do?

The intersection of WHY with Strategic Planning



Vision / SMART Goals

Where are we going and how will we get there?

Mission

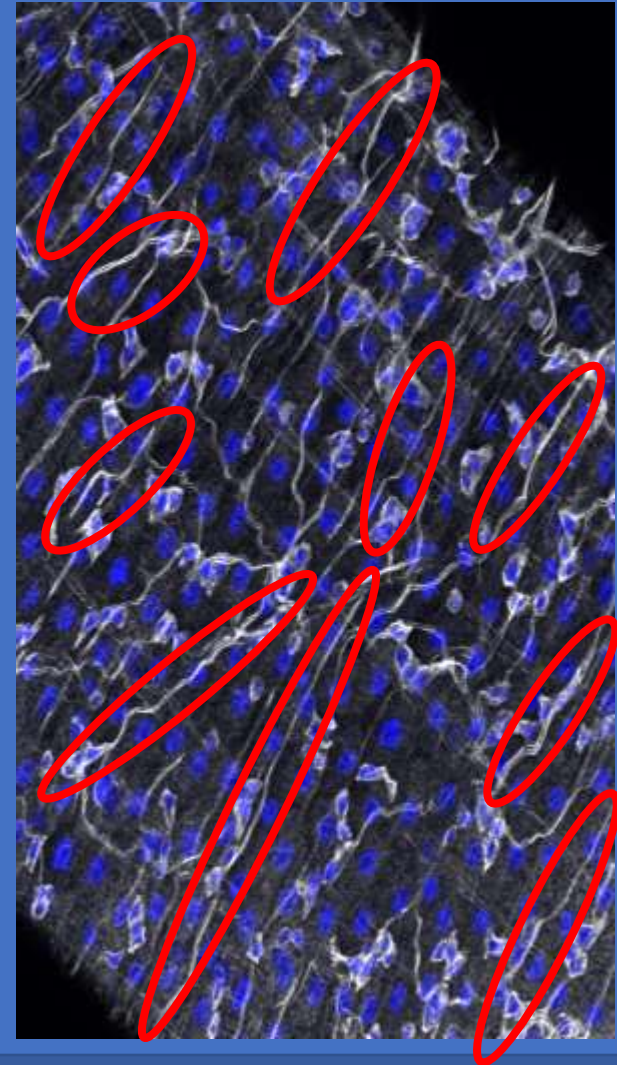
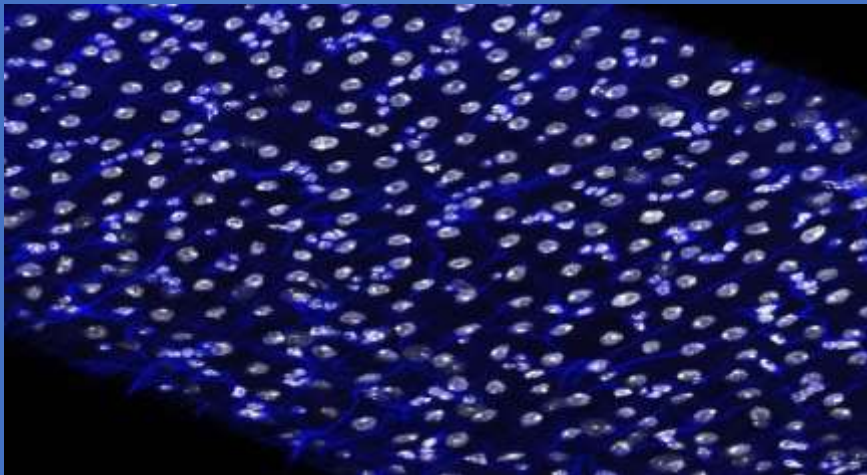
What do we do?

Your Second Brain”¹

“The 2nd brain informs our state of mind...”

The enteric nervous system
 (“second brain”) in our gut has
 100+ million neurons

*“A big part of our emotions are
 probably influenced by the
 nerves in our gut...”*



¹ The Second Brain (HarperCollins) Dr. Michael Gershon, Chairman Department of Anatomy and Cell Biology at New York–Presbyterian Hospital/Columbia University Medical Center

² Pictures of midgut enteric neuron system taken from PhD dissertation of Dr. Alexis Marianes –“*How to bust a gut: physiological and stem cell compartmentalization in the Drosophila midgut*” - Johns Hopkins University (2013)

“Two of the most important days of your life are:

First, the day you were born; and

Second, the day you figure out why.”



**Mark
Twain**

**To inspire people to
do the things that
inspire them**

**so that together, we
can change our
world.**



Simon Sinek's WHY?

**To help people and
parishes discover and
live their stewardship
callings,**

**so that they may have
a good account before
the awesome judgment
seat of Christ.**



**Helping transform and
improve Orthodox
Church parishes,
organizations and
ministries in order to
strengthen the Body
of Christ.**





CHRIST THE SAVIOUR ORTHODOX CHURCH
HARRISBURG, PENNSYLVANIA

Final WHY Statement

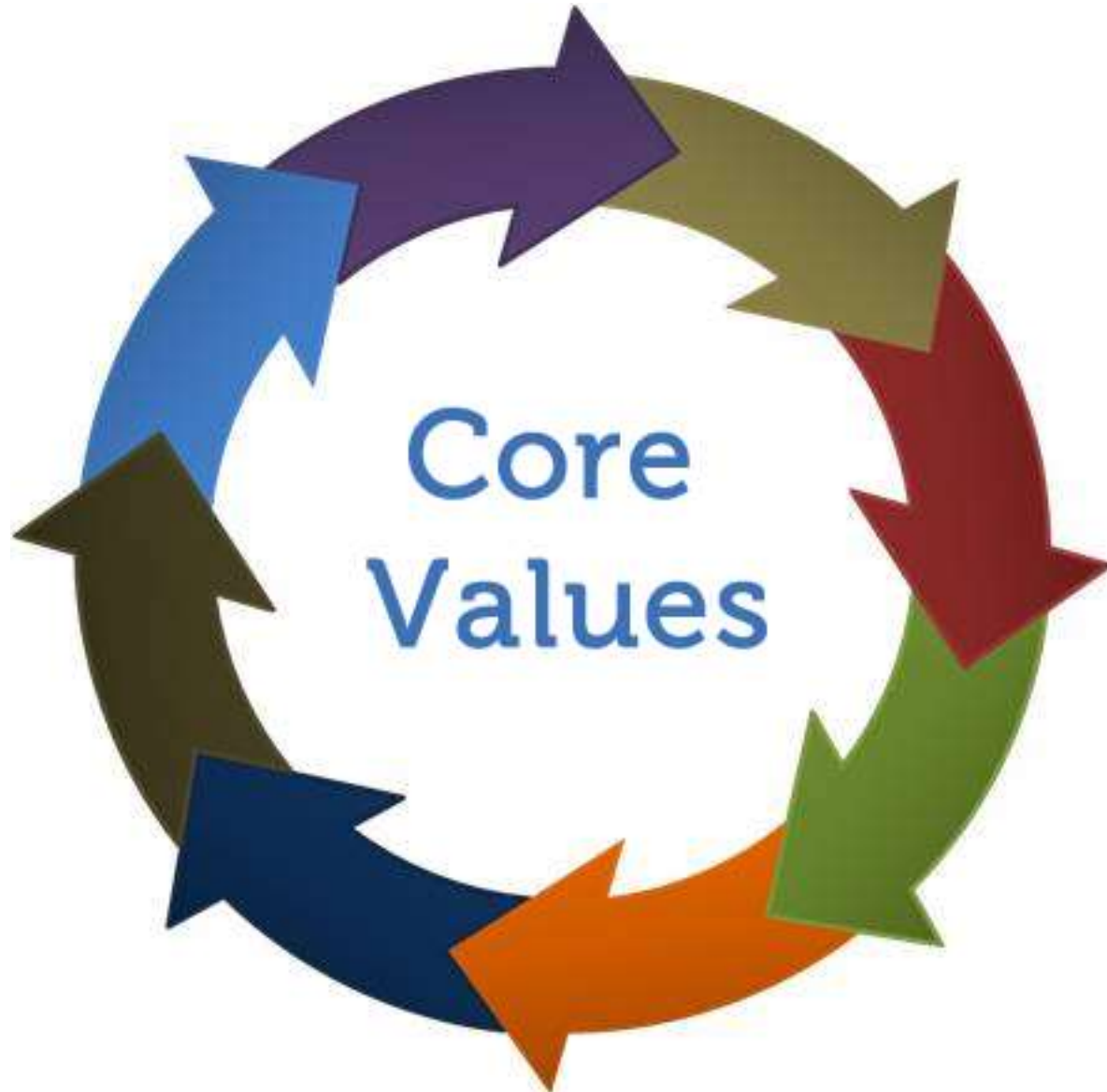
**To experience and share Christ's
love so that everyone we
encounter finds healing,
purpose, and eternal life.**



St. Nicholas
Orthodox Church

Statement of
WHY

**To seek and share
Christ's love
so that all will find
eternal life in Him.**



Core Values Are Biblical



GOD'S Core Values

I
THOU SHALT HAVE
NO OTHER GODS
BEFORE ME

II
THOU SHALT NOT
MAKE UNTO THEE
ANY GRAVEN IMAGE

III
THOU SHALT NOT
TAKE THE NAME OF
THE LORD THY GOD
IN VAIN

IV
REMEMBER THE
SABBATH DAY TO
KEEP IT HOLY

V
HONOR THY FATHER
AND THY MOTHER

VI
THOU SHALT
NOT KILL

VII
THOU SHALT NOT
COMMIT ADULTERY

VIII
THOU SHALT
NOT STEAL

IX
THOU SHALT NOT
BEAR FALSE
WITNESS AGAINST
THY NEIGHBOR

X
THOU SHALT
NOT COVET

CHRIST'S Core Values

THE BEATITUDES

Blessed are the poor in spirit,
for theirs is the kingdom of heaven.

Blessed are those who mourn,
for they shall be comforted.

Blessed are the meek,
for they shall inherit the earth.

Blessed are those who hunger and thirst
for righteousness, for they shall be satisfied.

Blessed are the merciful
for they shall obtain mercy.

Blessed are the pure of heart,
for they shall see God.

Blessed are the peacemakers,
for they shall be called children of God.

Blessed are those who are persecuted
for righteousness sake,
for theirs is the kingdom of heaven.

Matthew 5:3-10



1. Beliefs shared by the stakeholders

**2. Drive the organization's culture
and priorities**

3. Provide a framework for decisions



CHRIST THE SAVIOUR ORTHODOX CHURCH HARRISBURG, PENNSYLVANIA

Core Values

LOVE

for God,
the Holy Orthodox Faith,
our parish family
our neighbors



St. Nicholas
Orthodox Church

CORE VALUES

- ~ **Christ-Centered Love**
- ~ **Generous Stewardship**
- ~ **Faithful Worship**
- ~ **Caring Community**
- ~ **Spiritual Transformation**

Bill's Core Values

GI³



Grit

Integrity

Inquisitive

Inspirational





Question 2:

**Where are
we now?**

A SWOT Analysis and Effective Parish Assessment is Biblical





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

Test yourselves!”

2 Corinthians 13:5

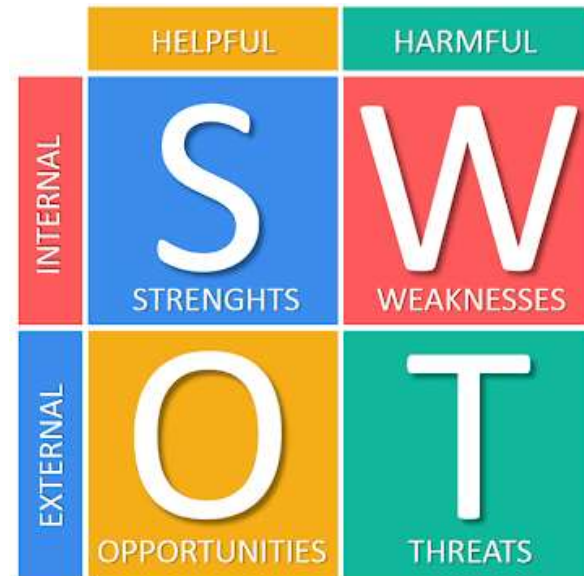
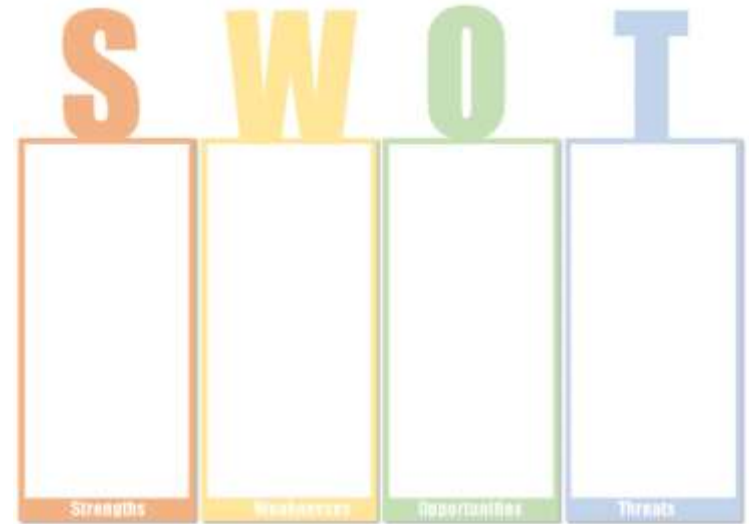
SWOT ANALYSIS

Answers strategic planning question #2:

Where are we now?

~ First focus on INTERNAL Parish Strengths and Weaknesses

~ Second focus on EXTERNAL Opportunities and Threats that our Parish faces



OMS EFFECTIVE PARISH MODEL



THE SOLUTION

Empirical research identified 6 Operational Pillars and 30 Building Blocks that must be optimized to excellence in the most healthy and effective Orthodox Parish.



Question 3:

**Where do we
want to be?**



Mission

Statement

A Mission Statement Is Biblical



The Great Commission Mission Statement

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



Matthew 28:18-20

Mission Statement

Answers strategic planning question #3:

What do we do?

~ A clear description of the what the organization does to achieve its Why/Vision/Goals





A Vision Statement Is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18

Vision

Acts 1:8

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



A Vision should be:

1. clear & concise
2. compelling & inspiring
3. a “picture” of where you're going
4. about the future (2-4 years)
5. possible...

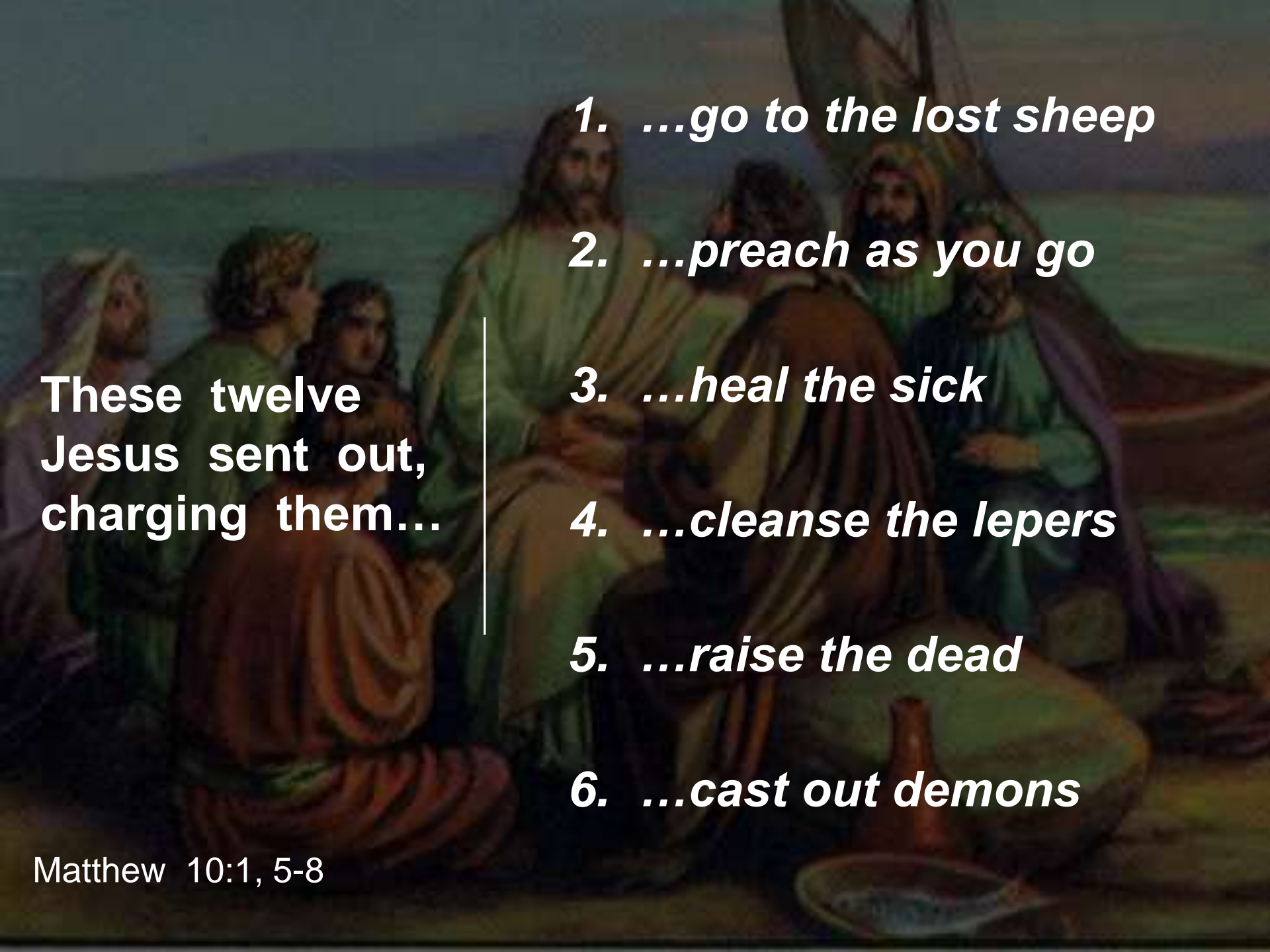


Question 4:

**How will we
get there?**

Strategic SMART Goals Are Biblical





These twelve
Jesus sent out,
charging them...

1. *...go to the lost sheep*

2. *...preach as you go*

3. *...heal the sick*

4. *...cleanse the lepers*

5. *...raise the dead*

6. *...cast out demons*

Matthew 10:1, 5-8

SMART Goals



The “S.M.A.R.T.” goal process helps ensure our Strategic Plan can be achieved

Specific: Is the goal clear and specific enough to be understandable?

Measurable: Can you measure the success of the goal?

Attainable: Is the goal attainable within a reasonable time?

Relevant: Is the goal most relevant to us and is it “Realistically written”?

Time-Bound: Is there a realistic timeline to achieve the goal?



The 5 Step Stewardship Calling Vision & Strategy Success Plan

1. S.M.A.R.T. Goals
2. Interim Lag Actions
3. Interim Lead Actions
4. Step-by-Step Action Plans
5. "SMART GAP"

(S.M.A.R.T. Goal Accountability
Process)

The Power of FOCUS

- ~ Human beings are genetically hardwired to do a very small number of things at a time with excellence¹
- ~ Focus on the most critical things produces larger scale positive impacts

¹ MIT neuroscientist Earl Miller: “Trying to concentrate on two tasks causes an overload of the brain’s processing capacity.”

The tyranny of the urgent

If you say NO to
good ideas, you can
put extra focus on
the most critical
ideas

If you spend only 80%
of your time on the
“tyranny of the urgent”
you can devote 20%
of your time on your
SMART Goals.



Date your:
Vision



Marry your:
Values & Mission



Die with your:
WHY

***Vision & Parish
Strategic
Planning
and the
Effective Parish
Assessment
Part 2***



Bill Marianes



Your Strategic Planning Page

Stewardship Calling
What are you doing with all of the gifts God has given you?

www.stewardshipcalling.com

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<https://stewardshipcalling.com/boston-metropolis-thriving-congregations-strategic-planning/>

SESSION TWO – HOW WILL THE METROIPOLIS HELP US?

12:30 - A. The 4 Ps of Vision and Planning, the Right:
1. People; 2. Process; 3. Plan; 4. Performance

- B. The Tools The Metropolis of Boston Will Offer:

1. A comprehensive **Effective Parish Assessment** to receive an empirical consensus assessment of your parish's effectiveness in the 6 Pillars and 30 Building Blocks of a healthy and effective parish.
2. monthly **6-PART ZOOM** Sessions teaching the elements of Effective Orthodox Strategic Planning
3. Metropolis Effective Orthodox **Strategic Planning Retreat** (at Metropolis of Boston Retreat Center)

1:15 - Questions

1:30 - Small Group Breakout

1. Is your parish willing to undertake an Effective Parish Assessment?
2. What does your parish hope to get out of the 9-part Effective Orthodox Strategic Planning programs, and who will participate?
3. Is your parish ready to start a strategic planning process?
4. Is your parish willing to participate in the Metropolis Effective Orthodox Strategic Planning Retreat, and what does it hope to learn?





**What Is Your Parish's
Biggest Challenge?**



Your Parish's Biggest Challenge

$$\Delta S = S_f - S_i = \int \frac{dq_{rev}}{T}$$

$$\Delta S = \frac{q_{rev}}{T}$$

Your Parish's Biggest Challenge

~ Entropy

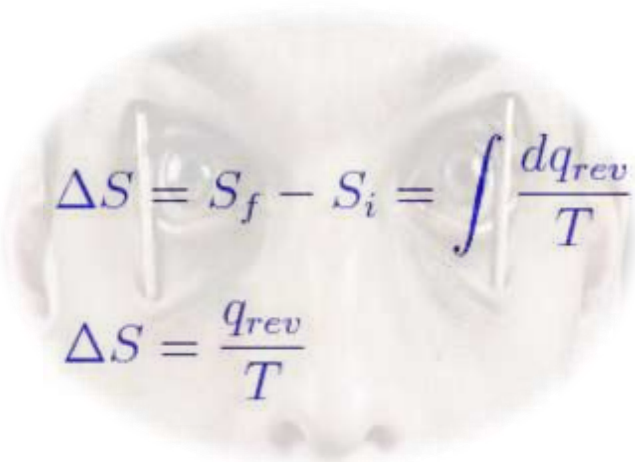
~ Everything in the universe moves from order to disorder, and Entropy measures that change

~ If you don't make positive changes, you will get negative changes



$$\Delta S = S_f - S_i = \int \frac{dq_{rev}}{T}$$

$$\Delta S = \frac{q_{rev}}{T}$$



The Cure To Your
Parish's Biggest
Challenge =

E²

E**ducate** the Faithful
what it means to be the
church 24x7x365

E**ngage** the Faithful
in a sacramental,
liturgical, ministry, and
evangelism lifestyle

The 4 Ps of



1. **People** - The right people leading, developing and implementing the process, with input from everyone along the way
2. **Process** - A comprehensive, inclusive and methodical process and schedule
3. **Plan** - A 10-element comprehensive strategic plan with a detailed implementation action plan and timeline
4. **Performance** - A well-managed and persistent implementation with full accountability

“If you keep doing what you’ve always done, you’ll keep getting what you’ve always got.”



Henry Ford

Bill's 2 Team Premises



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



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

“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.”

**ONE
TEAM
ONE
DREAM**



Ecclesiastes 4:9-10

***So we, being many,
are one body in
Christ,***

***and every one
members one of
another.***



Romans 12:5



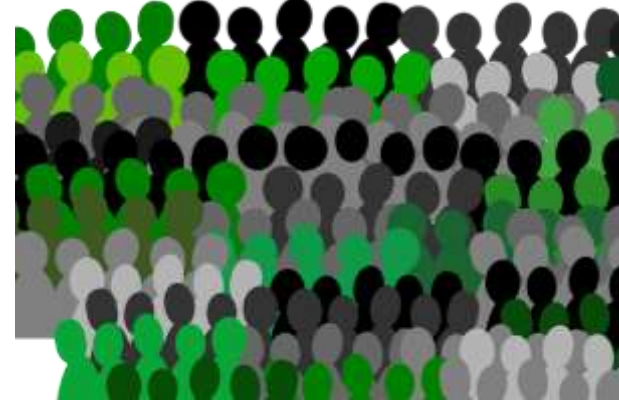
As iron sharpens iron, so one person sharpens another.

Proverbs 27:17

It Takes 3 Teams

Community

Community-wide input throughout, including the beginning and in the Strategic Goal formulation



Strategic Planning Team

A diverse, representative cross-section of Parish strategic thinkers who analyze the data and help draft a Strategic Plan



Implementation Team

A larger diverse group of parish faithful who actually do the work and implement all of the Strategic Goals and Action Plans and who are accountable for the achievement of the Strategic Plan





**UCLA Coach
John Wooden**

Won 10 NCAA national basketball championships in 12 years (7 in a row)

**Don't measure yourself
by what you have
accomplished,
but by what you should
have accomplished with
your ability.**

The 4 Ps of



1. **People** - The right people leading, developing and implementing the process, with input from everyone along the way
2. **Process** - A comprehensive, inclusive and methodical process and schedule
3. **Plan** - A 10-element comprehensive strategic plan with a detailed implementation action plan and timeline
4. **Performance** - A well-managed and persistent implementation with full accountability



**Must answer
4 questions:**

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

1. SWOT Analysis
2. Statement of Why
3. Core Values
4. Mission Statement
5. S.M.A.R.T. Goals
6. Interim Goals & Interim Actions
7. Success Timeline
8. SMART Goal Accountability Process (“SMART GAP”)
9. Vision Statement
10. Strategic Plan



10 Strategic Plan Deliverables





EFFECTIVE PARISH ASSESSMENT

A free opportunity to optimize your Parish health & operational excellence





- ~ Doctors can assess your personal health.
- ~ Financial planners can assess your financial health.
- ~ Parishes lacked similar empirical and validated tools to assess parish operational effectiveness.
- ~ **Orthodox Ministry Services** team developed its **Effective Parish Assessment (EPA)** after 20+ years of working with over 600 Orthodox parishes.
- ~ The **EPA** is a reliable, easy, and empirical way to assess the health and operational effectiveness of your Parish.

OMS EFFECTIVE PARISH MODEL

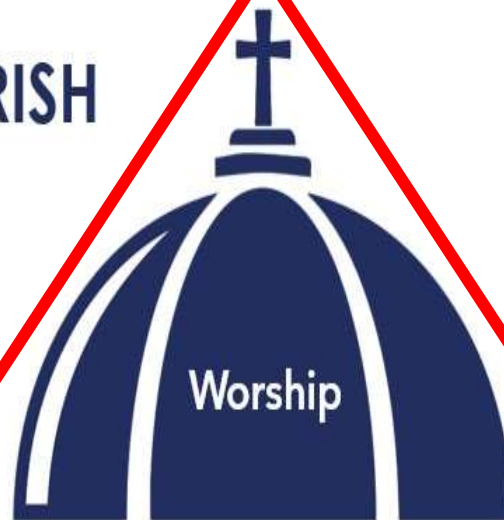


THE SOLUTION

Empirical research has identified 6 Operational Pillars and 30 Operational Building Blocks that must be optimized to excellence in the most healthy and effective Orthodox Parish.

THE ORTHODOX PARISH

A Living House of Faith



Vision & Planning



Leadership & Teams



Stewardship & Generosity



Parishioner Engagement



Ministry



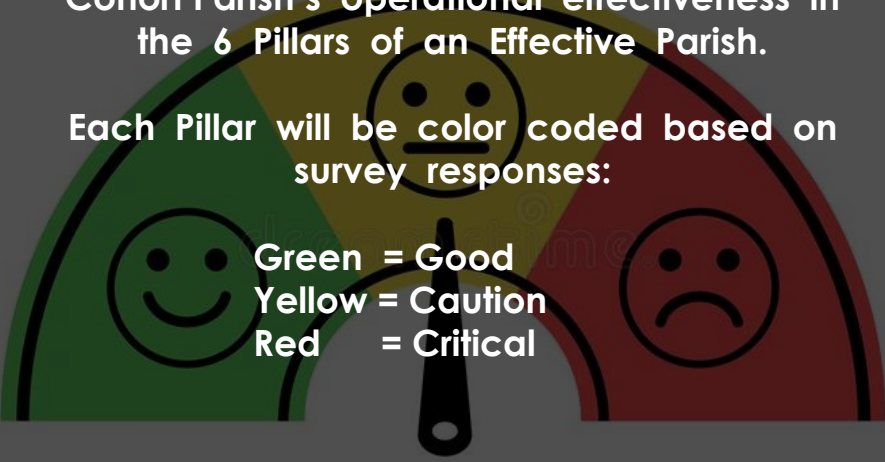
Operational Effectiveness

Personal Faith Formation

OMS Effective Parish Assessment 1

The EPA 1 online assessment evaluates a Cohort Parish's operational effectiveness in the 6 Pillars of an Effective Parish.

Each Pillar will be color coded based on survey responses:



Green = Good
Yellow = Caution
Red = Critical

EPA 1

OMS Effective Parish Assessment 2

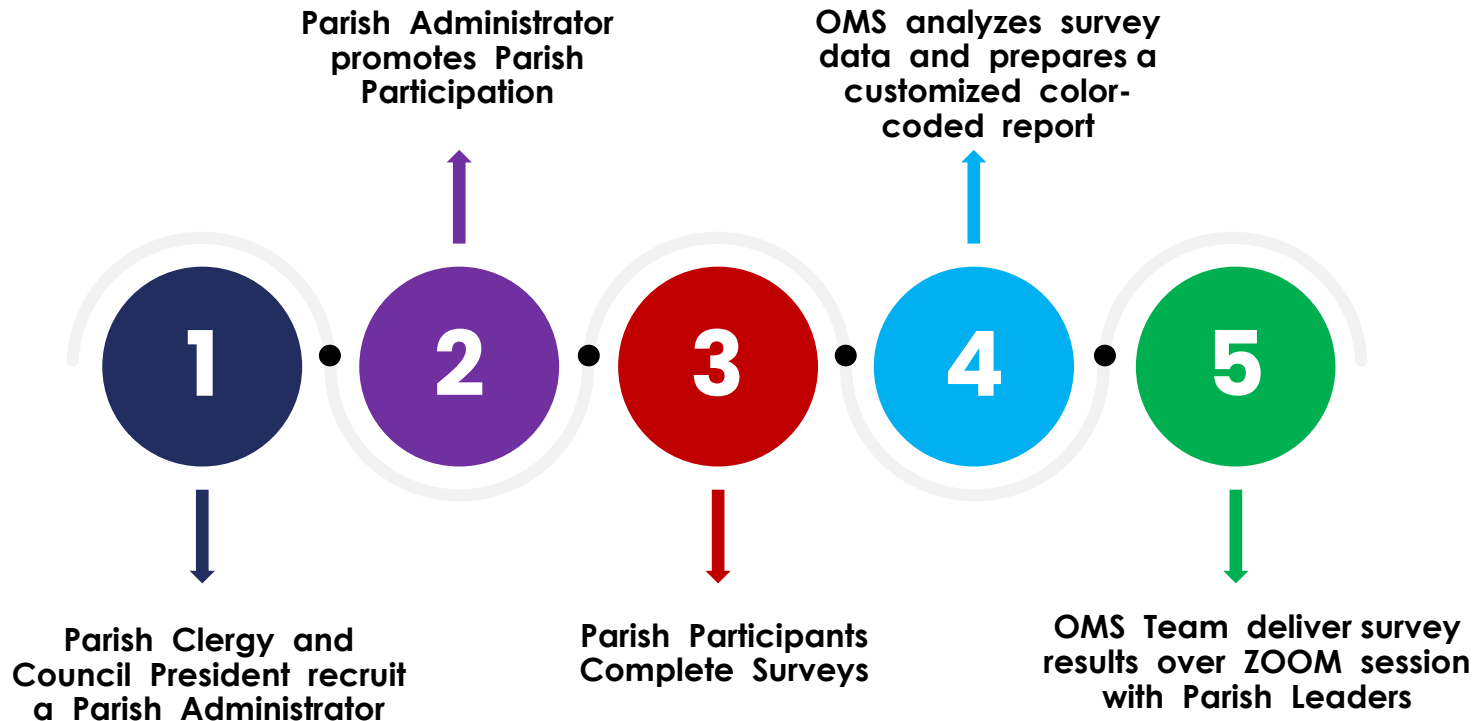
The EPA 2 online assessment evaluates in greater depth the Building Blocks in any of the 6 Pillars in the Red Critical category after the EPA 1.

Each Building Block area in each Pillar assessed will be color coded based on survey responses:

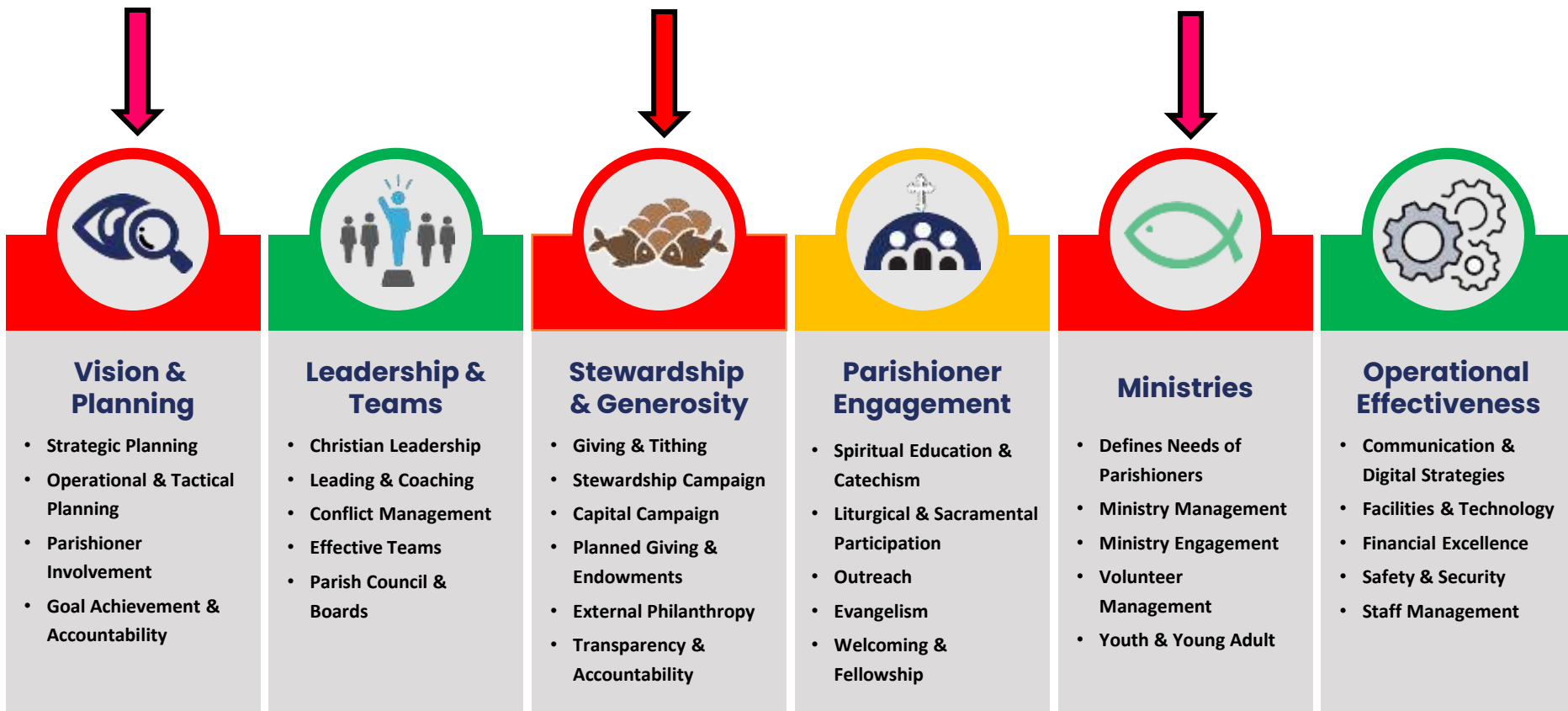
Green = Good
Yellow = Caution
Red = Critical

EPA 2

THE 5 STEPS IN THE EFFECTIVE PARISH COHORT JOURNEY



Sample EPA Preliminary Assessments



6 Pillars & 30 Building Blocks

Sample EPA 2

Leadership & Teams

Operational Effectiveness

Leadership & Teams	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>
Christian Leadership	76%	3%	21%
Leading & Coaching	79%	2%	20%
Conflict Management	66%	4%	31%
Effective Teams	76%	3%	21%
Parish Council & Boards	71%	4%	24%

Operational Effectiveness	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>
Communications & Digital Strategies	70%	3%	27%
Facilities & Technology	82%	4%	14%
Financial Excellence	54%	7%	39%
Safety & Security	63%	6%	31%
Staff Management	57%	2%	41%



Sample EPA 2



Parishioner Engagement Stewardship & Generosity

Parishioner Engagement	% favorable	% unfavorable	% neutral
Spiritual Engagement & Catechism	67%	8%	26%
Liturgical & Sacramental Participation	78%	4%	18%
Outreach	50%	12%	38%
Evangelism	53%	14%	34%
Welcoming & Fellowship	81%	7%	12%

Stewardship & Generosity	% favorable	% unfavorable	% neutral
Giving & Tithing	58%	4%	38%
Stewardship Campaign	25%	20%	55%
Capital Campaign	20%	10%	70%
Planned Giving & Endowments	9%	29%	68%
External Philanthropy	42%	9%	49%
Transparency & Accountability	58%	13%	28%

Sample EPA 2

Vision & Planning

Ministries

Vision & Planning	% favorable	% unfavorable	% neutral
Strategic Planning	38%	14%	49%
Operational & Technical Planning	57%	8%	35%
Parishioner Involvement	39%	9%	53%
Goal Achievement & Accountability	36%	9%	56%

Ministries	% favorable	% unfavorable	% neutral
Defines Needs of Parishioners	38%	22%	40%
Ministry Management	34%	13%	53%
Ministry Engagement	60%	7%	33%
Volunteer Management	50%	8%	42%
Youth & Young Adult	37%	13%	50%

Who Owns The Problem?

“Any time the majority of people behave a particular way the majority of the time, the people are not the problem. The problem is inherent in the system.

As a leader, you own responsibility for the system. Although a particular person can be a big problem, if you find yourself blaming the people, you should look again.”

**W. Edwards Deming
(father of the Quality Movement)**

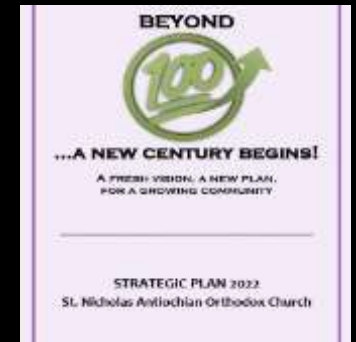
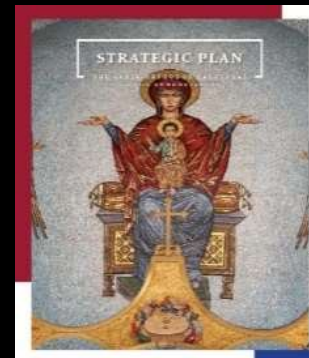
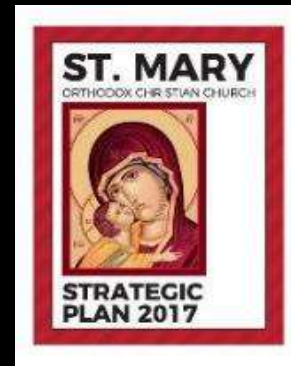
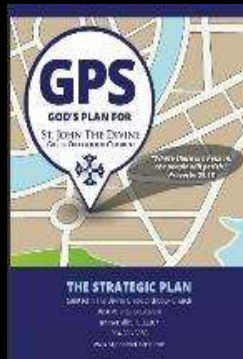
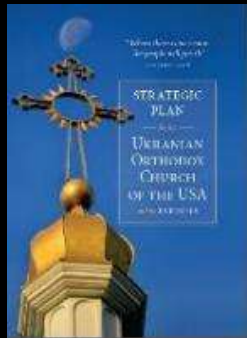
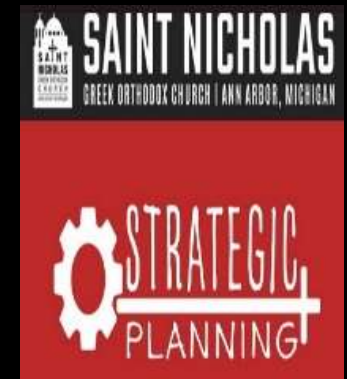
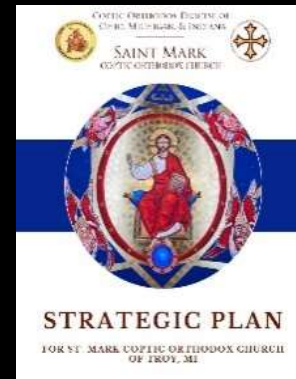
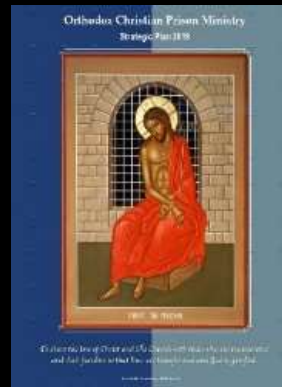
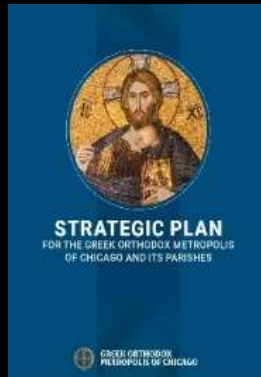
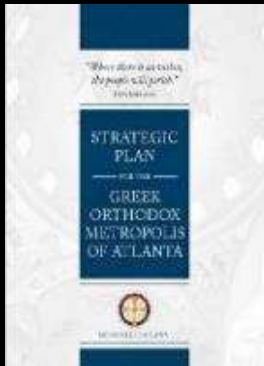


The 4 Ps of



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4. **Performance** - A well-managed and persistent implementation with full accountability

Strategic Plans





Stewardship & Engagement SMART Goal 1



Develop and implement effective Stewardship, Ministry, and Liturgical Engagement Programs (collectively, the “Engagement Programs”) that within 36 months will achieve the following “Engagement Targets”:

- (a) Increase liturgical engagement by 50% or more;**
- (b) Increase ministries engagement by 50% or more;**
- (c) Increase the parishioner financial stewardship so that all operating expenses are paid through stewardship.**



Interim Goals



- **IG 1:** Research the most effective stewardship, ministry, and liturgical engagement programs (the “Engagement Programs”) within 4 months
- **IG 2:** Develop the most effective Engagement Programs within 4 months
- **IG 3:** Recruit and train the parish “Engagement Ambassadors” within 2 months
- **IG 4:** Implement the Engagement Programs to achieve the Engagement Targets within 24 months
- **IG 5:** Compile and assess the results of the Engagement Programs and make necessary improvements within 2 months



Interim Actions



- **IA 1:**

A: recruit team

B: determine stewardship , ministry, and liturgical engagement key definitions and effectiveness metrics

C: analyze the parish baseline on those key effectiveness metrics and identify parish impediments to success

D: identify at least 5 Stewardship and 5 Ministry and Liturgical Engagement Programs to consider

- **IA 2:**

A: evaluate researched Stewardship, Ministry and Liturgical Engagement programs for effectiveness against key performance metrics and parish baselines

B: modify Stewardship, Ministry and Liturgical “Engagement “Programs” for utilization at the parish

C: finalize parish Engagement Programs and establish quarterly and/or monthly performance benchmarks

- **IA 3:**

A: identify numbers and names of Engagement Programs Engagement Ambassadors

B: develop Engagement Ambassadors training programs

C: train the Engagement Ambassadors

- **IA 4:**

A: implement Engagement Programs based on determined monthly and quarterly performance benchmarks

B: continue Ambassadors’ follow-up with parishioners until Engagement Targets are achieved

- **IA 5:**

A: obtain qualitative and quantitative data from Engagement Programs effectiveness

B: analyze all data and finalize Engagement Programs assessment and make all necessary improvements



Stewardship & Engagement SMART Goal 1 Action Plan



Key Actions Necessary To Achieve Strategic SMART Goal 1	Responsible Party	Deadline Timetable	Completion Confirmation Test
<u>IG 1: Research the most effective stewardship, and ministry and liturgical engagement programs (the “Engagement Programs”) within 4 months</u>			
1. Form Parish Wildly Important Goal Team 1 (“Engagement Ministry Team 1”).	Strategic Planning Team and Goal co-Captains	1 month after Start Date	Engagement Ministry Team 1 members agree to serve
2. Determine stewardship and ministry and liturgical engagement key definitions and effectiveness metrics.	Engagement Ministry Team 1	2 month after step 1	Engagement definitions and metrics determined
3. Analyze the parish baseline on those key stewardship and engagement effectiveness metrics and survey/research parish impediments to achieving increased stewardship and ministry and liturgical engagement success	Engagement Ministry Team 1	1 months after step 2	Parish baselines and parish impediments are finalized
4. ID at least 5 Stewardship and 5 Ministry and Liturgical Engagement Programs to consider from both inside and outside the Orthodox ecosystem.	Engagement Ministry Team 1	Simultaneous with steps 2 & 3	At least 5 Stewardship and 5 Ministry and Liturgical Engagement Programs examined



Stewardship & Engagement SMART Goal 1 Action Plan



Key Actions Necessary To Achieve Strategic SMART Goal 1	Responsible Party	Deadline Timetable	Completion Confirmation Test
<u>IG 2: Develop the most effective Engagement Programs within 4 months</u>			
5. Evaluate researched Stewardship, Ministry and Liturgical Engagement programs for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.	Engagement Ministry Team 1	2 months after step 4	Evaluation of alternative Stewardship, Ministry and Liturgical Engagement programs is completed
6. Modify Engagement Programs for utilization at the parish and finalize parish Engagement Programs and establish quarterly and/or monthly performance benchmarks.	Engagement Ministry Team 1	2 months after step 5	Engagement Programs are finalized
<u>IG 3: Recruit and train the parish Engagement Ambassadors within 2 months</u>			
7. Identify and recruit the “Engagement Ambassadors” who can implement the Engagement Programs.	Engagement Ministry Team 1	1 month after step 6	Engagement Ambassadors are recruited
8. Develop Engagement Ambassadors training program and train the Engagement Ambassadors selected in step 7.	Engagement Ministry Team 1	1 month after step 7	Engagement Ambassadors are trained



Stewardship & Engagement SMART Goal 1 Action Plan



Key Actions Necessary To Achieve Strategic SMART Goal 1	Responsible Party	Deadline Timetable	Completion Confirmation Test
<u>IG 4: Implement the Engagement Programs to achieve the targeted goals within 24 months</u>			
9. Implement Engagement Programs based on monthly and/or quarterly performance benchmarks determined in step 6 with continual Ambassador follow-up with parishioners until Engagement Targets are achieved.	Engagement Ambassadors	24 months after step 8	Established quarterly and/or monthly Engagement Targets are achieved
<u>IG 5: Compile and assess the results of the Parish Engagement Programs and make necessary improvements within 2 months</u>			
10. Obtain and compile qualitative and quantitative data from Engagement Programs and compile as to the effectiveness and success (based on criteria established in step 2) and areas for improvement.	Engagement Ambassadors and Engagement Ministry Team 1	1 month after step 9	Engagement Programs assessments are completed
11. Finalize and deliver improvements to Engagement Programs assessment analysis report, and make all refinements necessary to make those Ministries more effective based on information identified in step 10, and revise and improve them accordingly.	Engagement Ambassadors and Engagement Ministry Team 1	1 month after step 10	Engagement Programs implementation analysis is completed, and Engagement Programs are refined accordingly

Stewardship & Engagement Success Timeline

Interim Actions	Deadline Date	Status: Percent Complete and Date
1. Form Engagement Ministry Team 1	1-1-23	
2. Develop definitions and effectiveness metrics	3-1-23	
3. Analyze parish baselines and engagement success impediments	4-1-23	
4. Research Engagement Programs	5-1-23	
5. Evaluate Engagement Programs	7-1-23	
6. Finalize Engagement Programs	9-1-23	
7. Identify and recruit Engagement Ambassadors	10-1-23	
8. Train Engagement Ambassadors	11-1-23	
9. Implement Engagement Programs and manage to interim quarterly and monthly targets	11-1-25	
10. Obtain Data from Engagement Programs Implementation	12-1-25	
11. Improve Engagement Programs based lessons learned in step 10	1-1-26	

The 4 Ps of



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**Steve Jobs hired
Tim Cook to
improve the Apple
Supply Chain**



**The Apple Supply Chain
is now one of the best
in the world.**

**Tim Cook went from Apple's
Chief Procurement Officer
to being Apple's CEO.**



“We are the most focused company that I know of or have read of or have any knowledge of. We say no to good ideas every day.”

“We say no to great ideas in order to keep the amount of things we focus on very small in number so that we can put enormous energy behind the ones we do choose.”

“It’s not just saying yes to the right products, it’s saying no to many products that are good ideas, but just not nearly as good as the other ones.”



Tim Cook

Sun Tzu



“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”

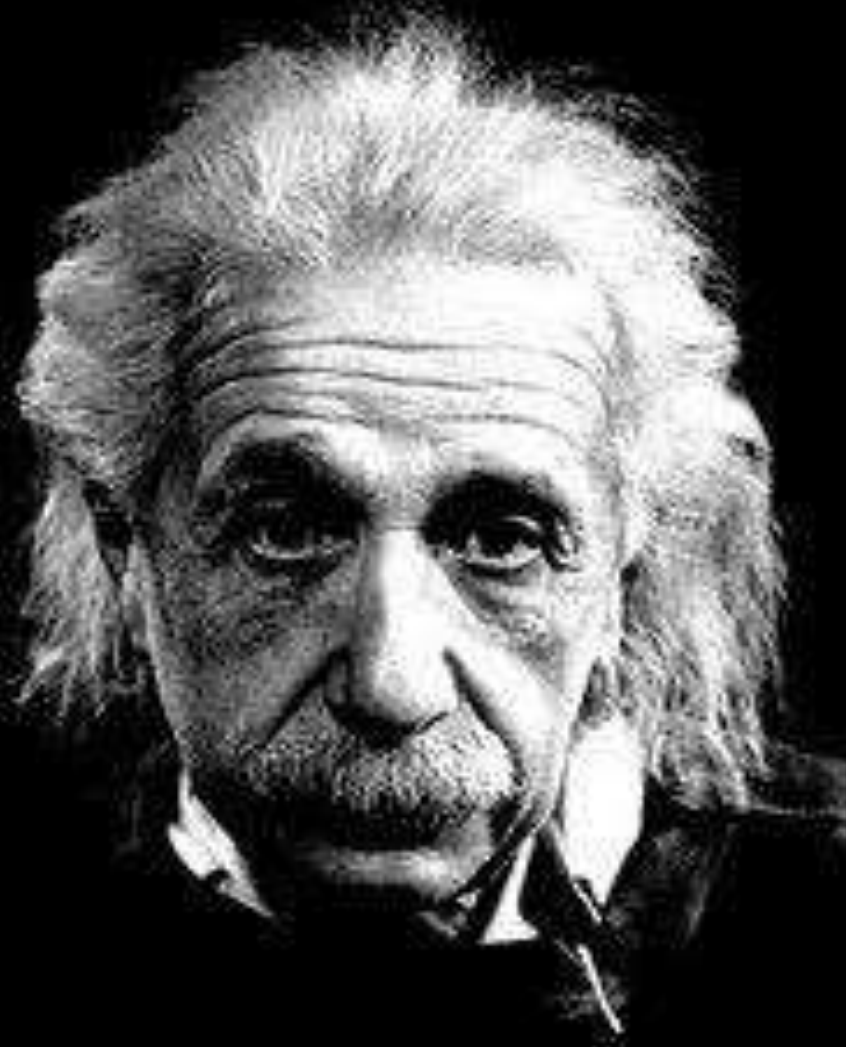


Words may inspire, but only ACTION creates change. Most of us live our lives by accident - we live life as it happens. Fulfillment comes when we live our lives on purpose.

— *Simon Sinek* —

AZ QUOTES

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



3 MOB and OMS Gifts



METROPOLIS
OF BOSTON





Gift #1



MOB COHORT PARISHES CAN RECEIVE

- ~ EPA 1 summary color-coded assessment of the strength of your 6 Pillars
- ~ EPA 2 detailed color-coded and scored assessments of the strength of each of the 30 Building Blocks
- ~ An OMS consultation to explain what all assessments mean and discuss areas a parish might focus on first
- ~ Let us know if you'd like to be a Cohort Parish and receive this confidential free assessment service



Gift #2



EACH MOB PARISH CAN ATTEND

- ~ **6-Part ZOOM “Striving for Thriving: Parish Vision and Strategic Planning”**
- ~ **Each session will have Q&A and be recorded for review later**
- ~ **Dates:**
 - January 24**
 - February 28**
 - March 28**
 - April 25**
 - May 30**
 - June 27**



Gift #3



STRATEGIC PLANNING RETREAT

- ~ **Metropolis Parish Strategic Planning Retreat (at Metropolis Retreat Center)**
- ~ **Hands on Strategic Planning process for interested and selected parishes**
- ~ **Preliminary Dates: March 17-19, 2023**
- ~ **Let us know if you'd like to participate in this free strategic planning retreat**

Tough Love



St. Paisios the Athonite

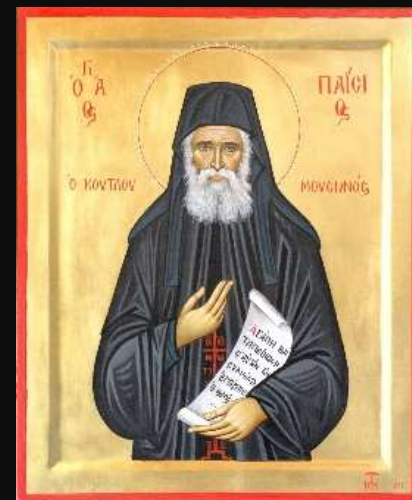
The spirit of luke-
warmness reigns.

We've been spoiled
for good.

How does God still
tolerate us?



St. Paisios the Athonite



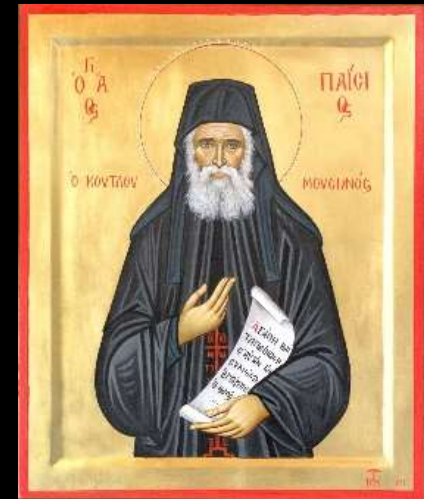
Today's generation
is the generation
of indifference.



St. Paisios the Athonite

There are no
warriors !

The majority are
fit for parades
and feasts only.

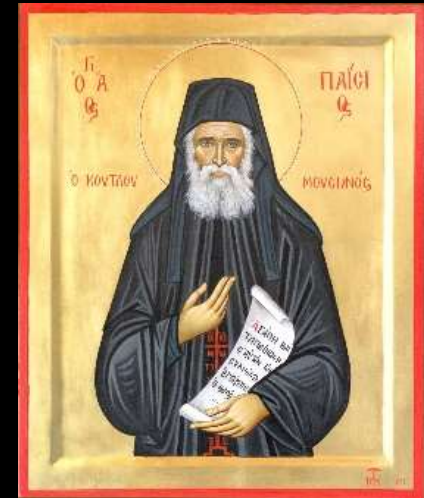


Even people who've
got something
inside have begun
to grow cool
saying,

Can I really do
anything to change
the situation ?



St. Paisios the Athonite



We have to
witness our Faith
with **boldness**,



St. Paisios the Athonite

because if we
continue to remain
silent, we'll have
to **answer in the
end.**



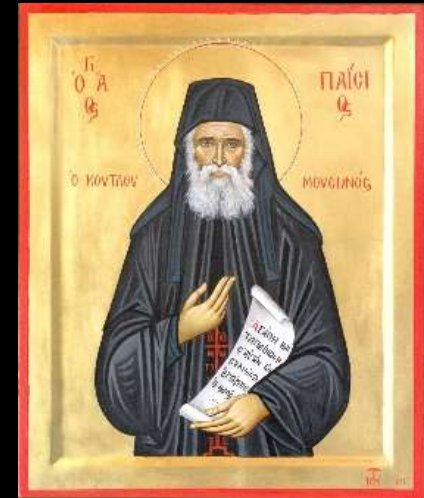
In these difficult days, **each must do** what is in their own power.



Leave what's out of their power to **GOD.**

St. Paisios the Athonite

In this way, our **conscience will be clear.**



TURN *the* PAGE



**There comes a day
when you realize
turning the page is
the best feeling in
the world.**

**Because you realize
there's so much
more to the book
than the page you
are stuck on.**



Your Strategic Planning Page

Stewardship Calling
What are you doing with all of the gifts God has given you?

www.stewardshipcalling.com

The screenshot shows the website's navigation menu with the following items:

- WHY ARE YOU HERE?
- STEWARDSHIP
- STRATEGIC PLANNING** (circled in red)
- THRIVING RADIO & PODCASTS
- RETIREES & LEADERSHIP
- BLOG
- RESOURCES
- PERSONAL
- 4DX – 4 DISCIPLINES OF EXECUTION STRATEGIC PLANNING PROCESS
- THRIVING CONGREGATIONS INITIATIVE (with a green cross icon)
- BOSTON METROPOLIS – THRIVING CONGREGATIONS STRATEGIC PLANNING** (circled in red)
- CHRIST THE SAVIOUR – HARRISBURG, PA
- HOLY TRINITY GOC – GRAND RAPIDS, MI.
- HOLY TRINITY – INDIANAPOLIS – STRATEGIC PLAN
- ST. NICHOLAS – GRAND RAPIDS, MI STRATEGIC PLAN
- ZOE FOR LIFE – WHY DISCOVERY
- ST. DEMETRIOS – SAGINAW, MI STRATEGIC PLAN
- CHURCH STRATEGIC PLANNING VIDEO
- ARMENIAN APOSTOLIC

The main content area features a large image of a church dome with the text: "opolis of Boston's response to the that churches a face today." Below this is a "Subscribe to Blog via Email" form with a "SUBSCRIBE" button.

This presentation can be found under the [Strategic Planning](#) tab at the page for: [Boston Metropolis Thriving Congregations Strategic Planning](#)

<https://stewardshipcalling.com/boston-metropolis-thriving-congregations-strategic-planning/>

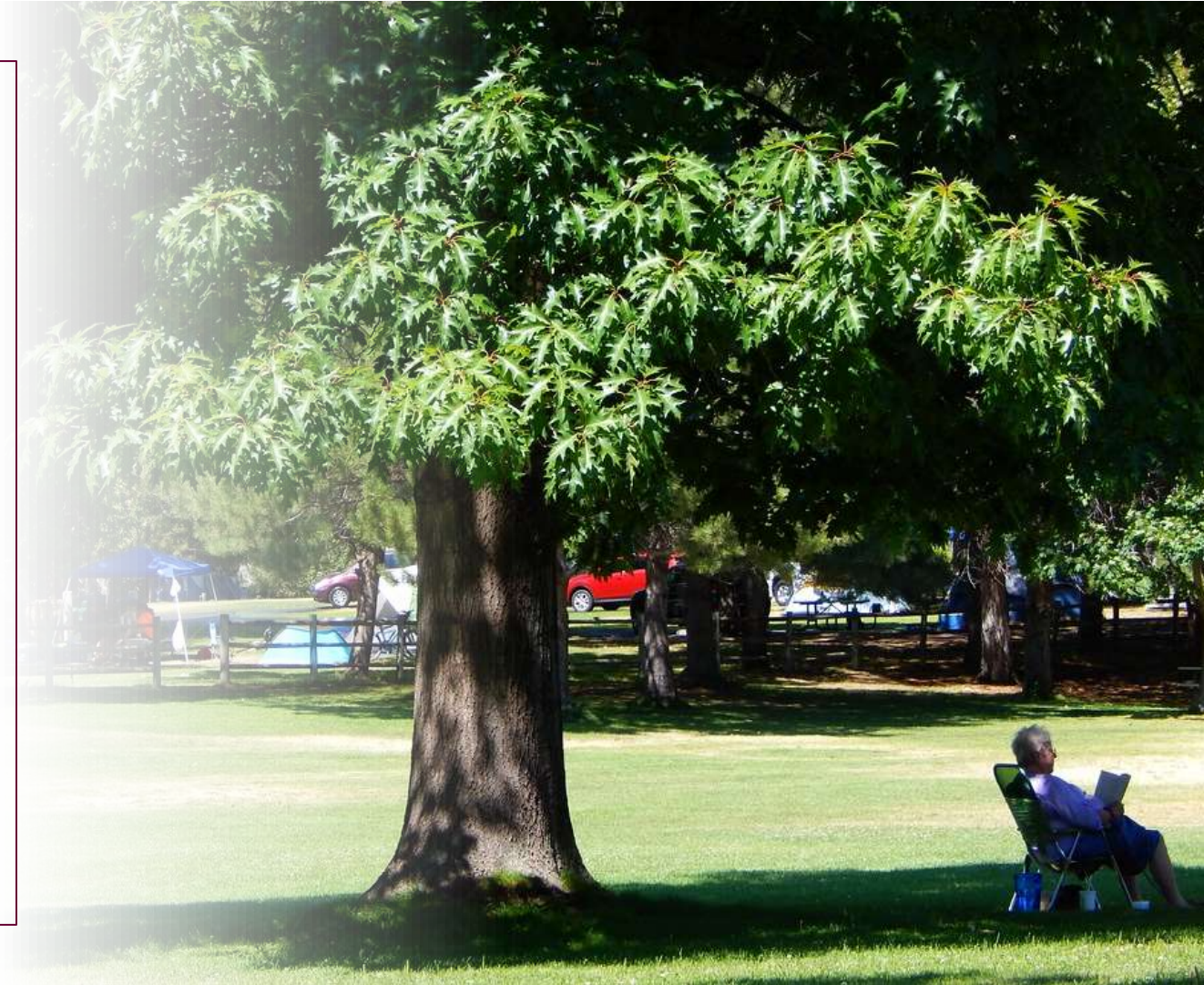


“The most basic task of the Church leader is to discern the spiritual gifts of all those under his authority, and to encourage those gifts to be used to the full for the benefit of all.”

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

**“A society
grows great
when old men
and women
plant trees in
whose shade
they shall
never sit.”**

Greek Proverb





Old Chinese Proverb

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

The second best time is today.”

Now, Lord,
look on their
threats, and
grant to Your
servants that
with all
boldness they
may speak
Your word!

Acts 4:29

Fortune Favors The Bold...



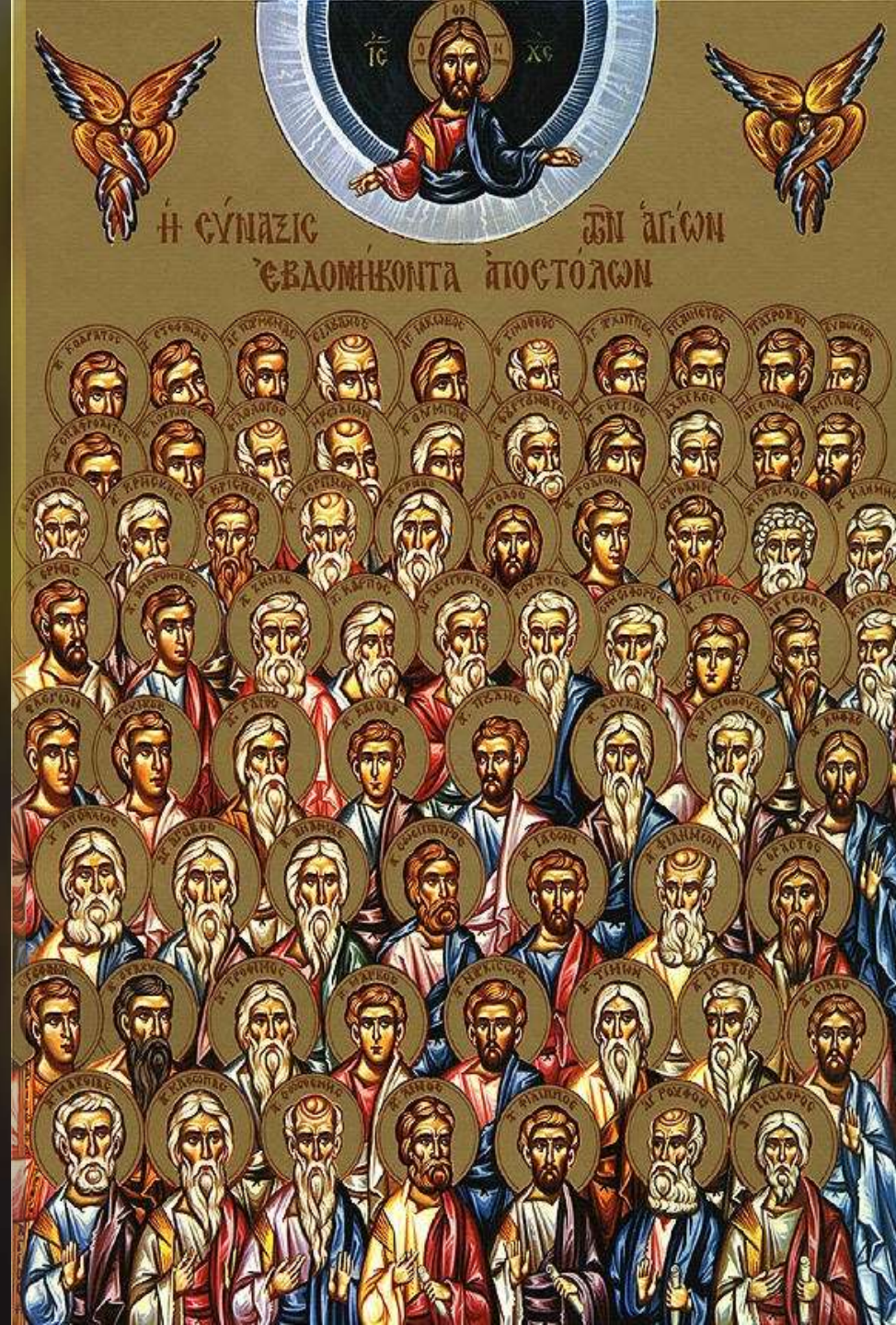


Why Are We Doing This?

“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.”

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

Luke 10:1



***Vision & Parish
Strategic
Planning
and the
Effective Parish
Assessment
Part 2***



Bill Marianes

