



GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ

# Strategic Planning Retreat Day 1

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

Proverbs 29:18

Bill Marianes



Χριστός Ανέστη

Christ Is Risen



TODAY is  
the day  
we...



**The sky is  
not the limit...**

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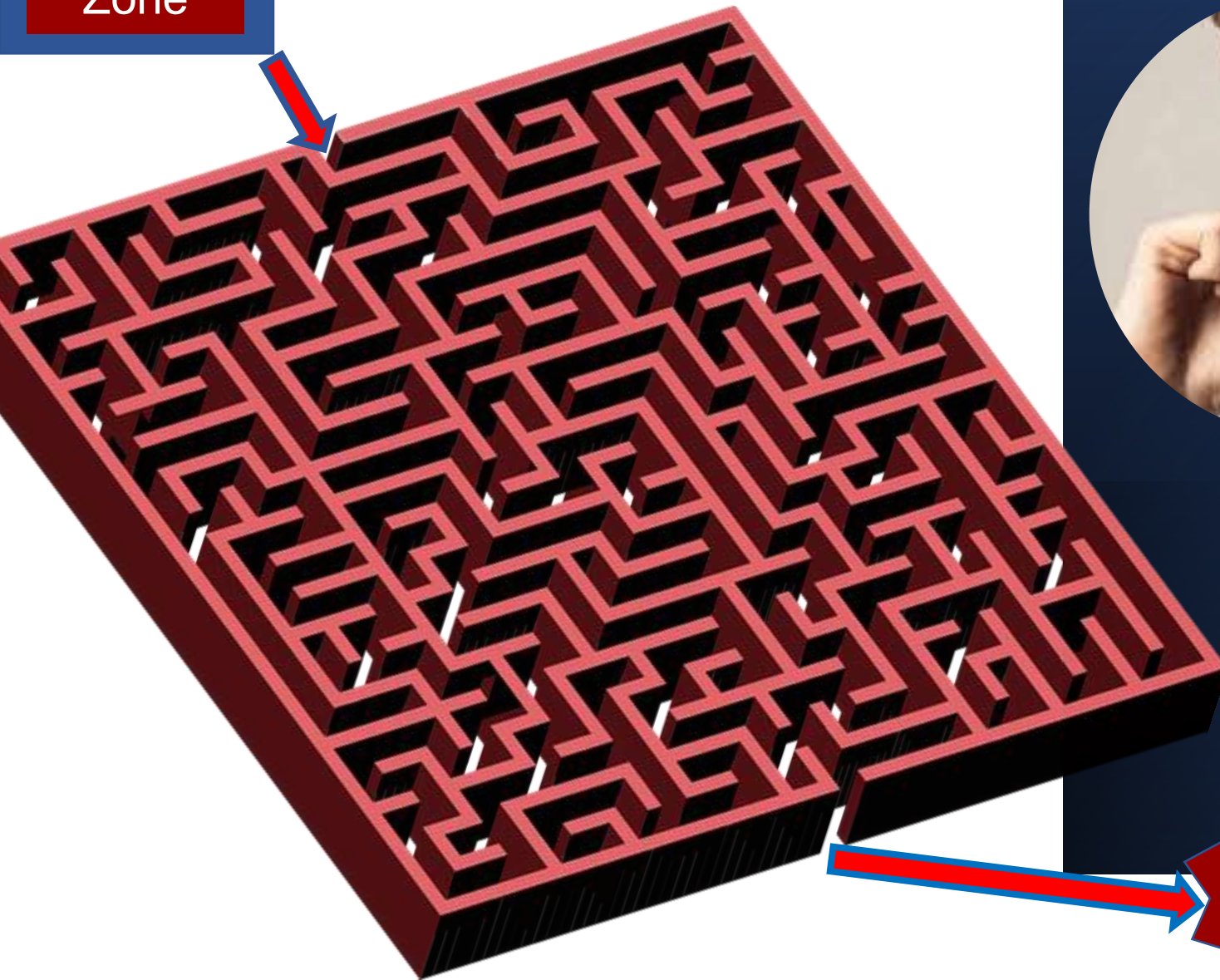


**...because there  
are footprints on  
the moon**



# Our Goal for Our Time Together

Your  
Comfort  
Zone



Where the  
Magic  
Happens

# Μετάνοια

# Metanoia



“a transformative change of heart”

# So, who's "helping" you today?



## Fr. Ted Barbas

- Chancellor of the Metropolis of Boston
- Director of Youth and Young Adult Ministries for the Diocese and Director of the Metropolis of Boston Camp
- Proistamenos Taxiarchae Parish in Watertown, Massachusetts
- Deacon to Metropolitan Methodios
- Master of Divinity, Holy Cross Greek Orthodox School of Theology
- Bachelors of Arts in Pre-Theology, Hellenic College

# So, who's "helping" you today?

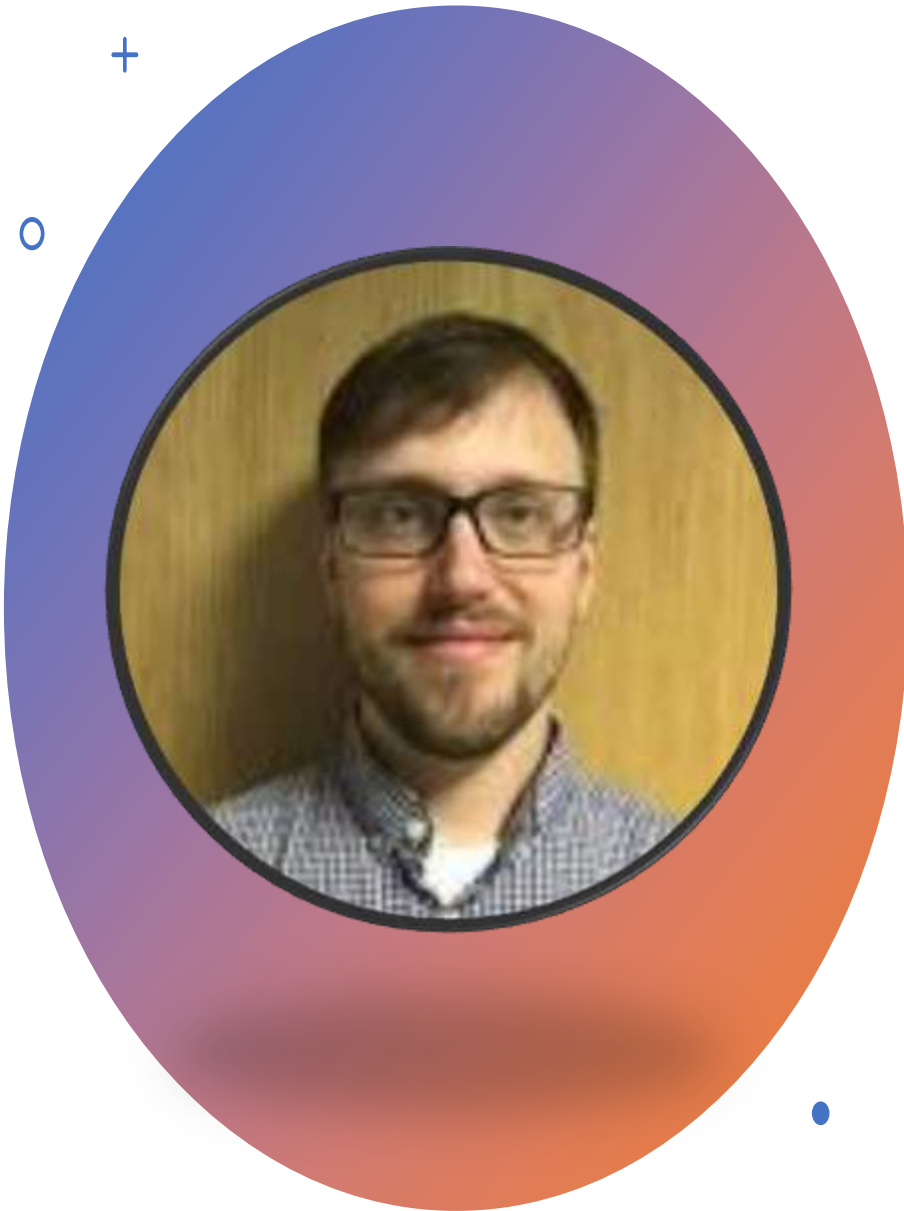


## PANOS COUFOS

- Director, Youth and Young Adult Ministries & Metropolis of Boston Camp
  - Coordinator of Boston's Orthodoxy on Tap
  - Masters of Divinity, Holy Cross Greek Orthodox School of Theology
  - St. Nectarios parish in Roslindale Pastoral Assistant,
  - Bachelors of Arts Industrial Engineering, Northeastern University
- 
-



# So, who's "helping" you today?



## ALEX COOLEY

- Orthodox Ministry Services, Effective Parish Assessment Program Delivery Coordinator
- New Chapter, Inc., Director Of Operations
- Fulflex Elastomerics Worldwide, Production Manager
- Masters of Business Administration, Northeastern School of Business
- Bachelor of Science in Mechanical Engineering Northeastern University

# So, who's "helping" you today?



## Don Khouri

- Khouri Coaching & Consulting, LLC – Founder and Principal
- Fortune Management Northeast – Managing Director
- Fidelity Investments – Vice President
- Doctor of Philosophy Human and Organizational Systems, Fielding Graduate University
- Masters of Business Administration, Boston University
- Bachelor of Science, Quantitative Methods Accounting Information Systems, Babson College

# So, who's "helping" you today?



## Bill Marianes

- Chief Evangelist Officer, Stewardship Calling, Parish Director, Orthodox Ministry Services
- Managing Partner Atlanta, McGuire Woods
- Executive Committee and Partner, Troutman Pepper
- Doctor of Strategic Leadership, Regent University (exp. 2025)
- Juris Doctorate, Emory University School of Law
- Masters in Business Administration, Emory University School of Business
- Bachelors of Arts in Psychology, Northwestern University

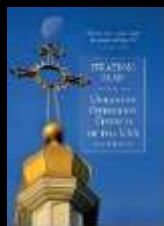
# A journey ...

*... 400,000+ airlines miles over 20 years*

*...presentations to well 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**



**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)**

## Recently Completed Strategic Plans:

**OCA Diocese of New England**

**OCA Diocese of Midwest**

**St. Demetrios (Saginaw, MI)**

**Holy Trinity (Indianapolis, IN)**

**Christ the Saviour (Harrisburg, PA)**

**Holy Trinity (Grand Rapids, MI)**

## Additional Strategic Plans In Progress:

**Metropolis of Boston – (6-part parish training program and 4 parish strategic planning retreat)**

**Holy Trinity (Charleston, SC)**

**ZOE for Life (Cleveland, OH)**

**St. Raphael (Iowa City, IA)**

**St. Sophia (San Antonio, TX)**

**St. Sophia (Miami, FL)**

# Your Strategic Planning Page


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

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

This presentation and all your ongoing work product can be found under the [Strategic Planning](#) tab at the page for: [Metropolis of Boston Four Parish Strategic Plan](#)

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

The screenshot shows the website's navigation menu with 'STRATEGIC PLANNING' circled in red. Below it, a list of strategic plans is shown, with 'METROPOLIS OF BOSTON - FOUR PARISH STRATEGIC PLAN' also circled in red. A red box highlights this plan, and red arrows point from the text on the right to these elements. The main content area shows details for the Concord - Holy Trinity Strategic Plan, including a list of parishes: Holy Trinity - Concord, St. Luke's - East Longmeadow, St. Nicholas - Lexington, and St. Demetrius - Somerville. A red box highlights the list of parishes, and a red arrow points from the text on the right to it. The page also features a section for a 4-parish retreat in April 2023.

A sunset over a body of water with a small boat in the distance. The sky is filled with colorful clouds in shades of orange, red, and purple, with the sun low on the horizon. The water reflects the colors of the sky. A small boat is visible in the distance on the water.

“The best way to  
predict the future is to  
create it.”

Peter Drucker

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





## 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

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

***First, the day you were born; and***

***Second, the day you figure out why.”***

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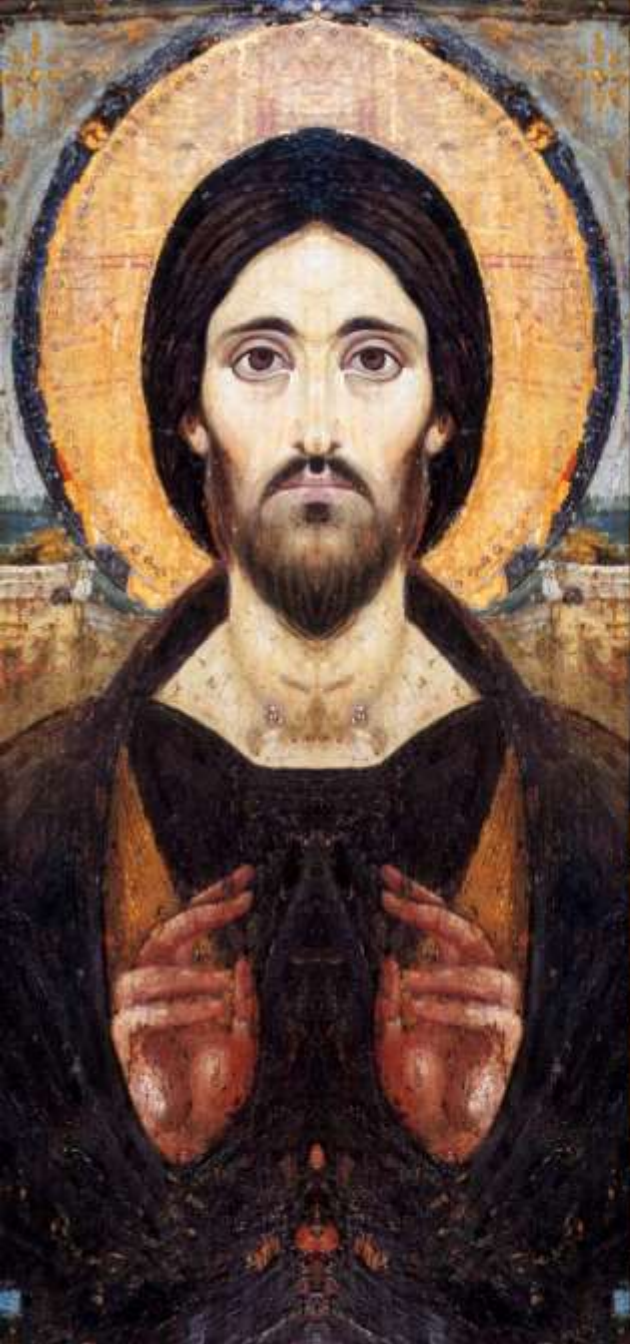
**Mark  
Twain**



## Why?

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

II Corinthians 5:10  
Divine Liturgy



**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**?



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

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1. Fr. Ted

2. Panos  
Coufos, Don  
Khouri, Alex  
Cooley

3. MOB Camp...

4. All of you...



Special Thanks

# Retreat Agenda

P.S. it's on pages 3 & 4  
of your handbook



# Strategic Planning Retreat Schedule – (pages 3-4)

## 1. Retreat Day 1 (Friday – April 28, 2023)

- a. 5 – 6 Dinner (all parishes together)
- b. 6 – 7 Team Building (all parishes together)
- c. 7 – 8:30 Setting the Stage, Facts and Figures, and Retreat Planning Process (all parishes together)
- d. 8:30 – 11 Parishes Break Out to Reach Consensus on Parish SWOT (parishes work separately)

## 2. Retreat Day 2 (Saturday – April 29, 2023)

- a. 8 – 8:30 Breakfast
- b. 8:30 – 9:30 Training on WHY Discovery, Core Values Creation, Mission Statements (all parishes together)
- c. 9:30 – 12:30 Each Parish Reaches Consensus on its WHY, Core Values and Mission Statement (parishes work separately)
- d. 12:30 – 2:00 Working Lunch To Collectively Share Results (all parishes together)
- e. 2:00 – 3:00 Training on Determining Strategic Areas of Focus and S.M.A.R.T. Goals (all parishes together)
- f. 3:00 – 5:00 Each Parish Reaches Consensus on Strategic Areas of Focus and Discuss Preliminary S.M.A.R.T. Goal ideas (parishes work separately)
- g. 5:00 – 6:30 Working Dinner To Collectively Share Results
- h. 6:30 Fellowship (all parishes together)

## 3. Retreat Day 3 (Sunday – April 30, 2023)

- a. 8:30 – 9:30 Divine Liturgy (all parishes together)
- b. 9:30 – 10:15 Breakfast
- c. 10:15 – 11:30 Training on Next Steps to Develop S.M.A.R.T. Goals and Action Plans (all parishes together)
- d. 11:30 – 12:15 Lunch
- e. 12:15 – 2:00 Parishes Finalize WHY, Core Values, Mission, Strategic Areas of Focus (parishes work separately)
- f. 2:00 – 3:30 What Comes Next, Final Q & A and Dismissal (all parishes together)

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# Two Process Keys



**Rules of Engagement & Consensus**

# Rules Of Engagement

ROEs

P.S. They are on page  
2 of your handbook.

1. We stay on schedule
2. Everyone is equal
3. We interact confidentially.
4. Ask questions
5. We'll park tangential issues.
6. No distractions.
7. All decisions made by consensus.
8. Focus only on things we control or influence
9. Everyone **MUST** participate.
10. Be honest and "no spin."



11. No defensiveness.
12. NO "Discussion Killers."
13. Think strategically and outside the box.
14. Speak precisely and succinctly.
15. We are members of the Body of Christ treating everyone with love and respect and allowing the Holy Spirit to participate freely.

A group of five business professionals (three women and two men) are gathered around a red circular table in a meeting room. They are all dressed in dark business suits. The scene is captured in a dramatic, slightly overexposed style. The individuals are leaning in, gesturing, and looking at each other with expressions of concern or disagreement. One woman on the left is pointing her finger towards the center. A man in the middle is holding a laptop. Another man on the right is also pointing. The overall atmosphere suggests a tense negotiation or a moment of conflict. The word "Consensus" is overlaid in large, white, sans-serif font across the middle of the image, underlined.

# Consensus

# Consensus

A group of business professionals in a meeting, with text overlaid on the image. The image is dark and semi-transparent, showing several people in business attire sitting around a table, engaged in discussion. The text is white and bold, providing a definition of consensus.

~ Seek the “common mind” through respectful dialogue

~ An agreement everyone can “live with” (even if it is not their first choice)

~ Consensus is achieved once:

(a) the discussion has been full and fair

(b) everyone can live with the modified proposal



Go into all  
the world

# How Fast Is Our World Changing?



**Exponentially!**



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?" (with certain updated statistics).**

Did You Know? is licensed by Karl Fisch, Scott McLeod, and XPLANE under a Creative Commons Attribution Non-Commercial Share-Alike license. You are free to copy, distribute, remix and transmit the presentation as long as you give proper attribution to the original creators and share the resulting work under the same license. You may not use Did You Know? for commercial purposes without permission from the creators. (Selected statistics have been updated, as much as reasonably possible, from available sources.)

# Years it took to reach 50 million users:

Telephone - 75 years



Radio - 38 years



TV - 13 years



Internet - 4 years



WeChat - 1 year



Angry Birds - 35 days



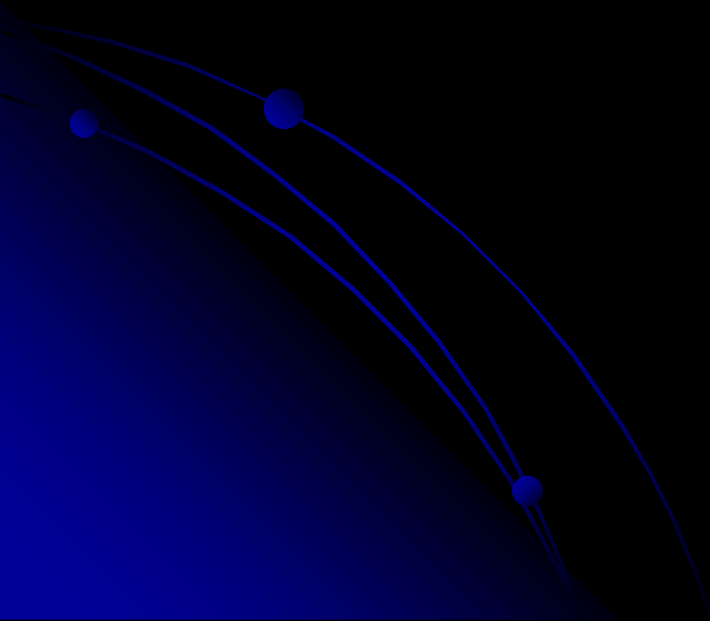
Pokémon GO - 19 days



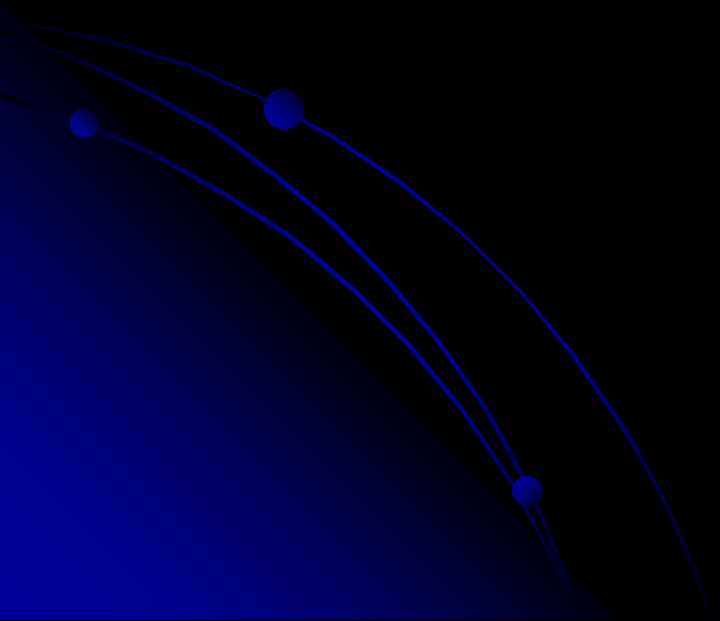


~ 2.3 BILLION worldwide  
users

~ 8.3 hours of video is  
uploaded every second



We are living in exponential times...



**facebook** started about 20+  
years ago in October 2003.

~ It now has over 2.89 Billion  
active monthly users.

~ It is has over 1.91 Billion  
active daily users.

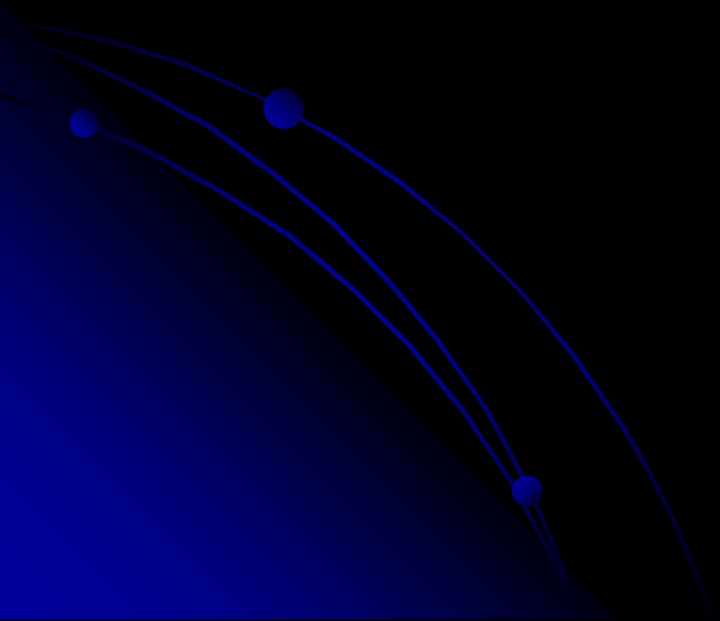
If Facebook were a country . . .



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

. . . Almost twice the size of China and India, and 8.7 times bigger than the U.S.

We are living in exponential times...



~ 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.





~ 13% of couples married in  
the U.S. in 2005 . . .  
. . .met online

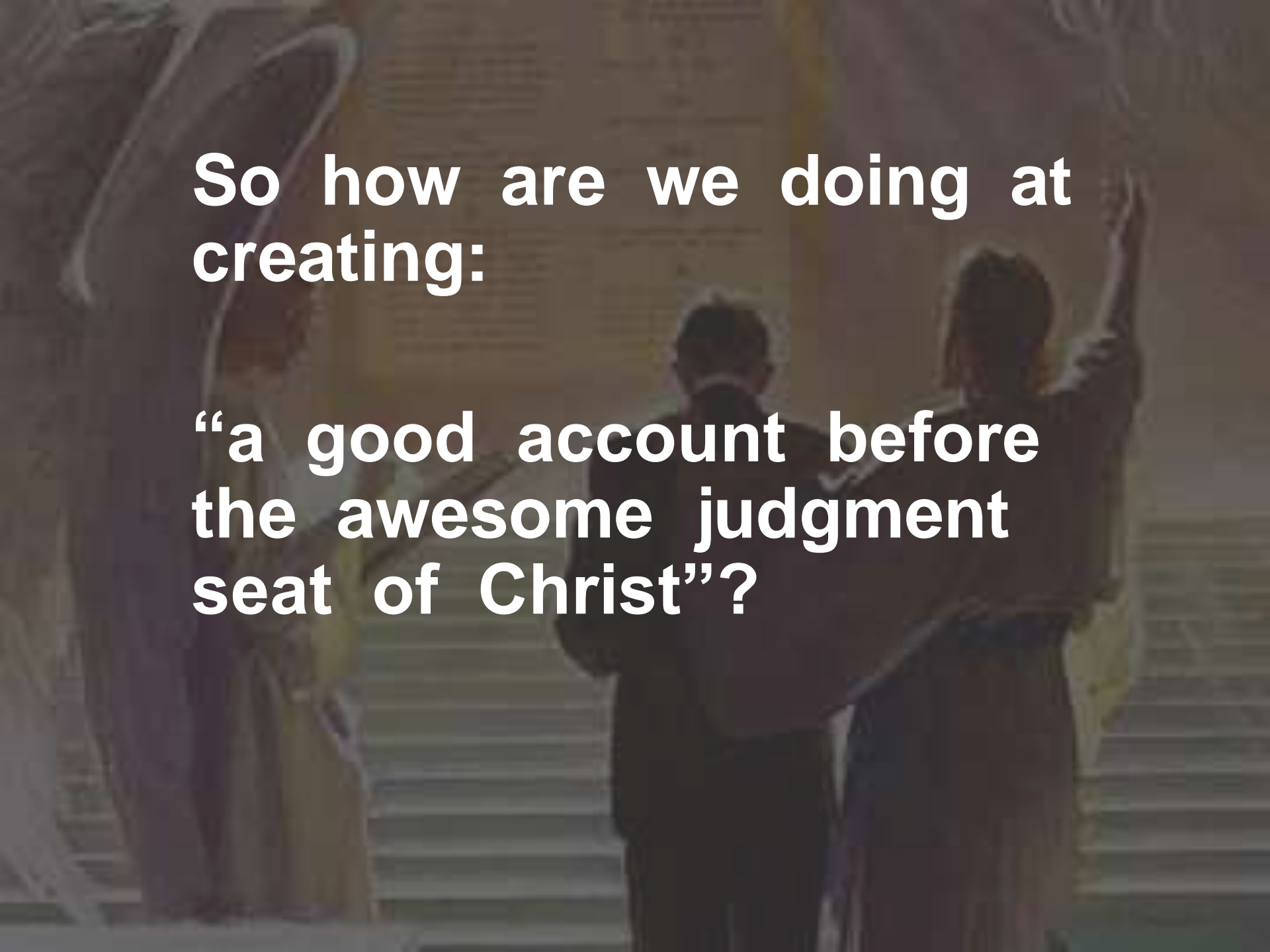
~ By 2017, 39% of couples  
in the U.S. met online

We are living in  
exponential times...

So what does this mean  
for your Parish?



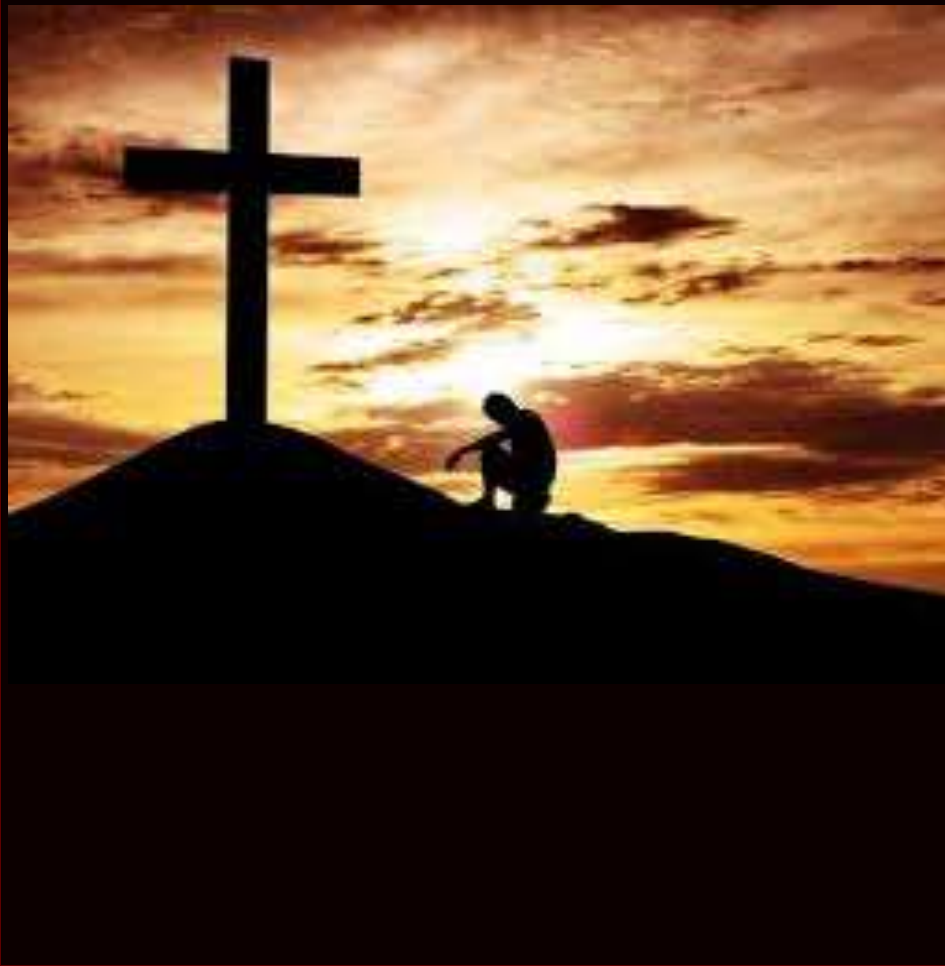




**So how are we doing at  
creating:**

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

# How Are We Doing Spiritually?



## We Lost Our Adults

**47% of adults who were raised in the Orthodox Church have left the Church<sup>1</sup>**

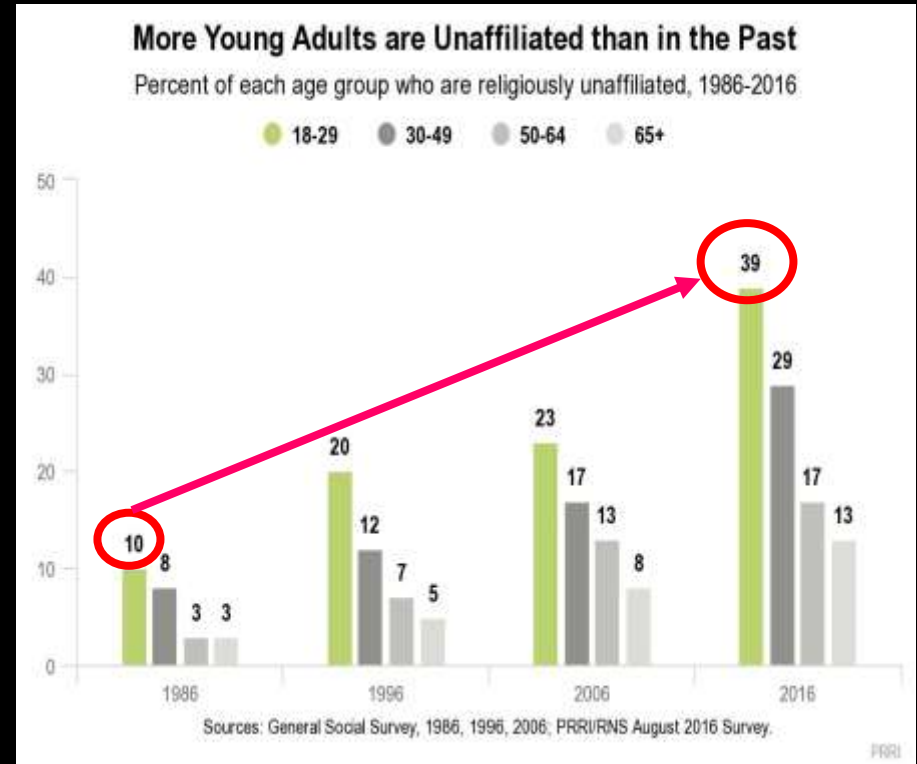
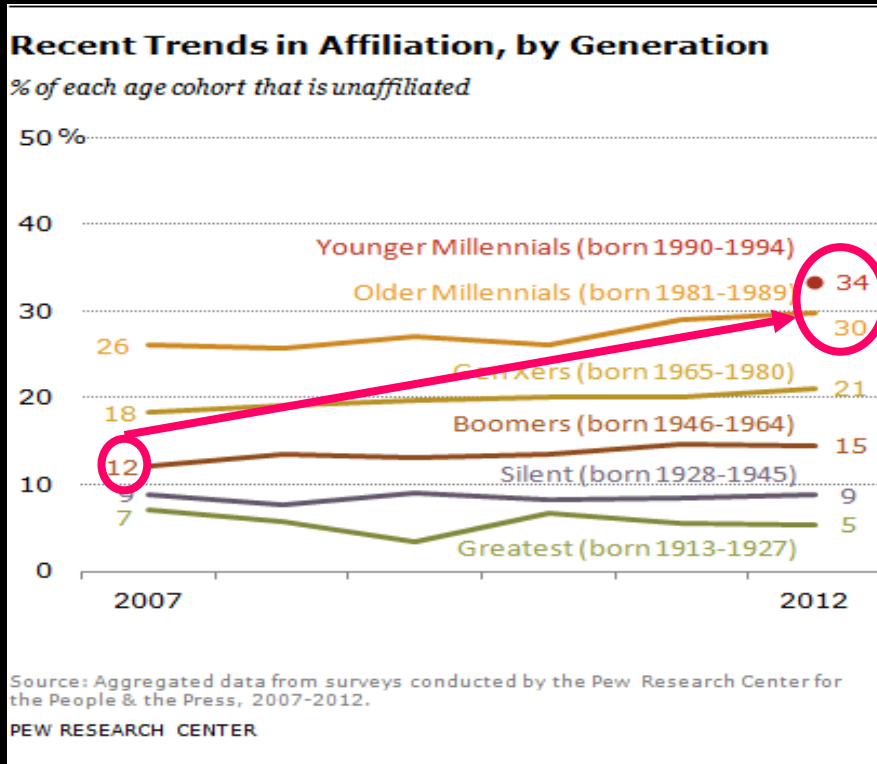
### Cradle Orthodox Adults Who Are Still in the Church



■ YES ■ NO

# PRE-COVID We Can “Kiss Our Youth Goodbye”

**34% to 39% of Millennials (1981-1996) are  
“NONES” and claim NO religion**



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

Public Religion Research Institute August 2016 Survey

# PRE-COVID We Can “Kiss Our Youth Goodbye”

Youth church drop out rate has grown from

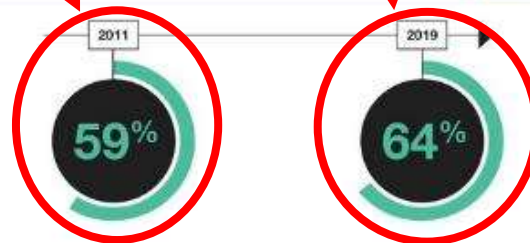
59% (2011) to 64% (2019)

When Barna president David Kinnaman published his 2011 book *You Lost Me*, we heard from many people (especially church leaders) who were shocked to learn that 59 percent of young adults with a Christian background had dropped out of church at some point during their 20s—many for just a time, but some for good.

Eight years later, research for Kinnaman's new book *Faith for Exiles: 5 Ways for a New Generation to Follow Jesus in Digital Babylon* reveals that the church dropout problem is still a problem. In fact, the percentage of young-adult dropouts has increased from 59 to 64 percent. Nearly two-thirds of U.S. 18–29-year-olds who grew up in church tell Barna they have withdrawn from church involvement as an adult after having been active as a child or teen.

## INCREASE IN CHURCH DROPOUTS

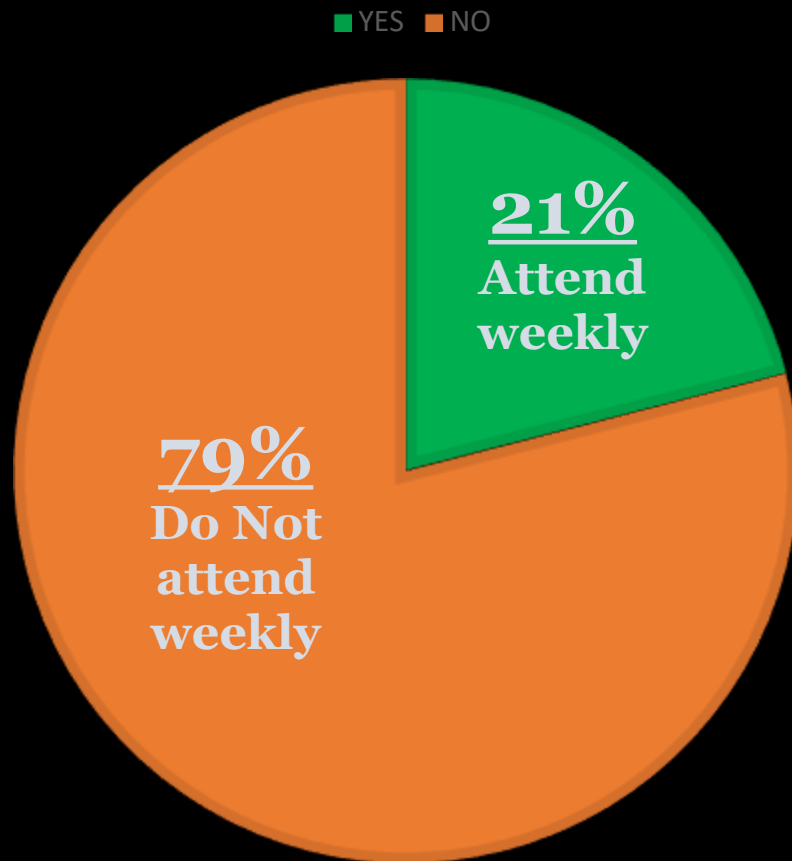
Barna





# PRE-COVID Church Attendance Data

## ATTEND CHURCH WEEKLY



Only 21% of all GOA adherents regularly attend church services on a weekly basis.<sup>1</sup>

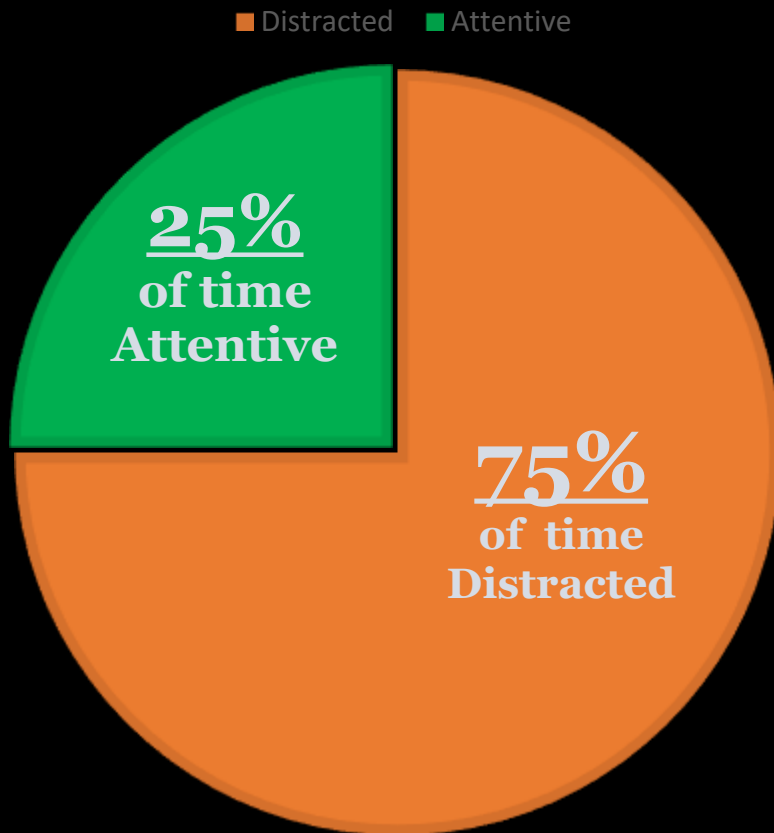
P.S. It averages:

- 21 % in GOA parishes
- 22 % in Serbian parishes
- 26% across all Orthodox parishes
- 37% in Antiochian parishes
- 40% in OCA parishes
- 48% in Carpatho Russian parishes

<sup>1</sup> Eight Facts about Church Attendance in US Orthodox Christian Churches (2010) Assembly of Canonical Orthodox Bishops of North and Central America.

# Church Attentiveness Data

## % OF TIME DISTRACTED



Our minds wander 70% to 80% of the time during Orthodox church services (excluding the sermon)<sup>1</sup>

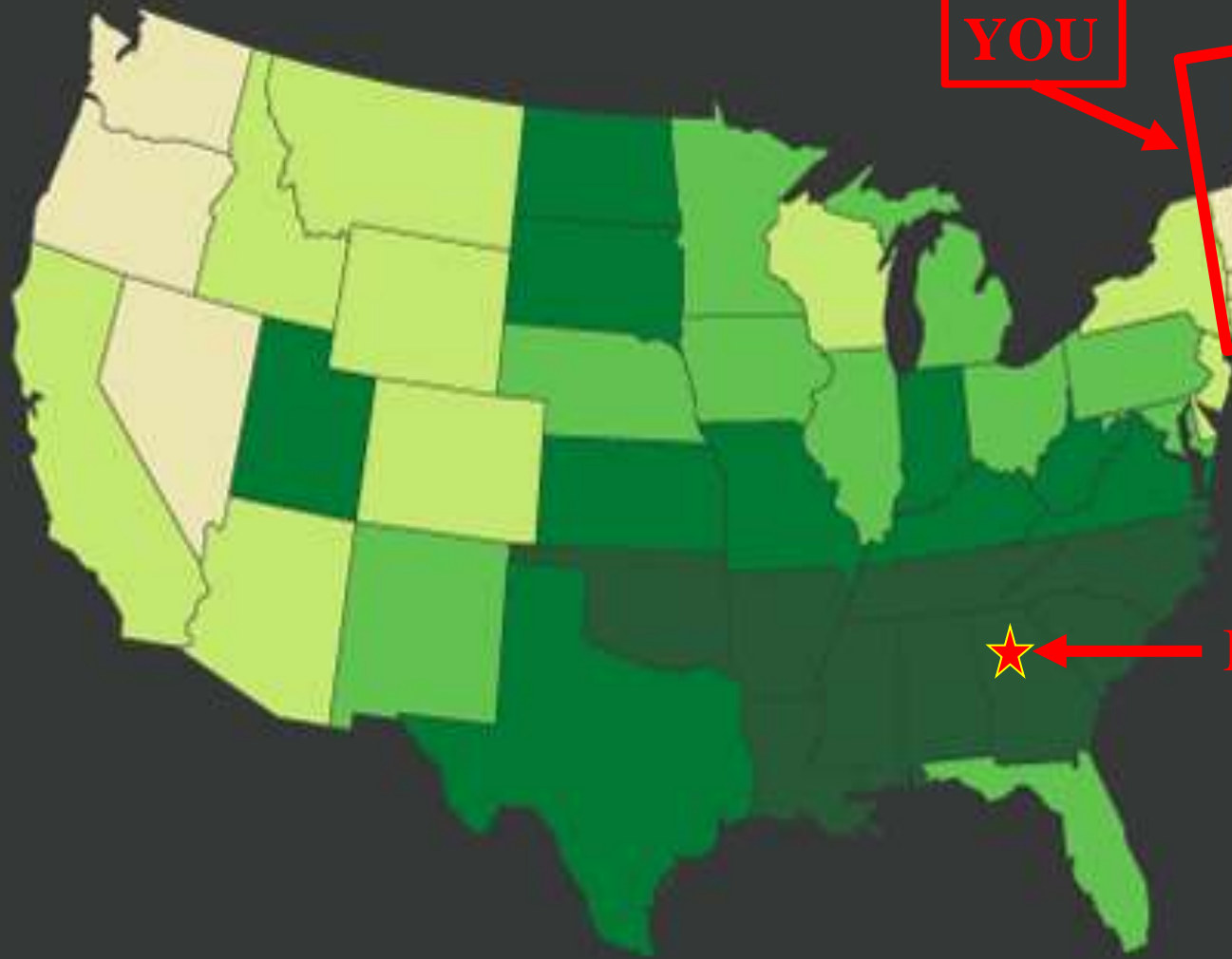
<sup>1</sup> Personal survey data acquired from interviews of hundreds of Orthodox Christians by Stewardship Calling

# lighter color = less religious

State of the States  
*Importance of Religion*

GALLUP POLL

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



YOU



ME



# How Are We Doing Financially?

GENEROSITY



# PRE-COVID Giving Facts<sup>1</sup>

- ~ People give a lower % of income to churches in the 2000's than during the Great Depression or the 1920's
- ~ 37% of church goers give \$0 to their church
- ~ 17% of Americans reduced their church giving
- ~ Average Orthodox stewards give their church between 0.5% to 0.8% of their income <sup>2</sup>

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<sup>1</sup> Christian Stewardship Association; Barna Research Group; Empty Tomb; Giving USA Foundation, <https://nonprofitssource.com/online-giving-statistics/church-giving/>, Stewardship Calling Financial Stewardship Analysis of over 250 parishes

<sup>2</sup> From Financial Stewardship Analysis of over 250 U.S. Orthodox Parishes conducted by Stewardship Calling ministry

# PRE-COVID Giving Facts<sup>1</sup>

U.S. Orthodox Christians are in:

~ top 1/3 in annual income

~ bottom 1/3 in church stewardship

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

# Orthodox Average Percentages

## INCOME TOTALS

- |                              | <u>AVG</u> |
|------------------------------|------------|
| • Stewardship                | 52%        |
| • Disguised Stewardship      | 20%        |
| • N.O. (Non-Orthodox) Income | 28%        |

>1% of total Parish funds go to Parish chosen charities, ministries & philanthropies

# Stewardship Donor Concentration

Top 10 donors contribute = **25-40%**

Top 20 donors contribute = **40-60%**





# Here's How This Is Possible?

<sup>1</sup> Median annual household income U.S. Census as reported 10-02-2020: Lebanese \$87,099; Russian \$85,989 - Greek \$82,036; Romanian \$81,878; Ukrainian \$81,603; Serbian \$81,452; Bulgarian \$80,626; Armenia \$77,110. =

**MEDIAN INCOME OF AMERICANS FROM HISTORICALLY ORTHODOX COUNTRIES = \$81,750**

- Est. Median U.S. Orthodox Christians 2019 income = **\$81,750<sup>1</sup>**
- **\$8,175** = a median income tithe
- Multiply your number of stewardship by \$8,175 to see what your stewardship income could be if everyone only earned the median annual income and tithed

| Parish                     | New ANNUAL Stewardship Income | % Increase from 2022 |
|----------------------------|-------------------------------|----------------------|
| Holy Trinity - Concord     | <b>\$1,054,575</b>            | 6.3 times more       |
| St. Luke - East Longmeadow | <b>\$1,471,500</b>            | 10.1 times more      |
| St. Nicholas - Lexington   | <b>\$1,455,150</b>            | 6.7 times more       |
| Dormition - Somerville     | <b>\$1,479,675</b>            | 15.8 times more      |



AUDIENCE PARTICIPATION TIME!

**What Is The Biggest Challenge  
Facing Your Parish?**

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# Your Parish's Biggest Challenge

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

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

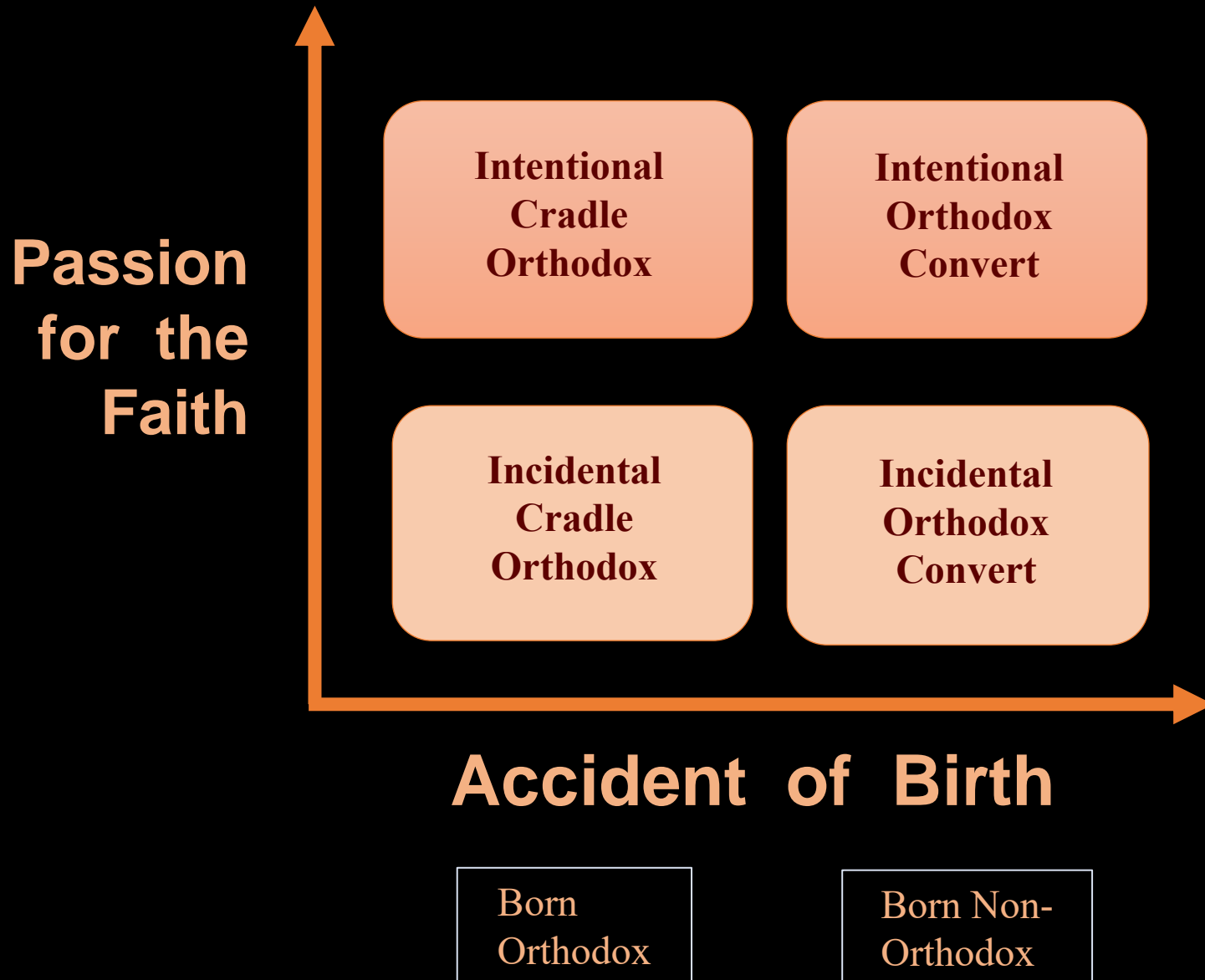
- ~ Entropy
- ~ Everything in the universe moves from order to disorder, and Entropy measures that change
- ~ If you don't make positive changes, you will get negative changes

The Orthodox Church  
Demographic  
Makeup Has  
Changed  
Significantly Over  
The Last 15  
Years

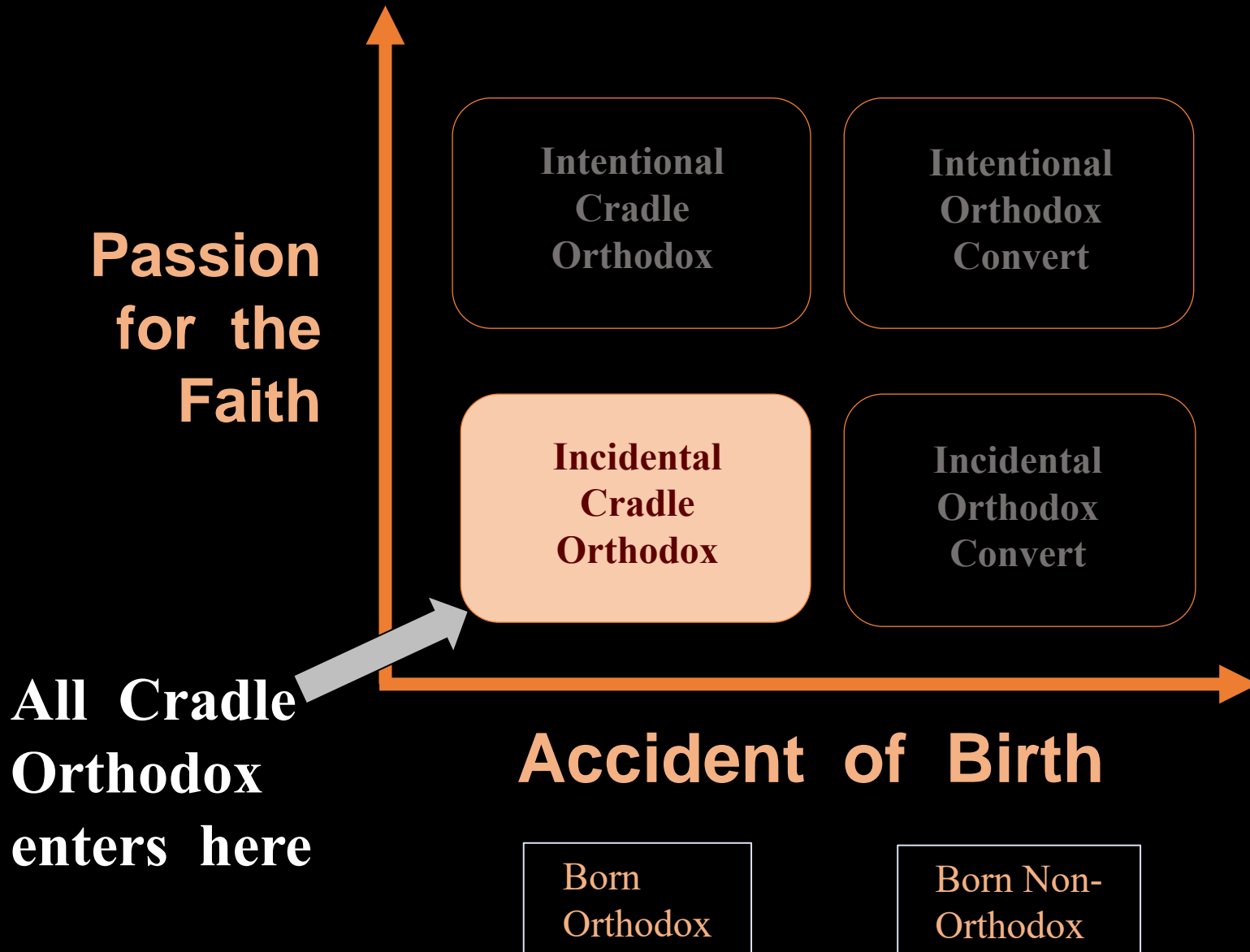
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# 4 Kinds of U.S. Orthodox Christians



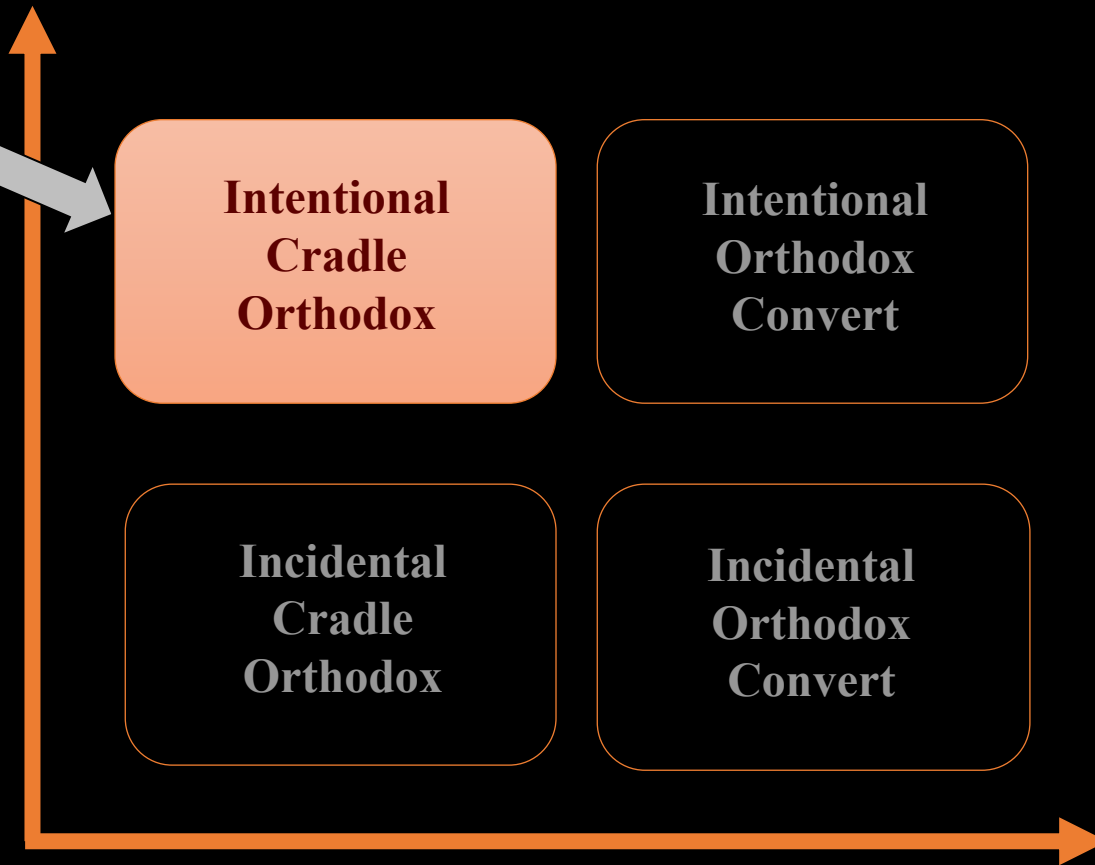
# 4 Kinds of U.S. Orthodox Christians



# 4 Kinds of U.S. Orthodox Christians

Few Cradle  
Orthodox  
move here

Passion  
for the  
Faith

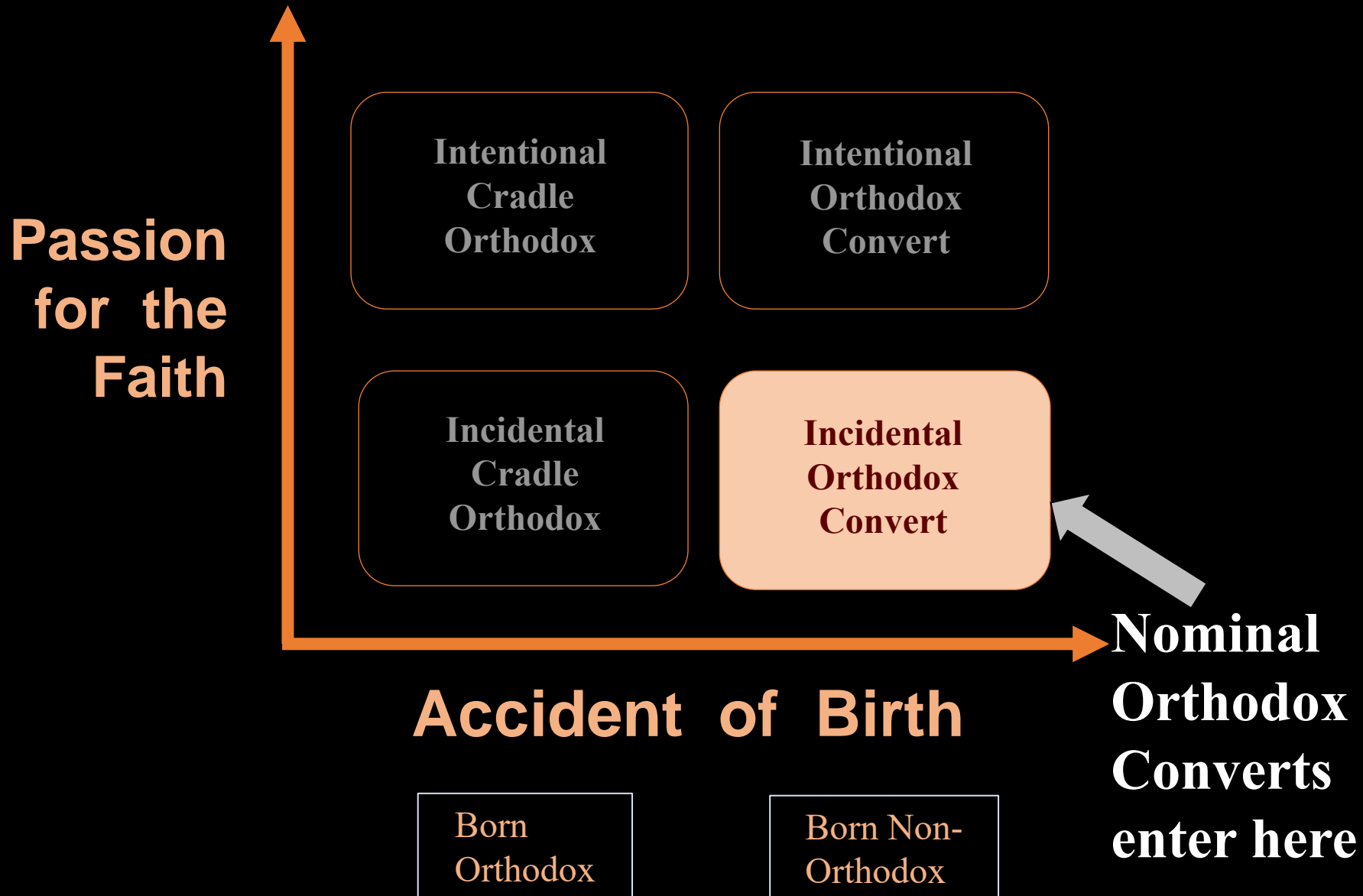


**Accident of Birth**

Born  
Orthodox

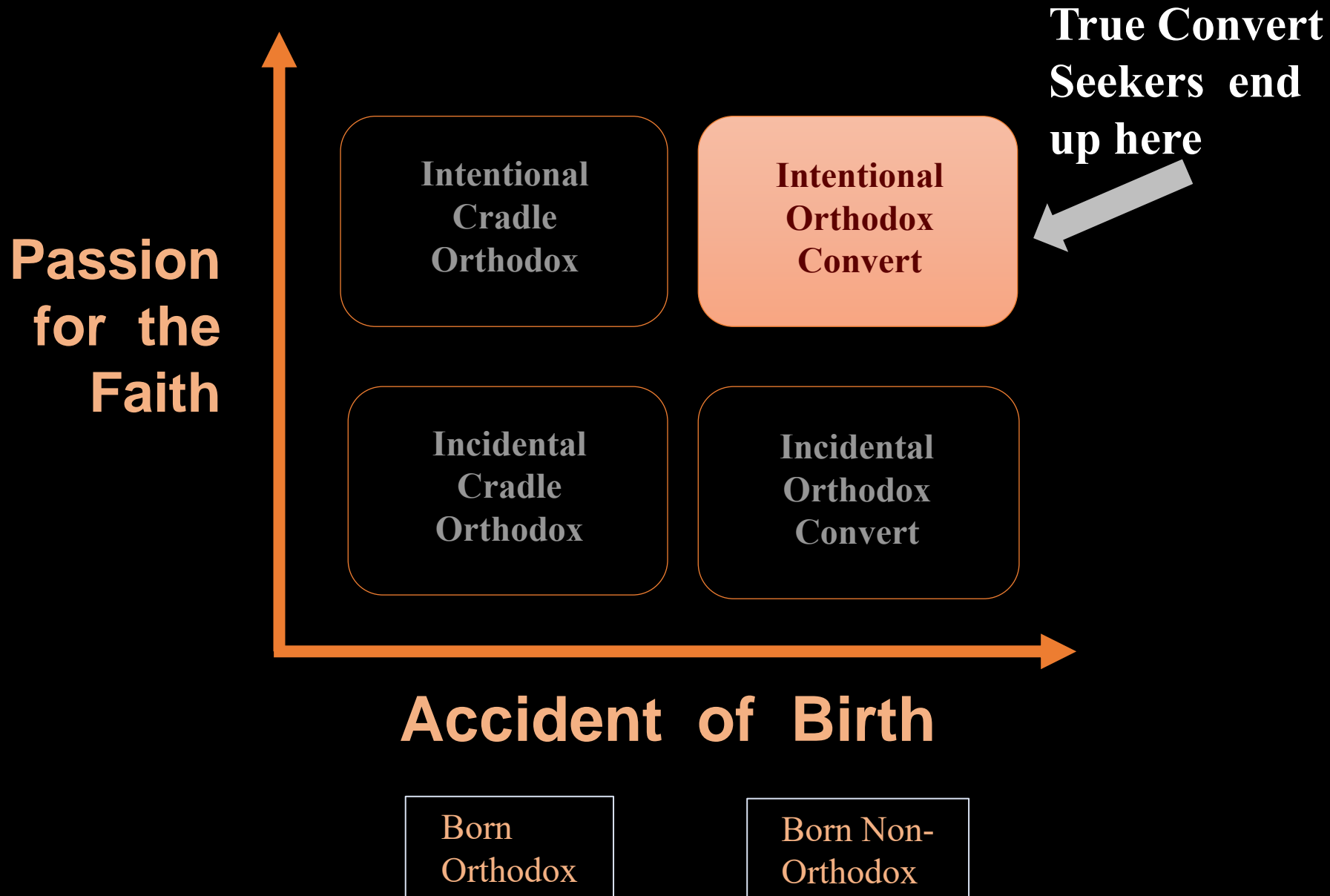
Born Non-  
Orthodox

# 4 Kinds of U.S. Orthodox Christians

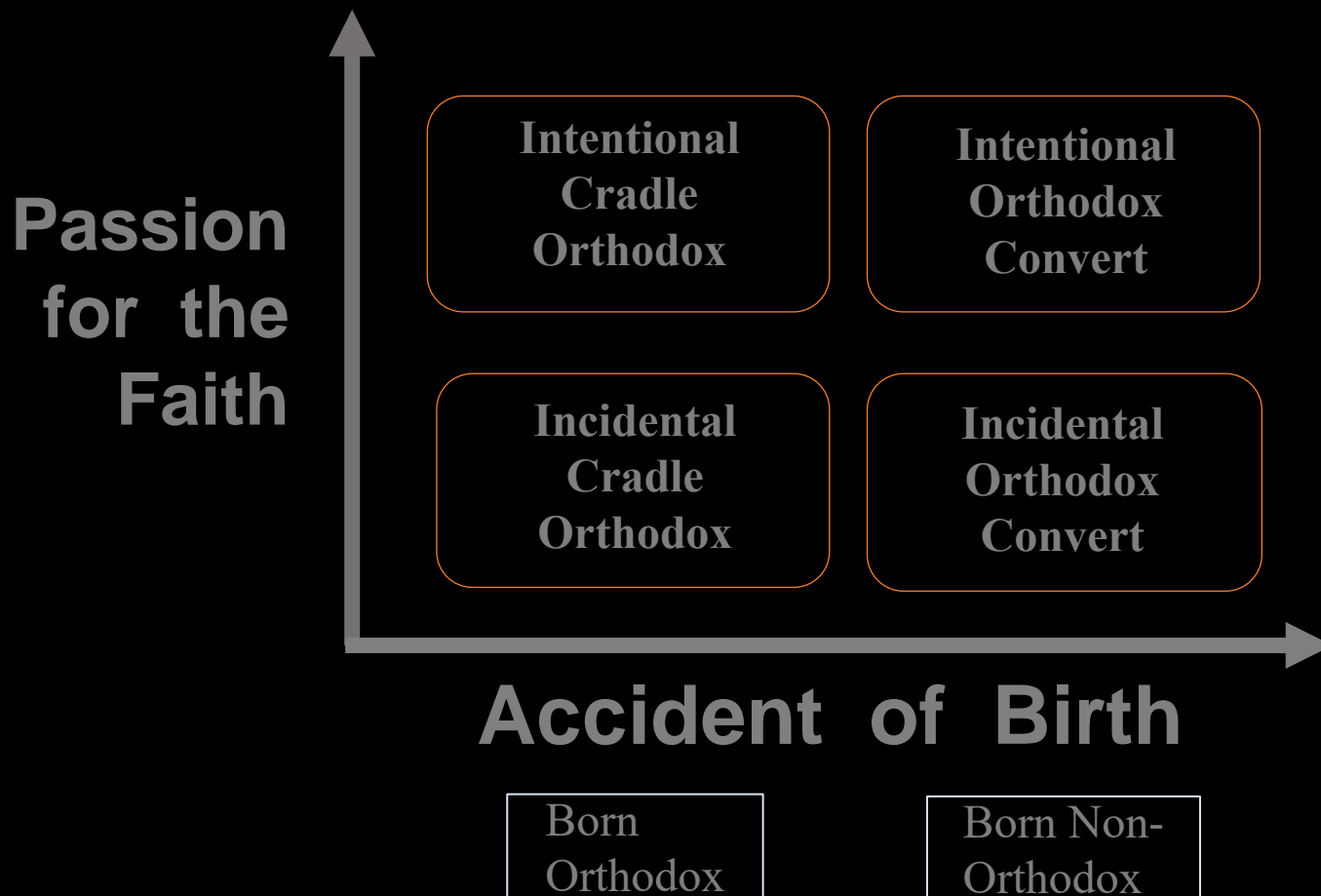




# 4 Kinds of U.S. Orthodox Christians



You have 4 different sets of parishioners (“customers”) with 4 different sets of needs  
One size fits all fits nobody

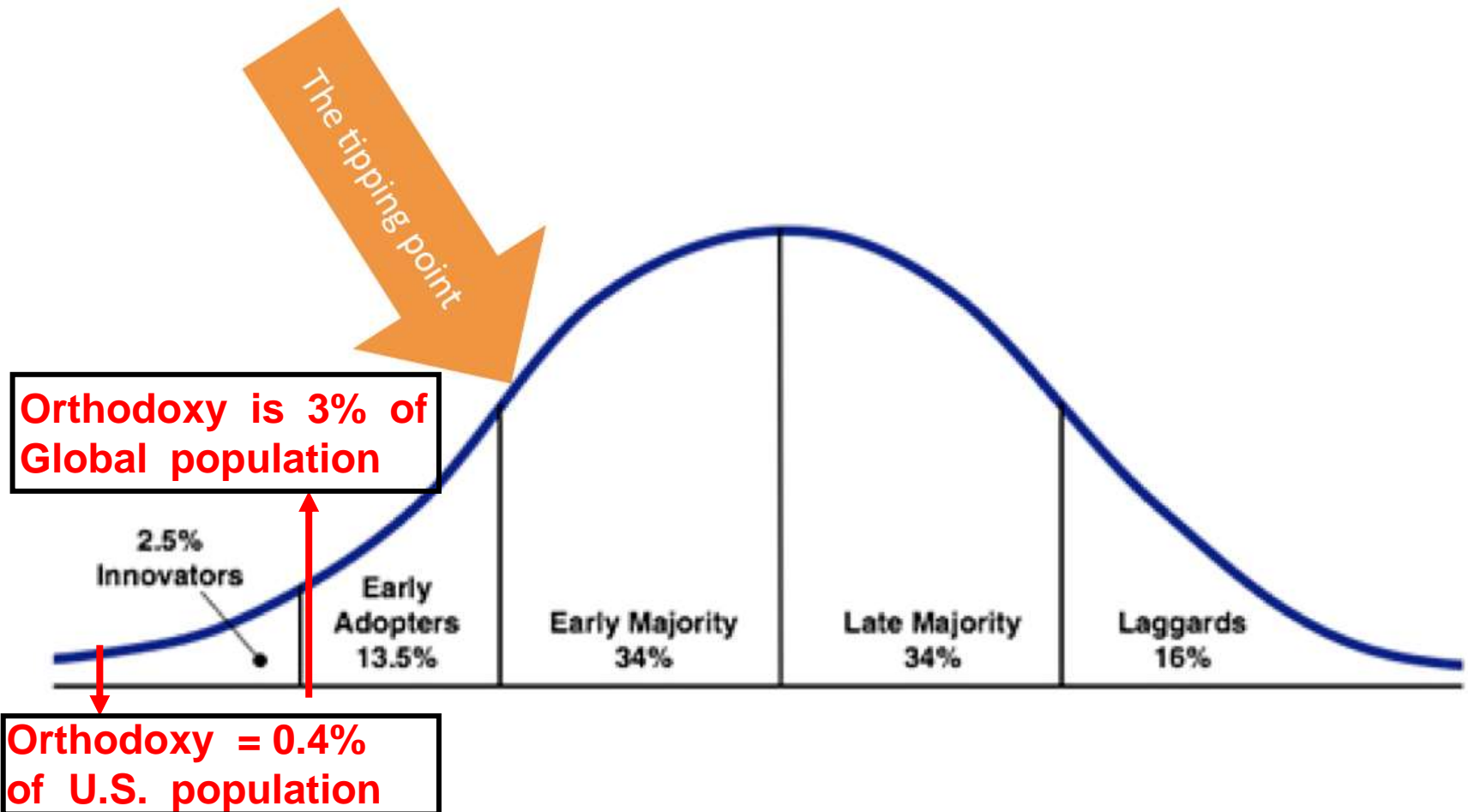


**Which do you prefer from me now?**



# How Is Orthodoxy Doing At Sharing Its WHY?

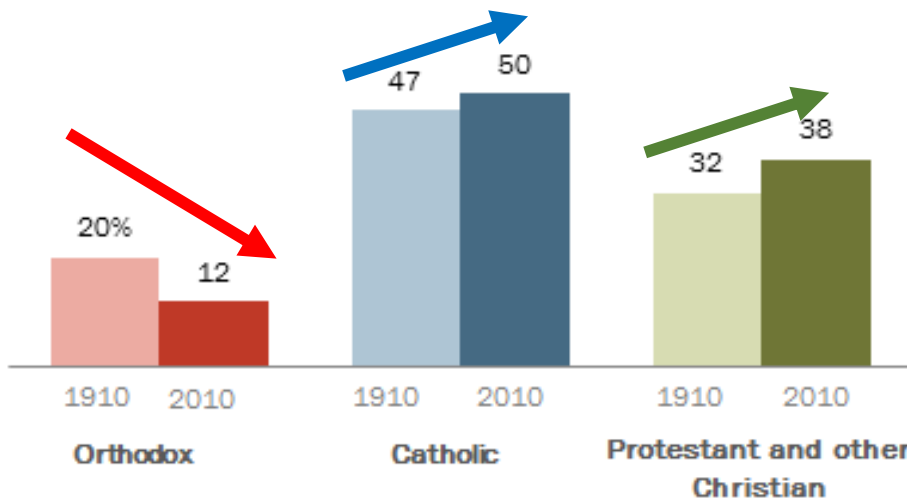
## The law of diffusion of innovation



# Orthodoxy is Shrinking Globally Compared To Other Religions

## Among Christians globally, Orthodox share falling, Catholic, Protestant shares increasing

% of world Christians who are ...



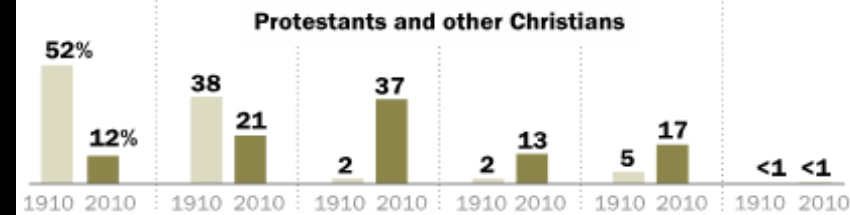
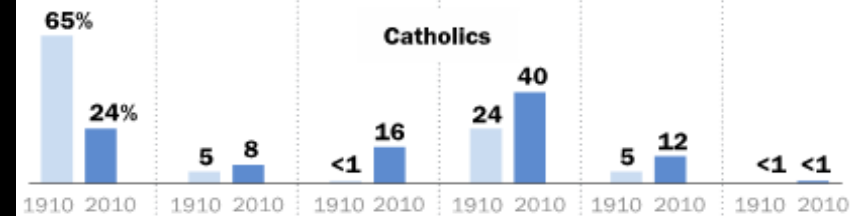
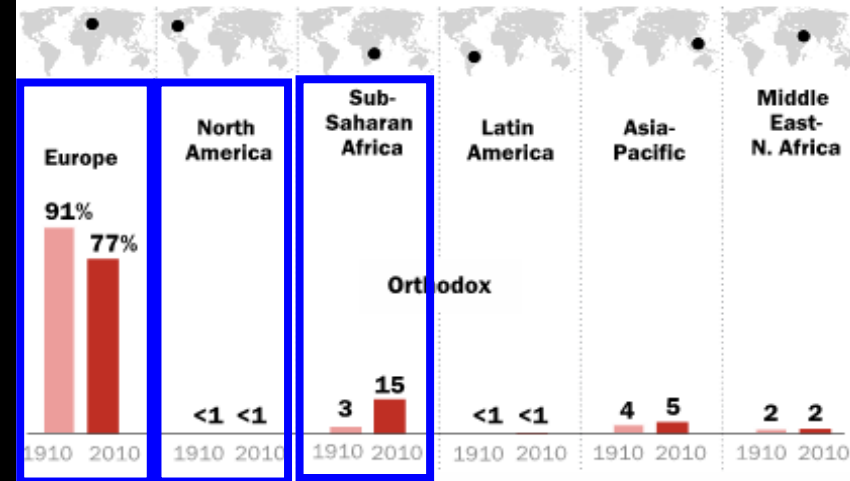
Note: "Protestants and other Christians" includes Mormons, Jehovah's Witnesses, Christian Scientists and other small Christian groups.

Source: 1910 data from World Religion Database. 2010 data from Pew Research Center analysis of censuses and surveys, originally published in 2011 report "Global Christianity." "Orthodox Christianity in the 21st Century"

PEW RESEARCH CENTER

A century ago, all three major branches of Christianity were concentrated in Europe. That is still the case for Orthodox Christians, but not Protestants and Catholics

% of each group living in each region, 1910 and 2010



Note: "Protestants and other Christians" includes Mormons, Jehovah's Witnesses, Christian Scientists and other small Christian groups.

Source: 1910 data from World Religion Database. 2010 data from Pew Research Center analysis of censuses and surveys, originally published in 2011 report "Global Christianity." "Orthodox Christianity in the 21st Century"

PEW RESEARCH CENTER

Orthodox Christianity in the 21<sup>st</sup> Century – Pew Research Center - November 8, 2017

<https://www.pewresearch.org/religion/2017/11/08/orthodox-christianity-in-the-21st-century>

**FUTURE**



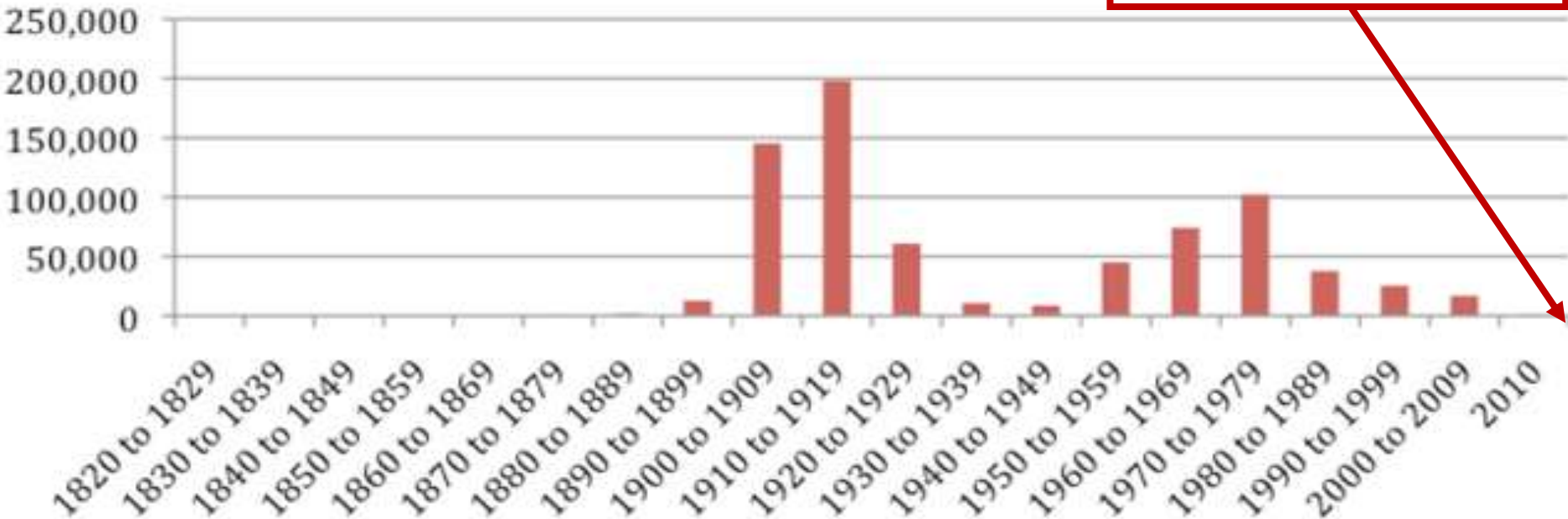
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# The Metamorphosis of the Greek

## American Orthodox Church

**Number of people from Greece obtaining legal permanent resident status 1820-2010**

**945 total in 2020**



So, now what do we do?



## Stress Reduction

**Bang  
Head  
Here**

**Directions:**

1. Place on **FIRM** surface.
2. Follow direction in circle.
3. Repeat step 2 as necessary, or until unconscious.
4. If unconscious, cease stress reduction activity.



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





## 2 Fundamental Rules and 1 Critical Question

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

**2. You cannot master what you do not measure.**

**3. How are you measuring effectiveness or success in your parish?**



An illustration of an iceberg floating in a blue sea. The tip of the iceberg, which is above the water line, is labeled "Symptom". The much larger part of the iceberg, which is submerged below the water line, is labeled "Root Causes".

Symptom

Root Causes

# Problem = large numbers of sub-Saharan African children getting repeated bacterial infections



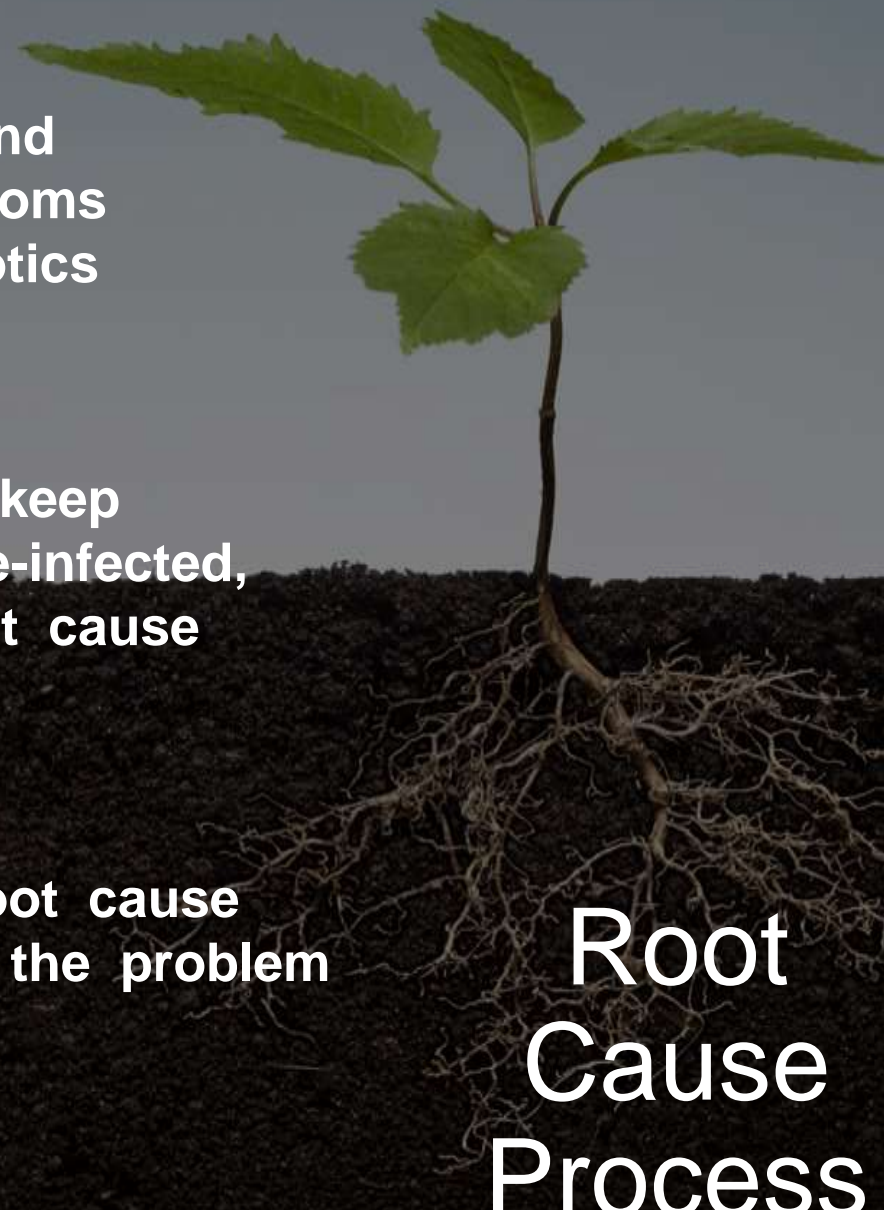
**Step 1: diagnose and treat symptoms with antibiotics**



**Step 2: when kids keep returning re-infected, identify root cause**



**Step 3: address root cause and solve the problem**



**Root  
Cause  
Process**

# THE 5 WHYS



# THE 5 WHYS

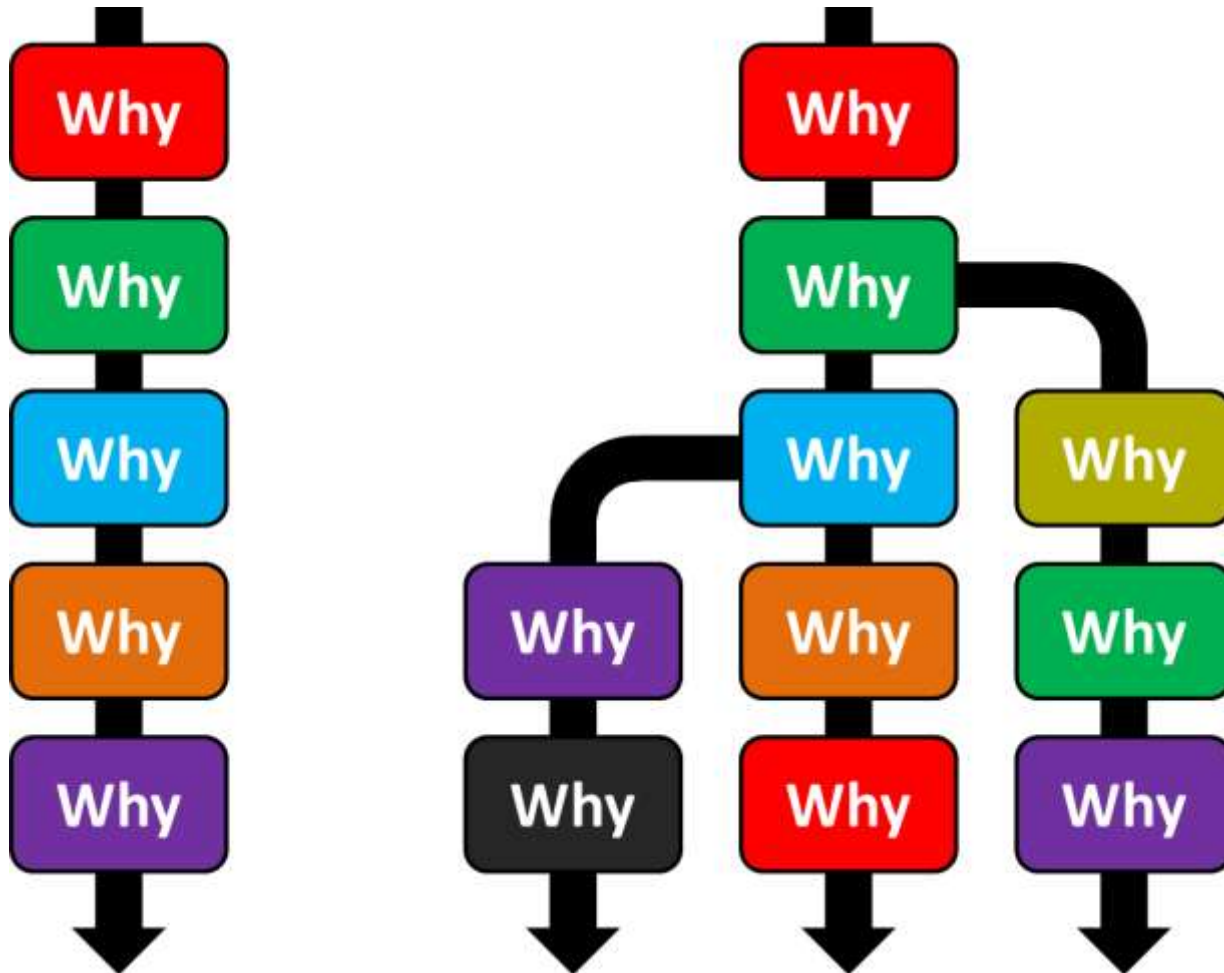
*"The basis of Toyota's scientific approach is to ask why five times whenever we find a problem ... By repeating why five times, the nature of the problem as well as its solution becomes clear."*

*Taiichi Ohno*

Father of the Lean Efficiency Process



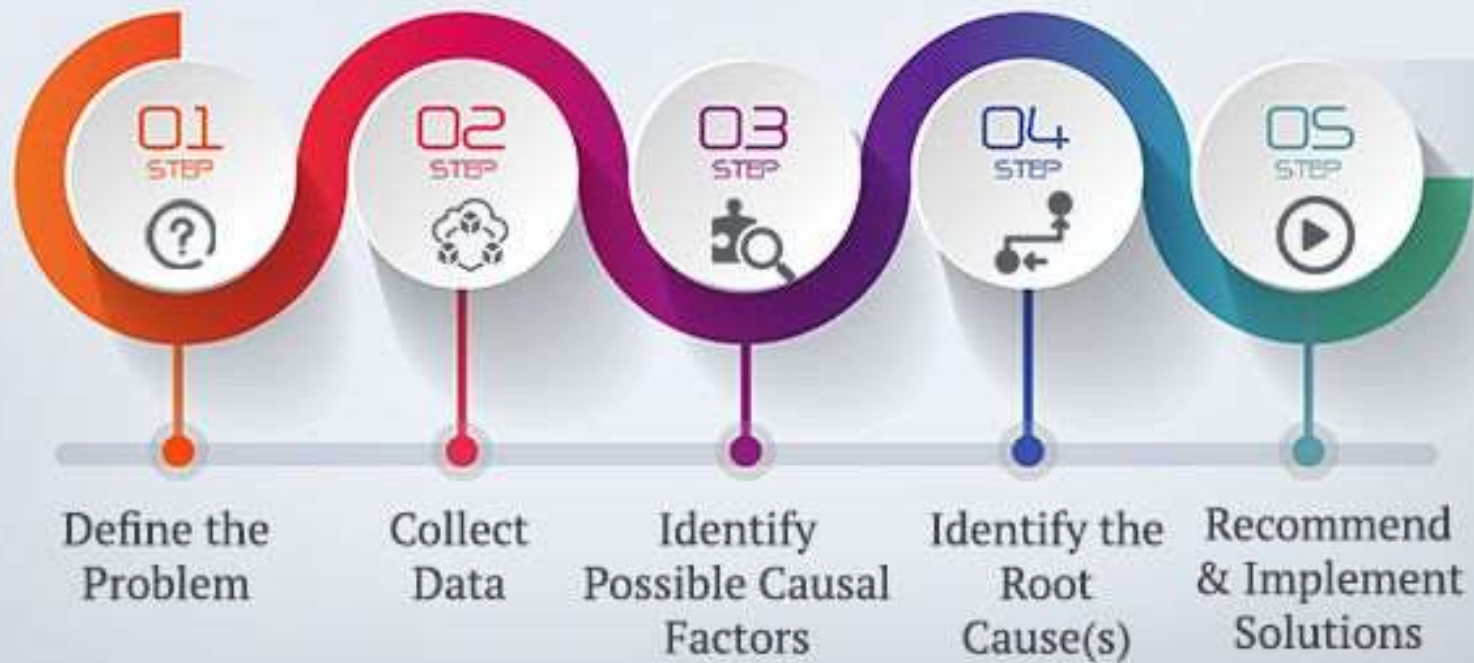
**Sometimes it's simple and linear,  
and sometimes there are multiple roots & branches**



# Why were you late for work?



## Root Cause Analysis Prosses





# Problem: our church is struggling

We don't have enough money or volunteers

They don't know why they should engage more

No one explained it to them

No one knew how to teach stewardship

The church never taught them

Their parents & Sunday school teachers didn't know

Their immigrant grandparents weren't stewards

In foreign countries, the government supported the churches

**You cannot teach or do what you never knew**

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



Henry Ford



**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 Analysis
2. Statement of Why
3. Core Values
4. Mission Statement
5. Wildly Important Goals (“WIGs”)
6. Lag and Lead Measures
7. Compelling Scoreboard
8. Cadence of Accountability
9. Vision Statement
10. Strategic Plan



# 10 Strategic Plan Deliverables





# A SWOT Analysis is Biblical



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

***Test yourselves!”***

$$\begin{aligned} & \frac{1}{5}y - \frac{2}{3}x - \frac{2}{3}y + \frac{1}{2}x \\ &= \frac{3 \cdot 1}{3 \cdot 5}y - \frac{5 \cdot 2}{5 \cdot 3}y - \frac{2 \cdot 2}{2 \cdot 3}x + \frac{3 \cdot 1}{3 \cdot 2}x \\ &= \frac{3}{15}y - \frac{10}{15}y - \frac{4}{6}x + \frac{3}{6}x \\ &= \frac{-7}{15}y - \frac{1}{6}x \quad \checkmark \end{aligned}$$

**LEADERS WHO DON'T  
LISTEN WILL EVENTUALLY  
BE SURROUNDED BY  
PEOPLE WHO HAVE  
NOTHING TO SAY**

**ANDY STANLEY**

**SMARTLEADERSHIP**

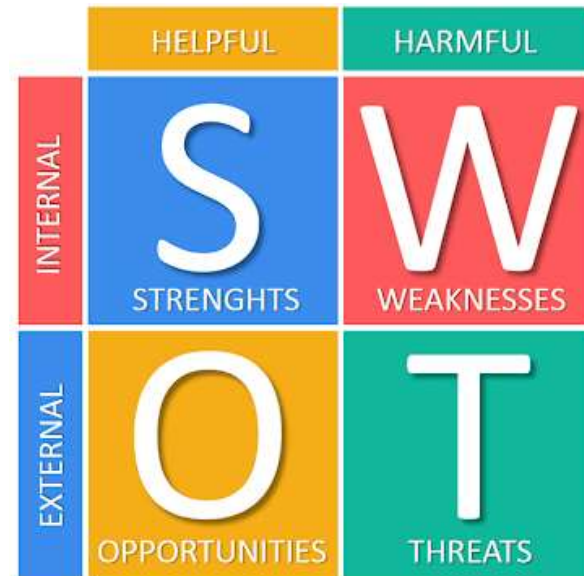
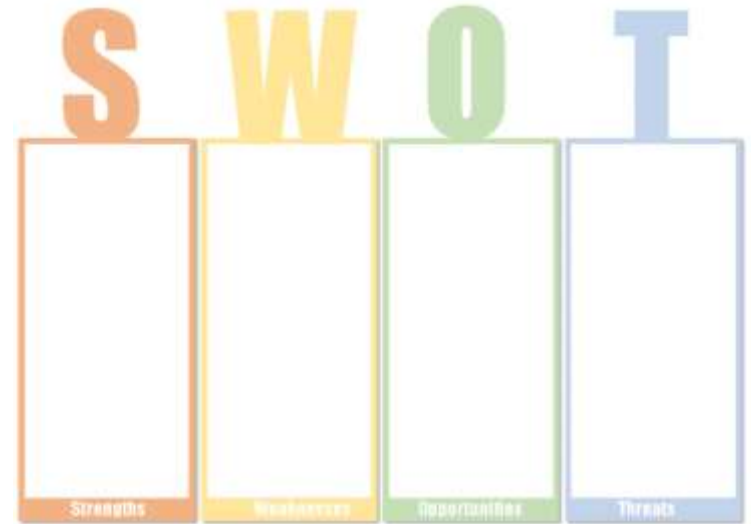
# SWOT ANALYSIS

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



## Strengths and Weaknesses

- (a) Strengths include things we do well and characteristics that give us advantages
- (b) Weaknesses include things we do poorly or challenges that place us at a disadvantage



Opportunities and Threats  
outside of our Parish that  
could affect us

- (a) Opportunities include external things outside of our control that could help us
- (b) Threats include external things outside of our control that could cause trouble for us



## Low Hanging Fruit

The Parish Council or Ministries can address our Weaknesses not making final Strategic Plan list



## EPA 2 RESULTS (43 responses)



## EPA 2 RESULTS (59 responses)



## EPA 2 RESULTS (60 responses)



## EPA 2 RESULTS (58 responses)





# EPA 2 RESULTS ACROSS ALL 4 PARISHES

0 Green  
2 Yellow  
2 Red

3 Green  
1 Yellow  
0 Red

0 Green  
0 Yellow  
4 Red

0 Green  
2 Yellow  
2 Red

0 Green  
0 Yellow  
4 Red

2 Green  
2 Yellow  
0 Red



## Vision & Planning

- Strategic Planning
- Operational & Tactical Planning
- Parishioner Involvement
- Goal Achievement & Accountability



## Leadership & Teams

- Christian Leadership
- Leading & Coaching
- Conflict Management
- Effective Teams
- Parish Council & Boards



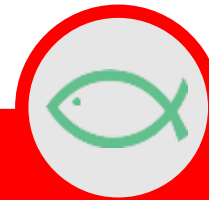
## Stewardship & Generosity

- Giving & Tithing
- Stewardship Campaign
- Capital Campaign
- Planned Giving & Endowments
- External Philanthropy
- Transparency & Accountability



## Parishioner Engagement

- Spiritual Education & Catechism
- Liturgical & Sacramental Participation
- Outreach
- Evangelism
- Welcoming & Fellowship



## Ministries

- Defines Needs of Parishioners
- Ministry Management
- Ministry Engagement
- Volunteer Management
- Youth & Young Adult



## Operational Effectiveness

- Communication & Digital Strategies
- Facilities & Technology
- Financial Excellence
- Safety & Security
- Staff Management

# 2022 Stewardship Dashboard 4 Parish Results

| PARISH                                      | Average          | A         | B         | C         | D        | Average          |
|---|------------------|-----------|-----------|-----------|----------|------------------|
| Number of Stewards                          | <b>167</b>       | 129       | 180       | 178       | 181      | <b>167</b>       |
| Total Stewardship Income                    | <b>\$155,762</b> | \$166,273 | \$145,956 | \$217,405 | \$93,415 | <b>\$155,762</b> |
| % of Operating Expenses Paid By Stewardship | <b>50%</b>       | 72%       | 40%       | 70%       | 19%      | <b>50%</b>       |
| Median Stewardship Contribution             | <b>\$475</b>     | \$600     | \$400     | \$600     | \$300    | <b>\$475</b>     |
| Proxy Tithe Stewardship %                   | <b>0.57%</b>     | 0.73%     | 0.49%     | 0.70%     | 0.36%    | <b>0.57%</b>     |
| \$ Invested in Charities/Ministries         | <b>\$2,260</b>   | \$500     | \$4,000   | \$2,438   | \$2,100  | <b>\$2,260</b>   |
| % Invested in Charities/Ministries          | <b>0.60%</b>     | 0.21%     | 1%        | 0.80%     | 0.40%    | <b>0.60%</b>     |
| % Top 10 Stewards Contribution              | <b>32%</b>       | 33%       | 33%       | 33%       | 28%      | <b>32%</b>       |
| % Top 20 Stewards Contribution              | <b>49%</b>       | 51%       | 46%       | 46%       | 53%      | <b>49%</b>       |



## SWOT, Core Values, Mission Statement & Strategic Area Of Focus Process

(NOTE: This same process will be used tomorrow for the Core Values, Mission Statement and Strategic Areas of Focus)

Draw the  
Line

---

Pick the  
Short Title

## SWOT

1. **You have 2.5 hours** to reach a consensus.
2. Use the Heat Mapped SWOT and Effective Parish Assessment documents for your Parish.
3. Bold number in front represents the number of times that item was mentioned.
4. The bold word(s) after the number is the short, suggested **SUMMARY DESCRIPTION** of those comments. You must decide if it needs editing to be more precise, concise, or accurate.
5. Only the most essential items can make the final list for each SWOT element. You decide how far down the list you will “**draw the line**” of the most mentioned and critical items.
6. **The most popular answers must make your final SWOT list** (even if you change the summary description words that describe them).
7. Make decisions by **consensus** based on the actual data in the Heat Mapped Document, and **NOT** your personal opinion. Thus, something you think is important may not make the final list.

Draw the  
Line

---

Pick the  
Short Title

## SWOT

8. **Don't take anything personally** (especially if you or something you work on or care about is criticized, mentioned, or not mentioned). The only way we improve is if we know the truth.
9. Opportunities and or Threats must be **external** to your Parish. Do not include any items listed at the bottom that were determined to be internal and not external.
- 10 You can look at your Parish Effective Parish Assessment (EPA) for further guidance; however, your SWOT Heat Map should be your primary source for your final list of SWOT elements.
11. Your job is to:
  - (A) “***draw the line***” as to which are the **most significant** SWOT items to make your final list; and
  - (B) ensure one-word or short phrase descriptions capture the essence of each item that makes your final list.
12. You can't include everything. Look for a logical place to draw the line far enough down to include the most essential items receiving the most mentions - but not so far down that you include items too infrequently mentioned.

Draw the  
Line

---

Pick the  
Short Title

## SWOT

13. Look for between **5-7 Strengths** and **5-7 Weaknesses** and between **2-3 Opportunities** and **2-3 Threats** for your final list. These are just general guidelines.
14. You can't skip items with more mentions to include something with fewer mentions. You can combine items (to increase the number of combined mentions and move them up the list), but only if you can justify why they logically go together. You'll probably need to change the SHORT description of combined items.
15. After drawing the line and finalizing your list of WEAKNESSES, identify Weaknesses below the line that are things your Parish Council or a Ministry or the Clergy can address or work on in the short or intermediate term. "Low Hanging Fruit."
16. Your **secretary should complete 5 flip chart pages<sup>1</sup>** (one for each SWOT element and the 5<sup>th</sup> for Low Hanging Fruit) listing **ONLY** your final **SUMMARY DESCRIPTIONS** for each item. (do not include numbers in front.)

**BRING THOSE 5 PAGES INTO THE GROUP ROOM**

<sup>1</sup> This is a change from the 4 flip chart pages requested on page 6 and adds the 5<sup>th</sup> page for the Low Hanging Fruit

# Draw the Line

&

Pick the  
Short Title for  
the Items that  
Make Your  
Short List

(for Weaknesses  
pick some “**Low  
Hanging Fruit**” the  
PC and ministries  
can work on)

## WEAKNESSES

- 57 - Parishioner Engagement & Stewardship
- 55 - Unwelcoming, Cliquish & Lack Of Fellowship
- 36 - Religious Education
- 34 - Leadership / Management Issues
- 28 - Youth & Young Adults
- 28 - Worship & Participation Issues
- 16 - Lack Of Outreach & Evangelism
- 16 - Facilities
- 13 - Family Issues
- 13 - Too Greek / Ethnic
- 10 - Inadequate Philanthropy
- 7 - Communications / Technologies Inadequacies
- 6 - Staffing Shortages
- 6 - Aging Congregation
- 6 - Not Greek / Ethnic Enough
- 5 - Sunday School
- 5 - Resistance To Change
- 4 - Not Enough Ministries/Activities
- 4 - Festival

# Draw the Line

&

Pick the Short Title for the Items that Make Your Short List

(for Weaknesses pick some “Low Hanging Fruit” the PC and ministries can work on)

## WEAKNESSES

- 57 - Parishioner Engagement & Stewardship
- 55 - Unwelcoming, Cliquish & Lack Of Fellowship
- 36 - Religious Education
- 34 - Leadership / Management Issues
- 28 - Youth & Young Adults
- 28 - Worship & Participation Issues

---

- 16 - Lack Of Outreach & Evangelism
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- 13 - Family Issues
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- 10 - Inadequate Philanthropy
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- 6 - Staffing Shortages
- 6 - Aging Congregation
- 6 - Not Greek / Ethnic Enough
- 5 - Sunday School
- 5 - Resistance To Change
- 4 - Not Enough Ministries/Activities
- 4 - Festival



## Draw the Line

&

Pick the  
Short Title for  
the Items that  
Make Your  
Short List

## OPPORTUNITIES

- 47 - Outreach & Education About Orthodoxy To Seekers**
- 27 - External Philanthropy & Community Opportunities**
- 20 - Social / Moral Issues**
- 16 - Technology / Social Media**
- 16 - Pan Orthodox Opportunities**
- 9 - Growing Area**

Draw the Line

&

Pick the  
Short Title for  
the Items that  
Make Your  
Short List

## OPPORTUNITIES

47 - **Outreach** & Education About Orthodoxy To Seekers

27 - External **Philanthropy** & Community Opportunities

20 - Social / **Moral Issues**

---

16 - Technology / Social Media

16 - Pan Orthodox Opportunities

9 - Growing Area

# 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.**

**... if you find yourself blaming the people, you should look again.”**

---

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

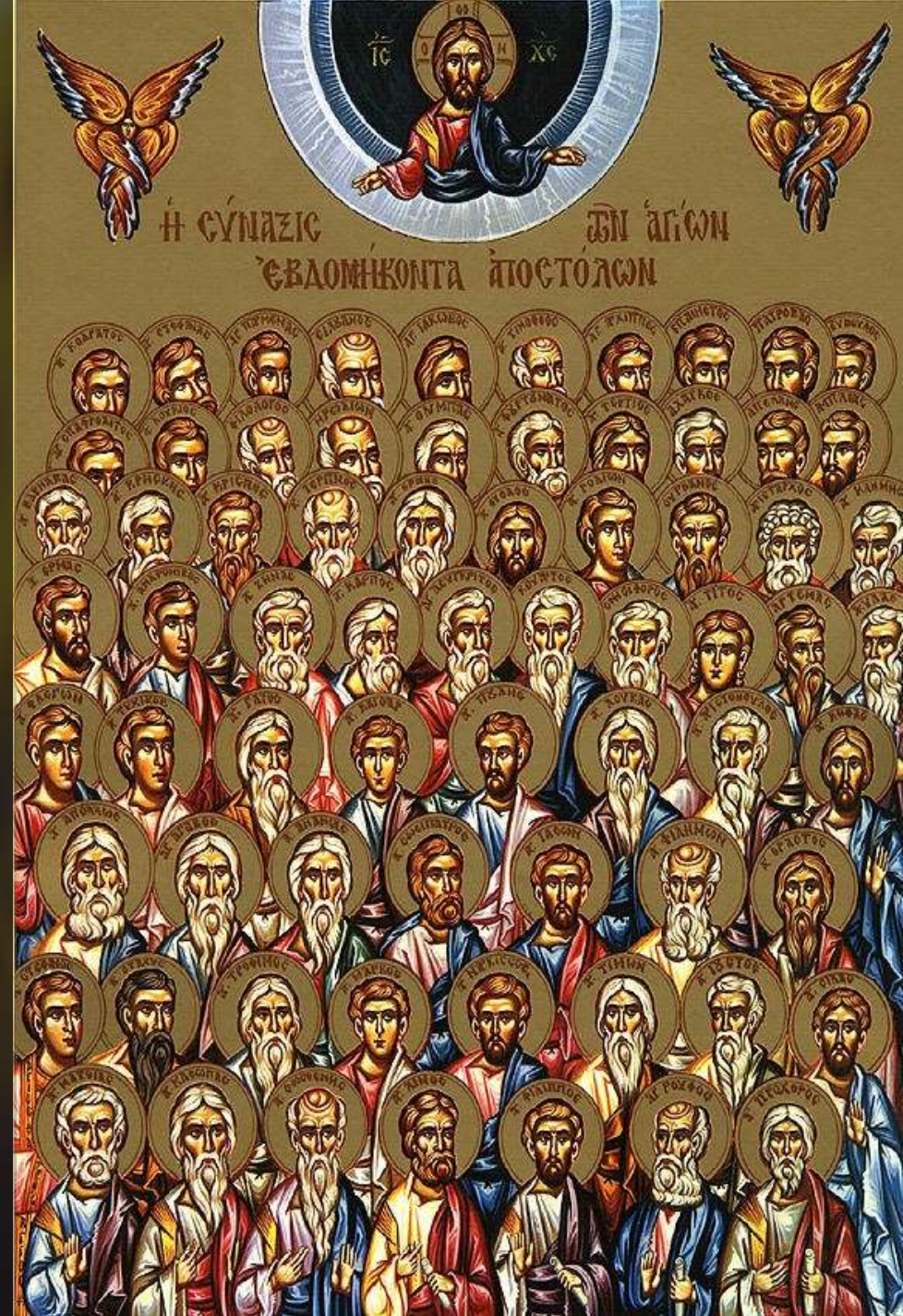




- ~ Room assignments are on page 4.*
- ~ SWOT instructions are on pages 5-6.*
- ~ Your Parish's heat mapped SWOT and EPA results are in your Parish's packet.*

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

*Luke 10:1*





GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ

# Strategic Planning Retreat Day 1

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

Proverbs 29:18

Bill Marianes



STEWARDSHIP  
CALLING





GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ

# Strategic Planning Retreat Day 2

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

Proverbs 29:18

Bill Marianes



STEWARDSHIP  
CALLING



ORTHODOX MINISTRY SERVICES

# Your Strategic Planning Page

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

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

This presentation and all your ongoing work product can be found under the [Strategic Planning](#) tab at the page for: [Metropolis of Boston Four Parish Strategic Plan](#)

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

The screenshot shows the website's navigation menu with 'STRATEGIC PLANNING' circled in red. Below it, a list of strategic plans is shown, with 'METROPOLIS OF BOSTON - FOUR PARISH STRATEGIC PLAN' circled in red. A red box highlights this plan, and a red arrow points from the circled menu item to it. Another red arrow points from the circled plan to the main content area. The main content area features logos for 'THRIVING', 'METROPOLIS OF BOSTON', and 'METROPOLIS OF BOSTON CAMP'. Below the logos, text describes the strategic planning process for four parishes: Holy Trinity-Concord, St. Luke's, Lexington-St. Nicholas, and Somerville-Dormition. A red box highlights this text, and a red arrow points from the circled plan to it. At the bottom, there is a notice about a 4-parish retreat in April 2023.

WHY? STEWARDSHIP **STRATEGIC PLANNING** INTERNET RADIO & PODCASTS KEYNOTES & LEADERSHIP RESOURCES

PERSONAL

BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING

**METROPOLIS OF BOSTON – FOUR PARISH STRATEGIC PLAN**

CONCORD – HOLY TRINITY STRATEGIC PLAN

EAST LONGMEADOW – ST. LUKE STRATEGIC PLAN

LEXINGTON – ST. NICHOLAS STRATEGIC PLAN

SOMERVILLE – DORMITION STRATEGIC PLAN

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

Metropolis of Boston

By the grace of God, we are continuing their Lilly Endowment Thriving Congregations work in progress until the end of 2023.

through Strategic Planning as a part of Holy Trinity- Concord; St. Luke's – East Longmeadow; St. Nicholas – Lexington; and Somerville. These pages will contain all of their parish websites.

The first ever 4 parish retreat is planned for April 28-30, 2023 at the St. Methodios Faith and Heritage Center in Contoocook, New Hampshire.

Share this: Email Print Twitter



# Strategic Planning Retreat Schedule – (pages 3-4)

## 1. Retreat Day 1 (Friday – April 28, 2023)

- a. 5 – 6 Dinner (all parishes together)
- b. 6 – 7 Team Building (all parishes together)
- c. 7 – 8:30 Setting the Stage, Facts and Figures, and Retreat Planning Process (all parishes together)
- d. 8:30 – 11 Parishes Break Out to Reach Consensus on Parish SWOT (parishes work separately)

## 2. Retreat Day 2 (Saturday – April 29, 2023)

- a. 8 – 8:30 Breakfast
- b. 8:30 – 9:30 Training on WHY Discovery, Core Values Creation, Mission Statements (all parishes together)
- c. 9:30 – 12:30 Each Parish Reaches Consensus on its WHY, Core Values and Mission Statement (parishes work separately)
- d. 12:30 – 2:00 Working Lunch To Collectively Share Results (all parishes together)
- e. 2:00 – 3:00 Training on Determining Strategic Areas of Focus and S.M.A.R.T. Goals (all parishes together)
- f. 3:00 – 5:00 Each Parish Reaches Consensus on Strategic Areas of Focus and Discuss Preliminary S.M.A.R.T. Goal ideas (parishes work separately)
- g. 5:00 – 6:30 Working Dinner To Collectively Share Results
- h. 6:30 Fellowship (all parishes together)

## 3. Retreat Day 3 (Sunday – April 30, 2023)

- a. 8:30 – 9:30 Divine Liturgy (all parishes together)
- b. 9:30 – 10:15 Breakfast
- c. 10:15 – 11:30 Training on Next Steps to Develop S.M.A.R.T. Goals and Action Plans (all parishes together)
- d. 11:30 – 12:15 Lunch
- e. 12:15 – 2:00 Parishes Finalize WHY, Core Values, Mission, Strategic Areas of Focus (parishes work separately)
- f. 2:00 – 3:30 What Comes Next, Final Q & A and Dismissal (all parishes together)

# Are You Willing To Play On A Championship TEAM?



**Comfort ... Discomfort**



An illustration of an iceberg floating in a blue sea. The tip of the iceberg, which is above the water line, is labeled "Symptom". The much larger part of the iceberg, which is submerged below the water line, is labeled "Root Causes".

Symptom

Root Causes



### 3 Critical Concepts

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

2. You need strong roots to grow, so address the root causes

3. You cannot master what you do not measure.



## WHY Statement

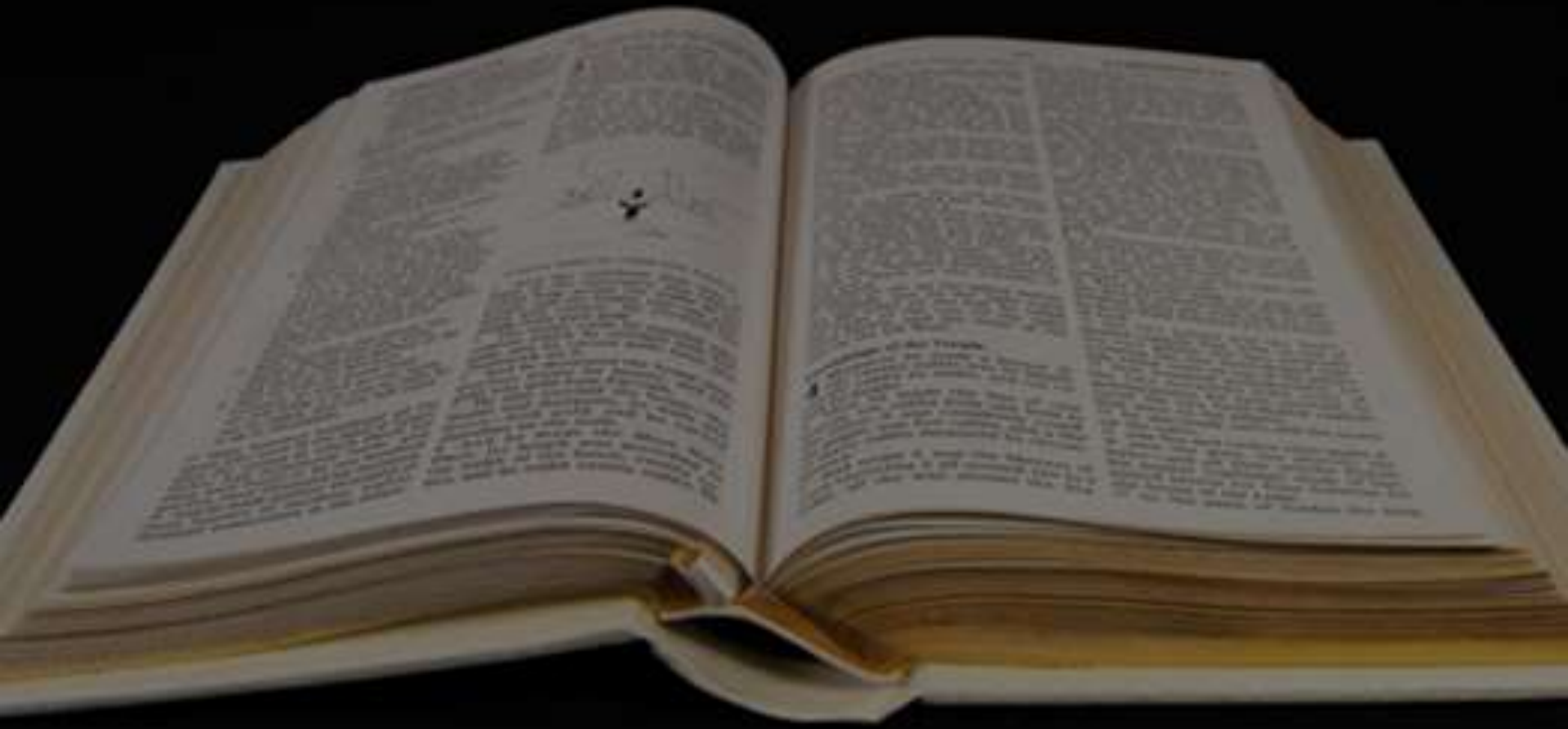
Answers strategic planning question #1:

*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

Joey Asher's book  
Even A Geek Can Speak,  
included my 1981 WHY  
Statement as a lawyer



**Elevator Pitch to Prospects**

What is a sales prospect interested in? Solutions to problems. With that in mind, your elevator pitch to a sales prospect should highlight how your product serves or solves your client's problems.

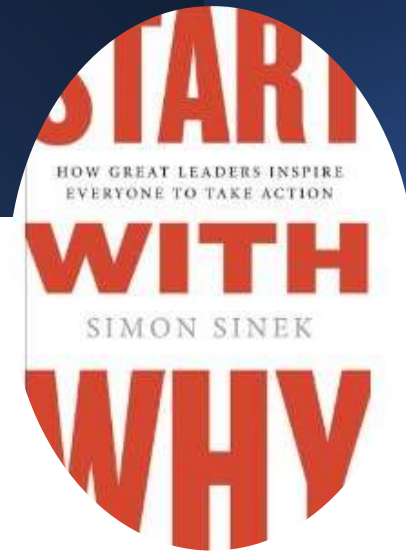
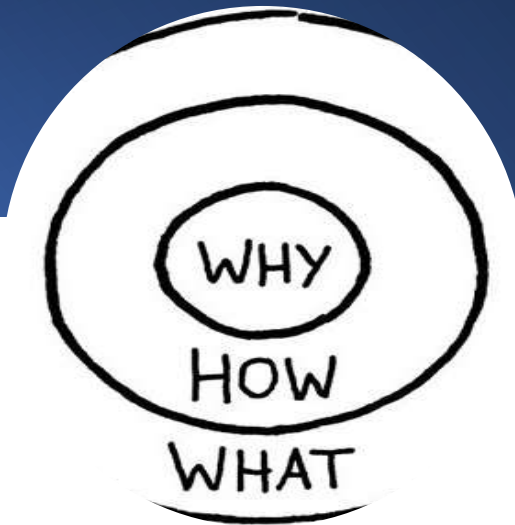
Bill Marianes is a transactional attorney with the law firm Troutman Sanders in Atlanta. When people ask him what he does for a living, he says "I'm a problem solver and dream facilitator." That's appropriate, because when people come to see a lawyer, he says, they either have a problem or something they want to accomplish. After hearing the Marianes elevator pitch, prospective clients are always lured into asking him more detail about what he does.

He never responds to the question, "What do you do?" with "I'm an attorney." That kind of response, he says, means, "I'm stuck with whatever box they put all the attorneys and lawyers in. I don't have a chance to distinguish myself."

*"I'm a problem solver  
and dream facilitator"*



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

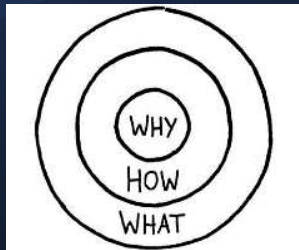
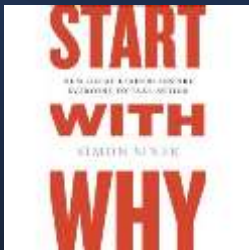


Over 54,212,375 views

[http://www.ted.com/talks/simon\\_sinek\\_how\\_great\\_leaders\\_inspire\\_action.html](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**

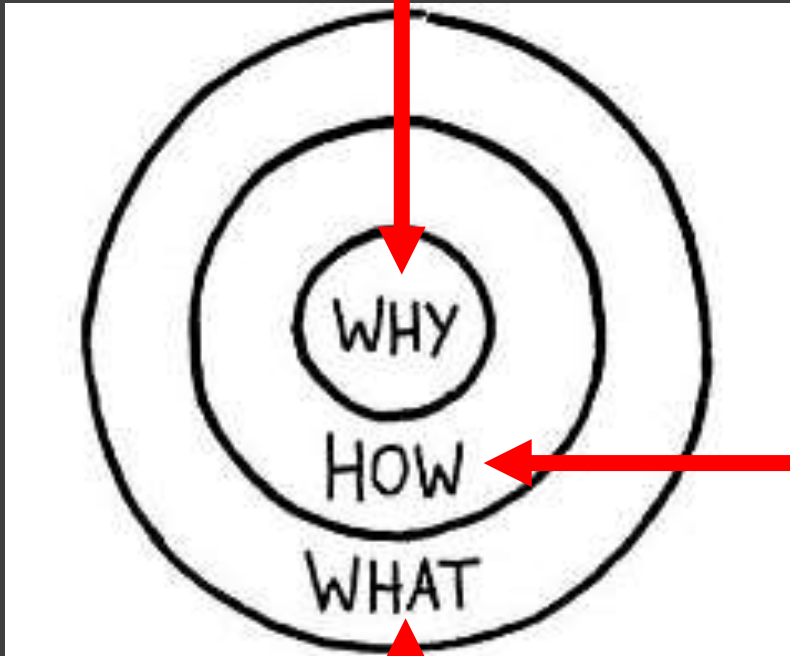


- ~ “How do you explain why some people are able to achieve things that defy all of the assumptions ...or what other similar organizations can do.”
- ~ “People don’t buy what you do, they buy why you do it, and what you do simply proves what you believe.”
- ~ “If you don’t know why you do what you do, 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



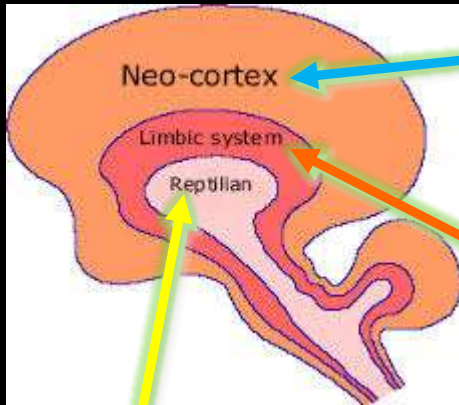
# Vision / WIGs

Where are we going and how will we get there?

# Mission

What do we do?

# Human Brain



**The Neo-cortex “Thinking” brain  
(where all language gets processed)**

**The Limbic “Feeling”  
brain (it has no  
capacity for language)**

**The Reptilian “Acting”  
brain (it drives action)**

**THE NEW BRAIN**  
RATIONAL

**THE MIDDLE BRAIN**  
EMOTIONAL

**THE REPTILIAN BRAIN**  
INSTINCTUAL

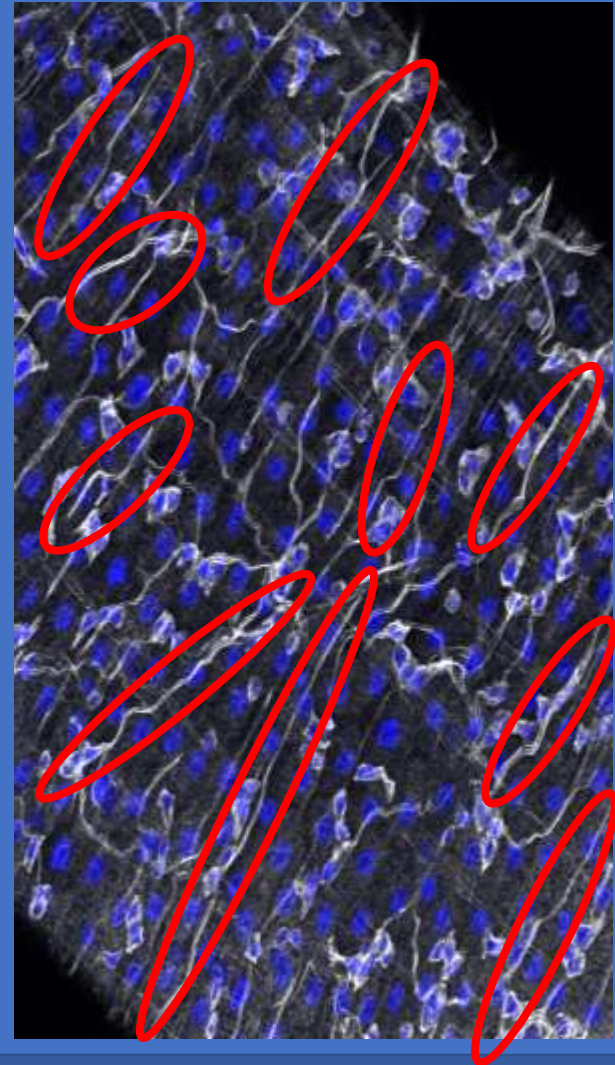
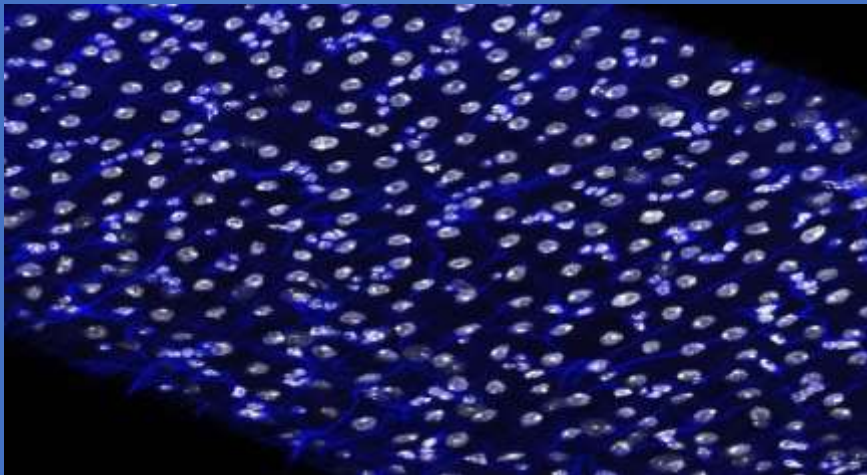


# Your Second Brain”<sup>1</sup>

*“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...”*



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

<sup>2</sup> 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)

This completes our  
Science Lesson!



## 2 Parts to a Why Statement

---

**TO = the contribution**

**SO THAT = the impact**

---



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.**



By the way, do you know your  
**WHY?**

**WHY** are you here on this earth?



**Additional  
reference  
examples are  
on pages 7 & 8  
of your  
handbooks**



**SAINT NICHOLAS**  
GREEK ORTHODOX CHURCH | ANN ARBOR, MICHIGAN

GREEK ORTHODOX  
METROPOLIS OF CHICAGO



COPTIC ORTHODOX DIOCESE OF  
OHIO, MICHIGAN, & INDIANA

SAINT MARK  
COPTIC ORTHODOX CHURCH



St. Nicholas  
Orthodox Church



ORTHODOX CHRISTIAN PRISON MINISTRY  
AN AGENCY OF THE ASSEMBLY OF BISHOPS





# Development Process

- 1. Everyone prepares their suggested Parish WHY Statement (or work with one other person to create one).**
- 2. Select a secretary (with good handwriting) who writes all suggested WHY Statements on the flip chart.**
- 3. After someone reads out loud all the proposed WHY Statements, your Facilitator will lead you through a straw poll where everyone selects their 2 favorites (even if it is one you did not draft).**
- 4. The two finalists will be written on the board, and any common words or elements will be circled.**
- 5. You then create a “mash-up” of the common words or elements to form a preliminary draft WHY Statement.**
- 6. You will agree by consensus on any edits to create a final WHY Statement.**
- 7. Some Parish and ministry WHY Statement examples are on pages 7-8 of the handbook.**

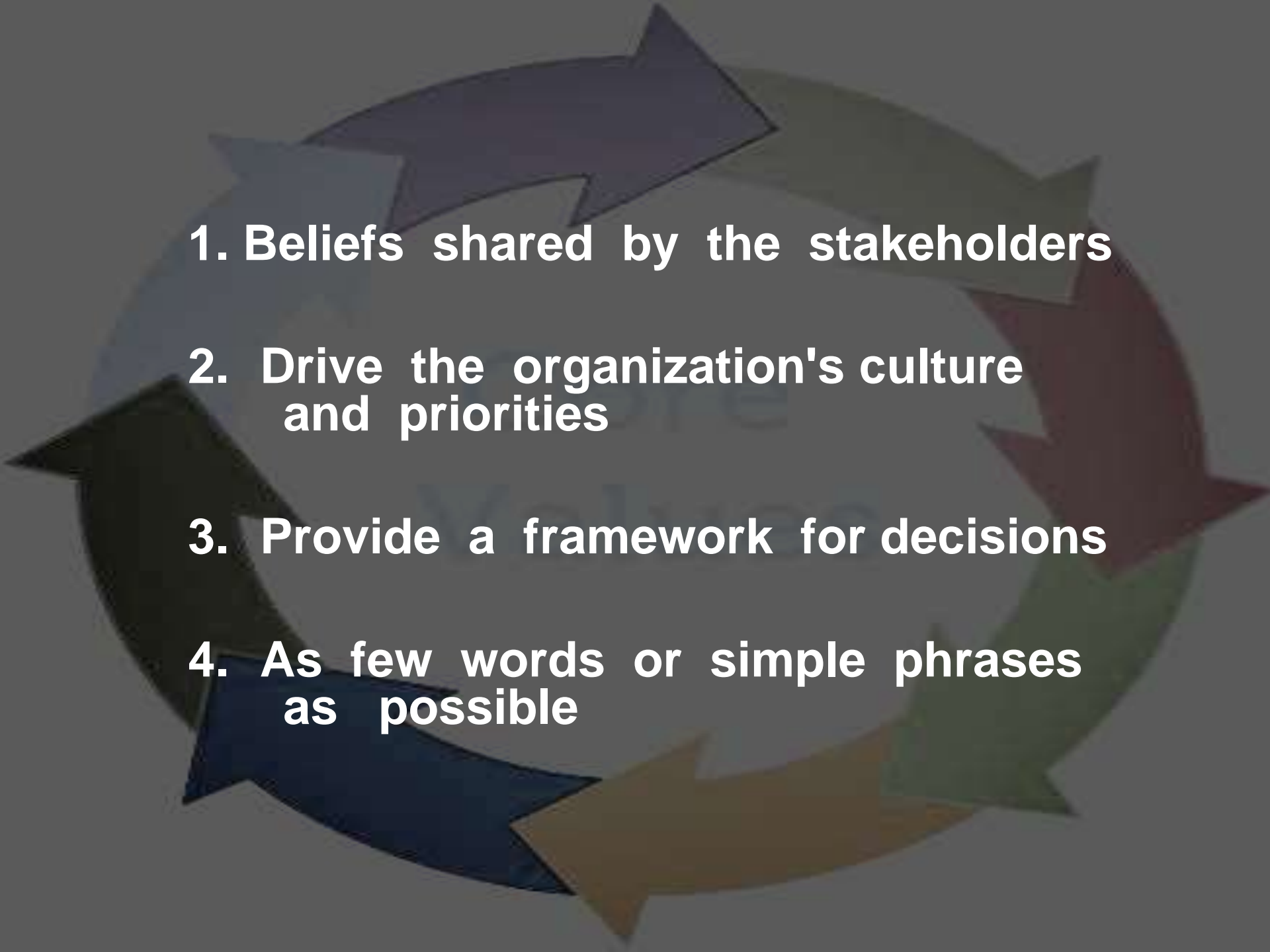


*~ Same room assignments - page 4.*

*~ WHY instructions are on pages 7-8.*

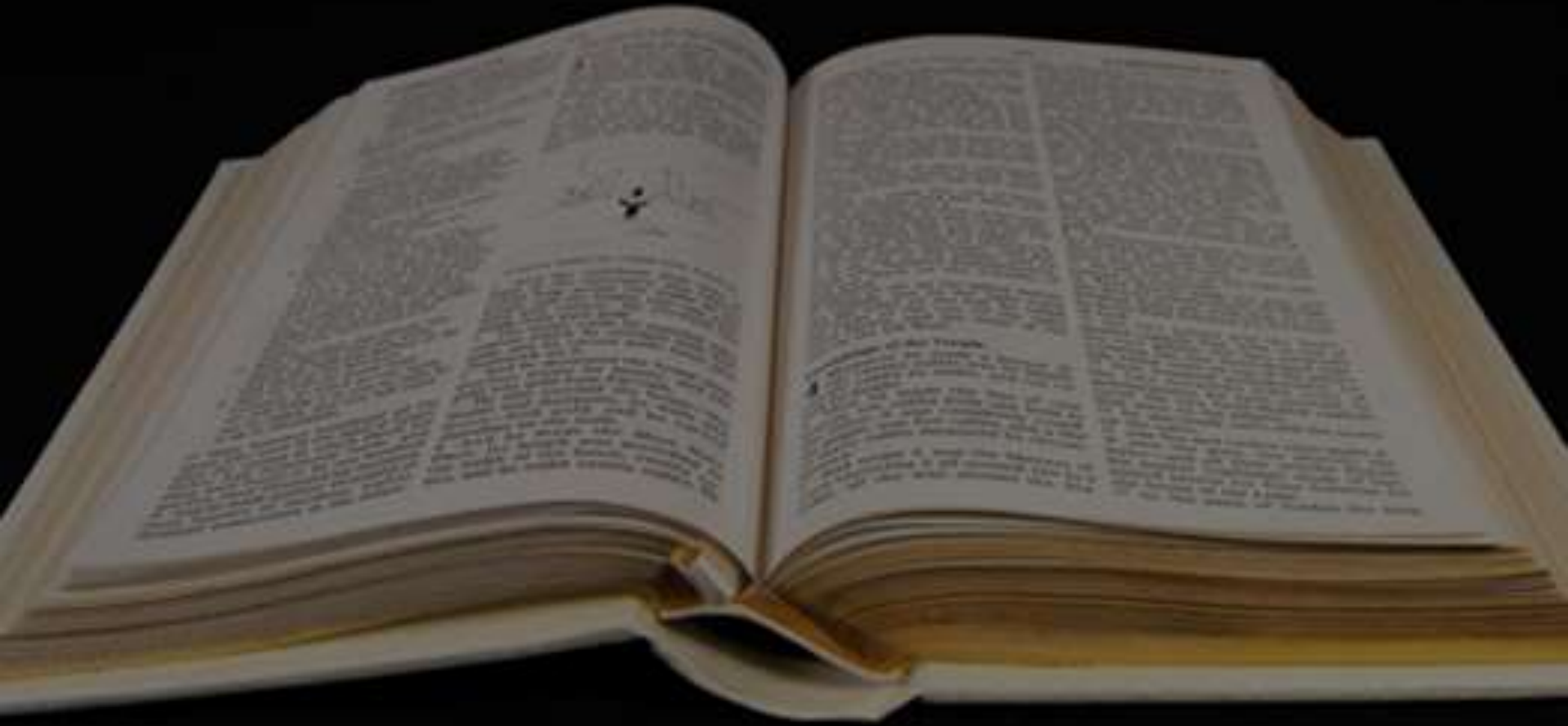


Core  
Values

- 
- 1. Beliefs shared by the stakeholders**
  - 2. Drive the organization's culture and priorities**
  - 3. Provide a framework for decisions**
  - 4. As few words or simple phrases as possible**



# 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



# Development Process

1. Use the Heat Mapped Core Values for your Parish in your Parish's packets.
2. The bold number in front of each Core Values item represents the number of times that item was mentioned. Start with the items mentioned most frequently.
3. The bold word(s) after the number is the short, suggested **SUMMARY DESCRIPTION** of those comments. You must decide if it needs editing to be more precise, concise, or accurate.
4. Only the most essential few items can make the final Core Values list. You decide how far down the list you will "**draw the line**" of the most mentioned and critical items. **The most popular items must make your final SWOT list** (although you can edit the words).
5. Make your decisions by **consensus based on the actual data in the Heat Mapped Document**, and **NOT** your personal opinion. Thus, something you think is important may not make the final list.
6. **Your Secretary** will fill out a flip chart listing **ONLY** your final Core Values.



*~ Same room assignments - page 4.*

*~ Core Values instructions are on page 9.*

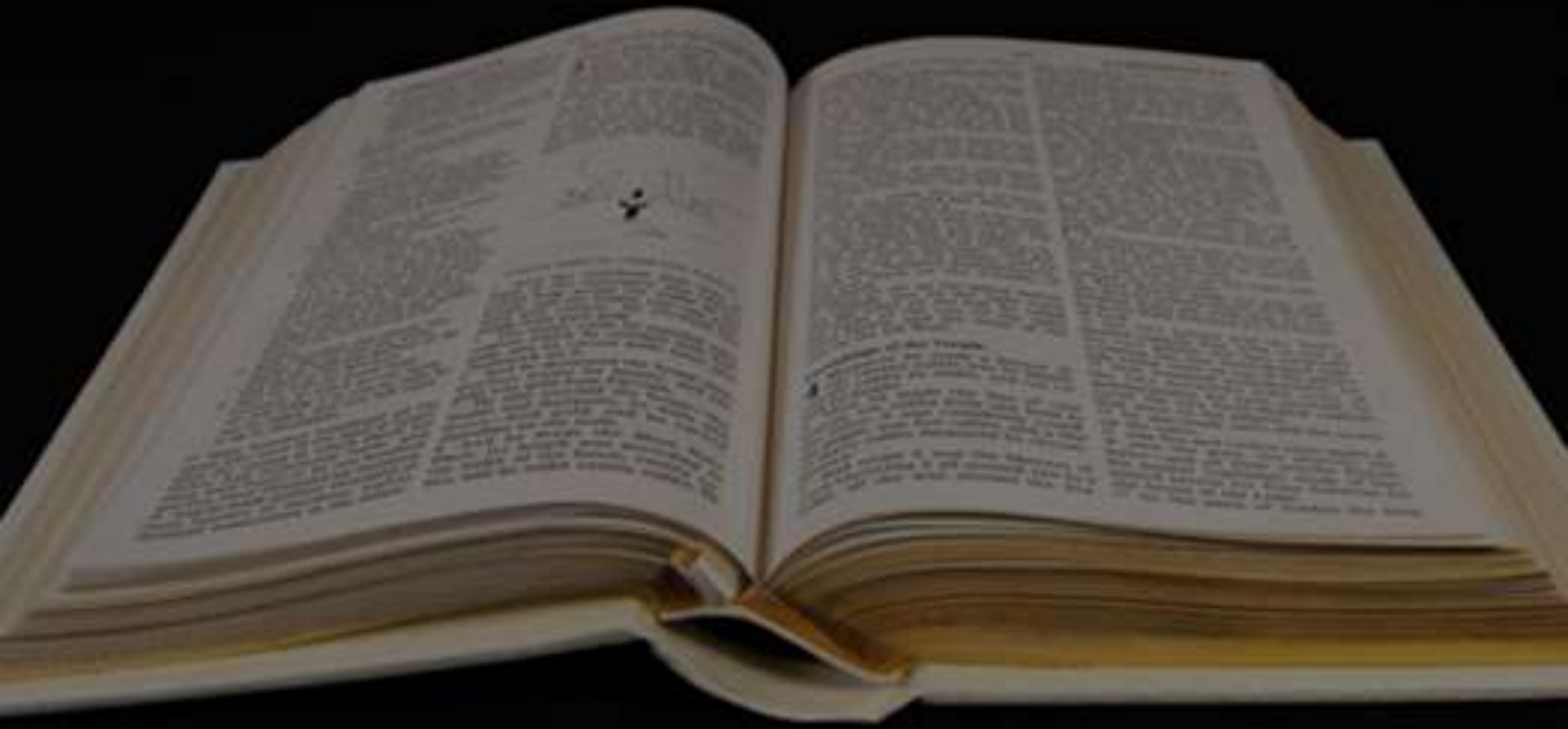
*~ Your Parish's heat mapped Core Values are in your Parish's packet.*



Mission

Statement

# A Mission Statement Is Biblical



The Great Commission  
Mission Part 2 (Matthew 28:18-20)

---

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





## Mission Statement

Answers strategic planning question #3:

What do we do?

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





## Key Elements

**Memorizable** – easy for people to remember

**Inspirational** – should excite and inspire people

**Strategic** – significant things your church does

**Short** – the shorter the easier to live and embrace

**Inclusive** – follow Christ's example and welcome all

**Orthodox** – consistent with Orthodox theology

**Negotiated** – parish consensus must embrace it



## Key Elements

### Some Key Mission Statements Principles To Consider

- ~ Your Mission Statement does NOT have to be different from other churches, it just has to say what YOU do
- ~ It must be substantive enough to be meaningful
- ~ It must be short enough to be memorable and memorizable
- ~ It does NOT include everything your parish does (just the most critical things)
- ~ If you want your parish to grow, think about how seekers, new spouses and converts will react to it
- ~ The more exclusionary it is, the less welcoming your parish is
- ~ A good Mission Statement should be timeless

**“Date your Vision, marry your Mission, die with your Why!”**



# Example Parish Mission Statement Submissions

- The mission of \_\_\_\_\_ Greek Orthodox Church is to promote and grow in the faith that brings all who enter in a closer relationship with God through the Word of His one and only Son, Jesus Christ;
- Bringing Families and Individuals in the greater metro area closer to Christ;
- We are leaning to be always rejoicing, praying and thanking you, Christ, Our Savior, for doing 'everything to bring us to Heaven and grant us Your kingdom to come;
- The Mission of \_\_\_\_\_ is to welcome ALL people who seek the saving grace of Jesus Christ, and fuse them into one community - - through the worship and the beliefs of the Orthodox Church;
- We will grow a Church community in Christ that embraces and teaches the Orthodox Christian faith;
- Love God, love others;
- Bringing families and individuals in our metropolitan area area closer to Christ;
- Our mission is to inspire others to be the best version of themselves like Christ said: be like your father in heaven. Hence bringing people closer to Christ and His mother church;



# Example Parish Mission Statement Submissions Heat Map

**9 - CHRIST CENTERED** - closer to Christ; closer to Christ; bringing people closer to Christ; Christ-centered community thanking Christ; Bring people closer to Christ; make Christ present; grow a Church community in Christ; Word of His one and only Son, Jesus Christ; seek the saving grace of Jesus Christ,

**6 - WELCOMING ALL** welcome ALL people; one community; engages; serves all people; Families and Individuals; families and individuals

**4 - ORTHODOX CHRISTIAN FAITH** - beliefs of the Orthodox Church; embraces and teaches Orthodox Christian faith; bringing people closer to mother church; promote and grow in the faith

**4 - OUTREACH** - greater metro area; In our city area; our city; in city

**3 - GOD** - Love God; be like your father in heaven; closer relationship with God;

**2 - TEACH** – teaching; guides,

**2 - LOVING** - loves, love others;

**2- WORSHIPING / PRAYING** - worship; praying

**2 - HEAVEN** - bring us to Heaven; grant us Your kingdom to come;

### **ONE-OFFS**

~ and beyond

~ preaching,

~ healing;

~ rejoicing,

~inspire others to be the best version of themselves



**Christ-centered**

**Welcoming all**

**Orthodox Christian Faith**

**Outreach**

**God**

**Teach**

**Loving**

**Worshiping / praying**

**Heaven**

**Example  
Parish Mission  
Statement  
Submissions  
Key Concept  
From Heat  
Map**



## Possible Parish Mission Statement

~~Christ-centered~~

~~Welcoming all~~

~~Orthodox Christian  
Faith~~

~~Outreach~~

~~God~~

~~Teach~~

~~Loving~~

~~Worshiping / praying~~

Heaven

**We welcome all to  
worship God in a loving  
Christ-centered Orthodox  
Christian Church that  
teaches, worships, prays,  
and serves.**

# Selected Sample Parish Mission Statements

We are a worshiping community, living and sharing the Faith given by Christ to the Apostles.

We exist to

- BE disciples,
- MAKE disciples,
- GROW disciples of Jesus Christ.

We welcome, engage, serve, and enrich the lives of all to live an Orthodox Christian way of life, through worship and outreach.

We reach out and welcome all to experience and share Christ's love and the apostolic faith through worship, education, fellowship, stewardship, and service.



# Selected Sample Parish Mission Statements

The Mission of \_\_ is to:

... bring people closer to Christ and each other.

...Love God, Love Others, Make Disciples.

... be a Christ-centered community that loves, guides, engages and serves all people.

... worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy, and service to others.

... energize, cultivate and guide the faithful by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.

... be a Christ-centered community welcoming all people to grow spiritually in the fullness of the Orthodox Christian faith through love, worship, and service.



# Development Process

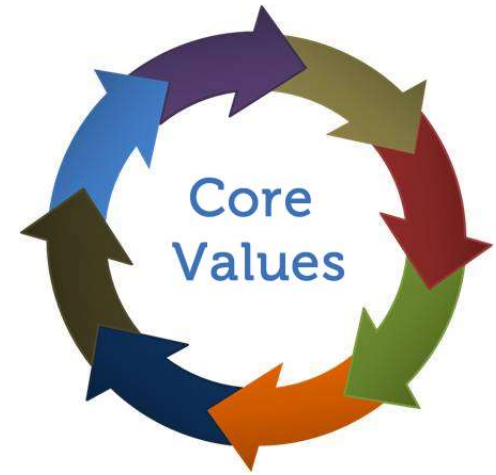
1. Use the Heat Mapped Mission Statement elements for your Parish in your Parish's packets.
2. The bold number in front of each item represents the number of times that item was mentioned. Start with the items mentioned most frequently.
3. The bold word(s) after the number is the short, suggested **SUMMARY DESCRIPTION** of those comments. You must decide if it needs editing to be more precise, concise, or accurate.
4. Stitch together **the most commonly mentioned heat mapped key concepts** with connecting words to form the shortest meaningful sentence possible
5. Make your decisions by **consensus based on the actual data in the Heat Mapped Document**, and **NOT** your personal opinion. Thus, something you think is important may not make the final list.
6. Keep tweaking until you have reached consensus
7. Your Secretary will fill out a flip chart listing **ONLY** your final Mission Statement.



- ~ Same room assignments - page 4.*
- ~ WHY instructions are on pages 7-8.*
- ~ Core Values instructions are on page 9.*
- ~ Mission Statement instructions are on pages 9-10.*
- ~ Your Parish's heat mapped Core Values and Mission Statement results are in your Parish's packet.*



Share

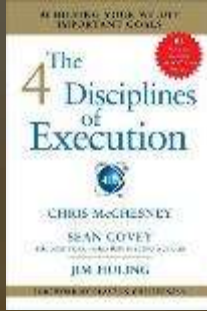




Strategic Areas Of:

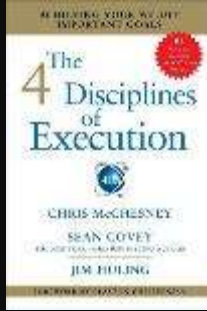
FOCUS

# The Power of FOCUS



- ~ Human beings are genetically hardwired to do a very small number of things at a time with excellence<sup>1</sup>
- ~ Focus on the most critical things produces larger scale positive impacts
- ~ Are they the most critical things that can have large scale impacts

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



---

***“In the moment, urgency always trumps importance”***

---



Chris McChesney

Franklin Covey 4DX

**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.**





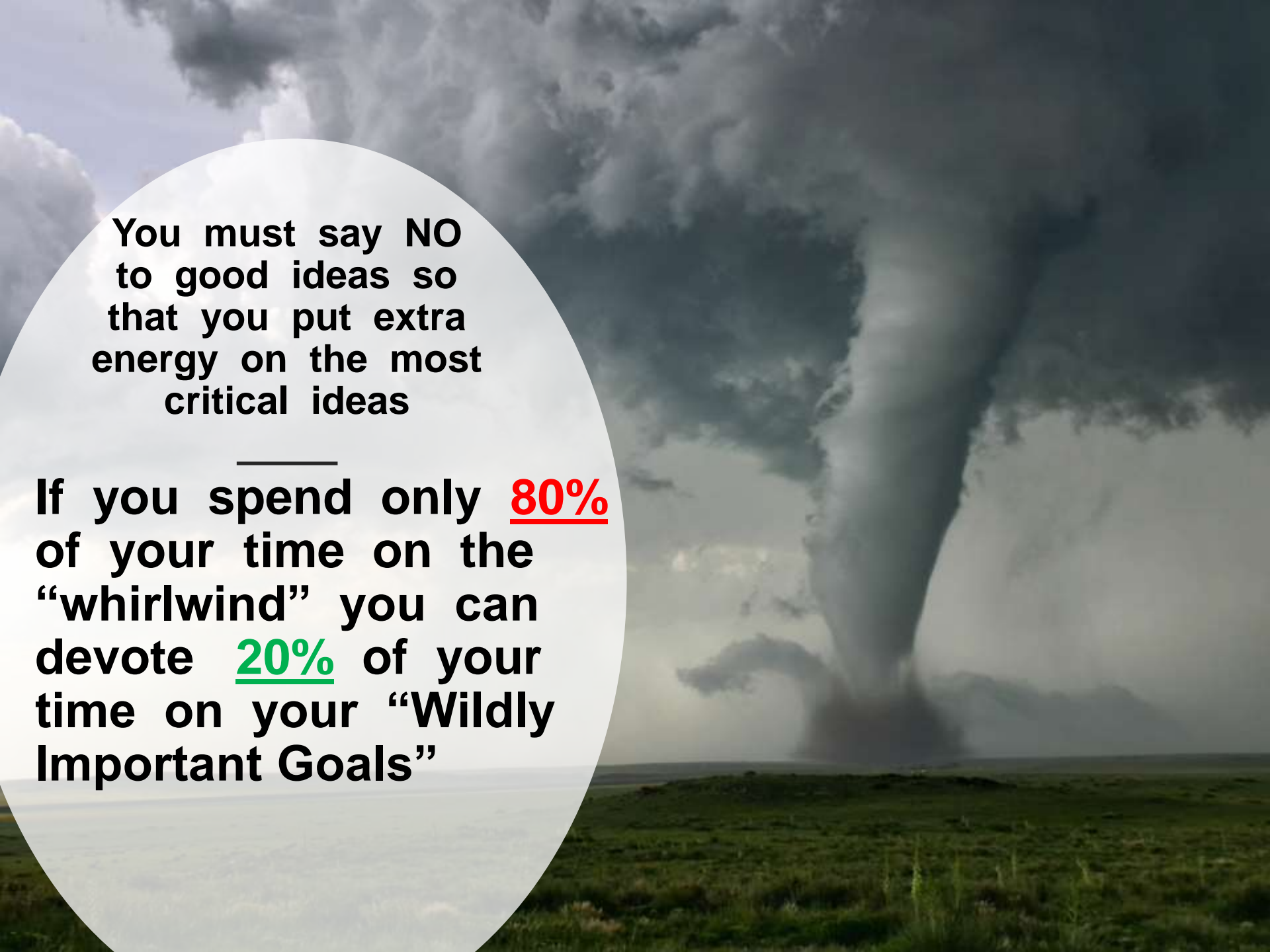
**“We are the most focused company that I know of or have read of or have any knowledge of. We say no to good ideas every day.**

**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**



**You must say NO  
to good ideas so  
that you put extra  
energy on the most  
critical ideas**

---

**If you spend only 80%  
of your time on the  
“whirlwind” you can  
devote 20% of your  
time on your “Wildly  
Important Goals”**

# Strategic Areas of Focus Are Biblical



# The Great Commission

## Mission Part 2 (Matthew 28:18-20)

---

***“ ...baptizing them in the name of the Father and the Son and the Holy Spirit, teaching them to observe all that I commanded you.”***



# The Great Commission Mission Part 3 (Acts 1:8)

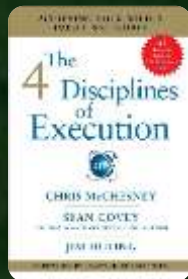
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**“... and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the ends of the earth.”**



# The 4 Disciplines of Execution

1. Determine your Wildly Important Goals (WIGs)
2. Act on Lead Measures
3. Create a compelling scoreboard
4. Create a cadence of accountability



# Gaylord Opryland

the largest non-gaming in-hotel exhibition space.



With 2,888 rooms, it is one of the 30 largest hotels in the world.

# Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines



1. **“Once you set the high-level WIG (‘the war’), defining ‘the battles’ becomes the leader’s key responsibility.”**
2. **“Leaders must ask: ‘What is the fewest number of battles necessary to win the war?’ ”**



# Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines



~ After much debate, they chose a “Customer Satisfaction” WIG of:

Move the guest “top box” satisfaction score of 5

(on a scale of 1 to 5) from 42% to 55% by the end of the year.

# **Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines**

## **Opryland research showed:**



- 1. Negative opinions formed in the first 15 - 20 minutes are almost impossible to change.**
- 2. Once the inevitable “problem” occurs, it’s all about WHAT the hotel does next.**
- 3. Most people ate at one of the restaurants, so food quality was critical.**

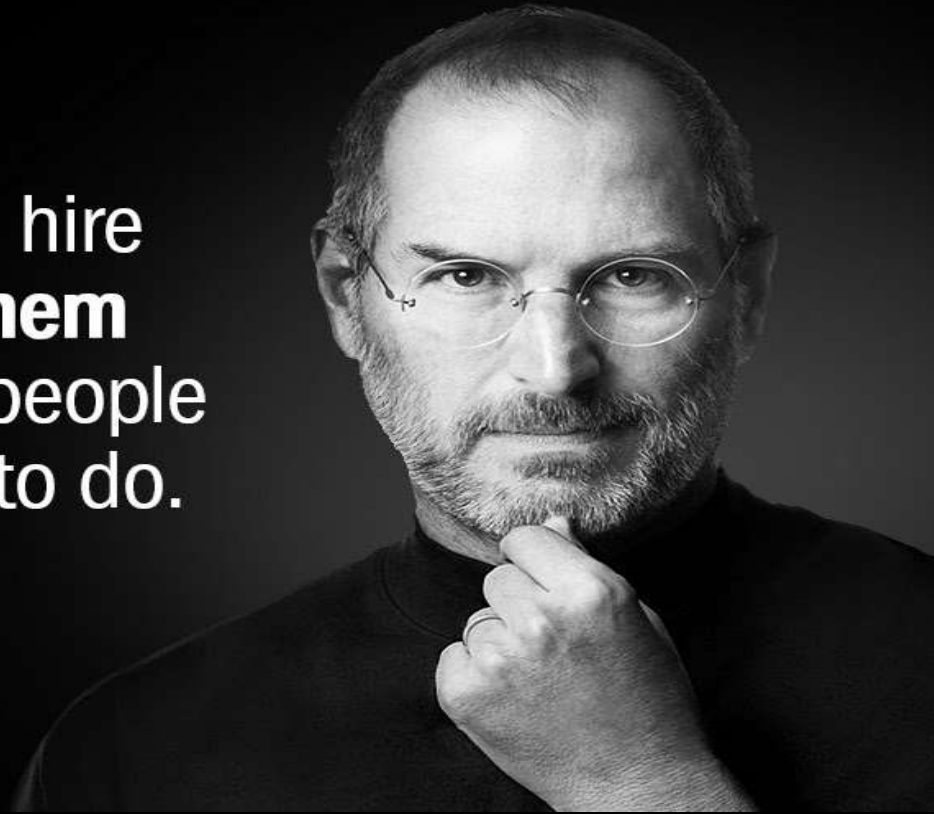
# Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines

Opryland Top Box Score Research Required The Following Target to meet their Overall WIG:



It doesn't make sense to hire smart people and **tell them** what to do; we hire smart people so they can **tell us** what to do.

– *Steve Jobs*



# Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines

**Team WIGs were developed to achieve the Overall WIG**



- ~ **Front desk team focused on improving check-in speed**
- ~ **Housekeeping focused on increasing quick room availability**
- ~ **Bellstand focused on decreasing the bag delivery time from 106 min to 20 min**

# Translating Broad 4DX Strategies (WIGs) Into Specific Finish Lines

The Opryland WIG was to raise top box score from **42%** to **55%** in 12 months)



After only **9** months of intense focus, they raised their Top Box score from **42%** to **61%**



# Development Process

1. Decide the fewest (2-3) major strategic areas your Parish will focus on to have the most significant impact. “*The few things that can change everything.*”
2. Use the Strategic Areas Of Focus (SAF) Heat Mapped Document to see what was identified before the retreat.
3. **IMPORTANT NOTE:** the Heat Mapped SAFs were suggested BEFORE our retreat and must be re-examined and re-evaluated through the lens of your Parish’s SWOT, EPA, WHY, Core Values, and Mission. These pre-retreat ideas may not be the most important now that you have thoroughly analyzed your Parish data. So, you are **NOT** bound to stick with the items most identified in the Heat Mapped data if you have more relevant data pointing you to a more critical strategic area of focus.
4. Reach a consensus on ONLY TWO or THREE SAFs upon which the Parish will focus with disproportionate energy to make the most significant transformation and difference.



# Development Process

5. Start by considering how to address the consensus biggest Parish Weaknesses first. The SAFs **MUST ADDRESS** the most significant Weaknesses.
6. Identify Two or Three SAFs only!
7. Have your secretary write the SAFs on a flip chart page. SAFs should be concise phrases or single words (just like the Summary Description words). They should summarize the longer-term strategic area in which specific Strategic SMART Goals will be developed.
8. Do **NOT** draft actual specific Strategic SMART Goals. We are just looking for the target areas we want to address to attack our most significant Weaknesses (e.g., Stewardship & Engagement, Leadership, Youth & Young Adult Ministries, Welcoming, Facilities, Religious Education, etc.). From these 2-3 SAFs, we will eventually create specific Strategic Goals.





## Development Process

9. **NOTE THIS CHANGE:** Ignore items 9 and 10 at the top of page 11 because you already did your Low Hanging Fruit with your Weaknesses

10. If you have time left over before 5:00 p.m. (and you should) re-discuss your WHY, Core Values, Mission Statement, and Low Hanging Fruit based on what you heard for other Parishes plus any inspirations of the Holy Spirit and agree by consensus to any changes to any of those items. You are NOT required to change anything. This just gives you the time and space to do so.



*~ Strategic Areas of Focus instructions are on pages 10-11.*

*~ Your PRE-RETREAT Parish's heat mapped SAFs results are in your Parish's packet.*



GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΥΛΟΝΗΣ

# Strategic Planning Retreat Day 2

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

Proverbs 29:18

Bill Marianes



STEWARDSHIP  
CALLING





GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ

# Strategic Planning Retreat Day 3

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

Proverbs 29:18

Bill Marianes



STEWARDSHIP  
CALLING



# Your Strategic Planning Page

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

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

This presentation and all your ongoing work product can be found under the Strategic Planning tab at the page for: Metropolis of Boston Four Parish Strategic Plan

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

WHY? STEWARDSHIP **STRATEGIC PLANNING** INTERNET RADIO & PODCASTS KEYNOTES & LEADERSHIP RESOURCES

PERSONAL

BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING

**METROPOLIS OF BOSTON – FOUR PARISH STRATEGIC PLAN**

CONCORD – HOLY TRINITY STRATEGIC PLAN

EAST LONGMEADOW – ST. LUKE STRATEGIC PLAN

LEXINGTON – ST. NICHOLAS STRATEGIC PLAN

SOMERVILLE – DORMITION STRATEGIC PLAN

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

Metropolis of Boston

By the grace of God, we are continuing their Lilly Endowment Thriving Congregations work in progress until the end of 2023.

through Strategic Planning as a part of Holy Trinity- Concord; St. Luke's - East Longmeadow; St. Nicholas - Somerville. These pages will contain all of their parish websites.

The first ever 4 parish retreat is planned for April 28-30, 2023 at the St. Methodios Faith and Heritage Center in Contoocook, New Hampshire.

Share this: Email Print Twitter

# Strategic Planning Retreat Schedule – (pages 3-4)

## 1. Retreat Day 1 (Friday – April 28, 2023)

- a. 5 – 6 Dinner (all parishes together)
- b. 6 – 7 Team Building (all parishes together)
- c. 7 – 8:30 Setting the Stage, Facts and Figures, and Retreat Planning Process (all parishes together)
- d. 8:30 – 11 Parishes Break Out to Reach Consensus on Parish SWOT (parishes work separately)

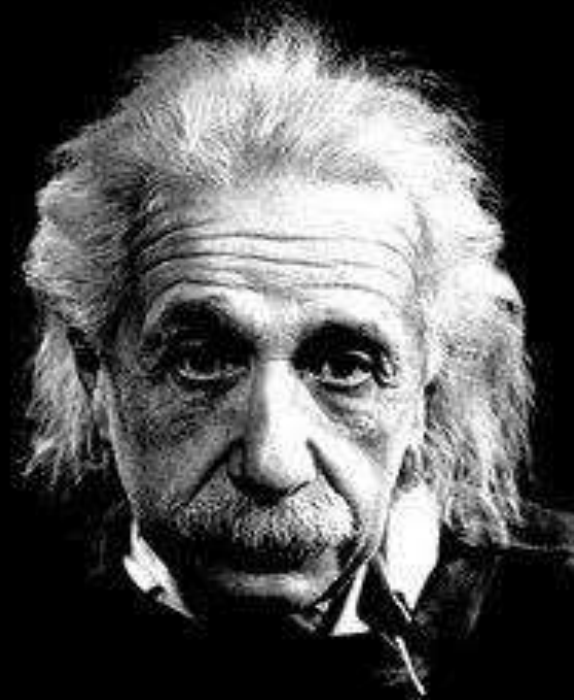
## 2. Retreat Day 2 (Saturday – April 29, 2023)

- a. 8 – 8:30 Breakfast
- b. 8:30 – 9:30 Training on WHY Discovery, Core Values Creation, Mission Statements (all parishes together)
- c. 9:30 – 12:30 Each Parish Reaches Consensus on its WHY, Core Values and Mission Statement (parishes work separately)
- d. 12:30 – 2:00 Working Lunch To Collectively Share Results (all parishes together)
- e. 2:00 – 3:00 Training on Determining Strategic Areas of Focus and S.M.A.R.T. Goals (all parishes together)
- f. 3:00 – 5:00 Each Parish Reaches Consensus on Strategic Areas of Focus and Discuss Preliminary S.M.A.R.T. Goal ideas (parishes work separately)
- g. 5:00 – 6:30 Working Dinner To Collectively Share Results
- h. 6:30 Fellowship (all parishes together)

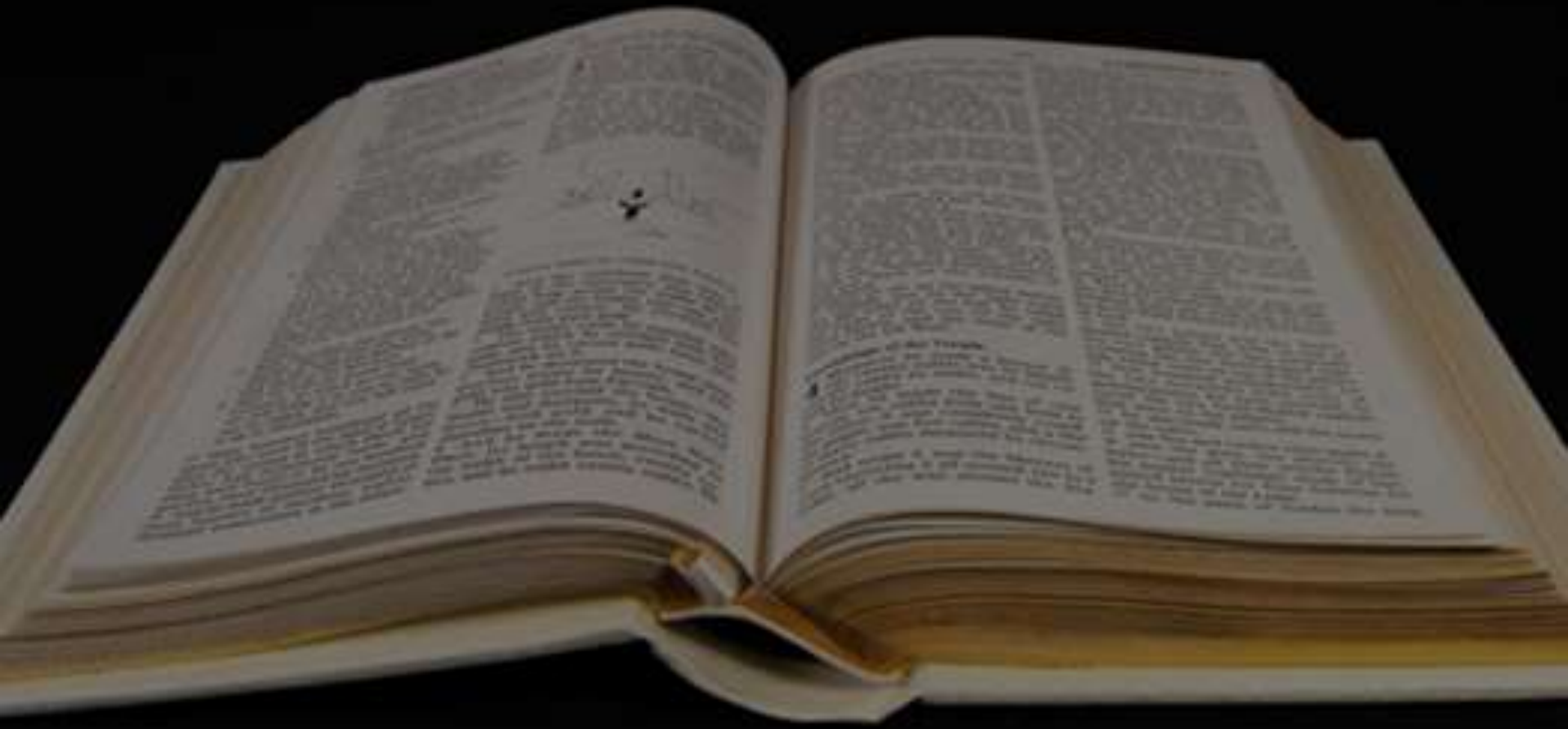
## 3. Retreat Day 3 (Sunday – April 30, 2023)

- a. 8:30 – 9:30 Divine Liturgy (all parishes together)
- b. 9:30 – 10:15 Breakfast
- c. 10:15 – 11:30 Training on Next Steps to Develop S.M.A.R.T. Goals and Action Plans (all parishes together)
- d. 11:30 – 12:15 Lunch
- e. 12:15 – 2:00 Parishes Finalize WHY, Core Values, Mission, Strategic Areas of Focus (parishes work separately)
- f. 2:00 – 3:30 What Comes Next, Final Q & A and Dismissal (all parishes together)

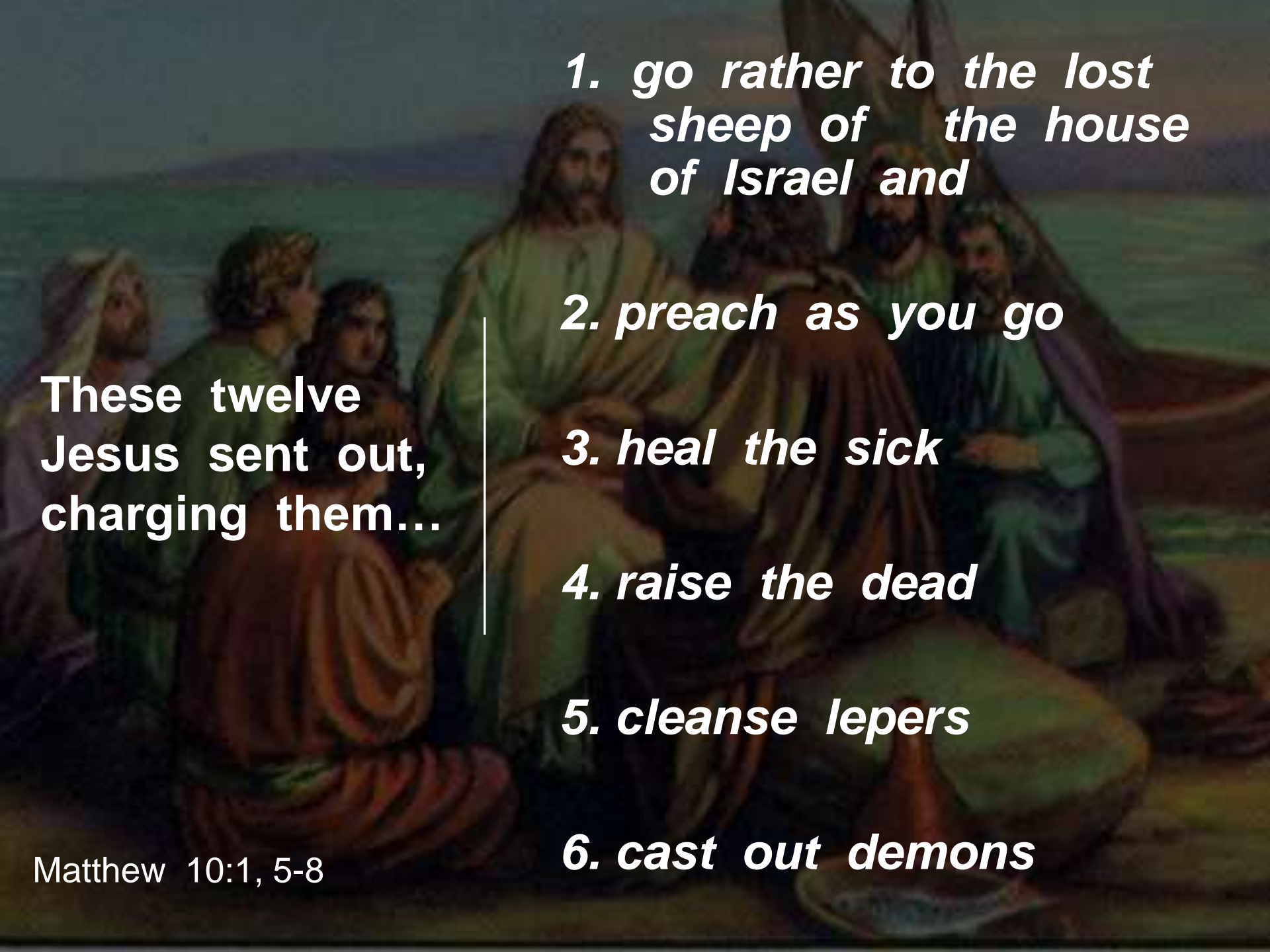
"WE CANNOT  
SOLVE OUR  
PROBLEMS  
WITH THE SAME  
THINKING WE  
USED WHEN WE  
CREATED THEM"



# Strategic S.M.A.R.T. (Wildly Important) Goals Are Biblical







**1. go rather to the lost  
sheep of the house  
of Israel and**

**2. preach as you go**

**3. heal the sick**

**4. raise the dead**

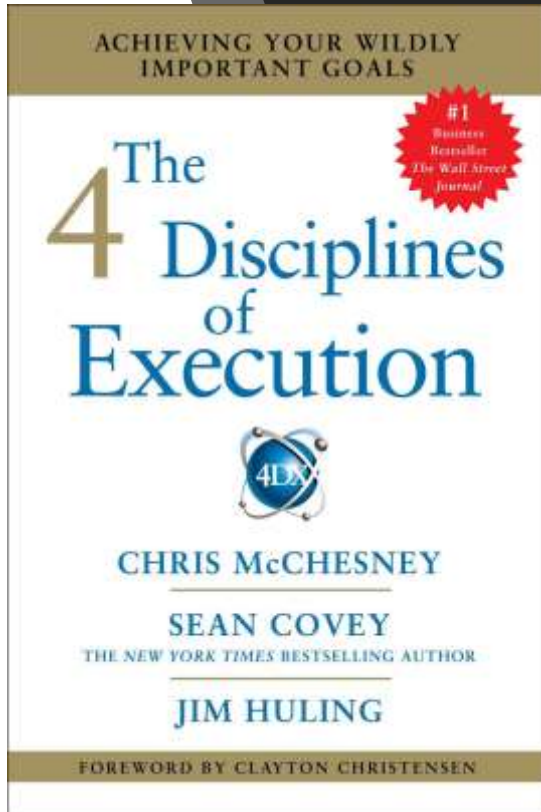
**5. cleanse lepers**

**6. cast out demons**

**These twelve  
Jesus sent out,  
charging them...**

**Matthew 10:1, 5-8**

# 1. Determine your WIGs (Wildly Iimportant Goals)



## 2. Act on Lead Measures

## 3. Create a compelling scoreboard

## 4. Create a cadence of accountability



**W**ildly  
**I**mportant  
**G**oals

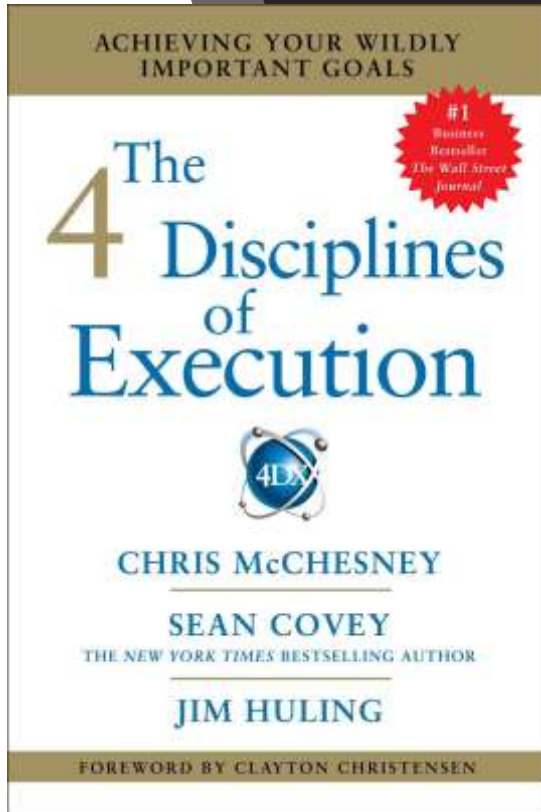
~The most important objectives that can only be achieved with special attention

~ This discipline allows focus on “the few things that can change everything”

~ The WIG language is:  
“From X, to Y, by when”

(e.g., raise stewardship from \$X to \$Y by 12-31-23)

1. Determine your WIGs  
(Wildly Important Goals)



2. Act on Lead Measures

3. Create a compelling scoreboard

4. Create a cadence of accountability



# Act On Lead Measures

- 
- ~ Interim Goals (Lag Measures) track the ultimate success of every major stage the Goal
  - ~ Interim Actions (Lead Measures) track the specific activities that drive a Lag measure
  - ~ By the time you see Lag Measures, you can't do anything to fix them
  - ~ Lead Measures predict the success of the Lag Measure and can be influenced directly by the team
  - ~ Lead Measures must be predictive and influenceable)

# Act On Lead Measures



**I have been losing  
the same 25  
pounds for 25  
years.**

**Very unsuccessfully!**



# Act On Lead Measures

- ~ Lead measures are
  1. PREDICTIVE of the Lag Measure changes
  2. INFLUENCEABLE - directly by the team
- ~ Applying disproportionate energy on Lead Measures helps achieve your Lag Measures
- ~ *“Managing an entity by looking at year end data (a lag measure) is like “driving a car by looking in the rearview mirror”<sup>1</sup>*

<sup>1</sup> W. Edwards Deming – father of the Quality Movement

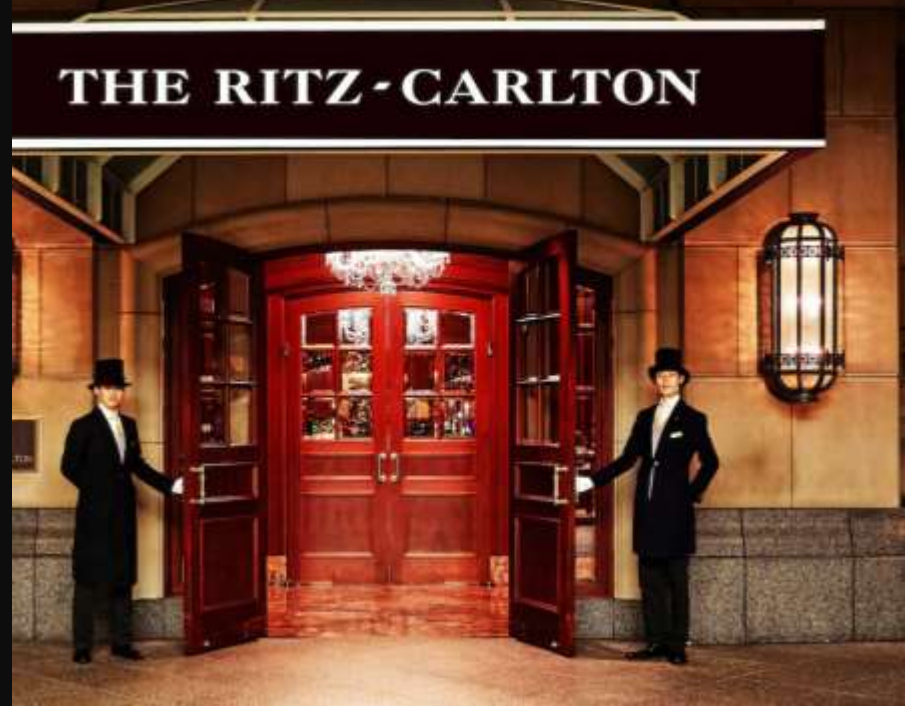
---

**Which is the  
best luxury  
global hotel  
chain?**

---



**THE RITZ-CARLTON**





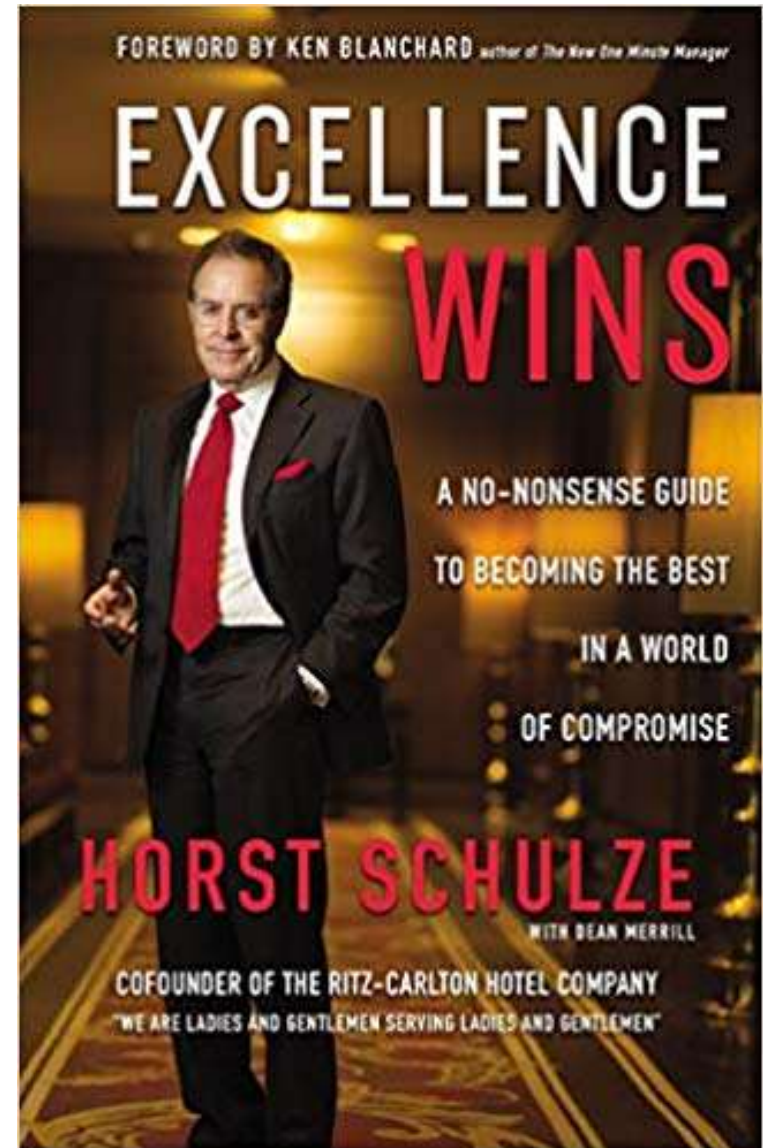
# How did Horst Schulze focus on Lead Measures to create the most premier hotel chain?

Andy Stanley Leadership Podcast  
Part 1 with Horst Schulze:

<https://podcasts.apple.com/us/podcast/building-vision-with-horst-schulze-part-1/id290055666?i=1000446163631>

Andy Stanley Leadership Podcast  
Part 2 with Horst Schulze:

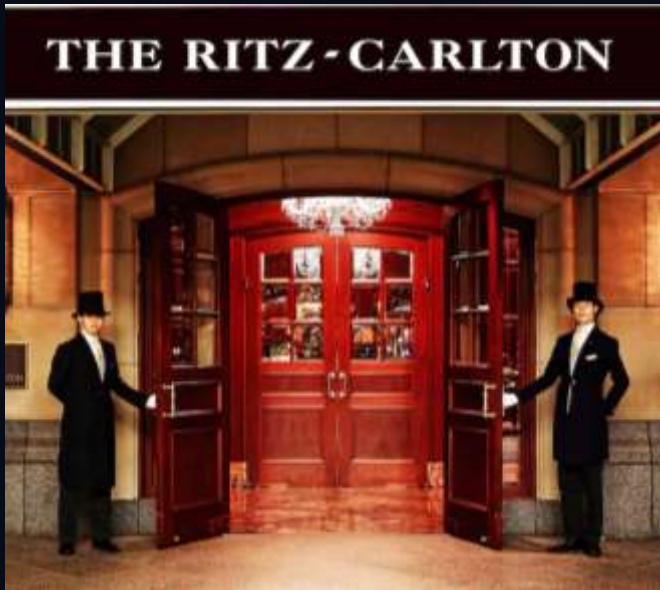
<https://podcasts.apple.com/us/podcast/building-vision-with-horst-schulze-part-2/id290055666?i=1000448382130>



# Act on Lead Measures Using Empirical Data

~ What are some important  
Lag Measures for the Ritz?

1. Customer satisfaction scores
2. Customers repeat visits/rebook at Ritz
3. Customer spend for each day/whole stay



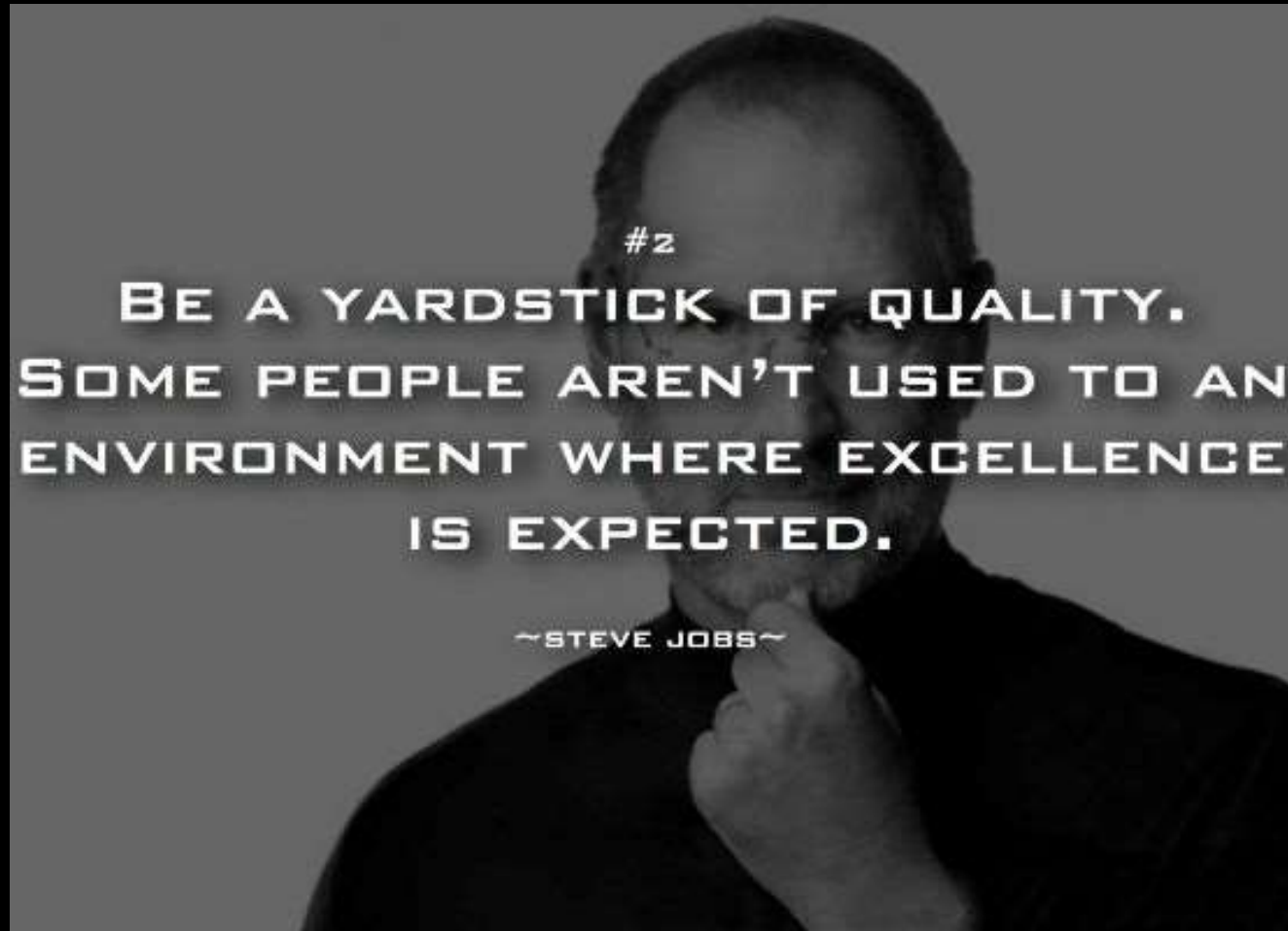
## Act on Lead Measures Using Empirical Data

~ What did Ritz Carlton determine was the most important Lead Measure that influenced the Lag Measures?

**EMPLOYEE  
SATISFACTION**



# What Are Our Expectations?



#2

BE A YARDSTICK OF QUALITY.  
SOME PEOPLE AREN'T USED TO AN  
ENVIRONMENT WHERE EXCELLENCE  
IS EXPECTED.

~STEVE JOBS~

# SMART Goals

The “SMART” goal process helps ensure our Strategic Wildly Important Goals can be realistically achieved

S



**SPECIFIC**

M



**MEASURABLE**

A



**ATTAINABLE**

R



**RELEVANT**

T



**TIME-BOUND**

# SMART Goals



**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?

# Action Plan

~ Answers strategic planning question #4:

## How will we get there?

- ~ The "rubber hits the road" with specific activities outlined in step-by-step detail
- ~ For each step to you identify:
  1. the specific detailed actions
  2. who does it
  3. the deadline for completion
  4. how we know it is completed





# Stewardship & Engagement

## SMART Goal 2



We will **research, develop, and implement** a **best practices, effective youth and adult Stewardship Ministry Engagement Program** (the “Stewardship & Engagement Program”) that will achieve the following “**Stewardship & Engagement Targets**” within **35 months**:

- (a) **create a stewardship ministry** that uses **effective communications strategies and full transparency** to personally **reach and engage all youth and adult** parishioners to invest their time and talents;
- (b) **increase ministry engagement** of parishioners by **at least 33%** through identifying and engaging the diverse talents of all parishioners;
- (c) **increase the parishioner financial stewardship** so that **all parish operating expenses (including at least 10% of expenses given to parish-chosen external charities and philanthropies)** are **paid solely through parishioner stewardship**;
- (d) establish a **parish benevolence fund** to help parishioners in need with **at least \$15,000 available**; and
- (e) establish a **planned giving program** and endowment in which **at least 5% of parishioners** participate.



# Stewardship & Engagement

## SMART Goal 2

- Interim Goal 1: **Research** the most effective stewardship and engagement programs within **3 months**
- Interim Goal 2: **Develop** the most effective parish stewardship and engagement program the “Stewardship & Engagement Program” within **4 months**
- Interim Goal 3: **Recruit and train** the parish Stewardship & Engagement “Ambassadors” within **2 months**
- Interim Goal 4: **Implement** the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within **24 months**
- Interim Goal 5: Compile and **assess the results** of the Stewardship & Engagement Program and make necessary improvements within **2 months**

# Stewardship & Engagement

## SMART Goal 2

- **LEAD 1:**
  - A: recruit team**
  - B: determine stewardship and engagement key definitions and effectiveness metrics and timelines**
  - C: analyze the parish baseline on those key effectiveness metrics and identify parish impediments to success**
  - D: identify at least 3 stewardship and engagement, 3 endowment and 3 benevolence fund programs to consider**
- **LEAD 2:**
  - A: evaluate researched programs for effectiveness against key performance metrics and parish baselines**
  - B: modify or develop new stewardship and engagement programs for utilization at the parish (the “Stewardship & Engagement Program”)**
  - C: finalize parish Stewardship & Engagement Program and establish quarterly and/or monthly performance benchmarks**
- **LEAD 3:**
  - A: identify Stewardship & Engagement Program "Ambassadors" to deliver Stewardship & Engagement Program**
  - B: develop Ambassadors training programs**
  - C: train the Ambassadors**
- **LEAD 4:**
  - A: implement Stewardship & Engagement Program based on determined monthly and quarterly performance benchmarks**
  - B: continue Ambassadors’ follow-up with parishioners until Stewardship & Engagement Targets are achieved**
- **LEAD 5:**
  - A: obtain qualitative and quantitative data from Stewardship & Engagement Program effectiveness**
  - B: analyze all data and finalize Stewardship & Engagement Program assessment and make all necessary improvements**



# Stewardship & Engagement SMART Goal 2 Action Plan



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



# Stewardship & Engagement SMART Goal 2 Action Plan



| Key Actions Necessary To Achieve SMART Goal 2  | Responsible Party                       | Deadline Timetable    | Completion Confirmation Test  |
|--|---|-----------------------|---|
| <b><u>IG 2: Develop the most effective Stewardship Program within 4 months</u></b>   |   |                       |   |
| <b>5. Evaluate researched stewardship and engagement, endowment, and benevolence fund programs for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.</b>   | Stewardship & Engagement Program Team 2 | 2 months after step 4 | Evaluation of alternative stewardship and ministry engagement, endowment and benevolence fund programs is completed |
| <b>6. Modify or develop new stewardship and engagement, endowment, and benevolence fund program for utilization at the parish (the “Stewardship &amp; Engagement Program”) and finalize Stewardship &amp; Engagement Program and establish monthly performance benchmarks.</b> | Stewardship & Engagement Program Team 2 | 2 months after step 5 | Stewardship & Engagement Program is finalized, and monthly performance benchmarks are determined                    |
| <b><u>IG 3: Recruit and train Ambassadors within 2 months</u></b>  |   |                       |   |
| <b>7. Identify and recruit the Stewardship &amp; Engagement “Ambassadors” who can implement the Stewardship &amp; Engagement Program.</b>  | Stewardship & Engagement Program Team 2 | 1 month after step 6  | Ambassadors are recruited   |
| <b>8. Train Ambassadors to implement the Stewardship &amp; Engagement Program.</b>   | Stewardship & Engagement Program Team 2 | 1 month after step 7  | Ambassadors are trained   |

# Stewardship & Engagement SMART Goal 2 Action Plan



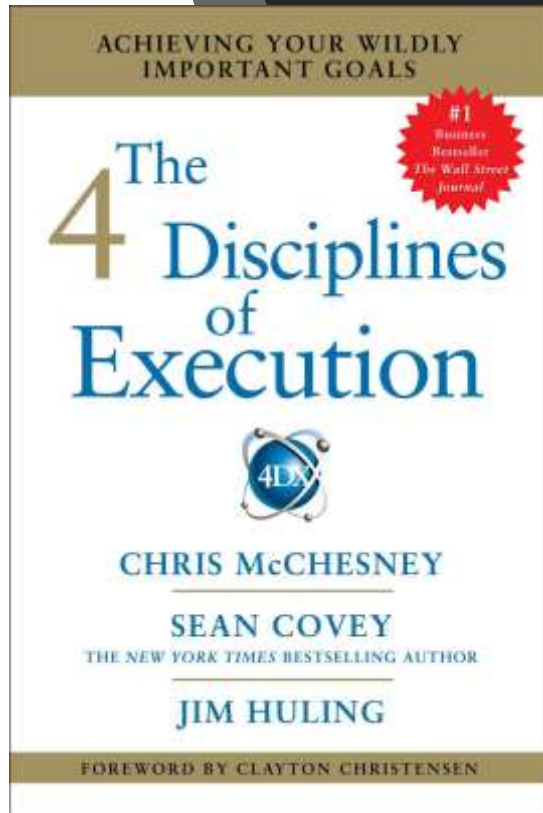
| Key Actions Necessary To Achieve<br>SMART Goal 2 | <u>Responsible Party</u> | <u>Deadline Timetable</u> | Completion<br><u>Confirmation Test</u> |
|--|--------------------------|---------------------------|--|
|--|--------------------------|---------------------------|--|

**IG 4: Implement the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within 24 months**

|   |             |                             |   |
|---|-------------|-----------------------------|---|
| <b>9. Implement Stewardship &amp; Engagement Program to achieve the Stewardship % Engagement Targets.</b>   | Ambassadors | 24 months after step 8      | Stewardship & Engagement Program is fully launched                |
| <b>10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship &amp; Engagement Targets are achieved</b> | Ambassadors | Contemporaneous with step 9 | Established monthly Stewardship & Engagement Targets are achieved |

**IG 5: Compile and assess the results of the Stewardship Program and make necessary improvements within 2 months**

|   |   |                       |  |
|---|---|-----------------------|--|
| <b>11. Obtain and compile qualitative and quantitative data from Stewardship &amp; Engagement Program and compile as to the effectiveness and success (based on criteria established in step 2) and identify areas for improvement.</b>         | Ambassadors and Stewardship & Engagement Program Team 2 | 1 month after step 10 | Stewardship & Engagement Program assessments are completed   |
| <b>12. Finalize and deliver Stewardship &amp; Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship &amp; Engagement Program more effective based on information identified in step 11.</b> | Ambassadors and Stewardship & Engagement Program Team 2 | 1 month after step 11 | Stewardship & Engagement Program analysis is completed, and Stewardship & Engagement Program are refined accordingly |



1. Determine your WIGs  
(Wildly Iimportant Goals)

2. Act on Lead Measures

3. Create a compelling  
scoreboard

4. Create a cadence of  
accountability

# Create A Compelling Scoreboard

- 
- ~ Highest engagement comes when people know the score
  - ~ The best scoreboard is
    1. designed for and by the players
    2. Only shows the critical information





## 2 Fundamental Rules and 1 Critical Question

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

**2. You cannot master what you do not measure.**

**3. How are you measuring effectiveness or success in your parish?**







# A Church Compelling Scoreboard

## FIRST WEST SCOREBOARD

|                | EVANGELISM                                   |       |           |       | WORSHIP                     |       |                       |         |
|----------------|--|-------|-----------|-------|-----------------------------|-------|-----------------------|---------|
|                | 1 STORY, 1 VERSE,<br>1 PERSON<br>COMMITMENTS |       | BAPTISMS  |       | INVITE CARDS<br>DISTRIBUTED |       | WORSHIP<br>ATTENDANCE |         |
|                | THIS WEEK                                    | TOTAL | THIS WEEK | TOTAL | THIS WEEK                   | TOTAL | THIS WEEK             | AVERAGE |
| WEST MONROE    | 20   | 156   | 2         | 14    | 114                         | 1,431 | 2,174                 | 1,827   |
| FAIRBANKS      | 16   | 19    | 0         | 7     | 120                         | 303   | 270                   | 261     |
| 2017 MULTISITE | 0  | 0     | 0         | 0     | 0                           | 0     | 0                     | 0       |
| TOTAL          | 36   | 175   | 2         | 21    | 234                         | 1,734 | 2,444                 | 2,088   |

|                | COMMUNITY     |       |                          |         | SERVICE                 |       |                           |       |
|----------------|---------------|-------|--------------------------|---------|-------------------------|-------|---------------------------|-------|
|                | NEW<br>GROUPS |       | LIFE GROUP<br>ATTENDANCE |         | NEW PEOPLE<br>MOBILIZED |       | MISSIONS<br>PARTICIPATION |       |
|                | THIS WEEK     | TOTAL | THIS WEEK                | AVERAGE | THIS WEEK               | TOTAL | THIS WEEK                 | TOTAL |
| WEST MONROE    | 2             | 7     | 1,355                    | 1,367   | 0                       | 19    | 0                         | 173   |
| FAIRBANKS      | 0             | 1     | 150                      | 155     | 0                       | 0     | 0                         | 0     |
| 2017 MULTISITE | 0             | 0     | 0                        | 0       | 0                       | 0     | 0                         | 0     |
| TOTAL          | 2             | 8     | 1,505                    | 1,522   | 0                       | 19    | 0                         | 173   |



# Stewardship & Engagement SMART Goal 2 Scoreboard



| Lead Measure Action   | Deadline Date | Status: Percent Complete and Date |
|---|---------------|-----------------------------------|
| 1. Form Stewardship Ministry Team 2   |               |                                   |
| 2. Develop definitions and effectiveness metrics  |               |                                   |
| 3. Analyze parish baselines and engagement success impediments                                |               |                                   |
| 4. Research Stewardship Program   |               |                                   |
| 5. Evaluate Stewardship Program   |               |                                   |
| 6. Finalize Stewardship Program   |               |                                   |
| 7. Identify and recruit Stewardship Ambassadors   |               |                                   |
| 8. Train Stewardship Ambassadors  |               |                                   |
| 9. Implement Stewardship & Engagement Program and manage to interim monthly targets           |               |                                   |
| 10. Track performance Data from Stewardship & Engagement Program Implementation               |               |                                   |
| 11. Obtain qualitative and quantitative assessment data from Stewardship & Engagement Program |               |                                   |
| 12. Improve Stewardship & Engagement Program based lessons learned in step 11                 |               |                                   |

## Sun Tzu



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

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



# Brainstorm Process

1. Brainstorm preliminary SMART Goals to consider. The “*few things that can change everything.*” Consider **WHAT** precisely you want to accomplish (and the metrics you will use to measure your success). **DO NOT** reach any conclusions. Just brainstorm goals and metrics.

2. Each Parish Team must also:

(a) identify specific names of people in your Parish you should recruit and “on-ramp” in each specific SAF based on their expertise, knowledge, current involvement in such ministries, skills, prior experience, passion, etc. for this SAF.

(b) For each On-Ramp Candidate, a person should be identified to recruit them, and a deadline for their recruitment should be set.

(c) Each SAF needs 2 Co-Chairs and 1 Secretary. (Co-Chairs coordinate the meetings and work with OZ and the Parish Facilitator, and the Secretary communicates with the SAF Team.)



# Brainstorm Process

(d) Identify when you will present all work (including the Low Hanging Fruit) to the Parish Council. You'll answer their questions, start to build a consensus, and “on-ramp” them into SAFs. (OZ and the Parish Facilitator join via ZOOM). Any gaps in Co-Chairs or Secretaries for a SAF should be filled from Parish Council or On-Ramped Candidates.

(e) Set deadline for completion of steps (a)-(d) above and have the first ZOOM with OZ and the Parish Facilitator to bring all On-Ramped folks up to speed and begin to develop the SMART Goals and Action Plans. At first meeting of the expanded Parish Team (including all On-Ramped team members), we will set out the overall schedule for developing one SMART Goal and Action Plan for each SAF.

(f) Parish Team members **pick one of the SAFs** to work on (roughly equal numbers of you on each SAF). Make sure OZ and your Parish Facilitator know who is on which SAF.

3. Each Parish team must finalize their WHY, Core Values, Mission Statement, Strategic Areas of Focus, and Low Hanging Fruit. (You can change things based on what you heard or thought about since last night)



*~ Same room assignments - page 4.*

# What's Next?







## **Part 2 (after Retreat 1) and Second Retreat**

**Review page 11-13 of the  
Retreat Handbook**



# Development Process

1. Each SAF Team develops only 1 SMART Strategic Goal and a comprehensive Action Plan.
2. Each SAF Team has as many meetings/ZOOMs necessary to finalize all the items in #1 above. (Please invite the Parish Facilitator and OZ to all sessions.)
3. Each SAF Team recruits and on-ramps any new vital individuals who can add value to their Strategic Area of Focus.
4. Your SAF Team is **NOT** responsible for researching or determining the specific solution or way to achieve the SMART Goals. Your Action Plans will outline the steps a separate Implementation Team will use to determine the answer.  
**NOTE: DO NOT DISCUSS SPECIFIC SOLUTIONS.** Merely provide the to-be-formed Implementation Team with the step-by-step roadmap they need to follow to research, develop, implement, and evaluate the new solution.
5. The Action Plan you will develop will **NOT** start now. A start date for implementation will be chosen by the separate Implementation Team that will be selected after the strategic plan is finalized.



# Development Process

6. Each Action Plan lists all the steps necessary to achieve the SMART Goal in 4 columns:

- ~ Column 1 = the specific action to be undertaken
- ~ Column 2 = who must do that action
- ~ Column 3 = the deadline (**IN MONTHS**) for completing that action
- ~ Column 4 = describes how someone will know when that action is completed

7. Each SAF Team should check with other Parish constituencies affected by the topic they are focusing on and recruit the involvement of those people.

8. You **MUST** use the official **Goal and Action Plan Template** to develop your SMART Goals and Action Plans. Everything will be located at:

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

9. Each SAF Team must **COMPLETE** all their work and submit it to OZ and their Parish Facilitator by a deadline that will be established at the first Parish Team meeting after the retreat and the Parish Council presentation and on-ramping are complete.



# Development Process

10. OZ and Parish Facilitator participate remotely in SAF Team meetings/calls to ensure you are on the right track, answer your questions and help you finalize the specific wording.

11. Examples of the correct format for SMART Goals and comprehensive Action Plans, and Compelling Scoreboards can be found here:

(a) Christ The Saviour OCA Harrisburg PA:

<https://stewardshipcalling.com/christ-the-saviour-harrisburg-pa-2/>

(b) Holy Trinity GOA Grand Rapids, MI

<https://stewardshipcalling.com/holy-trinity-goc-grand-rapids-mi/>

(c) Holy Trinity Antiochian Grand Rapids, MI:

<https://stewardshipcalling.com/st-nicholas-grand-rapids-mi/>

(d) St Demetrios Saginaw, MI:

<https://stewardshipcalling.com/st-demetrios-saginaw-mi-strategic-plan/>

(e) Holy Trinity GOA Indianapolis, IN:

<https://stewardshipcalling.com/holy-trinity-indianapolis-strategic-plan/>

12. If you have ANY questions, please don't guess; just email OZ at: [billmarianes@gmail.com](mailto:billmarianes@gmail.com).



# Development Process

13. Talk up this strategic planning process every chance you get with friends at your Parish and other events and activities. This is a critical part of the consensus-building and communications process.

14. This Handbook, the entire Retreat #1 PowerPoint presentation, and other general information and updates for all four Parishes will be available on the: **Stewardship Calling** website under the **Church Strategic Planning Tab** on your Metropolis of **Boston Four Parish Strategic Plan Parish** page located at:

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

15. Your work will be updated on your specific parish pages on the Stewardship Calling website as follows:

(a) **Concord – Holy Trinity:**

<https://stewardshipcalling.com/concord-holy-trinity-strategic-plan/>

(b) **East Longmeadow – St. Luke:**

<https://stewardshipcalling.com/east-longmeadow-st-luke-strategic-plan/>

(c) **Lexington – St. Nicholas:**

<https://stewardshipcalling.com/lexington-st-nicholas-strategic-plan/>

(d) **Somerville – Dormition:**

<https://stewardshipcalling.com/somerville-dormition-strategic-plan/>

# Your Strategic Planning Page

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

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

This presentation and all your ongoing work product can be found under the Strategic Planning tab at the page for: Metropolis of Boston Four Parish Strategic Plan

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

WHY? STEWARDSHIP **STRATEGIC PLANNING** INTERNET RADIO & PODCASTS KEYNOTES & LEADERSHIP RESOURCES

PERSONAL

BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING

**METROPOLIS OF BOSTON – FOUR PARISH STRATEGIC PLAN**

CONCORD – HOLY TRINITY STRATEGIC PLAN

EAST LONGMEADOW – ST. LUKE STRATEGIC PLAN

LEXINGTON – ST. NICHOLAS STRATEGIC PLAN

SOMERVILLE – DORMITION STRATEGIC PLAN

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

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ARMENIAN APOSTOLIC

Metropolis of Boston  
By the grace of God, we are...  
their Lilly Endowment Th...  
Longmeadow; St Nicholas...  
work in progress until th...

THRIVING

IC XC NI KA

METROPOLIS OF BOSTON

METROPOLIS OF BOSTON CAMP

through Strategic Planning as a part of...  
y Trinity- Concord; St. Luke's – East...  
rville. These pages will contain all of their...  
rsh websites.

The first ever 4 parish retreat is planned for April 28-30, 2023 at the St. Methodios Faith and Heritage Center in Contoocook, New Hampshire.

**PAY CLOSE  
ATTENTION**

**Area of  
Focus  
SMART  
GOAL  
Team  
Meetings**

- ~ YOU ARE NOT SOLVING THE PROBLEM - that's the job of the implementation team we will recruit after the strategic plan is finalized
- ~ You are an architect outlining plans and designs for new programs and solutions
- ~ The implementation team will actually do the research, design, build and implement the programs and solutions you design
- ~ JUST IDENTIFY THE PLAN

**PAY CLOSE  
ATTENTION**

**Area of  
Focus  
SMART  
GOAL  
Team  
Meatings**

**Every Action Plan will have 4 phases:**

**1. Research Phase**

- ~ research how to measure success
- ~ research best practices
- ~ assess your current program against best practices

**2. Design and Development Phase**

- ~ develop the solution based on research of best practices

**3. Training and Implementation Phase**

- ~ train any solution team and implement solution

**4. Evaluation and Improvement Phase**

- ~ assess solution implementation and Improve it



**PAY CLOSE  
ATTENTION**

# **Area of Focus WIG Team Meatings**

- ~ You will use the PowerPoint template I will present to you at our first meeting with your team
- ~ Additional examples of completed plans can be accessed from the drop down menus at:  
<https://stewardshipcalling.com/strategic-planning/>

# Your Strategic Planning Page

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

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

This presentation and all your ongoing work product can be found under the [Strategic Planning](#) tab at the page for: [Metropolis of Boston Four Parish Strategic Plan](#)

<https://stewardshipcalling.com/metropolis-of-boston-four-parish-strategic-plan/>

The screenshot shows the website's navigation menu with 'STRATEGIC PLANNING' circled in red. Below it, a list of strategic plans is shown, with 'METROPOLIS OF BOSTON - FOUR PARISH STRATEGIC PLAN' circled in red. A red box highlights this plan, and a red arrow points from the circled text to the right-hand text box. Another red arrow points from the 'STRATEGIC PLANNING' tab to the right-hand text box. The page content includes logos for the Metropolis of Boston and the Metropolis of Boston Camp, and a section titled 'The first ever 4 parish retreat is planned for April 28-30, 2023 at the St. Methodios Faith and Heritage Center in Contoocook, New Hampshire.'



# **Second Retreat**

---

- ~ Each Parish will schedule a second retreat once SAF Teams are finished
- ~ Entire SPT + “on-ramped members” reach a consensus and finalize the entire Strategic Plan
- ~ Each SAF Team presents proposed SMART Goal and “Action Plan.” Everyone debates, revises, and reaches a consensus on the exact wording of everything



# **On-Ramping Warning**

---

~ Please on-ramp specific people whose insights would be helpful

~ **DO NOT** on-ramp anyone without:

(a) spending face to face time sharing with them what we did at this retreat; and

(b) making sure they review this retreat presentation once I upload the final version

# Tough Love



**St. Paisios the Athonite**

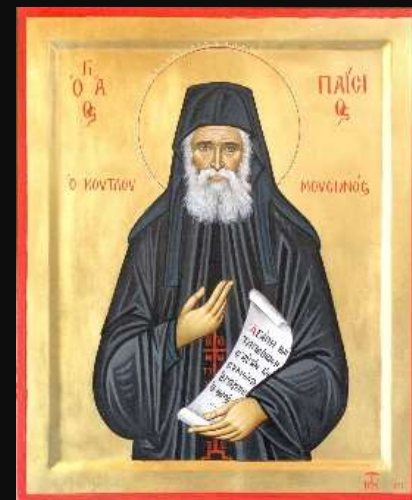
The spirit of luke-  
warmness reigns.

We've been spoiled  
for good.

How does God still  
tolerate us?



St. Paisios the Athonite



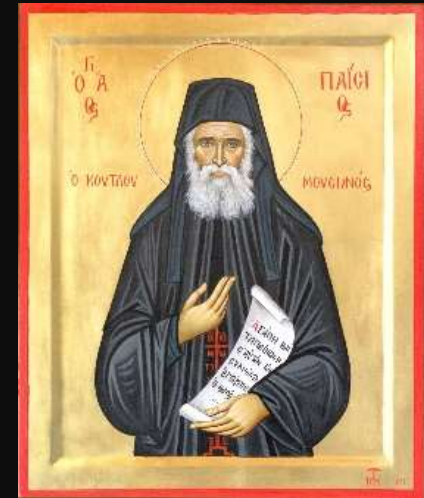
Today's generation  
is the generation  
of indifference.

There are no  
warriors !

The majority are  
fit for parades  
and feasts only.



St. Paisios the Athonite

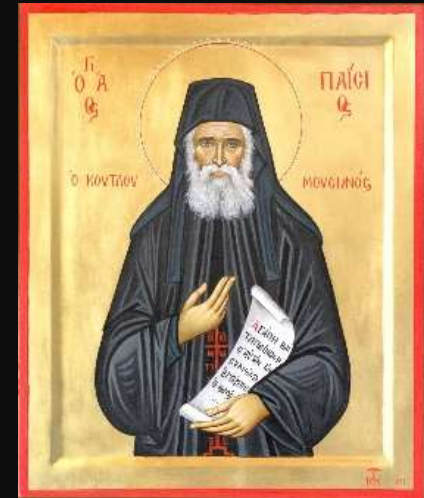


Even people who've  
got something  
inside have begun  
to grow cool  
saying,

Can I really do  
anything to change  
the situation ?



St. Paisios the Athonite



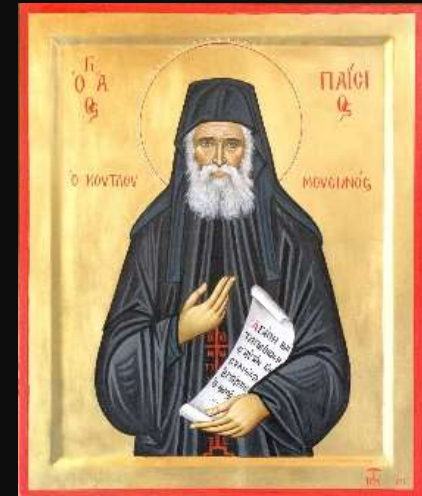


We have to  
**witness** our Faith  
with **boldness**,

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



St. Paisios the Athonite



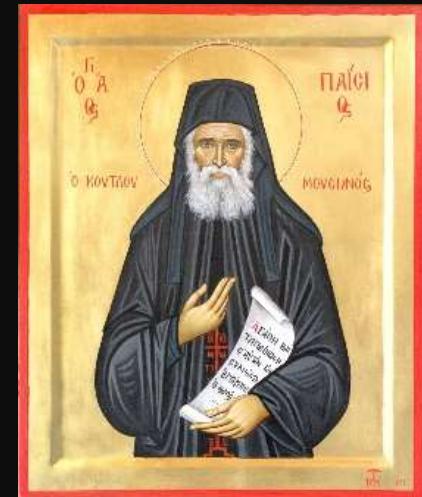
In these difficult days, **each must do** what is in their own power.

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

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



St. Paisios the Athonite



1. Fr. Ted, Panos,  
Don, Alex

2. Retreat Center  
Team

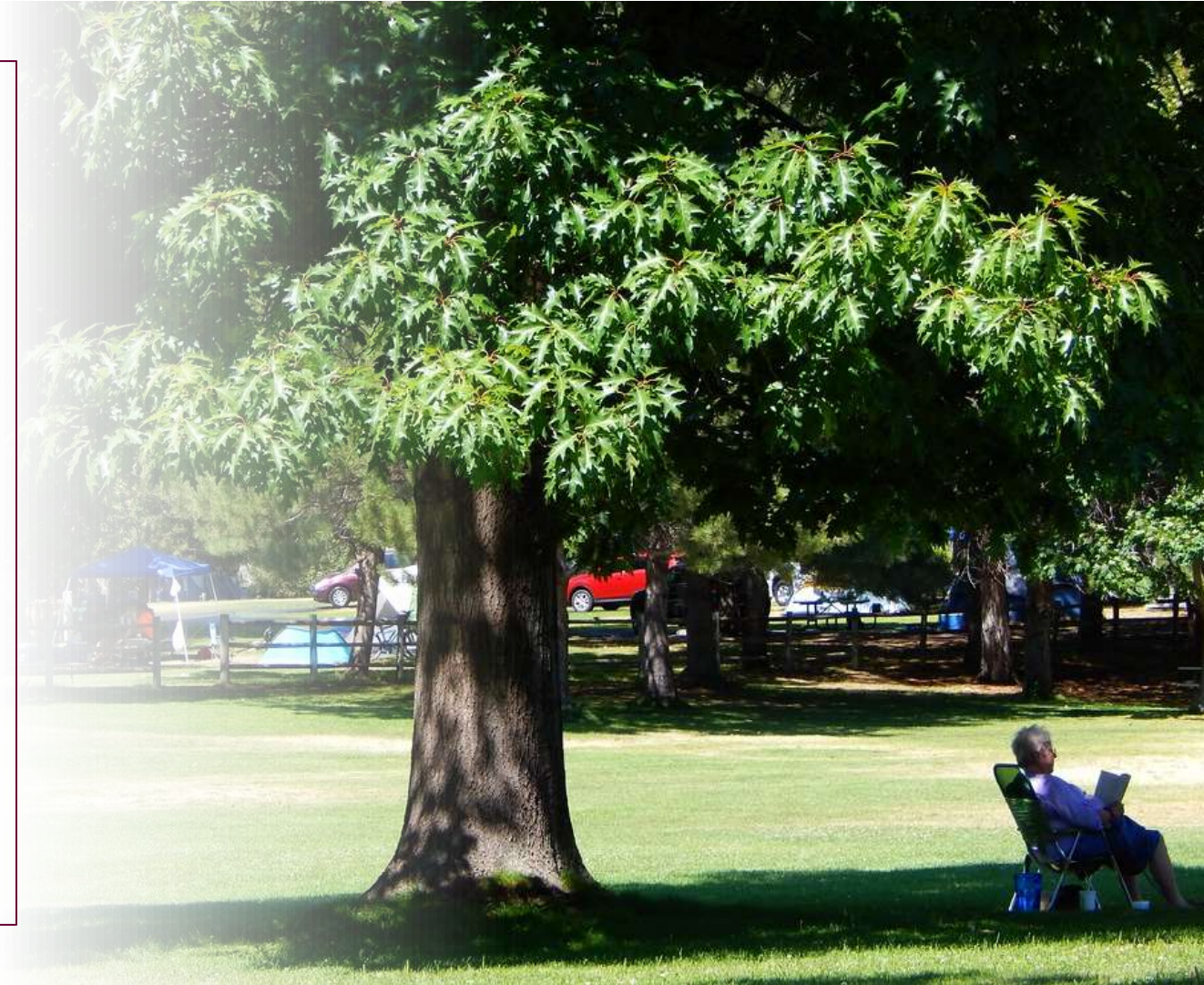
3. All of you...

Special Thanks



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

**Greek Proverb**





**—**

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

---

**The second  
best time is  
today.”**



**“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**

# Be Courageous

**If anyone ever asks you, "What Would Jesus Do?"**



**Remind them that flipping over tables and chasing people with a whip is within the realm of possibilities.**

**Matthew 21:12  
Luke 19:45**

**Mark 11:15  
John 2:15**

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?

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

II Corinthians 5:10  
Divine Liturgy

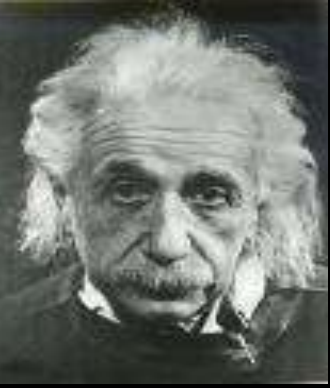
# TURN *the* PAGE



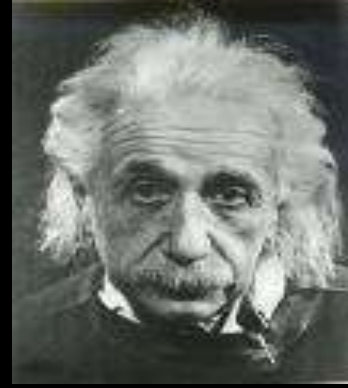
**There comes a day  
when you realize  
turning the page is  
the best feeling in  
the world.**

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





# Albert's Insight



❖ What was Albert Einstein's greatest contribution?

❖  ~~$E=mc^2$~~

“NOTHING HAPPENS UNTIL SOMETHING MOVES”

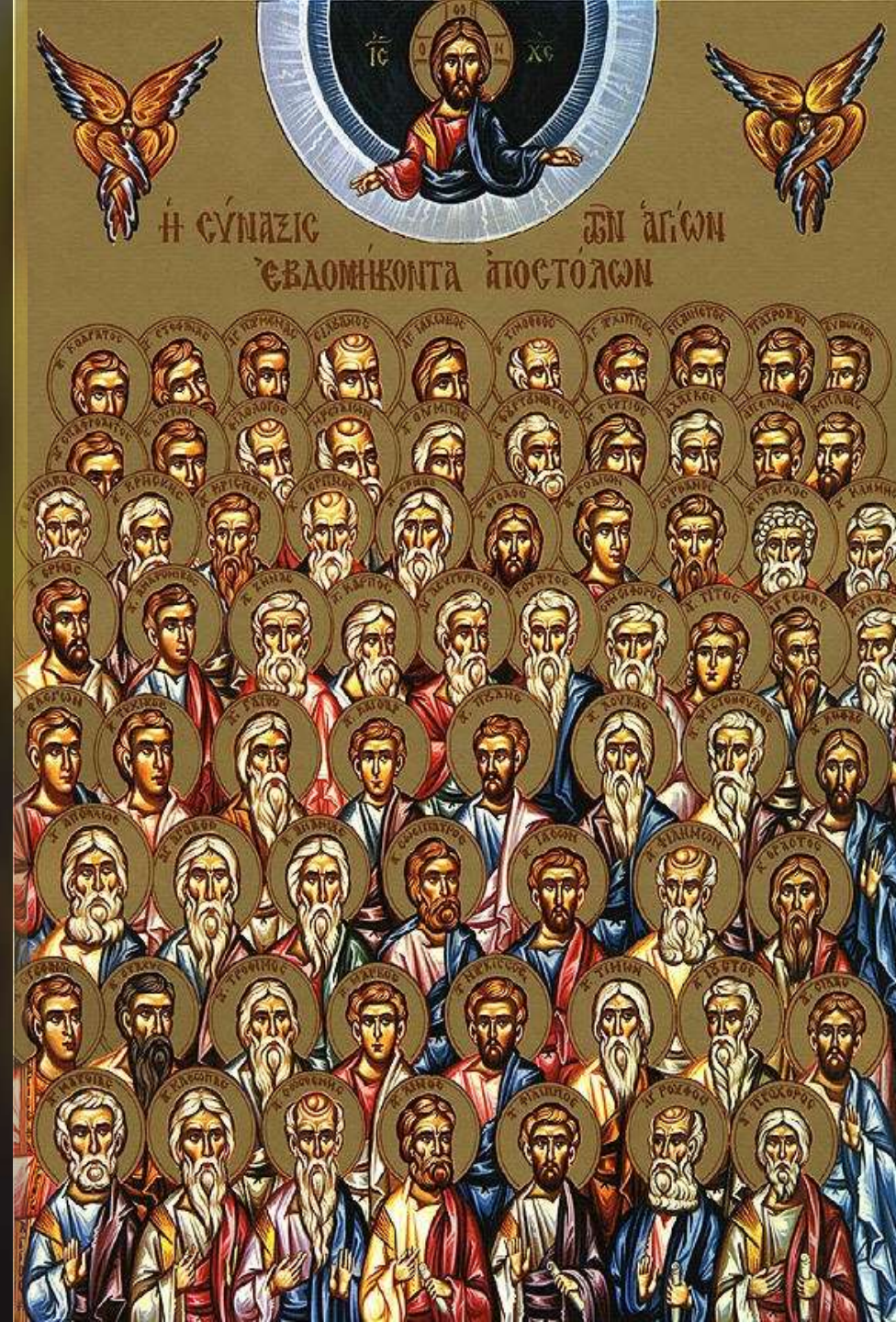


# The Marianes Corollary

**“NOTHING HAPPENS  
UNTIL SOMEBODY  
MOVES”**

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

*Luke 10:1*





GREEK ORTHODOX  
METROPOLIS OF BOSTON  
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ

# Strategic Planning Retreat Day 3

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

Proverbs 29:18

Bill Marianes



STEWARDSHIP  
CALLING

