

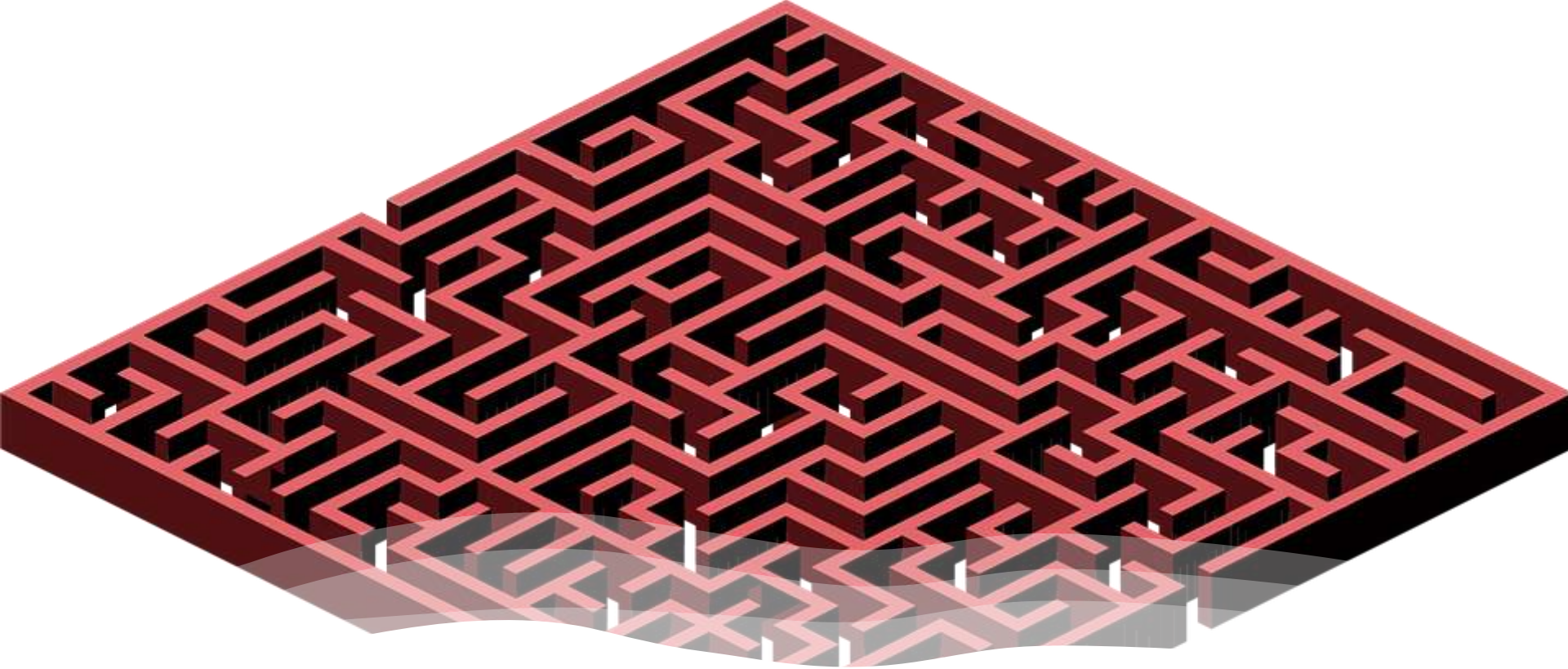
Welcome home!
Saint Demetrios Greek Orthodox Church
Warren, OH

Vision & Parish Strategic Planning

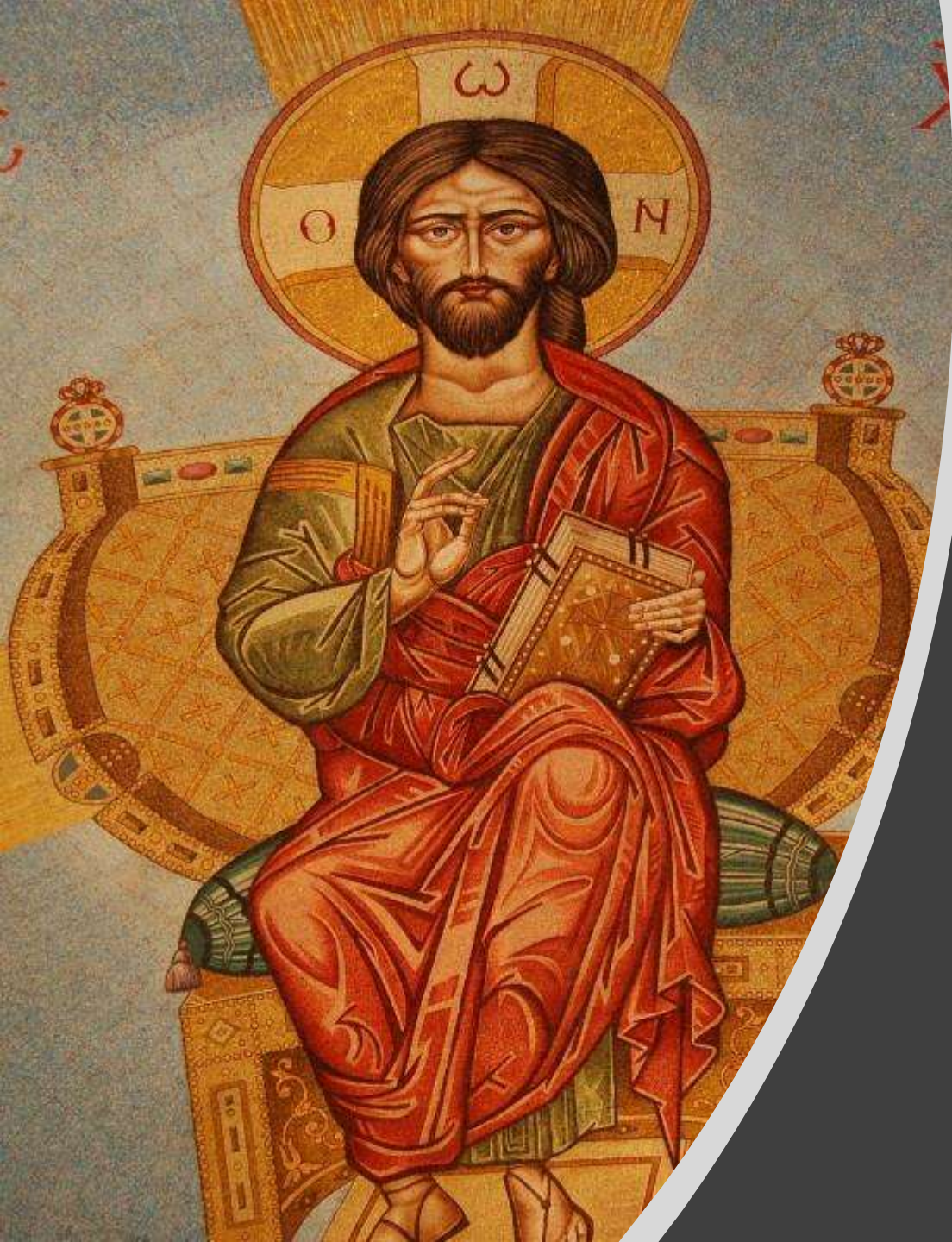


Bill Marianes





**A church that doesn't know
why it exists or where it's
going may never get where
God needs it to be.**



Why Do This?

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

Orthodox Divine Liturgy
II Corinthians 5:10

AGENDA

- 1. What is the Stewardship Calling Strategic Planning process and what will we accomplish?**
- 2. How will we assess where we are?**
- 3. What is expected of the Core Team, Strategic Planning Team and Implementation Teams?**
- 4. What are our next steps?**



Your Strategic Planning Page

Stewardship Calling

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

www.stewardshipcalling.com

This presentation and all your ongoing work product will be found under the [Strategic Planning](#) tab at the page for: [Warren, OH- St. Demetrios Strategic Plan Page](#)

<https://stewardshipcalling.com/warren-oh-st-demetrius-strategic-plan/>

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

PERSONAL

BOSTON METROPOLIS –
THRIVING CONGREGATIONS
TRAINING PROGRAMS ON
PARISH STRATEGIC PLANNING

SAMPLE S.M.A.R.T GOAL &
ACTION PLANS

METROPOLIS OF BOSTON –
FOUR PARISH STRATEGIC PLAN

**WARREN, OH – ST DEMETRIOS
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

Welcome home!
St. Demetrios Greek Orthodox Church
Warren, OH

Warren, OH – St De

By the grace of God, the
transformational and co
of Father Constantine Va
Core Team consisting of:
Georgia Marousis, Anna
Team will be supplement
ongoing work of our very

St. Demetrios Greek Orthodox Church in Warren, OH. is undertaking a
planning process. This incredible work is under the inspired leadership
of Father Constantine, Strategic Planning Chairman, Anthony Payiavlas, and a
Core Team consisting of: Constantine Payiavlas, Vicki Raptis and Steve Zervas. This Core
Team will be supplementing the ongoing work of our very
Strategic Planning Team can be found on this page.

COMING S

AGENDA

- 1. What is the Stewardship Calling Strategic Planning process and what will we accomplish?**
2. How will we assess where we are?
3. What is expected of the Core Team, Strategic Planning Team and Implementation Teams?
4. What are our next steps?



Strategic Planning is Biblical





FUTURE

loading...

“For I know the plans I have for you, declares the Lord, plans for welfare and not for evil, to give you a future and a hope.”

Jeremiah 29:11

“The domain of
the Leader is the

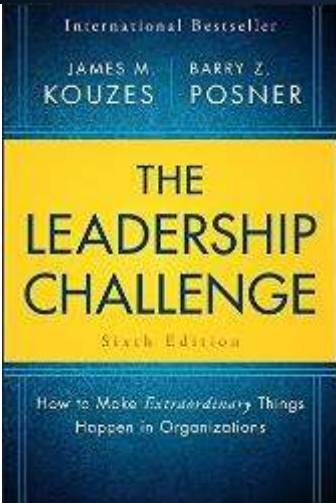


The work of the
leader is
change.”



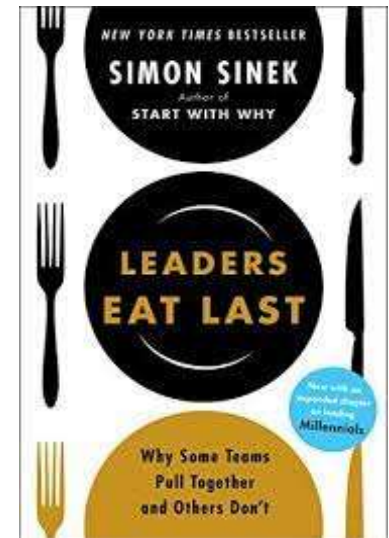
Dr. James Kouzes

Inspiring A Better Future



“Change is the province of leaders. It is the work of leaders to inspire people to do things differently, to struggle against uncertain odds, and to persevere toward a misty image of a better future.”

“We are not victims of our situation. We are the architects of it.”





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



STEWARDSHIP
CALLING

Consensus Vision and Strategic Planning



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:**

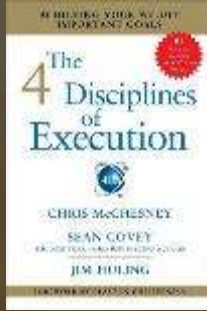
- 1. Why do we exist?**
- 2. Where are we now?**
- 3. Where do we want to be?**
- 4. How will we get there?**

The 4 Ps of



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

The Power of FOCUS



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

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

So, who's facilitating your strategic planning process?



You can download the keynote presentation and written testimonial at:
<https://stewardshipcalling.com/yal-conference-2021-exclaim-your-faith/>

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**



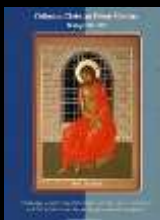
**GOA
Metropolis
of Atlanta**



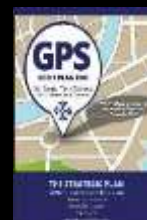
**Ukrainian
Orthodox
Church of
the USA**



**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)

St. John The Divine (Jacksonville FL)

St. Mary (Wichita, KS)

St. John The Baptist (Beaverton, OR)

St. Nicholas (Ann Arbor, MI)

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

Annunciation Cathedral (Atlanta, GA)

St. Nicholas (Grand Rapids, MI)

Additional Strategic Plans In Progress:

Holy Trinity (Concord, NH)

St. Nicholas (Lexington, MA)

Metropolis of Boston – (6-part parish training program and multi parish strategic planning retreats)

Holy Trinity (Charleston, SC)

ZOE for Life (Cleveland, OH)

St. Raphael (Iowa City, IA)

St. Luke (E. Longmeadow, MA)

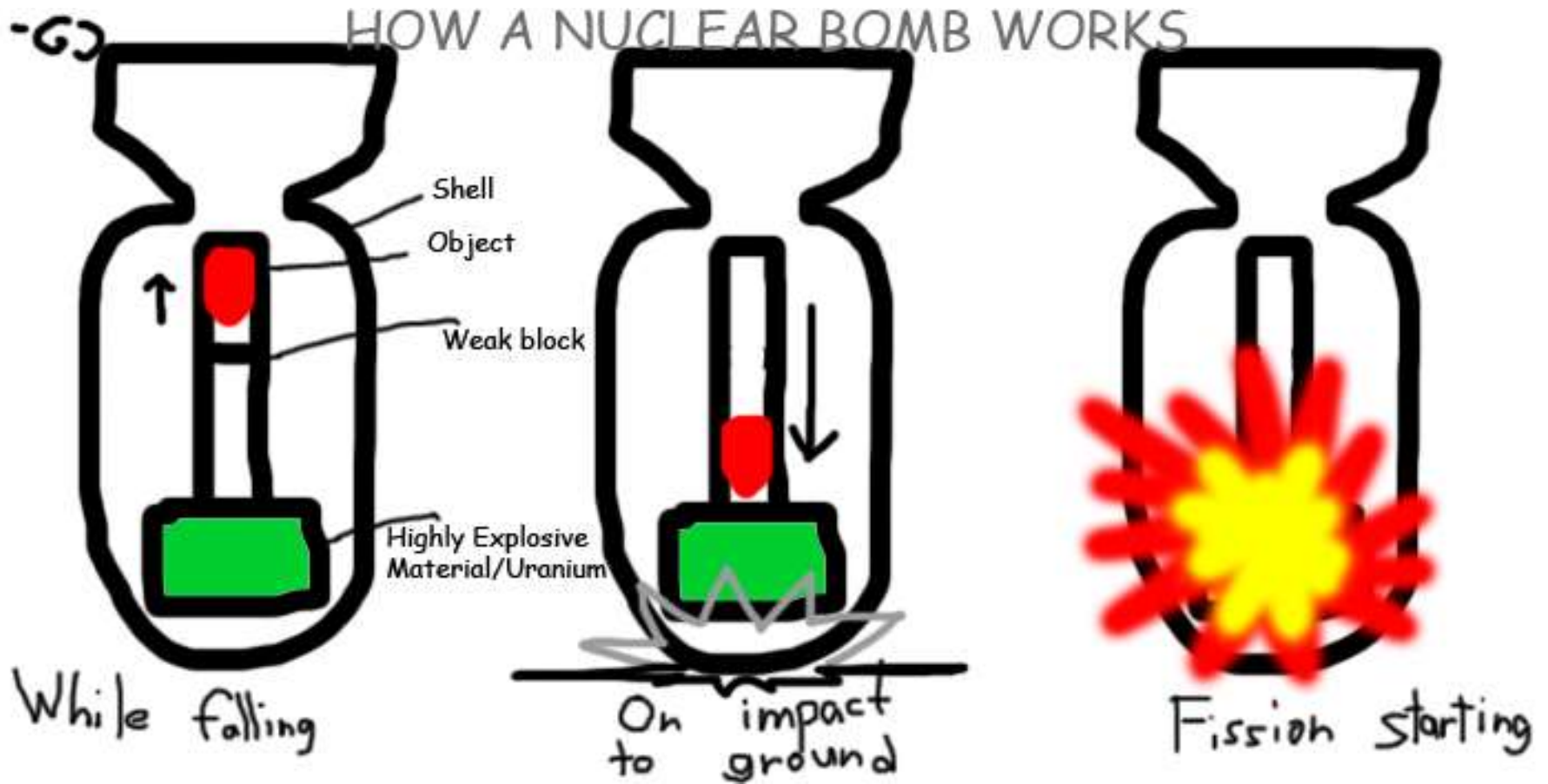
Dormition of the Theotokos Luke (Somerville, MA)

St. Sophia (San Antonio, TX)

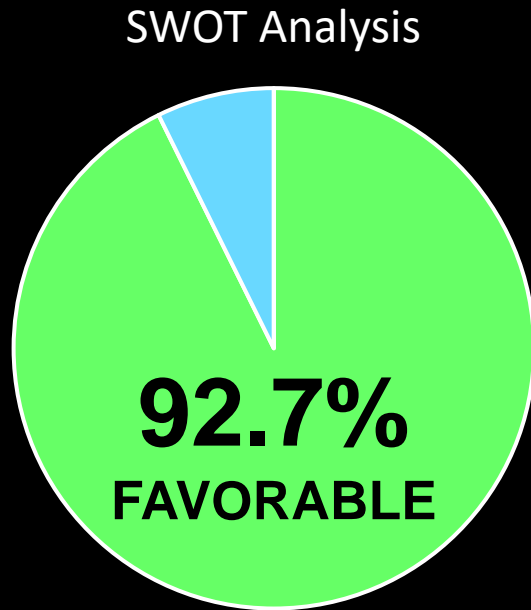
St. Sophia (Miami, FL)



Does This Work?



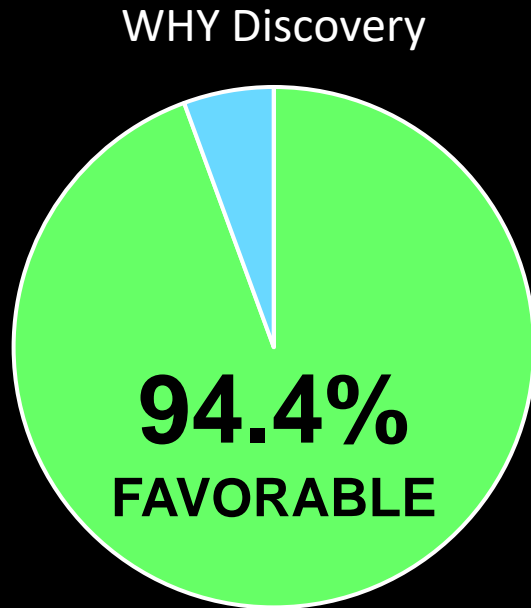
SWOT Analysis Was Overwhelmingly Favorable



SWOT Analysis	Evaluation
FAVORABLE	92.7%
NEUTRAL	7.3%
UNFAVORABLE	0%

■ Favorable ■ Neutral ■ Unfavorable

WHY Discovery Was Overwhelmingly Favorable

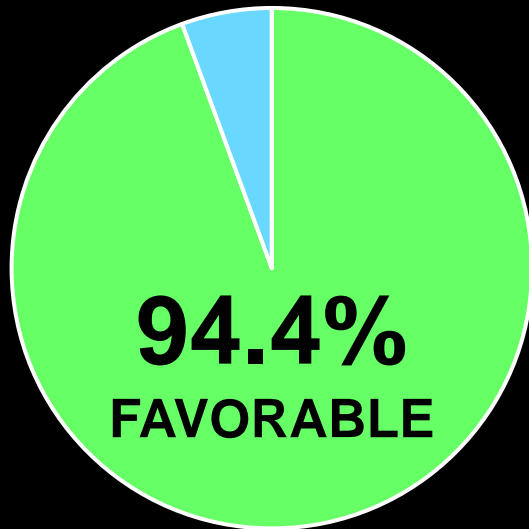


WHY Discovery	Evaluation
FAVORABLE	94.4%
NEUTRAL	5.6%
UNFAVORABLE	0%

■ Favorable ■ Neutral ■ Unfavorable

Core Values Development Was Overwhelmingly Favorable

Core Values Discovery

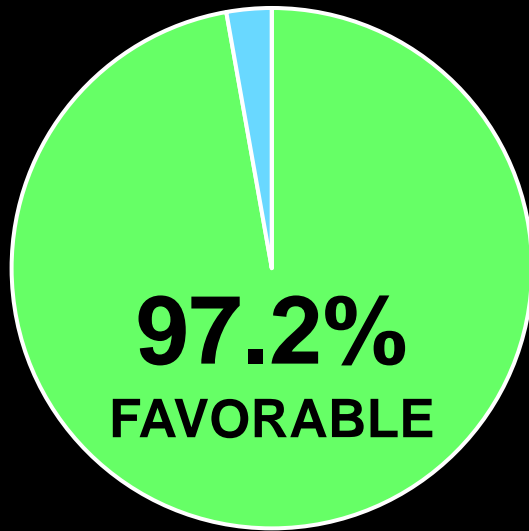


Core Values Discovery	Evaluation
FAVORABLE	94.4%
NEUTRAL	5.6%
UNFAVORABLE	0%

■ Favorable ■ Neutral ■ Unfavorable

Mission Statement Development Was Overwhelmingly Favorable

Mission Statement Development

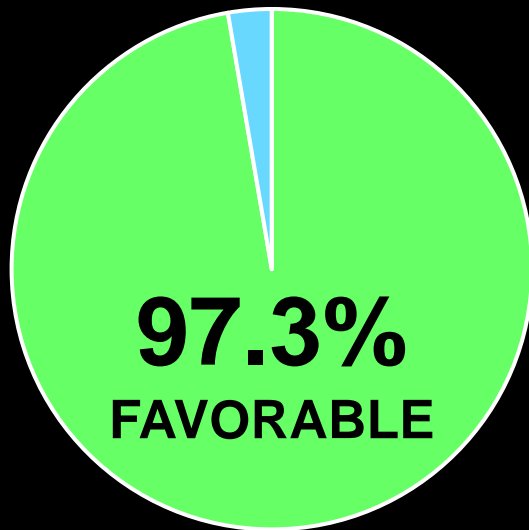


■ Favorable ■ Neutral ■ Unfavorable

Mission Statement Development	Evaluation
FAVORABLE	97.2%
NEUTRAL	2.8%
UNFAVORABLE	0%

Strategic Areas of Focus Development Was Overwhelmingly Favorable

Strategic Areas of Focus Development



Strategic Areas of Focus Development	Evaluation
FAVORABLE	97.3%
NEUTRAL	2.7%
UNFAVORABLE	0%

■ Favorable ■ Neutral ■ Unfavorable



GREEK ORTHODOX
METROPOLIS OF BOSTON
ΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ



Strategic Planning Retreat Evaluation

<u>ACTIVITY</u>	<u>FAVORABLE</u>	<u>UNFAVORABLE</u>	<u>NEUTRAL</u>
SWOT	92.7%	0%	7.3%
WHY DISCOVERY	94.4%	0%	5.6%
CORE VALUES PROCESS	94.4%	0%	5.6%
MISSION STATEMENT PROCESS	97.2%	0%	2.8%
STRATEGIC AREA OF FOCUS PROCESS	97.3%	0%	2.7%



GREEK ORTHODOX
METROPOLIS OF BOSTON
ΙΕΡΑ ΜΗΤΡΟΠΟΛΙΣ ΒΟΣΤΩΝΗΣ



Strategic Planning Retreat Evaluation Comments

~ Life saving for our parishes. Inspiring and daunting, but with all the continued support we will have changed the deadening trajectories that we have been on Thank you. God bless you.

~ Amazing!! Very eye opening!!!

~ A truly transformative experience with superb facilitators and speakers. If the tide is going to turn in our parishes, that change will come out of events like this one.

~ Motivational and inspirational, makes me want to do more.

~ This was a very intense weekend, but I feel like we got a lot done and I'm inspired to go back and make big changes to help guide our church to greater success in terms of increasing the engagement of our community and the depth and meaning that people gain from their participation in liturgical life.

~ I also think the entire strategic plan and methods that were being taught look very effective and I am hopeful that this is going to bring great rewards.

**1. SWOT / EPA / OCAI
Analysis**

2. Statement of Why

3. Core Values

4. Mission Statement

5. S.M.A.R.T. Goals

6. Vision Statement

**7. Interim Goals & Interim
Actions**

**8. Comprehensive Action
Plan**

**9. Accountability
Scoreboard**

**10. SMART GAP - SMART
Goal Accountability
Process**



10 Strategic Plan Deliverables





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

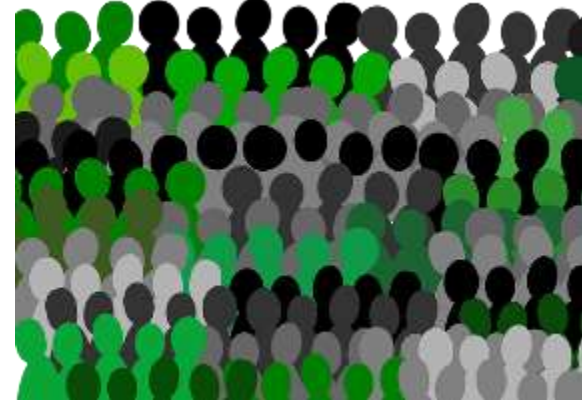
***...and every one members
one of another.”***

Romans 12:5

It Will Takes 3 Teams

Community

Community-wide input throughout



Core Team & Strategic Planning Team

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



Implementation Team

A larger diverse group of faithful who implement all of the Strategic Goals and Action Plans





STEWARDSHIP
CALLING

The Stewardship Calling Strategic Planning Timeline



SUMMARY OVERALL TIMETABLE¹

Finalize SPT²	≈	2 months from start
First retreat	≈	4-5 months from start
Second retreat	≈	7-8 months from start
Public Rollout	≈	8-9 months after start

² **SPT** =
Strategic
Planning Team

¹ Subject to Pascha, Festival and Holidays

<u>TASK</u>	<u>TIME</u>
Pick and Recruit SPT	1-2 months after start
Solicit “Where Are We Now” Data	2-3 months after start
First retreat	4-5 months after start
Create SMART Goals and Action Plans	6-7 months after start
Second retreat	7-8 months after start
Public rollout event	8-9 months after start



Two Process Keys



Rules of Engagement & Consensus

- 1. We stay on schedule**
- 2. Everyone is equal**
- 3. We interact confidentially**
- 4. Ask questions**
- 5. 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**
- 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**

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

The 4 Deliverables From the



Strategic Planning Process

1. Comprehensive Strategic Plan

SWOT / EPA

WHY

Core Values

Mission Statement

Vision Statement

S.M.A.R.T. Goals

Interim Goals

Interim Actions

Comprehensive Action Plan

Accountability Scoreboard

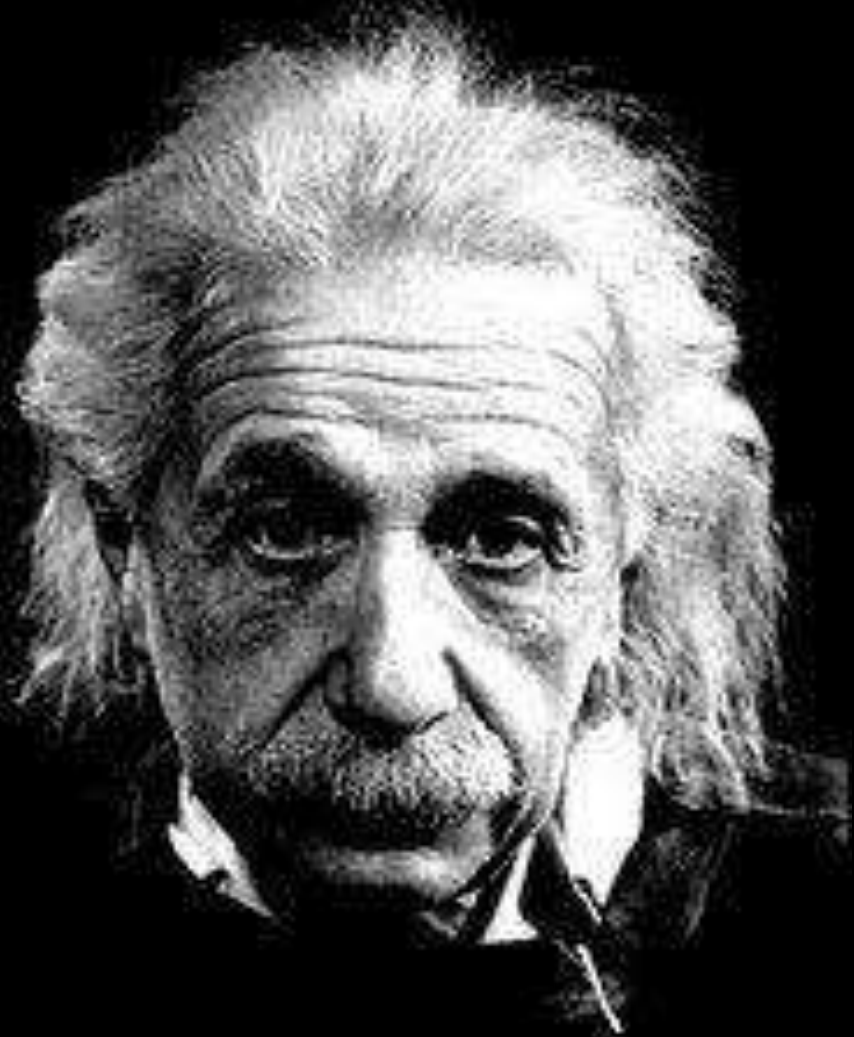
SMART GAP: SMART Goal Accountability Process

2. Inspired Teams

3. Consensus Decision Makers

4. Energized & Improved Culture

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



AGENDA

1. What is the Stewardship Calling Strategic Planning process and what will we accomplish?
- 2. How will we assess where we are?**
3. What is expected of the Core Team, Strategic Planning Team and Implementation Teams?
4. What are our next steps?



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.

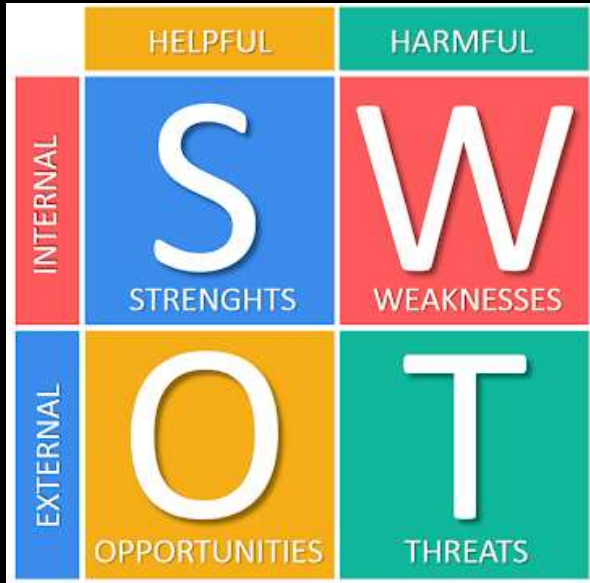
As a leader, you own responsibility for the system.

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

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



We Will Use Three Discovery Tools



Financial Stewardship Analysis

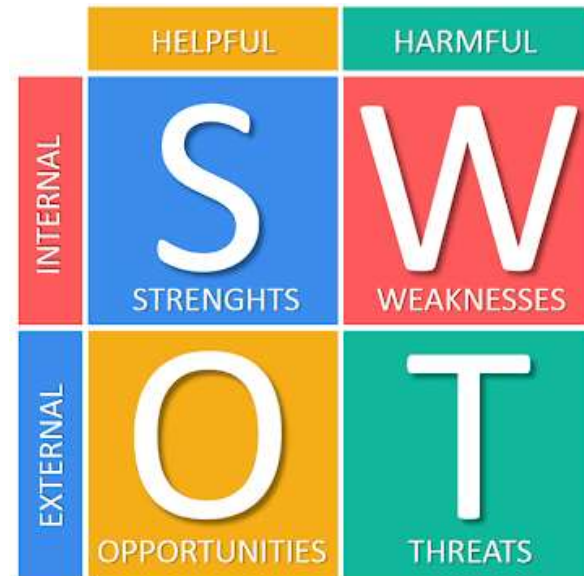
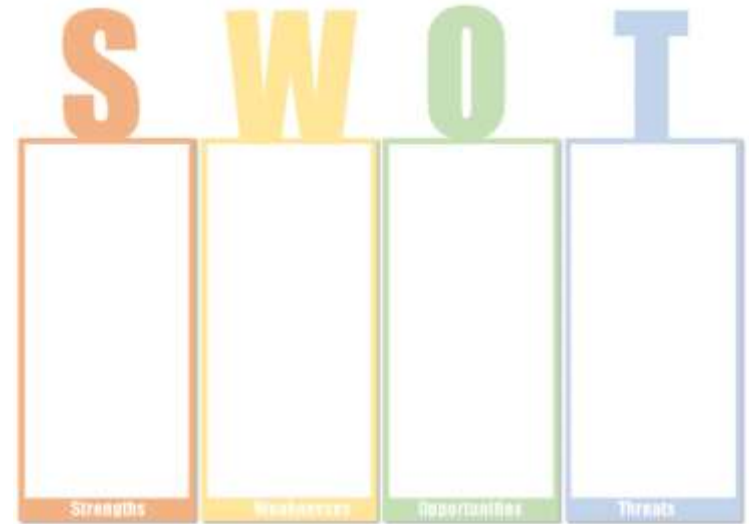
SWOT ANALYSIS

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



THE ORTHODOX PARISH

A Living House of Faith



Vision & Planning



Leadership & Teams



Stewardship & Generosity



Parishioner Engagement



Ministry



Operational Effectiveness

Personal Faith Formation

EPA 2 SAMPLE PILLAR LEVEL RESULTS



Summary 6 Pillars



	% favorable	% unfavorable	% neutral	% I don't know
Vision & Planning	43%	33%	24%	30%
Leadership & Teams	72%	9%	19%	14%
Stewardship & Generosity	50%	29%	21%	40%
Parishioner Engagement	67%	17%	16%	14%
Ministries	45%	30%	24%	30%
Operational Effectiveness	61%	17%	22%	28%

EPA Footnotes

- Favorable + Unfavorable + Neutral = 100% (does not include "I don't know")
- "I don't know" is separately shown as a % of total responses

Leadership & Teams

Leadership & Teams	% favorable	% unfavorable	% neutral	% I don't know
Christian Leadership	90%	3%	7%	3%
Leading & Coaching	83%	5%	12%	5%
Conflict Management	77%	7%	16%	10%
Effective Teams	87%	7%	6%	5%
Parish Council & Boards	87%	5%	8%	6%

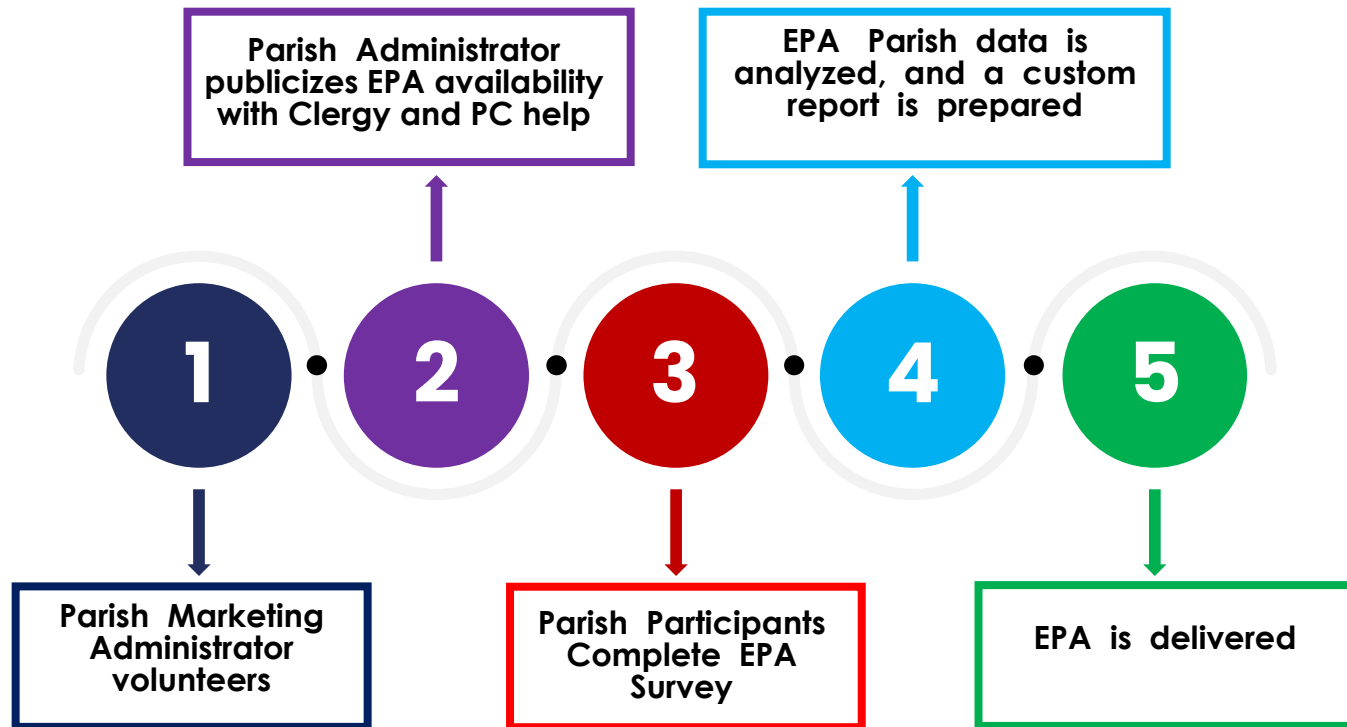
Stewardship & Generosity

Stewardship & Generosity	% favorable	% unfavorable	% neutral	% I don't know
Giving & Tithing	62%	22%	16%	17%
Stewardship Campaign	65%	18%	17%	21%
Capital Campaign	72%	17%	11%	35%
Planned Giving & Endowments	58%	26%	16%	30%
External Philanthropy	64%	24%	12%	25%

Parishioner Engagement

Parishioner Engagement	% favorable	% unfavorable	% neutral	% I don't know
Spiritual Engagement & Catechism	77%	9%	14%	7%
Liturgical & Sacramental Participation	76%	13%	12%	14%
Outreach	55%	24%	21%	24%
Evangelism	67%	17%	16%	17%
Welcoming & Fellowship	73%	15%	12%	7%

THE 5 STEPS IN THE EFFECTIVE PARISH ASSESSMENT JOURNEY



Who Volunteers as Tribute



**...to help publicize
the EPA in the
Parish?**





Financial Stewardship Analysis

- ~ Parishes often get lost in detailed financial statement minutia and miss the big picture
- ~ Without focusing on key performance indicators (KPI) Parishes look at the wrong things (e.g., average pledges).
- ~ The FSA evaluates the key stewardship metrics and relevant benchmarks
- ~ Someone needs to send me the data required under here:
<https://stewardshipcalling.com/financial-stewardship-analysis-fsa-for-churches/>

Who Volunteers as Tribute



**...to email me the
needed financial and
stewardship information**



Financial
Stewardship
Analysis

<https://stewardshipcalling.com/financial-stewardship-analysis-fsa-for-churches/>

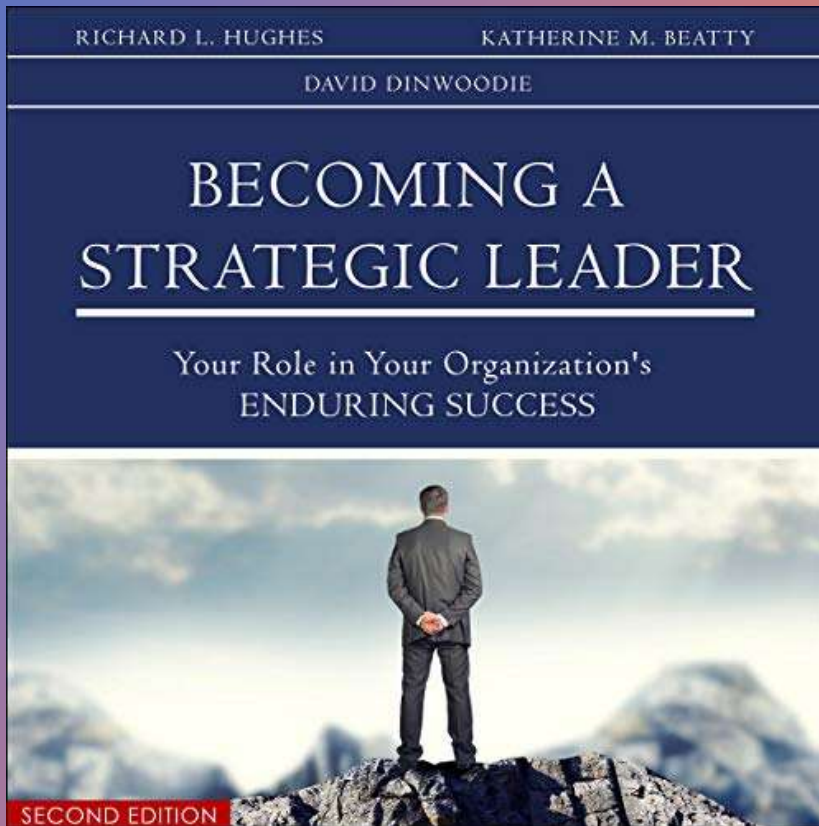
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4. What are our next steps?





Core Team Strategic Team Review and Action Assessment



Strategic Team Review and Action Tool (STRAT)

- Developed by U.S. Air Force Academy Department of Leadership and Behavioral Sciences
- A short 32 questions assessment opens communications about effectiveness in handling strategic change

Who Am I? Myers Briggs

- Everyone experiences sensations, intuitions, feelings, and thoughts; however, generally one of these tends to be dominant in your personality.
- The Myers Briggs assessment provides an empirical and easy way to understand yourself and others to communicate and work better together as a team. It brings greater self awareness, interpersonal communications, and personal and team effectiveness.
- Each Core team member will take a short 10-minute Myers Briggs online assessment

16Personalities

Personality Test - Personality Types - Premium Guides - Specialized Tests - Teams - Resources -

Log In

Take the Test

"It's so incredible to finally be understood."

Only 10 minutes to get a "freakishly accurate" description of who you are and why you do things the way you do.

Take the Test ->

<https://www.16personalities.com/free-personality-test>

10 Duties of Core Team

1. **Set the strategic planning schedule**
2. **Participate as a full member of the Strategic Planning Team (SPT)**
3. **Pick the SPT invitees**
4. **Follow-up with SPT invitees not responding by the deadline**
5. **Complete the SPT advance assignments**
6. **Follow-up with SPT members not completing the SPT advance assignments by the deadline**
7. **Help Heat Map the “where are we now” Parish data**
8. **Participate in ALL retreats and one Strategic Area of Focus Team**
9. **Do something amazingly transformational**
10. **Have fun!**

SPT Members Must

1. Attend the entirety of both retreats
 - a) Retreat 1 – Friday night, all day Saturday, 4 hours Sunday
 - b) Retreat 2 – one Saturday
2. Complete the Effective Parish Assessment (between 15-30 minutes)
3. Complete all Retreat 1 Advanced Assignments (about 30 minutes)
4. Attend 3 or 4 meetings of one of the Strategic Area of Focus Teams determined at the first retreat (each meeting is between 60-90 minutes)





**Implementation
Team Duties**

**Execute the Action Plan
developed by the
Strategic Planning Team**

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This is your last chance. After this, there is no turning back. You take the blue pill - the story ends, you wake up in your bed and believe whatever you want to believe.



You take the red pill - you stay in Stewardship Calligland and I show you how deep the rabbit hole goes.

Core Team Next Steps

1. Pick the dates for
 - a) First retreat
 - b) Second retreat
 - c) Date of Community Open Forum
 - d) Meeting to finalize SPT invitees (after June 25th)
2. I will forward this deck and the spreadsheet (already loaded on your website) into which you will type identify everyone you think meets the Stewardship Calling Strategic Planning Team Criteria
3. By no later than **JUNE 25th** you email me (billmarianes@gmail.com) your completed Excel spreadsheet with your SPT nominees (please fill out your list by yourself, and do NOT consult with each other)
4. ALL SPT submissions to me are totally confidential!

#	DATE	ACTIVITY	RESPONSIBILITY	NOTES
1		SPT Invite List Finalized	Core Team	SET DATE NOW
2		SPT Invitation Goes Out	Father and Parish Admin	10 days later
3		SPT Invitee Follow-Up Calls to Non-Responders	Core Team	10-14 days later
4		SPT Deadline for Acceptance	Core Team	7 to 10 days later
5		Advance Assignments sent to SPT and SWOT Released to Community	Father and Parish Admin	2-4 days later
6		SPT Advance Assignment Reminder Calls	Core Team	10-14 days later
7		Advance Assignments and Community Written SWOT Final Deadline Due	Parish Admin	14 days later
8		Advance Assignments Heat Mapping Processing Begins	Core Team & Bill	7-10 days later
9		Community SWOT Open Forum	Core Team & Bill	Anytime after parish SWOT went out
10		Advance Assignments Heat Mapping Processing Ends	Core Team & Bill	14-18 days after step 8 start of heat mapping
11		First SPT Retreat	Full SPT & Bill	About 4 months after step 1
12		Finalize Wording of S.M.A.R.T. Goals, Interim Goals/Actions, Accountability Scoreboards and Action Plans	Separate WIG Area of Focus Teams	2-3 months later
13		Second SPT Retreat	Full SPT & Bill	About 3 months after 1 st retreat
14		Strategic Plan Finalized	Bill & Core Team	About 30 days later
15	TBD	Implementation Leadership and Teams Recruited	Father, 2 Head Coaches and 6 Goal Co-Captains	TBD
16	TBD	Community Roll Out of Strategic Plan	Implementation Team	TBD



Selected SPT Criteria

YES:

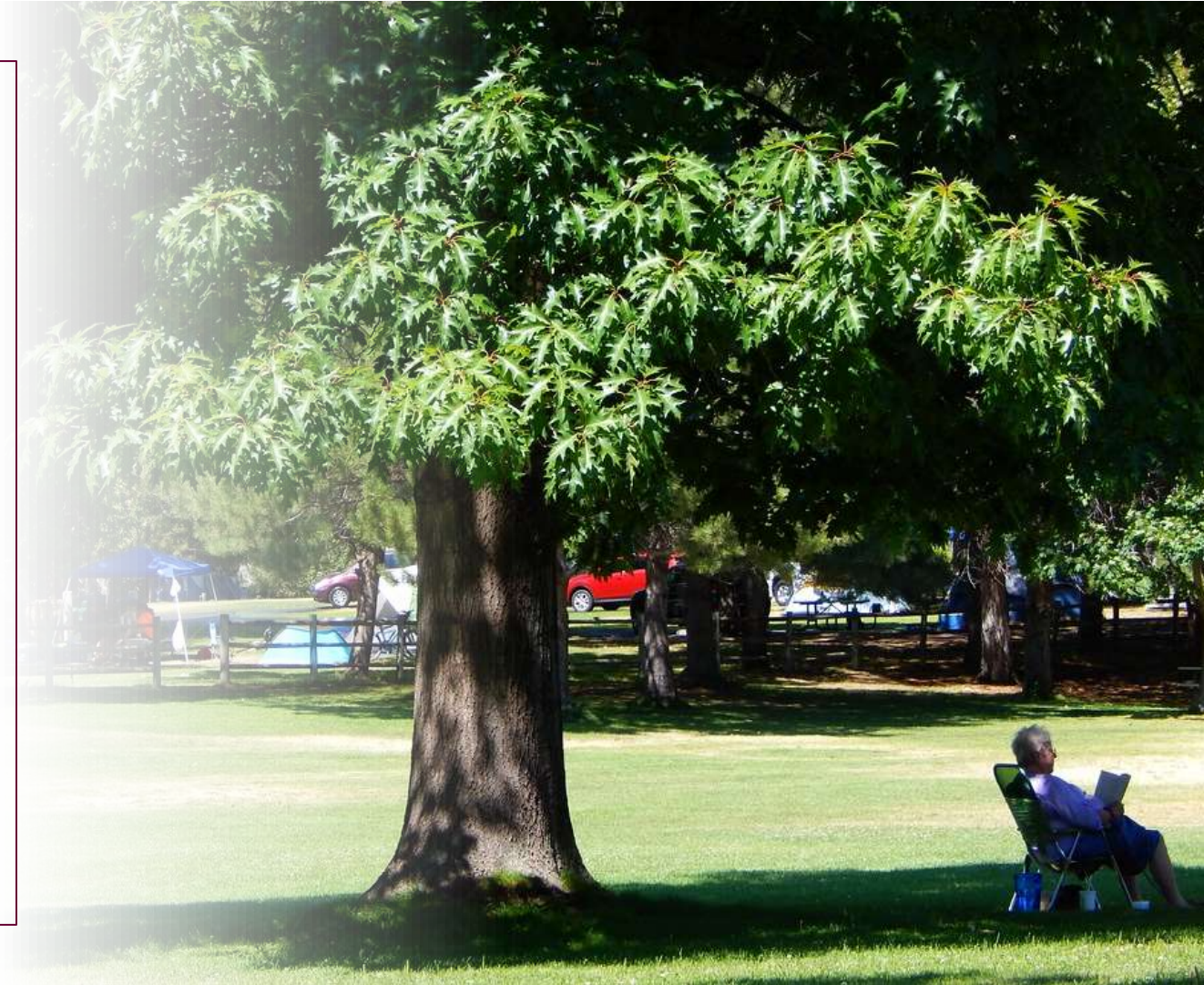
- ~ Who must be a part of the team
- ~ Many different perspectives
- ~ Many diverse gifts
- ~ All major constituencies
- ~ Team-players
- ~ Intelligent
- ~ Strategic thinkers and not small thinkers
- ~ Creative
- ~ Visionaries + futurists not rooted in past
- ~ Articulate
- ~ Engaged
- ~ Faithful
- ~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

NO:

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

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

Greek Proverb





Old Chinese Proverb

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

The second best time is today.”

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

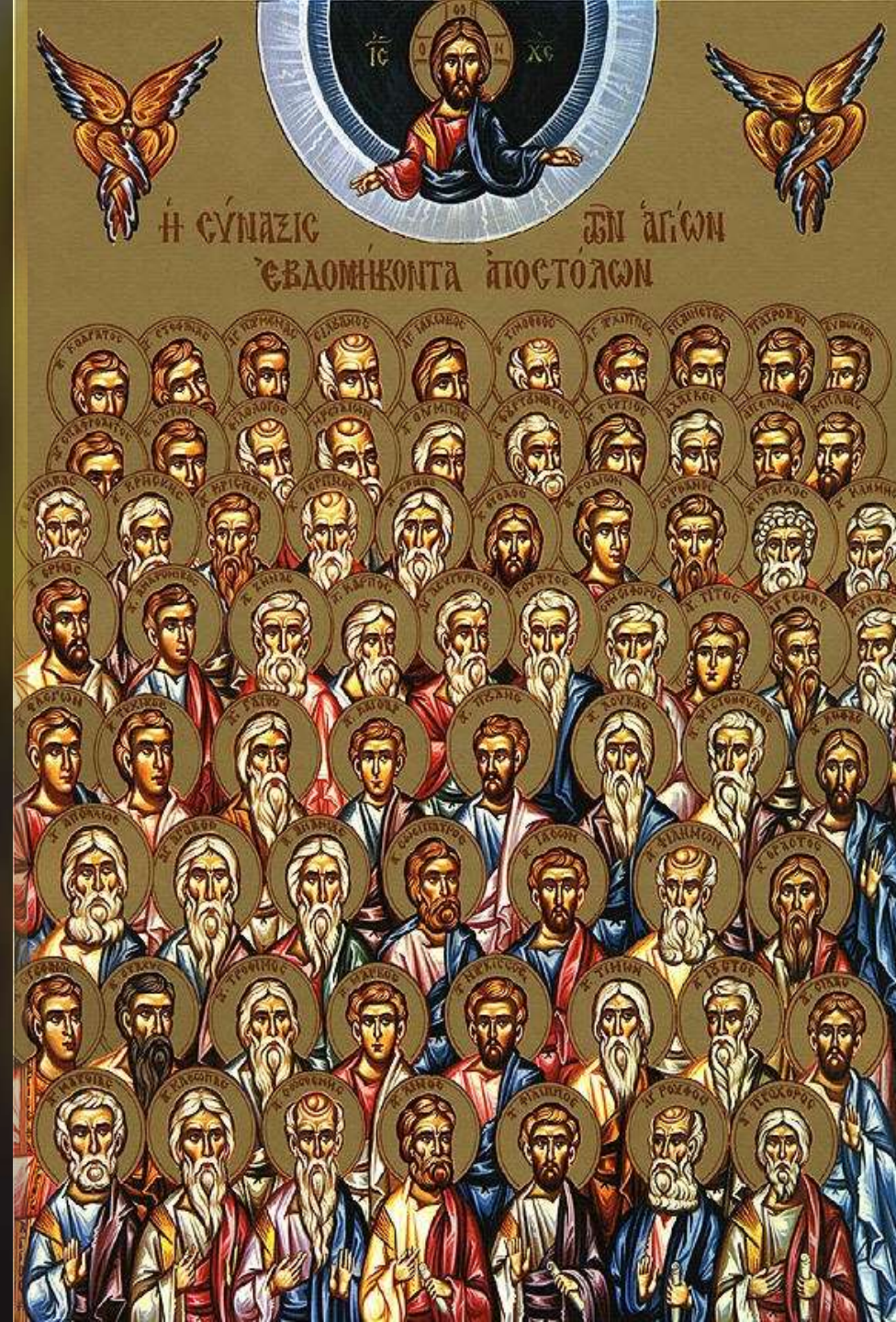
Acts 4:29

Fortune Favors The Bold...



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

Luke 10:1





QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES

Any Questions?



Appendix With More Detail of Strategic Planning Elements

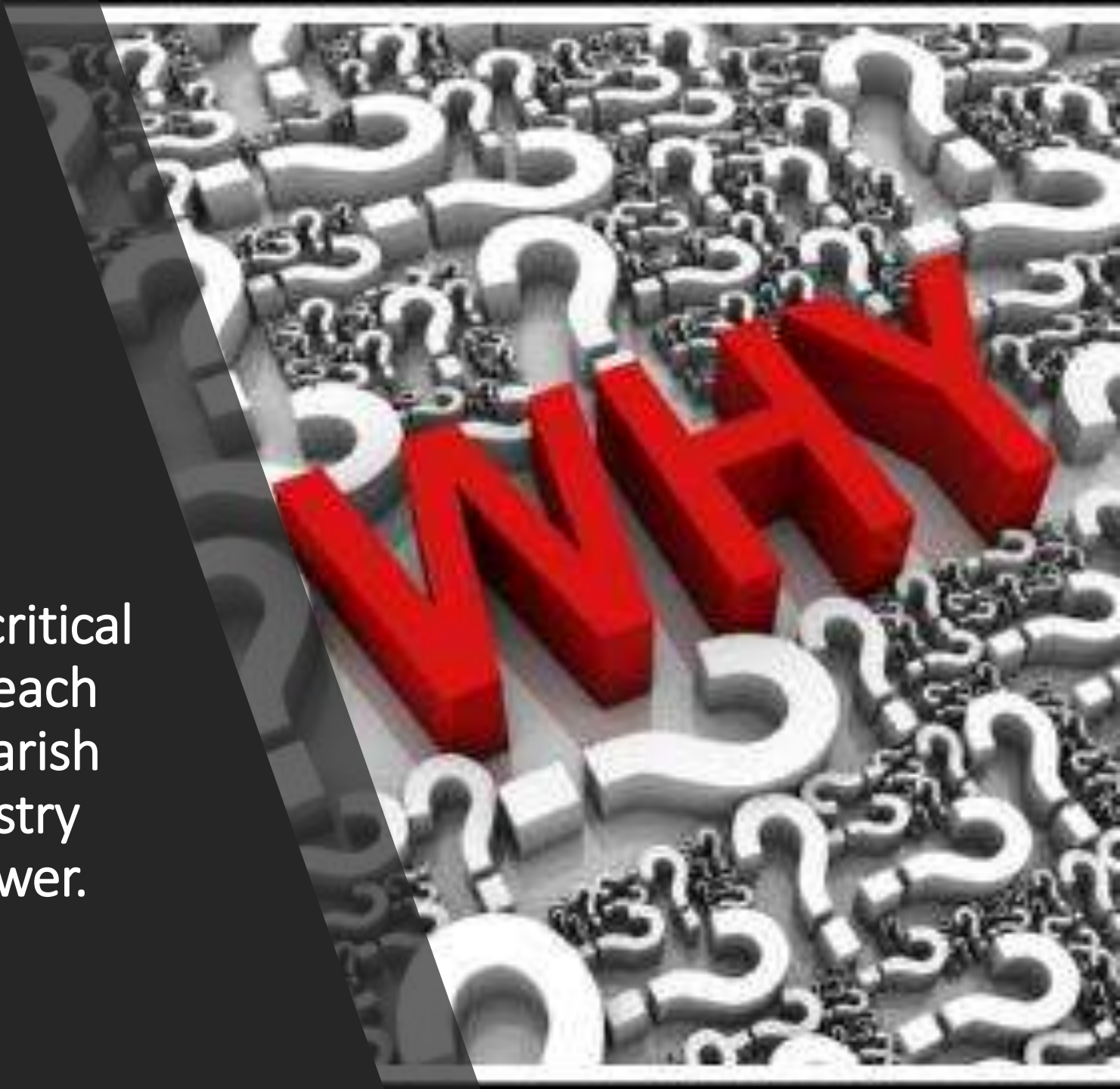




Question 1:

**WHY do we
exist?**

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



WHY Statement

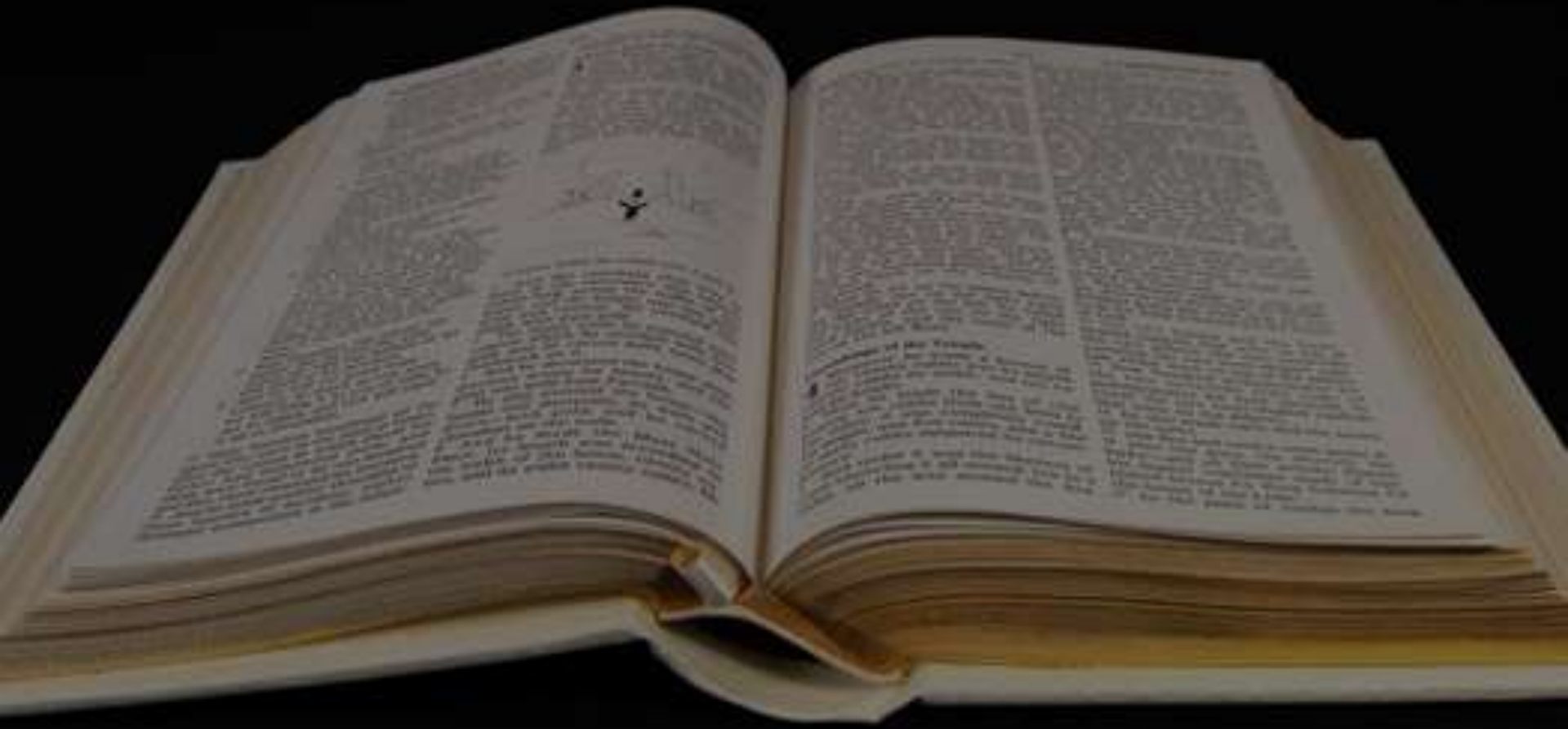
Answers strategic planning question #1:

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



Core
Values

Core Values Are Biblical



GOD'S Core Values

I
THOU SHALT HAVE
NO OTHER GODS
BEFORE ME

II
THOU SHALT NOT
MAKE UNTO THEE
ANY GRAVEN IMAGE

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

IV
REMEMBER THE
SABBATH DAY TO
KEEP IT HOLY

V
HONOR THY FATHER
AND THY MOTHER

VI
THOU SHALT
NOT KILL

VII
THOU SHALT NOT
COMMIT ADULTERY

VIII
THOU SHALT
NOT STEAL

IX
THOU SHALT NOT
BEAR FALSE
WITNESS AGAINST
THY NEIGHBOR

X
THOU SHALT
NOT COVET

CHRIST'S Core Values

THE BEATITUDES

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

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

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

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

Blessed are the merciful
for they shall obtain mercy.

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

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

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

Matthew 5:3-10



1. Beliefs shared by the stakeholders

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

3. Provide a framework for decisions



Question 2:

**Where are
we now?**

Where Are We Now Assessment is Biblical





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

Test yourselves!”

2 Corinthians 13:5



Question 3:

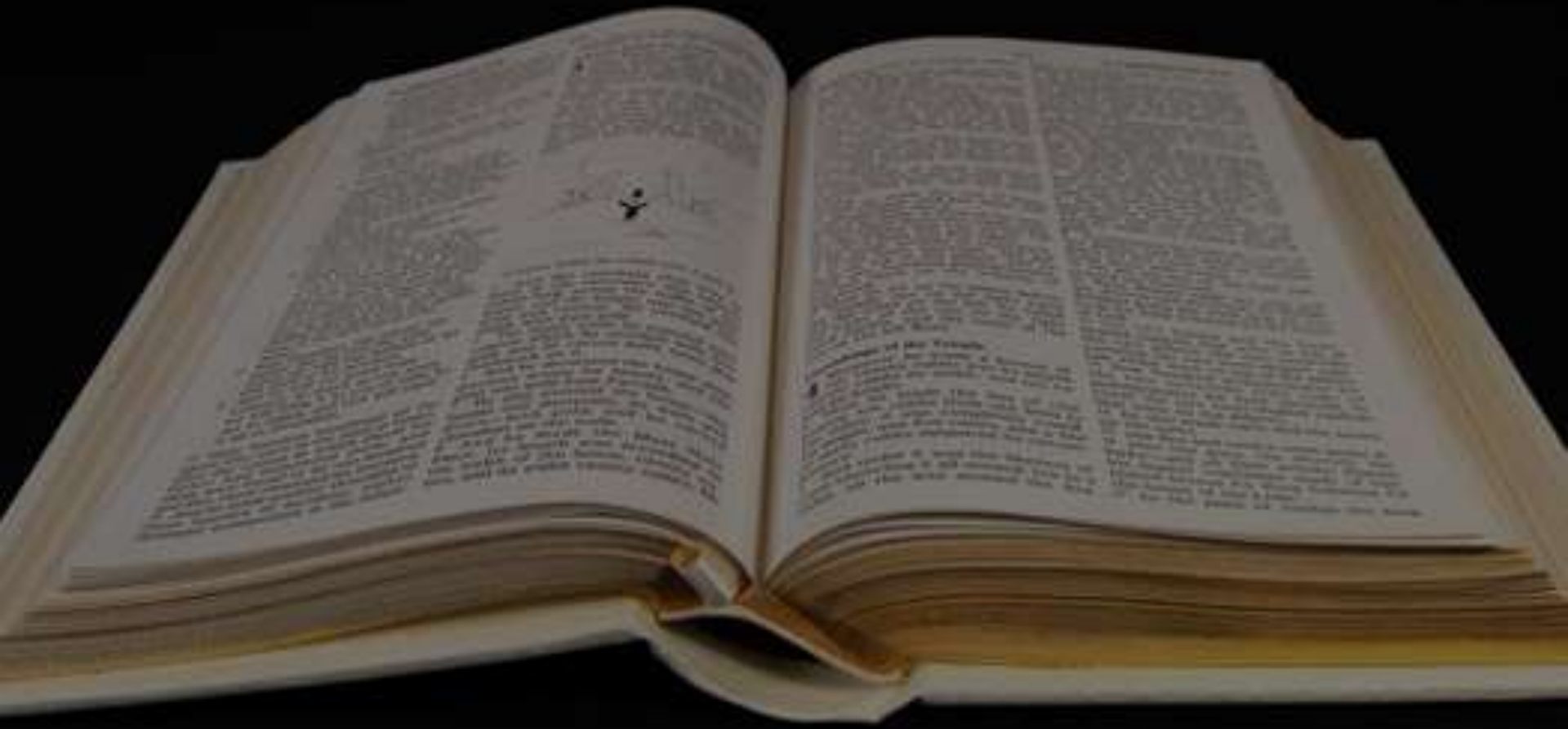
**Where do we
want to be?**



Mission

Statement

A Mission Statement Is Biblical



Mission Statement

Answers strategic planning question #3:

What do we do?

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



The Great Commission Mission Statement

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

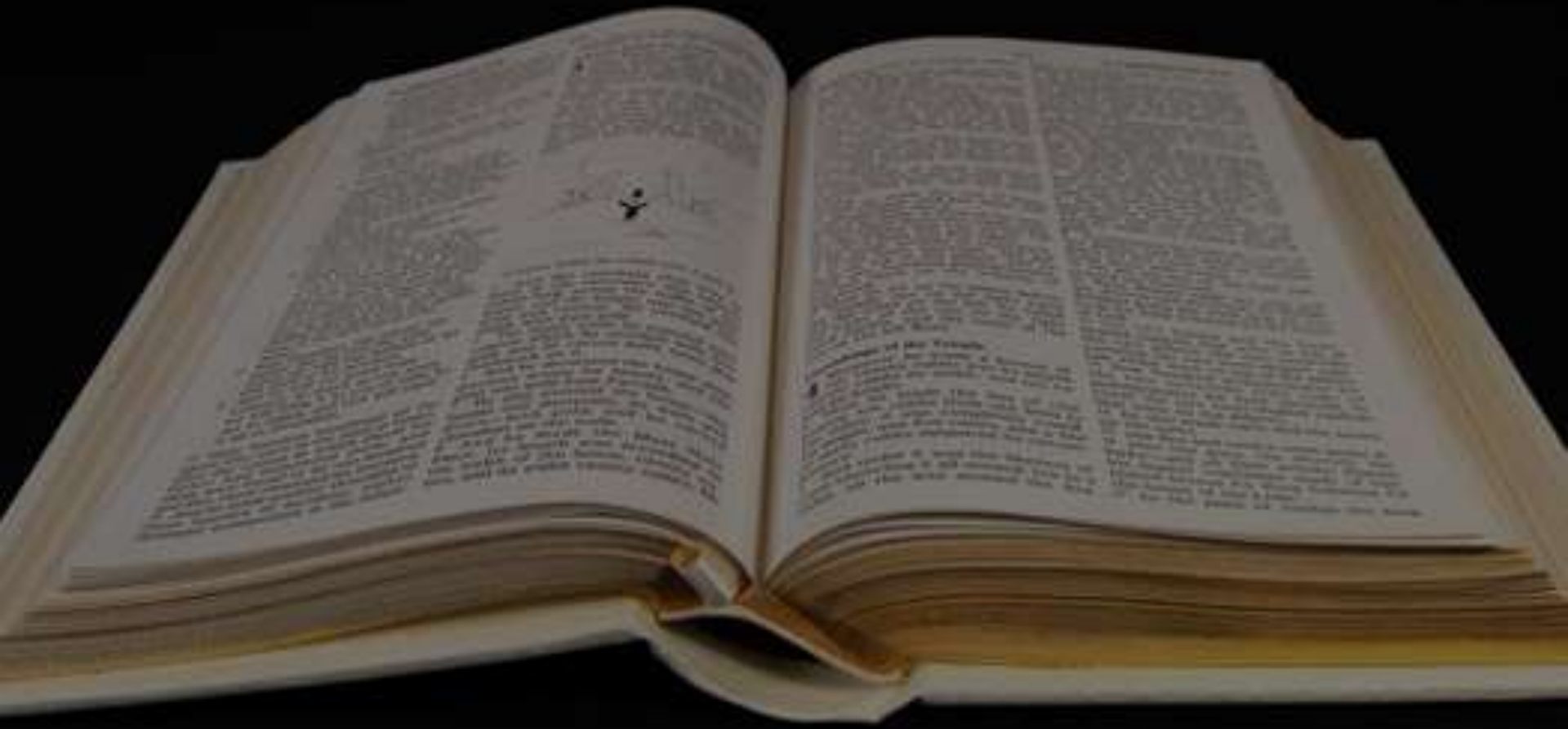


Matthew 28:18-20



VISION

A Vision Statement Is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18



A Vision should be:

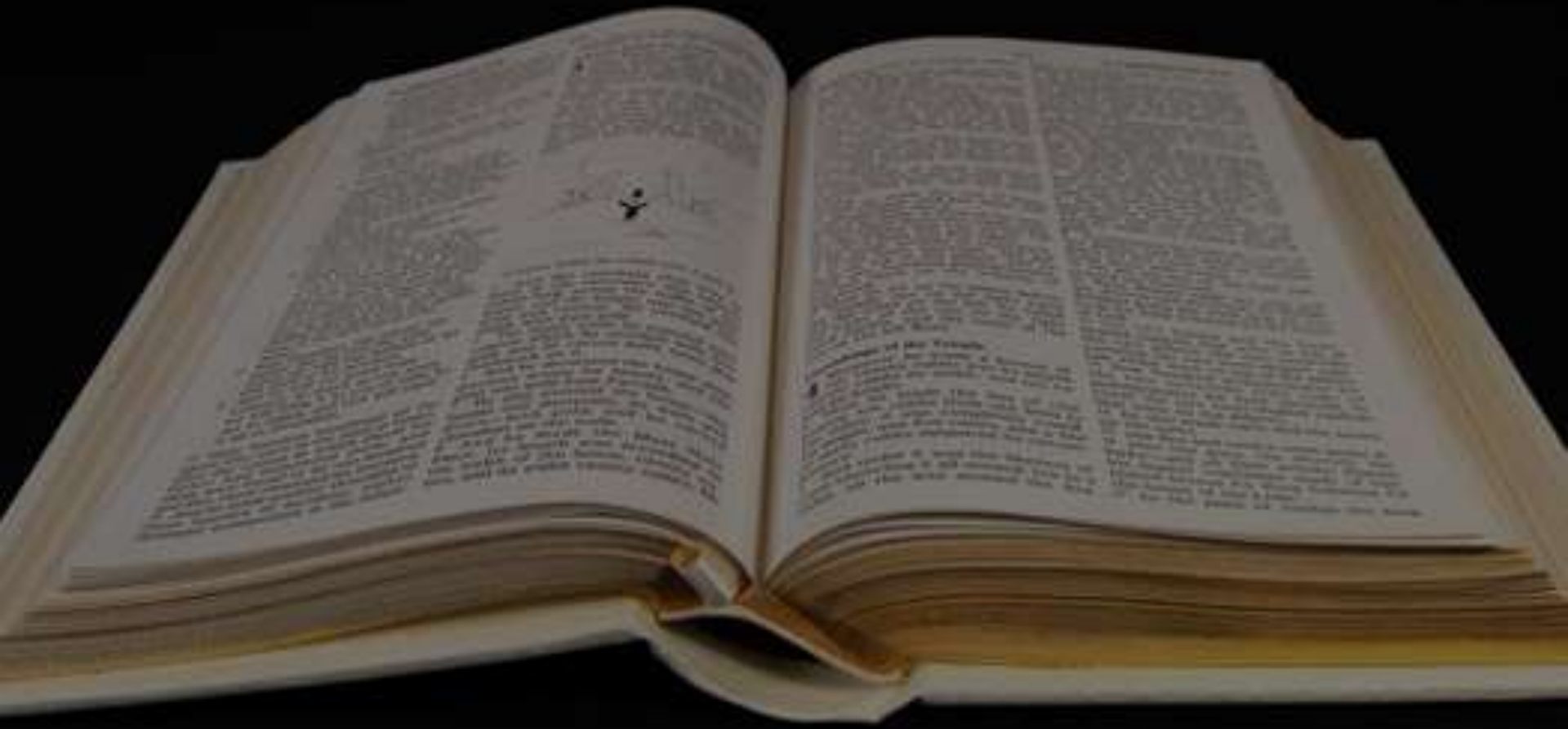
1. clear & concise
2. compelling & inspiring
3. a “picture” of where you're going
4. about the future (2-4 years)
5. possible...




Question 4:

**How will we
get there?**

Strategic SMART Goals Are Biblical





These twelve
Jesus sent out,
charging them...

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

2. *...preach as you go*

3. *...heal the sick*

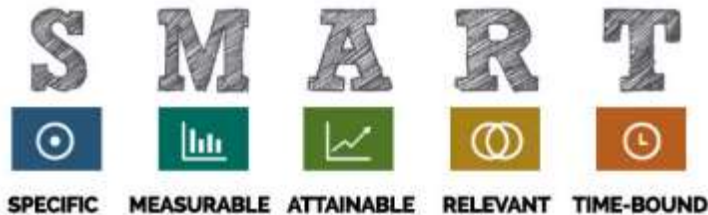
4. *...cleanse the lepers*

5. *...raise the dead*

6. *...cast out demons*

Matthew 10:1, 5-8

SMART Goals



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

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

Measurable: Can you measure the success of the goal?

Attainable: Is the goal attainable within a reasonable time?

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

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

5 Phases of Every S.M.A.R.T. Goal Action Plan

1. Research Phase

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

2. Design and Development Phase

- ~ develop the solution based on research of best practices

3. Training

- ~ train your team on your program

4. Implementation Phase

- ~ Implement the new best practices solution

5. Evaluation and Improvement Phase

- ~ assess solution implementation and improve it for next roll out

A detailed mosaic of Christ Pantocrator, the central figure of the Holy Trinity. He is depicted with a beard and long hair, wearing a blue robe over a red garment. He holds a book in his left hand and a scepter in his right. The mosaic is set within a circular frame with a gold background. Surrounding the central figure are various symbols, including a cross, a fish, and a dove. The text "IC XC" is visible on either side of the central figure, and "ΚΒΙΤΩΡ" is written below him. The mosaic is part of a larger wall painting, with other figures and symbols visible in the background.

**Welcome to Holy Trinity Greek
Orthodox Cathedral**

**STEWARDSHIP &
ENGAGEMENT**
Wildly Important Goal 1

Stewardship & Engagement

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 contribute their time, talents, and treasures;**
- (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;**
- (e) establish a planned giving program and endowment in which at least 5% of parishioners participate (in addition to their annual stewardship);**
- (f) Will transition to having parishioners become percentage financial givers on their way to becoming at least 10% tithers.**

Stewardship & Engagement Interim Goals

- Interim Goal 1: Research the most effective youth and adult Stewardship & Ministry Engagement Programs within 3 months
- Interim Goal 2: Develop the most effective Stewardship & Engagement Programs within 4 months
- Interim Goal 3: Recruit and train the parish “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 Programs and make necessary improvements within 2 months

Stewardship & Engagement Interim Actions

- Interim Actions for Interim Goal 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 offer

- Interim Actions for Interim Goal 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

- Interim Actions for Interim Goal 3:

A: identify Stewardship & Engagement Program "Ambassadors" to deliver Stewardship & Engagement Program

B: develop Ambassadors training programs

C: train the Ambassadors

- Interim Actions for Interim Goal 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

- Interim Actions for Interim Goal 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 Action Plan



Key Actions Necessary To Achieve SMART Goal 2	<u>Responsible Party</u>	<u>Deadline Timetable</u>	Completion <u>Confirmation Test</u>
<u>LAG 1: Research the most effective stewardship and ministry engagement programs within 3 months</u>			
1. Form Parishioner SMART Goal Team 2 (“Stewardship & Engagement Program Team 2”).	Strategic Planning Team and Goal co-Captains	1 month after Start Date	Stewardship & Engagement Program Team 2 members agree to serve
2. Determine stewardship and ministry engagement key definitions and effectiveness metrics.	Stewardship & Engagement Program Team 2	1 month after step 1	Stewardship definitions and metrics determined
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.	Stewardship & Engagement Program Team 2	1 months after step 2	Parish baselines and parish impediments determination are finalized
4. Identify at 3 stewardship and engagement, 3 endowment, and 3 benevolence fund programs to consider from both inside and outside the Orthodox ecosystem.	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 Action Plan



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

Stewardship & Engagement SMART Goal Action Plan



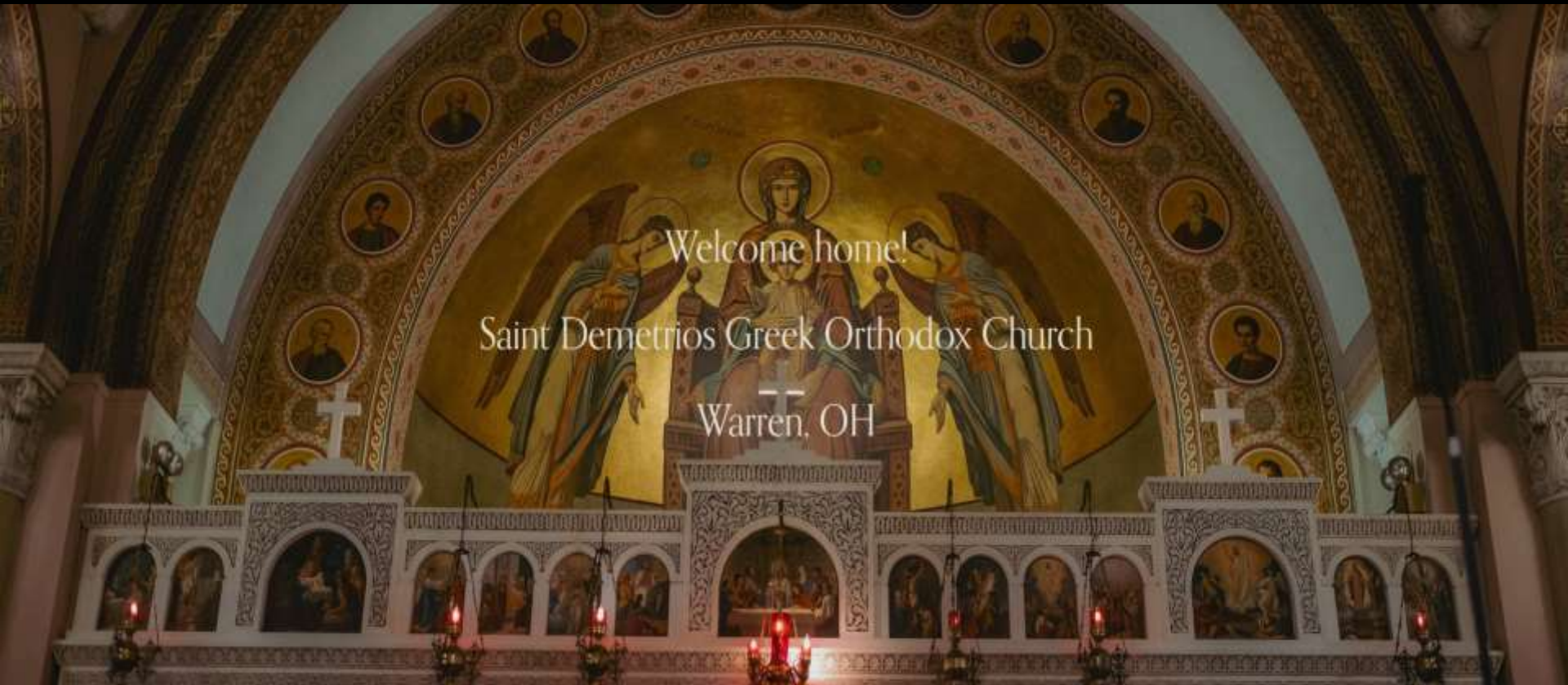
Key Actions Necessary To Achieve SMART Goal 2	<u>Responsible Party</u>	<u>Deadline Timetable</u>	Completion <u>Confirmation Test</u>
<u>LAG 4: Implement the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within 24 months</u>			
9. Implement Stewardship & Engagement Program to achieve the Stewardship % Engagement Targets.	Ambassadors	24 months after step 8	Stewardship & Engagement Program is fully launched
10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship & Engagement Targets are achieved	Ambassadors	Contemporaneous with step 9	Established monthly Stewardship & Engagement Targets are achieved
<u>LAG 5: Compile and assess the results of the Stewardship Program and make necessary improvements within 2 months</u>			
11. Obtain and compile qualitative and quantitative data from Stewardship & Engagement Program and compile as to the effectiveness and success (based on criteria established in step 2) and identify areas for improvement.	Ambassadors and Stewardship & Engagement Program Team 2	1 month after step 10	Stewardship & Engagement Program assessments are completed
12. Finalize and deliver Stewardship & Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship & Engagement Program more effective based on information identified in step 11.	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



Stewardship & Engagement Accountability 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		



Welcome home!
Saint Demetrios Greek Orthodox Church
Warren, OH

Vision & Parish Strategic Planning



Bill Marianes

