

ST. NICHOLAS GREEK
ORTHODOX CHURCH

Strategic Planning Final Key Elements

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

(Proverbs 29:18)

Bill Marianes



STEWARDSHIP
CALLING

ST. NICHOLAS GREEK ORTHODOX CHURCH

RETREAT STRATEGIC PLANNING TEAM

Fr. George	Parsenios
Tina	Babalas
Carol	Bearse
Bill	Brown
Pam	Brown
Maria	Decoulos
Stephanie	DeVasto
Robert	DeVasto
Demetrios	Katos
Ghada	Massabni
Nector	Ritzakis
Penelope	Tzougros

“The domain of
the Leader is the



The work of the
leader is
change.”





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. S.M.A.R.T. Strategic Goals
6. Interim Goals & Interim Actions
7. Comprehensive Action Plan
8. Vision Statement
9. SMART Gap Implementation Process
10. Strategic Plan



10 Strategic Plan Deliverables



EPA 2 RESULTS (60 responses)



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



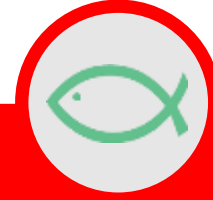
Stewardship & Generosity

- 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

Summary Results (Six Pillars)

	<u>%</u> favorable	<u>%</u> unfavorable	<u>%</u> neutral	<u>% I don't</u> know
Vision & Planning	60%	20%	20%	23%
Leadership & Teams	80%	5%	14%	12%
Stewardship & Generosity	47%	33%	19%	36%
Parishioner Engagement	55%	27%	18%	19%
Ministries	45%	31%	24%	26%
Operational Effectiveness	69%	15%	17%	25%

Footnotes

- Favorable + Unfavorable + Neutral = 100% (does not include “I don’t know”)
- “I don’t know” is separately shown as a % of total responses
- Best score across all 6 pillars is darkest green, lowest is darkest red

RESULTS – first 3 pillars

Vision & Planning	% favorable	% unfavorable	% neutral	% I don't know
Strategic Planning	62%	15%	22%	23%
Operational & Technical Planning	61%	21%	18%	19%
Parishioner Involvement	64%	22%	14%	26%
Goal Achievement and Accountability	54%	20%	26%	27%

Leadership & Teams	% favorable	% unfavorable	% neutral	% I don't know
Christian Leadership	84%	5%	12%	8%
Leading & Coaching	81%	5%	14%	12%
Conflict Management	75%	7%	18%	20%
Effective Teams	83%	3%	14%	10%
Parish Council & Boards	79%	7%	13%	12%

Stewardship & Generosity	% favorable	% unfavorable	% neutral	% I don't know
Giving & Tithing	53%	30%	17%	29%
Stewardship Campaign	62%	22%	16%	25%
Capital Campaign	45%	26%	29%	54%
Planned Giving & Endowments	10%	67%	23%	46%
External Philanthropy	43%	40%	17%	38%
Transparency & Accountability	71%	16%	13%	22%

RESULTS – final 3 pillars

<u>Parishioner Engagement</u>	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>	<u>% I don't know</u>
Spiritual Engagement & Catechism	64%	18%	18%	14%
Liturgical & Sacramental Participation	58%	29%	13%	16%
Outreach	33%	47%	19%	33%
Evangelism	45%	33%	22%	25%
Welcoming & Fellowship	73%	10%	17%	5%

<u>Ministries</u>	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>	<u>% I don't know</u>
Defines Needs of Parishioners	40%	33%	26%	20%
Ministry Management	39%	35%	26%	34%
Ministry Engagement	56%	22%	23%	23%
Volunteer Management	51%	26%	23%	22%
Youth & Young Adult	41%	36%	23%	29%

<u>Operational Effectiveness</u>	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>	<u>% I don't know</u>
Communications & Digital Strategies	71%	11%	18%	22%
Facilities & Technology	72%	10%	18%	13%
Financial Excellence	69%	17%	13%	30%
Safety & Security	66%	21%	13%	29%
Staff Management	65%	15%	20%	31%

2021-22 Stewardship Dashboard Results

PARISH	2022	2021
Number of Stewards	178	193
Total Stewardship Income	\$217,405	\$217,328
% of Operating Expenses Paid By Stewardship	70%	73%
Median Stewardship Contribution	\$600	\$600
Proxy Tithe Stewardship %	0.70%	0.70%
\$ Invested in Charities/Ministries	\$2,438	\$5,538
% Invested in Charities/Ministries	0.80%	1.9%
% Top 10 Stewards Contribution	33%	25%
% Top 20 Stewards Contribution	46%	39%

Final Strengths

ST. NICHOLAS GREEK
ORTHODOX CHURCH



- **Community**
- **Clergy**
- **Welcoming and Hospitable**
- **Leadership**
- **Financial Management**

Final Weaknesses

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ORTHODOX CHURCH



- **Facilities**
- **Continuity and Ministry Management**
- **Stewardship**
- **Youth and Young Adults**
- **Outreach & Evangelism**
- **Religious Education**

Final Opportunities

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- **Community Outreach and Engagement**
- **Orthodox Outreach and Engagement**
- **Technologies**

Final Threats

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- **Societal**
- **Economic**
- **Competing Youth Activities**

Final WHY Statement

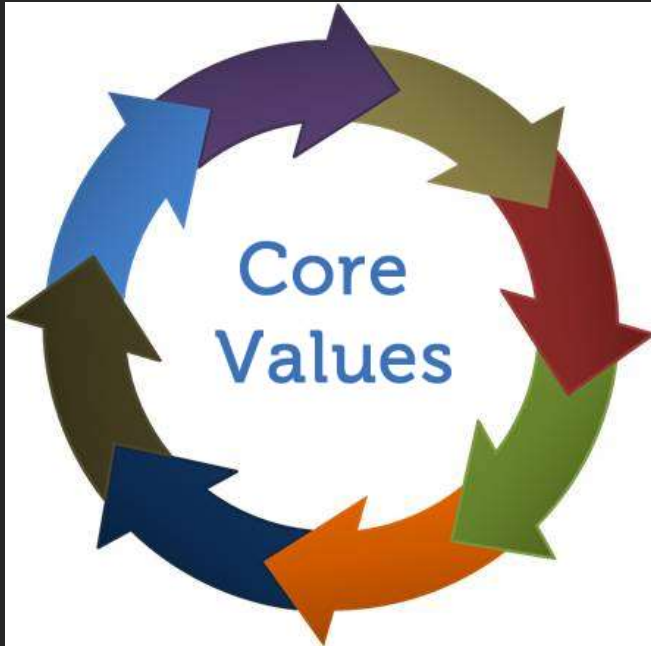
ST. NICHOLAS GREEK
ORTHODOX CHURCH



**To share love,
spread joy, instill
hope, and live
with purpose.**

Final Core Values

ST. NICHOLAS GREEK
ORTHODOX CHURCH



- **Collaborative**
- **Welcoming**
- **Philanthropic**
- **Loving**
- **Christian Spirituality**

Final Mission Statement

ST. NICHOLAS GREEK
ORTHODOX CHURCH



**We are a Christ-centered
community that
welcomes all to worship,
to pray, to serve others,
and to learn our
Orthodox faith.**

Final 3 Strategic Areas of Focus

ST. NICHOLAS GREEK
ORTHODOX CHURCH



1. **Stewardship
Engagement**
2. **Outreach &
Evangelism**
3. **Religious
Education**
4. **Facilities**

Low Hanging Fruit

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ORTHODOX CHURCH



- **Communications**
- **Technology**
- **Continuity and Ministry Management**

Strategic Areas of Focus #1

ST. NICHOLAS GREEK
ORTHODOX CHURCH

Stewardship Engagement

Strategic Areas Of:



Team Leader Names	Emails
<u>Co-Chair</u> Penelope Tzougros	penniesnow@aol.com
<u>Co-Chair</u> Stephanie DeVasto	Stephbob1976@aol.com
<u>Secretary</u> Carol Bearse	carolbearse@aol.com

Strategic Areas of Focus #1

ST. NICHOLAS GREEK
ORTHODOX CHURCH

Outreach & Evangelism

Strategic Areas Of:



Team Leader Names	Emails
<u>Co-Chair</u> Bob DeVasto	robertdevasto@gmail.com
<u>Co-Chair</u> Bill Brown	billcbrown55@gmail.com
<u>Secretary</u> Nector Ritzakis	nritzakis@gmail.com

Strategic Areas of Focus #2

ST. NICHOLAS GREEK
ORTHODOX CHURCH

Religious Education

Strategic Areas Of:



Team Leader Names	Emails
<u>Co-Chair</u> Maria Decoulos	maria@decoulos.com
<u>Co-Chair</u> Demetri Katos	dskatos@gmail.com
<u>Secretary</u> Ghada Massabni	ghadamassabni@gmail.com

Strategic Areas of Focus #2

ST. NICHOLAS GREEK
ORTHODOX CHURCH

Facilities

Strategic Areas Of:



Team Leader Names	Emails
<u>Co-Chair</u> Maria Decoulos	maria@decoulos.com
<u>Co-Chair</u> Demetri Katos	dskatos@gmail.com
<u>Secretary</u> Ghada Massabni	ghadamassabni@gmail.com

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 can be found under the [Strategic Planning](#) tab at the page for: [Metropolis of Boston Four Parish Strategic Plan](#)

<https://stewardshipcalling.com/lexington-st-nicholas-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 arrow points from this menu item to the 'LEXINGTON - ST. NICHOLAS STRATEGIC PLAN' page, which is also circled in red. The page content includes a title, a paragraph about strategic planning, and a section 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 the year.

through Strategic Planning as a part of the Holy Trinity- Concord; St. Luke's – East 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.

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Sample Strategic Sample Goals and Action Plans Page

Stewardship Calling

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

www.stewardshipcalling.com

The screenshot shows the website's navigation menu with the following tabs: WHY?, STEWARDSHIP, STRATEGIC PLANNING (circled in red), INTERNET RADIO & PODCASTS, KEYNOTES & LEADERSHIP, and RESOURCES. Below the menu, there are icons for 'PERSONAL', 'SPECIFIC', and 'MEASURABLE'. The main content area features a large graphic with the text 'ACTION PLAN' and a hand writing on a whiteboard. Below this, there is a list of sample S.M.A.R.T. goal and action plans, with one item circled in red: 'SAMPLE S.M.A.R.T. GOAL & ACTION PLANS'. The list includes titles such as 'BOSTON METROPOLIS - THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING', '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', and 'ZOE FOR LIFE - WHY DISCOVERY'. At the bottom, there are links for 'COMMUNICATIONS & TECHNOLOGY', 'EDUCATION & SPIRITUAL GROWTH', 'FACILITIES & CHURCH CAMPUS', 'LEADERSHIP', 'LIFE-STAGE MINISTRY', and 'OUTREACH & EVANGELISM'.

Sample S.M.A.R.T. Goals and Action Plans can be found under the [Strategic Planning](#) tab at the page for: [SAMPLE S.M.A.R.T. GOAL & ACTION PLANS](#)

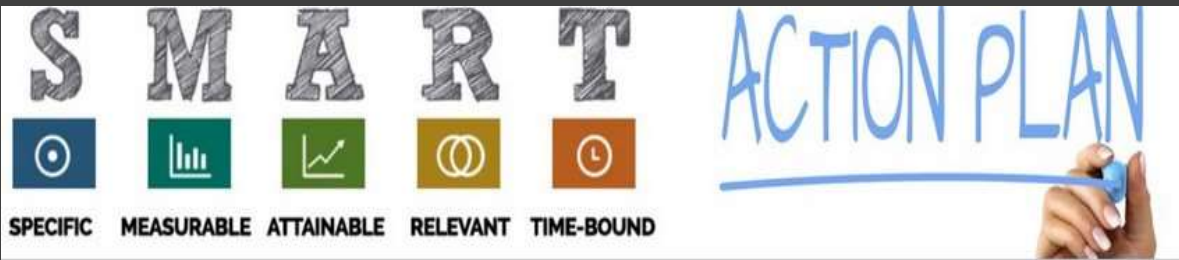
<https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/>

Sample Strategic Sample Goals and Action Plans Page

www.stewardshipcalling.com

Sample S.M.A.R.T.
Goals and Action
Plans can be found
under the [Strategic
Planning](#) tab at the
page for: [SAMPLE
S.M.A.R.T. GOAL &
ACTION PLANS](#)

<https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/>



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

Here are sample draft S.M.A.R.T. Goals and Action Plans created by Parishes using my Stewardship Calling Strategic Planning process. They are broken down by subject matter category. Parishes can use these as a starting point to create their own S.M.A.R.T. Goals and Action Plans designed specifically for their Parish needs. If you have any questions, or would like to see examples of other goals, please contact me at Bill@stewardshipcalling.com.

[COMMUNICATIONS & TECHNOLOGY](#)

[EDUCATION & SPIRITUAL GROWTH](#)

[FACILITIES & CHURCH CAMPUS IMPROVEMENT](#)

[LEADERSHIP](#)

[LIFE-STAGE MINISTRY](#)

[OUTREACH & EVANGELISM](#)

[PHILANTHROPY MINISTRY](#)

[SMALL GROUP MINISTRY](#)

[STEWARDSHIP & ENGAGEMENT \(Time, Talent & Treasures\)](#)

[WELCOMING](#)

[WORSHIP ENGAGEMENT, PRAYER LIFE & IN-REACH](#)

WE WANT YOU



...to pick a Strategic Area of Focus Task Force to join to develop a S.M.A.R.T. Goal and Action Plan

~ Stewardship Engagement

~ Outreach & Evangelism

~ Religious Education

Three Strategic Area Of Focus Meetings (for each SAF)

ST. NICHOLAS GREEK
ORTHODOX CHURCH



ZOOM 1 - Determine the sub-goals of the S.M.A.R.T. Goal and preliminary success targets (do not set the timeline)

ZOOM 2 - Edit Action Steps and estimated deadline (column 1 and 3)

ZOOM 3 – Reach Consensus on Final S.M.A.R.T. Goal and success targets, Action Plan and Timeline



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:



Stewardship & Engagement

SMART Goal 2



(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;



Stewardship & Engagement

SMART Goal 2



(b) increase ministry engagement of parishioners by at least 33% through identifying and engaging the diverse talents of all parishioners;



Stewardship & Engagement

SMART Goal 2



(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;



Stewardship & Engagement

SMART Goal 2



(d) establish a parish benevolence fund to help parishioners in need with at least \$15,000 available; and



Stewardship & Engagement

SMART Goal 2



(e) establish a planned giving program and endowment in which at least 5% of parishioners participate.



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**

Stewardship & Engagement SMART Goal 2

- Interim Goal 2: **Develop** the most effective parish stewardship and engagement program the “Stewardship & Engagement Program” within **4 months**

Stewardship & Engagement

SMART Goal 2

- Interim Goal 3: **Recruit and train** the parish Stewardship & Engagement “Ambassadors” within **2 months**

Stewardship & Engagement

SMART Goal 2

- Interim Goal 4: **Implement** the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within **24 months**

Stewardship & Engagement

SMART Goal 2

- 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

- **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

- INTERIM ACTIONS 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

Stewardship & Engagement SMART Goal 2

- **INTERIM ACTIONS 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

Stewardship & Engagement SMART Goal 2

- INTERIM ACTIONS 3:

- A: **identify** Stewardship & Engagement Program "**Ambassadors**" to **deliver** Stewardship & Engagement Program
- B: **develop** Ambassadors **training programs**
- C: **train** the Ambassadors

Stewardship & Engagement SMART Goal 2

- INTERIM ACTIONS 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

Stewardship & Engagement SMART Goal 2

- **INTERIM ACTIONS 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

- **INTERIM ACTIONS 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

- **INTERIM ACTIONS 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 3:**

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

B: develop Ambassadors training programs

C: train the Ambassadors

- **INTERIM ACTIONS 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 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

**PAY CLOSE
ATTENTION**

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



Stewardship & Engagement SMART Goal 2 Action Plan



Key Actions Necessary To Achieve SMART Goal 2	<u>Responsible Party</u>	<u>Deadline Timetable</u>	Completion <u>Confirmation Test</u>
<u>IG 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 2 Action Plan



Key Actions Necessary To Achieve SMART Goal 2	<u>Responsible Party</u>	<u>Deadline Timetable</u>	Completion <u>Confirmation Test</u>
<u>IG 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 2 Action Plan



Key Actions Necessary To Achieve SMART Goal 2	Responsible Party	Deadline Timetable	Completion Confirmation Test
IG 2: Develop the most effective Stewardship Program within 4 months			
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
IG 3: Recruit and train Ambassadors within 2 months			
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 2 Action Plan



Key Actions Necessary To Achieve SMART Goal 2	<u>Responsible Party</u>	<u>Deadline Timetable</u>	Completion <u>Confirmation Test</u>
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IG 4: Implement the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within 24 months

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

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

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

SAF Zooms

ST. NICHOLAS GREEK
ORTHODOX CHURCH

<u>Action</u> SAF	Zoom 1 - SMART Goal Date & Time	Zoom 2 – Action Plan Date & Time	Zoom 3 – Final Approval Date & Time
STEWARDSHIP & ENGAGEMENT	August 1 - 6:30	August 10 - 6:30	August 23 - 6:30
OUTREACH & EVANGELISM	August 8 - 6:30	August 17 - 6:30	August 24 - 6:30
RELIGIOUS EDUCATION & SPIRITUAL ENGAGEMENT	August 7 - 5:30	August 21 - 5:30	August 31 - 6:30

ST. NICHOLAS GREEK
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Strategic Planning Final Key Elements

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

(Proverbs 29:18)

Bill Marianes



STEWARDSHIP
CALLING