



# St. Nicholas Orthodox Church Lexington

## Strategic Plan FINAL

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

(Proverbs 29:18)

**March 3, 2024**

Table of Contents

Executive Summary..... 3

PART ONE: The Process, Mission, SWOT, Core Values, Strategic Goals ..... 6

    Start With WHY ..... 6

    What is Strategic Planning?..... 7

    Statement of Why ..... 7

    Current State ..... 7

    Desired Future State ..... 8

    Action Plan ..... 8

    What is Our Plan?..... 8

    MISSION ..... 8

    SWOT Analysis..... 8

    Low Hanging Fruit ..... 10

    CORE VALUES ..... 10

    VISION ..... 11

    STRATEGIC GOALS ..... 11

    You Are Invited to Join the Team ..... 13

    Conclusion ..... 14

PART TWO – Specific Action Plans for Each of the Four Strategic Goals ..... 16

    Stewardship and Engagement SMART Goal ..... 16

    Stewardship and Engagement Action Plan ..... 17

    Stewardship and Engagement Scoreboard..... 21

    Religious Education SMART Goal ..... 22

    Religious Education Action Plan..... 23

    Religious Education Scoreboard..... 27

    Outreach, Evangelism, and Welcoming SMART Goal ..... 28

    Outreach, Evangelism, and Welcoming Action Plan ..... 29

    Outreach, Evangelism, and Welcoming Scoreboard..... 33

    Renovation Program SMART Goal ..... 34

    Renovation Program Action Plan ..... 35

    Renovation Program Scoreboard..... 38

Appendix A – The Strategic Planning Team ..... 39

Appendix B – Effective Parish Assessment (EPA)..... 40

    EPA 2 RESULTS (60 responses) ..... 40

    Summary Results..... 41

    Results ..... 42

Appendix C – Stewardship Dashboard Results 2021-23 ..... 45

ENDNOTES..... 46

## Executive Summary

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

Progress and success require periodically assessing where you are, where you want to be, and how you will get there. Our St. Nicholas Orthodox Church is a pioneer in undertaking this systematic, ambitious, and exciting process. We focus on helping our faithful and creating the most robust and dynamic parish. This comprehensive Strategic Plan will help all of us manage the “busyness” of our Parish without turning our Parish into a “business.” We will make history together as we implement this Strategic Plan to benefit our parish, parishioners, and community.

For many months, over thirty dedicated lay stewards and our clergy (see Appendix A), representing the significant diversity within our parish, have worked joyfully and diligently to analyze available data and issues to develop this Strategic Plan. This was completed by consensus with input from many of our faithful throughout our parish. Through a disciplined process, we conducted a detailed analysis of the Strengths, Weaknesses, Opportunities, and Threats (**SWOT**) of our parish, an effective parish assessment, and developed the following **mission** statement:

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

We also carefully analyzed the behaviors we wanted to model in our Parish. We concluded that to drive our culture and priorities and provide a framework for decision-making, we will embrace the following shared **core values**:

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

In determining what we hoped to accomplish and where we were going, we developed a dynamic and inspirational **vision** that proclaims that:

**St. Nicholas in Lexington is a loving, Christ-centered church that works together to welcome all and serve the community. We have a thriving stewardship program; an impactful, flourishing religious education program that serves youth and adults; and an evangelism ministry that contributes to a growing church family. We do all of this in a facility that is structurally sound, creatively designed to meet our needs, and accessible to all.**

Additionally, we surveyed parishioners using the Effective Parish Assessment (EPA). After over 20 years of research and work with well over 500 Orthodox Christian parishes in the United States, the empirical data compiled by Orthodoxy Ministry Services (OMS) team members shows that there are 6 Operational Pillars and 30 Operational Building Blocks that must be optimized to excellence in the most healthy and effective Orthodox Christian parish. OMS team members used their research and data to develop the Effective Parish Assessment. The EPA is a reliable, easy, and empirically proven way to assess the health and operational effectiveness of your parish.

The EPA is made up of two parts: Effective Parish Assessment 1 (EPA 1) of the 6 Pillars of operational excellence and the Effective Parish Assessment 2 (EPA 2) of the 30 Building Blocks of operational excellence. We received a color-coded, accurate assessment of the current state of the parish that identifies where operational improvements would be most beneficial. Please see Appendix B for the results.

To address our Strengths, Weaknesses, Opportunities, and Threats, stay true to our Mission and Core Values, and pursue our Vision, we identified four strategic areas of focus and organized a separate task force to identify and address goals in each area:

- **Stewardship and Engagement**
- **Religious Education**
- **Outreach and Evangelism**
- **Renovation Program**

In the time between the two strategic planning retreats, the Strategic Planning Team divided itself into these four Strategic Task Forces. It began monthly meetings and calls to develop a reasonable number of the most critical SMART Strategic Goals to achieve in their Strategic Area.

These four task forces then developed, by consensus, the Strategic Goals and detailed action plans to achieve them, all of which met the **SMART** goal criteria of being **Specific, Measurable, Attainable, Relevant**, and with achievable **Timetable**. These were all agreed upon and finalized during the second retreat.

Our Strategic Plan that follows this Executive Summary is in three distinct parts:

**Part 1** (pages 6-15) includes more detail about the process, the team, our Statement of Why, and our SWOT Analysis, Core Values, Mission, and Vision.

**Part 2** (pages 16-38) lays out the four specific SMART Goals and the methodical, step-by-step implementation action plan and process to achieve each goal, including precise timelines, areas of responsibility, and measurements of success.

**Part 3** (pages 39-47) is the Appendix which includes a list of the Strategic Plan Team members, the Effective Parish Assessment results, the Stewardship Dashboard, end endnotes.

The length of this Strategic Plan is purposeful. Given the vast diversity of our Parish, faithful, and our needs, we wanted to provide a thorough analysis of what we must do and a comprehensive plan to accomplish everything in a unified and effective manner. We ensured that our parish, parish-level ministries, and parishioners were the primary focus of every aspect of our planning.

The real work begins as we commit ourselves to dedicating the necessary resources and prioritizing our efforts to work diligently and achieve this blueprint that offers us an exciting road map to our sacred destiny. We have also established a systematic process to assess our successes and challenges and adjust to achieve measurable, positive results. Please walk with us as we take this journey of faith. The future of our parish's faithful depends on how diligently we perform this Strategic Plan as stewards of God's many blessings.

With this Strategic Plan, we now have a clear road map for how our St. Nicholas Orthodox Church exists ***to share love, spread joy, instill hope, and live with purpose.***

# PART ONE: The Process, Mission, SWOT, Core Values, Strategic Goals

## Start With WHY

Our Lord and Savior, Jesus Christ, gave us His life as an example of how we should live. He also asked us to nurture and grow His Church. Our Father gives us all our many other blessings. What will we do with all these gifts for God's greater glory and a righteous life both here and as we prepare for a **"good account before the awesome judgment seat of Christ"**<sup>1</sup> for all of eternity?

Visionaries understand the importance of first creating a clear vision of Why?<sup>2</sup> It is said that the two most important days of your life are:

1. First, the day you were born, and
2. Second, the day you figure out why<sup>3</sup>

Once one knows their Why, there is no end to the creativity, enthusiasm, energy, and dedication they will devote to achieving what God has called them to do. Christ communicated the Why of His coming to be with us and the Why of God's expectations of us. The Apostles understood their Why and sacrificed everything to achieve the Lord's vision. Now, it is our turn.

It is also critical for each organization and Church to know its "Why." Understanding one's Why is Biblical: **"Men, why are you doing these things?"**<sup>4</sup> Through this Strategic Plan, the St. Nicholas Orthodox Church (the "Parish") commits to emulate the kingdom of God. We unequivocally state:

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

**"Come and see"**<sup>5</sup> how you can change your life and the lives of others for the better by joining a dedicated team of disciples seeking to discover and live their callings through a strong, dynamic, faithful, and purposeful Orthodox Parish.

### Why Strategic Planning?

Strategic Planning is, first and foremost, Biblical and Christ-centered. At the very end of our Lord's ministry on this earth, He gave His Apostles a clear strategic plan as to how they were to achieve his vision by saying: **"Go therefore and make disciples of all the nations, baptizing them in the name of the Father and the Son and the Holy Spirit, teaching them to observe all that I commanded you."**<sup>6</sup>

In Jeremiah 29:11-12 we hear: **"For I know the plans that I have for you, declares the Lord, plans for well-being, and not for calamity, in order to give you a future and a hope. When you call out to me and come and pray to me, I will hear you."**

The Book of Acts, written by St Luke, has been described as: "...**a blueprint for reproducing the specific details and aspects of the Church...However, it is of great importance for understanding the organization and structure of the Church...**"<sup>7</sup> And in the rich Holy Gospel, we find Christ's clear strategic direction and plan given to his Apostles: "**But you shall receive power when the Holy Spirit has come upon you; and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the ends of the earth.**"<sup>8</sup>

The world has changed dramatically since our Lord's time on this earth and even since the Orthodox Church first arrived in the United States. And the speed of change is accelerating.

All the data inevitably leads to the conclusion that to thrive in the current millennium, our Parish must consider the existence of rapidly changing, practical realities without abandoning the truth and essence of our Orthodox Faith and Holy Traditions. Most notably of these is the timeless teachings of our Lord and Savior Jesus Christ. In other words, there can be no indifference. If we are not moving forward, we are drifting backward.

One of the common challenges of strategic planning for a diverse parish is the need to fully appreciate and meaningfully address the issues experienced by our parishioners. Thus, the Parish's Strategic Planning Team was comprised of very diverse representatives of our Parish who primarily focused on the opportunities, needs, and challenges of all our parishioners and Parish-level ministries. It remains incumbent upon all who serve our Church to listen to and focus on the unique needs of our faithful and those seeking Christ. We believe this Strategic Plan does that.

## What is Strategic Planning?

Strategic planning defines our direction (strategy) and allocates our resources to achieve our goals. A Strategic Plan must answer four fundamental questions:

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

## Statement of Why

1. Why do we exist? We must articulate why we exist and why anyone should want to join our Church.

## Current State

2. Where are we now? This step consists of a factual assessment of current strengths, weaknesses, opportunities, threats, programs, talents, financial resources, and needs.

## Desired Future State

3. Where do we want to be? Following our sense of God’s calling, we determine our consensus and comprehensive vision of where we want to be within a reasonable period.

## Action Plan

4. How will we get there? This is where specific activities are outlined in each area, which we determine to be critical in making our vision a reality.

## What is Our Plan?

A “Strategic Planning Committee” that grew to over thirty diverse lay leaders and clergy (see Appendix A) throughout our Parish community was formed to do the initial work. We made every effort to be as inclusive and diverse as possible as we gathered people from our Parish family’s perspectives, constituencies, and regions.

## MISSION

A critical part of any Strategic Planning process is developing a clear description of the fundamental purpose for which an organization exists and what it does to achieve its Vision. Mission answers the question: “What do we do?” A Mission statement is Biblical: ***“Go therefore and make disciples of all the nations.”***<sup>9</sup>

To address the needs of the Parish more particularly, we adopted the new Parish Mission Statement: **We are a Christ-centered community that welcomes all to worship, to pray, to serve others, and to learn our Orthodox faith.**

## SWOT Analysis

Proper Strategic Planning requires a comprehensive analysis of the current state by examining one’s Strengths, Weaknesses, Opportunities, and Threats (“**SWOT**”). A SWOT Analysis focuses on the following: (a) internal factors comprised of Strengths and Weaknesses; and (b) external factors comprised of Opportunities and Threats that include sociocultural shifts, macroeconomic matters, technological advances, changes in laws or our environment, etc.

Such an analysis and testing of oneself is Biblical: ***“Examine yourselves as to whether you are in the faith. Test yourselves!”***<sup>10</sup> The entire Parish family and each member of the Strategic Planning Team participated in this SWOT Analysis in writing and through community forums.

At the first three-day retreat, the Strategic Planning Team assessed many unique Strengths, Weaknesses, Opportunities, and Threats. However, to make the final SWOT list, a particular item had to be recorded by many people and agreed upon by consensus. The Strategic Planning Team extensively discussed everything to reach a consensus on our Strengths, Weaknesses,



Opportunities, and Threats. This list is a static assessment and will inevitably be modified as our parishioners, parish, Diocese, and the world around us change.

As a result, the Strategic Planning process must remain dynamic and not static to address new or different Strengths, Weaknesses, Opportunities, and Threats. One of the challenges that must be addressed is implementing, periodically reassessing, refreshing, and potentially modifying this Strategic Plan so that it will remain a living and breathing document and roadmap through a constantly changing environment.

To maximize the effectiveness and results of any Strategic Plan, the various Strategic Goals should address as many of the items discovered in the SWOT Analysis as possible. This Strategic Plan does that. A summary of the consensus SWOT conclusions follows:

### **St. Nicholas Orthodox Church SWOT Summary**

#### **1. Strengths**

Strengths include characteristics of our Parish that give us advantages. This can consist of things we do well.

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

#### **2. Weaknesses**

Weaknesses include characteristics that place our Parish at a disadvantage. This can consist of problems we face that we must overcome.

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

#### **3. Opportunities**

Opportunities include external chances to improve our performance in our environment.

- **Community Outreach and Engagement**

- **Orthodox Outreach and Engagement**
- **Technology**

#### 4. Threats

Threats include external elements in our environment that could be problematic for our Parish or inhibit our success.

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

Many interesting and valuable pieces of information and inferences were drawn from this SWOT Analysis. Significant time must be invested by the various ministries and leaders of the Parish to continue to assess and address the items identified in the SWOT Analysis.

#### Low Hanging Fruit

We identified several Weaknesses as “low hanging fruit” that the Parish Council and ministries can improve while we achieve the more significant Strategic Goals.

- **Communication**
- **Technology**
- **Continuity and Ministry Management**

We acknowledge that our post-immigrant generation Church is experiencing massive numbers of interfaith marriages and the significant outstanding outreach and evangelism opportunities in our extremely ethnically diverse Parish family. Accordingly, we must work diligently to be a Church that exists *to share love, spread joy, instill hope, and live with purpose.*

#### CORE VALUES

Core Values are beliefs shared among the stakeholders in an organization. They drive an organization’s culture and priorities and provide a framework to help make decisions. God presented us with critical Core Values in the Ten Commandments, and our Lord and Savior Jesus Christ augmented them in his Sermon on the Mount with what is known as the Beatitudes.<sup>11</sup>

After numerous small and large group discussions, the Strategic Planning Team agreed by consensus that the following Core Values should guide the Parish in everything we do:

**Collaborative      Welcoming      Philanthropic      Loving      Christian Spirituality**

## VISION

Vision defines what the organization hopes to do in the future. Vision is a longer-term, multi-year view focusing on **who do we want to be in the future?**

A Vision is Biblical: ***“Where there is no vision, the people will perish.”***<sup>12</sup> After numerous and extensive small and large group discussions, the Strategic Planning Team, by consensus, agreed upon the following Vision for the Parish:

**St. Nicholas in Lexington is a loving, Christ-centered church that works together to welcome all and serve the community. We have a thriving stewardship program; an impactful, flourishing religious education program that serves youth and adults; and an evangelism ministry that contributes to a growing church family. We do all of this in a facility that is structurally sound, creatively designed to meet our needs, and accessible to all.**

## STRATEGIC GOALS

Strategy is a roadmap for implementing the Vision and achieving the organization’s goals. It keeps the organization going in the right direction. Strategic Goals are only as effective as the process and discipline implemented to execute and monitor them.

Setting strategic goals and action plans is Biblical. Our Lord provided his Apostles and Disciples with clear direction and step-by-step instructions throughout the Holy Gospel.

***“Let your light shine before men, that they may see your good works and glorify your Father in heaven.”***<sup>13</sup>

***“These twelve Jesus sent out, charging them... go rather to the lost sheep of the house of Israel. And preach as you go... Heal the sick, raise the dead, cleanse lepers, cast out demons.”***<sup>14</sup>

The Strategic Planning Team used the SMART goal process to help ensure that each Strategic Goal is achieved if the various actions and steps identified in the process are diligently pursued and executed.

The SMART Goal process requires that each Strategic Goal be:

**Specific:** Is the goal specific enough for clarity so everyone will understand?

**Measurable:** Is there a way to measure the success of the goal?

**Attainable:** Is the goal genuinely achievable by us within a reasonable time?

**Relevant and Realistically Written:** Is the goal relevant to our situation and realistically written to address our needs?

**Timeline:** Is there a timeline associated with ensuring completion and accountability?

## Strategic Task Forces

At the first Strategic Planning retreat, the Strategic Planning Team brainstormed many specific strategic items that addressed the Weaknesses, Opportunities, and Threats, were consistent with the Core Values, focused on the Mission, and helped achieve the Vision. After many hours of discussions, the Strategic Planning Team consolidated the many items and organized them into four Strategic Areas of Focus to systematically address the most critical issues. The Parish's four Strategic Areas of Focus are:

- **Stewardship and Engagement**
- **Religious Education**
- **Outreach and Evangelism**
- **Renovation Program**

## Four Strategic Goals

In the months between the two strategic planning retreats, the Strategic Planning Team divided itself into these four Strategic Task Forces. It began monthly meetings and calls to develop a reasonable number of the most critical SMART Strategic Goals to achieve in their Strategic Area.

At a second retreat, the Strategic Planning Team thoroughly discussed and agreed upon the specific wording of each SMART Strategic Goal and a detailed Action Plan to achieve each goal that outlined (1) each specific action to be undertaken; (2) who was responsible for doing each necessary action; (3) how we would measure the achievement of that action; and (4) the timetable for the achievement of the action.

## Can We Do This?

Some challenges we will address have been with us for a while. Others are new. We have unique gifts that must be celebrated and put to the best use for God's greater glory and our salvation. And all of us working together can achieve the unimaginable.

***“God has appointed some in the church as follows: first apostles, second prophets, third teachers, then wonderworkers, also those having the gifts of healing, those able to help others, those with gifts of administration, and those with different kinds of tongues.”<sup>15</sup>***

Just as our Lord appointed 70 Disciples to go to ***“every city and place”<sup>16</sup>*** and preach the word, so too must all of us in the Parish family become disciples and share the good news. This Strategic Plan affords each of us that opportunity.

## **Implementation of Action Plans for four Strategic Goals and Accountability**

To be successful, any genuine Strategic Plan should follow a 4P approach: (1) use the proper **P**rocess; (2) recruit the right **P**eople; (3) develop the best, practical **P**lan; and (4) **P**erform effectively and thoroughly implement the plan. We believe that with God's grace and the Holy Spirit's invaluable and essential assistance and presence, this Strategic Planning process allowed the right team to deploy the proper process to reach significant goals and action plans. The most critical and complex step remains, namely the performance and implementation of this Strategic Plan.

The initial hard work of the Strategic Planning Team and Facilitator is now complete with publishing this Strategic Plan. The Parish will now reorganize itself and dedicate the necessary resources (human, financial, time, and other) to ensure complete implementation and success. This will require the dedication of time and the active involvement of a much bigger and broader group of the faithful. Indeed, significant additional human and financial resources and operational changes will be required to succeed.

To achieve the four Strategic Goals, reconstituted "**Implementation Task Forces**" will be formed, one for each of the Strategic Goals identified by the Strategic Planning Team. These new Implementation Task Forces will include some initial Strategic Planning Task Forces members. They will also add individuals from throughout (and perhaps outside) the Parish who can assist in achieving the four Strategic Goals.

We are also implementing an unprecedented level of accountability and transparency. As you can see, every action plan step for all four Strategic Goals is measurable and has a deadline. We will be regularly and publicly reporting on our progress. We have also instituted multiple feedback and accountability loops to ensure that we stay on track and are focused on achieving success. All of this will be publicly tracked and reported on our Parish Strategic Plan website <https://www.stnicholaslex.org/> and will be shared with parishioners regularly. After we have achieved every Strategic Goal, we will again measure how well we have addressed our challenges and then reassess what's next. Failure is not an option!

### **You Are Invited to Join the Team**

We invite anyone interested in working on any specific Strategic Goal to volunteer and offer their stewardship of time and talents. The more experienced and dedicated souls we have working together, the more we can achieve. These newly constituted and expanded four Strategic Planning Implementation Task Forces will execute and manage the tasks identified in the specific Strategic Action Plans contained in this Strategic Plan.

Each Strategic Goal will have **Goal Co-Captains**, who are primarily responsible for ensuring that the Implementation Task Force team working on that Strategic Goal stays on track and schedule. The overall implementation of every aspect of this Strategic Plan will be coordinated by the Goal Co-Captains, a **Head Coach**, and Fr. George, all of whom form our **Implementation Headquarters** (“IHQ”) to help ensure the entire project remains on track. At the same time, we welcome all the faithful of our Parish family to join us on this holy journey of faith by contacting us and volunteering at <https://www.stnicholaslex.org/volunteer>.

## **Communications and Breadth**

The proper and effective communication of this Strategic Plan and the progress made on its achievement will be equally critical. Accordingly, regular communications about how we are achieving our exciting Strategic Goals and Vision is an integral part of this Strategic Plan. Our Clergy and IHQ will regularly communicate the latest updates regarding our progress to all the faithful. The Parish website and other publications will be re-formatted to feature active links and content to each element of our Vision and four Strategic Goals. Regularly communicating our progress and successes will make our Strategic Plan real and achievable.

Some might be concerned that the breadth of this Strategic Plan may be overwhelming. So are the challenges facing our Parish and Holy Orthodox Church. Given our faithful’s disparate needs and varied talents, it is critical to have Strategic Goals that serve the vast diversity of our Parish, stewards, and challenges. Prioritization and allocation of available resources will inevitably be required. Each step sets out the time and sequence from the previous action item(s) and steps. After the Head Coaches and Strategic Goal Co-Captains set the start dates for each Strategic Goal, the timetable for its achievement is established. We have also included numerous reporting, accountability processes, and feedback loops to ensure that we transparently report our progress and do not drop the ball on any of this critical and holy work.

## **Conclusion**

There is something in this Strategic Plan for everyone that will allow us to address our most significant issues. After thorough research, careful and prayerful reflection, and diligent work by over thirty dedicated faithful from our Parish (see Appendix A), we believe that the systematic implementation of the detailed action plans in this Strategic Plan will allow us to directly address our needs and allow us to improve our service to the faithful entrusted to us measurably.

We do not believe our resources to implement this Strategic Plan are scarce, given the extraordinary God-given talents that exist within the faithful of our Parish. We believe we live in a world of abundance. By the Grace of God and with the essential support of the Holy Spirit, we can make a difference and achieve all of our Strategic Goals in the fullness of time. Our future can be very bright if we work together!

Throughout the process, our Parish will remain true to our **Core Values**:

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

We want as many of our faithful as possible involved in the transformational improvements resulting from this exciting Strategic Plan. If you, or anyone you know, wants more information or to volunteer, please contact the Parish office directly, complete the volunteer form <https://www.stnicholaslex.org/volunteer> or email [strategicplan@stnicholaslex.org](mailto:strategicplan@stnicholaslex.org).

You can always access this entire Strategic Plan and check out our progress, which we will regularly update, by going to our Parish Strategic Planning website at <https://www.stnicholaslex.org/>.

There is plenty of room for the active engagement of every person and organization prepared to ensure that our Parish achieves our Vision:

**St. Nicholas in Lexington is a loving, Christ-centered church that works together to welcome all and serve the community. We have a thriving stewardship program; an impactful, flourishing religious education program that serves youth and adults; and an evangelism ministry that contributes to a growing church family. We do all of this in a facility that is structurally sound, creatively designed to meet our needs, and accessible to all.**

May God bless St. Nicholas Orthodox Church and its faithful on our journey!



## PART TWO – Specific Action Plans for Each of the Four Strategic Goals

### Stewardship and Engagement SMART Goal

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

- a) Transition the adult and youth parishioners to become percentage givers;
- b) Increase the adult and youth ministry engagement by at least 25% through implementing pathways for parishioners to use their talents and gifts; and
- c) Cover all parish operating expenses solely through financial stewardship contributions, with such parish operating expenses to include:
  - i. an amount equal to at least 5% of all other operating expenses, with intent to increase annually, to be given to parish-chosen external charities and philanthropies, and
  - ii. at least four external service events for identified needs in conjunction with Outreach and Evangelism Ministry.





## Stewardship and Engagement Action Plan

| Actions Steps   | Responsible Party     | Deadline                 | Completion Test   |
|---|-----------------------|--------------------------|---|
| <b>Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 3 months</b>   |                       |                          |   |
| 1. Form Stewardship and Engagement Program Team (SEPT).   | SEPT Goal Co-Captains | 1 month after Start Date | SEPT members agree to serve   |
| 2. Determine adult and youth stewardship and ministry engagement and percentage giving key definitions and effectiveness metrics.   | SEPT                  | 1 month after step 1     | Definitions and metrics determined                                  |
| 3. Analyze the adult and youth parish baseline on those key stewardship and ministry engagement effectiveness metrics and survey/research parish impediments to achieving increased stewardship, and ministry engagement success. | SEPT                  | 1 month after step 2     | Parish baselines and parish impediments determination are finalized |



| Actions Steps   | Responsible Party | Deadline                        | Completion Test  |
|---|-------------------|---------------------------------|--|
| 4. Identify at least 3 stewardship and engagement and 3 percentage giving programs for both youth and adults to consider from both inside and outside the Orthodox ecosystem.   | SEPT              | Simultaneous with steps 2 and 3 | At least 3 stewardship and engagement and 3 percentage giving programs are examined                |
| <b>Interim Goal 2: Develop the most effective Stewardship Program within 3 months</b>   |                   |                                 |  |
| 5. Evaluate researched adult and youth stewardship and engagement for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.   | SEPT              | 1 months after step 4           | Evaluation of alternative stewardship and ministry engagement programs is completed                |
| 6. Modify or develop new adult and youth stewardship and engagement program for utilization at the parish (the “Stewardship and Engagement Program”) and establish monthly performance benchmarks and comprehensive communications strategy and plan. | SEPT              | 2 months after step 5           | Stewardship and Engagement Program is finalized, and monthly performance benchmarks are determined |
| <b>Interim Goal 3: Recruit and train Ambassadors within 2 months</b>  |                   |                                 |  |



| Actions Steps   | Responsible Party | Deadline                    | Completion Test   |
|---|-------------------|-----------------------------|---|
| 7. Identify and recruit personal visitation ambassadors/small group leaders (“Ambassadors”) who can implement the Stewardship and Engagement Program.                                   | SEPT              | 1 month after step 6        | Ambassadors are recruited   |
| 8. Train Ambassadors to implement the Stewardship and Engagement Program.   | SEPT              | 1 month after step 7        | Ambassadors are trained   |
| <b>Interim Goal 4: Implement the Stewardship and Engagement Program to achieve the Stewardship and Engagement Targets within 12 months</b>  |                   |                             |   |
| 9. Implement Stewardship and Engagement Program to achieve the Stewardship and Engagement Targets.  | Ambassadors       | 25 months after step 8      | Stewardship and 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 and Engagement Targets are achieved. | Ambassadors       | Contemporaneous with step 9 | Established monthly Stewardship and Engagement Targets are achieved |
| <b>Interim Goal 5: Compile and assess the results of the Stewardship Program and make necessary improvements within 2 months</b>  |                   |                             |   |



| Actions Steps   | Responsible Party           | Deadline                     | Completion Test   |
|---|-----------------------------|------------------------------|---|
| <p>11. Obtain and compile qualitative and quantitative data from Stewardship and Engagement Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.</p>               | <p>Ambassadors and SEPT</p> | <p>1 month after step 10</p> | <p>Stewardship and Engagement Program assessments are completed</p>                         |
| <p>12. Finalize and deliver Stewardship and Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship and Engagement Program more effective based on information identified in step 11.</p> | <p>Ambassadors and SEPT</p> | <p>1 month after step 11</p> | <p>Analysis is completed, and Stewardship and Engagement Program is refined accordingly</p> |



## Stewardship and Engagement Scoreboard

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



## Religious Education SMART Goal

We will research, develop, and implement a best practices and effective adult and youth Religious Education Program (the “Religious Education Program”) with a comprehensive communications plan that will achieve the following “Religious Education Targets” under the direction of the priest within 35 months:

- a) at least 80% of parish youth will complete a revised and updated full academic year Sunday School program with goals and objectives for each grade level;
- b) A religious education program (with content for adults and youth) will be offered twice per month with monthly attendance increasing 15% each year (the “Parish Life Program”);
- c) A “Small Group Religious Education Ministry” will actively engage at least 4 small group programs at least every two months; and
- d) A “Religious Education Content Program” will deliver videos, audio recordings, and written religious educational materials to all parishioners (separately targeted to youth, young adults, and adults) at least weekly and be published on the parish website and/or social media platforms with specific metrics for open and click rates that each show at least a 10% increase per quarter, growing over time in an amount to be determined in step 6.



## Religious Education Action Plan

| Action Steps  | Resp Party                 | Deadline                           | Completion Test  |
|---|----------------------------|------------------------------------|--|
| <b>Interim Goal 1: Research the most effective religious education programs within 3 months</b>   |                            |                                    |  |
| 1. Form Religious Education Team (RET).   | SPT and RET<br>Co-Captains | 1 month after<br>Start Date        | RET members agree to serve   |
| 2. Determine religious education key definitions and effectiveness metrics for adults and youth for each of the four SMART Goal religious education programs.   | RET                        | 1 month after step<br>1            | Religious education key<br>Definitions and metrics<br>determined   |
| 3. Analyze the parish baseline on those key religious education effectiveness metrics and survey parishioners to determine what religious education content they need and what delivery modalities they will use regularly. | RET                        | 1 month after step<br>2            | Parish baselines, and content<br>delivery vehicle and frequency<br>of religious education content<br>is finalized            |
| 4. Identify at least 3 adult religious education, 3 youth religious education, and 3 small group ministry programs to consider from both inside and outside the Orthodox ecosystem.   | RET                        | Simultaneous with<br>steps 2 and 3 | At least 3 adult religious<br>education, 3 youth religious<br>education, and 3 small group<br>ministry programs are examined |



| Action Steps   | Resp Party | Deadline              | Completion Test  |
|--|------------|-----------------------|--|
| <b>Interim Goal 2: Develop the most effective religious education program within 4 months</b>  |            |                       |  |
| <p>5. Evaluate researched religious education and small group ministry programs for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2 and determine topics and modalities.</p>  | RET        | 2 months after step 4 | Evaluation of alternative religious education and small group ministry programs is completed |
| <p>6. Modify or develop new Sunday School Program, Parish Life Program, Small Group Religious Education Ministry, and Religious Content Education Program (collectively, the “Religious Education Program”) and establish monthly performance benchmarks to achieve Religious Education Targets.</p> | RET        | 2 months after step 5 | Religious Education Program is finalized, and monthly performance benchmarks are determined  |





| Action Steps  | Resp Party | Deadline                    | Completion Test  |
|---|------------|-----------------------------|--|
| <b>Interim Goal 3: Recruit and train Religious Educators and Small Group Ministry Leaders within 2 months</b>   |            |                             |  |
| 7. Identify and recruit Religious Education Program “Educators” (including Adult and Youth Religious Education Program Educators and Small Group Ministry Leaders) who can implement the Religious Education Program. | RET        | 1 month after step 6        | Educators are recruited                                      |
| 8. Train Educators to implement the Religious Education Program.  | RET        | 1 month after step 7        | Educators are trained  |
| <b>Interim Goal 4: Implement the Religious Education Program to achieve the Religious Education Targets within 24 months</b>  |            |                             |  |
| 9. Implement Religious Education Program to achieve the Religious Education Targets.  | Educators  | 24 months after step 8      | Religious Education Program is fully launched                |
| 10. Track and report on monthly performance benchmarks determined in step 6 and continue Educators’ follow-up with parishioners until Religious Education Targets are achieved.                                       | Educators  | Contemporaneous with step 9 | Established monthly Religious Education Targets are achieved |



| Action Steps  | Resp Party        | Deadline              | Completion Test   |
|---|-------------------|-----------------------|---|
| <b>Interim Goal 5: Compile and assess the results of the Religious Education Program and make necessary improvements within 2 months</b>  |                   |                       |   |
| 11. Obtain and compile qualitative and quantitative data from Religious Education Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.       | Educators and RET | 1 month after step 10 | Religious Education Program assessments are completed                         |
| 12. Finalize and deliver Religious Education Program assessment analysis report and make all refinements necessary to make the Religious Education Program more effective based on information identified in step 11. | Educators and RET | 1 month after step 11 | Analysis is completed, and Religious Education Program is refined accordingly |



## Religious Education Scoreboard

| Lead Measure Action  | Deadline Date | % Complete and Date  |
|--|---------------|--|
| 1. Form Religious Education Program Team   | 10/15/2023    | 10/15/2023   |
| 2. Develop definitions and effectiveness metrics   | 11/15/2023    | 10/15/2023   |
| 3. Analyze parish baselines and engagement success impediments                           | 11/15/2023    | In Progress  |
| 4. Research Religious Education Program  | In Progress   | Researching church school curriculums / platforms to share education materials |
| 5. Evaluate Religious Education Program  |               |  |
| 6. Finalize Religious Education Program  |               |  |
| 7. Identify and recruit Educators  |               |  |
| 8. Train Educators   |               |  |
| 9. Implement Religious Education Program and manage to interim monthly targets           |               |  |
| 10. Track performance Data from Religious Education Program Implementation               |               |  |
| 11. Obtain qualitative and quantitative assessment data from Religious Education Program |               |  |
| 12. Improve Religious Education Program based lessons learned in step 11                 |               |  |



## Outreach, Evangelism, and Welcoming SMART Goal

We will research, develop, and implement a best practices and effective adult and youth “Outreach, Evangelism, and Welcoming Program” with a comprehensive communications plan that will achieve the following “Outreach, Evangelism, and Welcoming Goals” within 35 months:

a) Our Evangelism Ministry will:

- i. at least quarterly, sponsor a social event with broad appeal that is open to the public with at least 100 adults and youth participating each time, of which at least 25% are non-parishioners;
- ii. at least quarterly, participate in Lexington-area community events with at least 100 different adult and youth parishioners participating over the course of each calendar year; and
- iii. have at least 10 new non-parishioners attend a Divine Liturgy each month.

b) Our Outreach Ministry will:

- i. within 6 months, will contact 100% of steward families/individuals who have lapsed or lessened their engagement to understand why and what they need to return or to better serve them; and
- ii. at least quarterly, participate in a community philanthropic, and service project with at least 50 parishioners (adults and youth) participating in conjunction with Stewardship and Engagement Ministry.

c) We will establish a Welcoming Ministry, including all PC Members, that ensures 100% of guests and catechumens are fully welcomed and engaged based on a comprehensive welcoming process that maintains contact with, and seeks to engage, all guests and catechumens.

d) We will add at least 10 new parishioner families each year.



## Outreach, Evangelism, and Welcoming Action Plan

| Action Steps  | Resp Party                 | Deadline                        | Completion Test  |
|---|----------------------------|---------------------------------|--|
| <b>Interim Goal 1: Research the most effective outreach, evangelism, and welcoming programs within 3 months</b>   |                            |                                 |  |
| 1. Form Outreach, Evangelism and Welcoming Ministry Team (OEW-MT).  | SPT and OEW-MT Co-Captains | 1 month after Start Date        | OEW-MT members agree to serve  |
| 2. Determine outreach, evangelism and welcoming key definitions and effectiveness metrics and survey/research parish impediments to achieving increased outreach, evangelism and welcoming success.   | OEW-MT                     | 1 month after step 1            | Definitions and metrics determined                                       |
| 3. Analyze the parish baseline on those key outreach, evangelism and welcoming effectiveness metrics and identify outreach, evangelism and welcoming activities in which parishioners wish to engage. | OEW-MT                     | 1 month after step 2            | Parish baselines and parish impediments determination are finalized      |
| 4. Identify at least 3 outreach, 3 evangelism, and 3 welcoming programs to consider from both inside and outside the Orthodox ecosystem.  | OEW-MT                     | Simultaneous with steps 2 and 3 | At least 3 outreach, 3 evangelism, and 3 welcoming programs are examined |



| Action Steps   | Resp Party | Deadline              | Completion Test  |
|--|------------|-----------------------|--|
| <b>Interim Goal 2: Develop the most effective Outreach, Evangelism, and Welcoming Program within 4 months</b>  |            |                       |  |
| 5. Evaluate researched outreach, evangelism & welcoming programs for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.     | OEW-MT     | 2 months after step 4 | Evaluation of alternative outreach, evangelism, and welcoming programs is completed                        |
| 6. Modify or develop new outreach, evangelism, and welcoming programs for utilization at the parish (the “Outreach, Evangelism and Welcoming Program”) and establish monthly performance benchmarks. | OEW-MT     | 2 months after step 5 | Outreach, Evangelism and Welcoming Program is finalized, and monthly performance benchmarks are determined |
| <b>Interim Goal 3: Recruit and train OEW Ambassadors within 2 months</b>   |            |                       |  |
| 7. Identify and recruit “OEW Ambassadors” who can implement all elements of the Outreach, Evangelism and Welcoming Program.  | OEW-MT     | 1 month after step 6  | OEW Ambassadors are recruited  |
| 8. Train OEW Ambassadors to implement the Outreach, Evangelism and Welcoming Program.  | OEW-MT     | 1 month after step 7  | OEW Ambassadors are trained  |



| Action Steps   | Resp Party                 | Deadline                    | Completion Test  |
|--|----------------------------|-----------------------------|--|
| <b>Interim Goal 4: Implement the Outreach, Evangelism &amp; Welcoming Program to achieve the Outreach, Evangelism, &amp; Welcoming Goals within 24 months</b>  |                            |                             |  |
| 9. Implement Outreach, Evangelism and Welcoming Program to achieve the Outreach, Evangelism, and Welcoming Goals.  | OEW Ambassadors            | 24 months after step 8      | Outreach, Evangelism and Welcoming Program is fully launched               |
| 10. Track and report on monthly performance benchmarks determined in step 6 and continue OEW Ambassadors' follow-up with parishioners until Outreach, Evangelism, and Welcoming Goals are achieved                             | OEW Ambassadors            | Contemporaneous with step 9 | Established monthly Outreach, Evangelism, and Welcoming Goals are achieved |
| <b>Interim Goal 5: Compile and assess the results of the Outreach, Evangelism, and Welcoming Program and make necessary improvements within 2 months</b>   |                            |                             |  |
| 11. Obtain and compile qualitative and quantitative data from Outreach, Evangelism and Welcoming Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement. | OEW Ambassadors and OEW-MT | 1 month after step 10       | Outreach, Evangelism and Welcoming Program assessments are completed       |



| Action Steps   | Resp Party                                | Deadline                         | Completion Test   |
|--|---|----------------------------------|---|
| <p>12. Finalize and deliver Outreach, Evangelism and Welcoming Program assessment analysis report, and make all refinements necessary to make the Outreach, Evangelism, and Welcoming Program more effective based on information identified in step 11.</p> | <p>OEW<br/>Ambassadors<br/>and OEW-MT</p> | <p>1 month after<br/>step 11</p> | <p>Analysis is completed, and Outreach, Evangelism and Welcoming Program is refined accordingly</p> |





## Outreach, Evangelism, and Welcoming Scoreboard

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



## Renovation Program SMART Goal

We will research, develop, and implement a best practices “Renovation Program” that will achieve the following Renovation Program Targets within 42 months:

- a) Update and finalize the parish priorities for the Renovation Program as initially identified in the 50-Year Parish Survey: Structural, Storage, Handicap Access, Classrooms, Mold Remediation, and Altar Expansion;
- b) Complete the architect’s schematic design consistent with parish priorities.
- c) Obtain all necessary parish and Metropolis approvals for design and construction;
- d) Develop and execute a “Capital Campaign” process plan and methodology to create a Renovation Program Budget to complete all parish priorities of the Renovation Program including up to five-year pledges (“Contributed Portion”) and obtain funding commitments, if needed, as an option (the “Borrowed Portion”) with a repayment plan approved by the parish; and
- e) Complete the Renovation Program consistent with parish priorities.



## Renovation Program Action Plan

| Action Steps  | Resp Party                      | Deadline                           | Completion Test  |
|---|---------------------------------|------------------------------------|--|
| <b>Interim Goal 1: Research the most effective Renovation Program within 10 months</b>  |                                 |                                    |  |
| 1. Form Renovation Program team (RPT).  | SPT and RPT<br>Goal Co-Captains | 2 months after<br>Start Date       | RPT members agree to serve   |
| 2. Finalize the parish consensus list, prioritization, and timeline for all building and capital improvement projects in the Renovation Program.          | RPT                             | 2 months after<br>step 1           | Finalize Renovation Program projects and prioritization                  |
| 3. Finalize the construction budget for the Renovation Program and obtain necessary approvals for total budget, Contributed Portion and Borrowed Portion. | RPT                             | 6 months after<br>step 2           | Building Project budget and Contributed and Borrowed Portions determined |
| 4. Identify at least 3 capital campaign processes (and/or consultants if needed) to consider from both inside and outside the Orthodox ecosystem.         | RPT                             | Simultaneous<br>with steps 2 and 3 | At least 3 capital campaign programs and/or consultants are examined     |



| Action Steps  | Resp Party | Deadline                                 | Completion Test   |
|---|------------|--|---|
| <b>Interim Goal 2: Develop the most effective Renovation Program within 14-18 months</b>  |            |  |   |
| 5. Obtain all necessary parish, Metropolis, and city approvals for Renovation Program, including Capital Campaign and Borrowing budgets.  | RPT        | 6 months after step 4                    | Approvals obtained and Capital Campaign and Borrowing levels finalized            |
| 6. Develop effective Capital Campaign to reach 100% of parishioners to (a) solicit no more than five-year pledges, (b) negotiate with lenders for construction loans, and (c) solicit foundations for additional funding. Develop monthly performance benchmarks. | RPT        | 8-12 months after step 5                 | Capital Campaign and construction and mortgage loans are finalized and negotiated |
| <b>Interim Goal 3: Recruit and train Ambassadors within 0 months</b>  |            |  |   |
| 7. Identify and recruit personal visitation capital campaign ambassadors (“Ambassadors”) who can implement the capital campaign.  | RPT        | 1 month simultaneous with steps 5 and 6. | Ambassadors are recruited   |



| Action Steps  | Resp Party          | Deadline                                 | Completion Test                                     |
|---|---------------------|--|---|
| 8. Train Ambassadors to implement the capital campaign.   | RPT                 | 1 month simultaneous with steps 5 and 6. | Ambassadors are trained                             |
| <b>Interim Goal 4: Implement the Renovation Program to achieve the Building Targets within 12 months</b>  |                     |  |   |
| 9. Implement Renovation Program to achieve the Renovation Targets.  | Ambassadors         | 12 months after step 8                   | Renovation is fully launched                        |
| 10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors' follow-up with parishioners until Renovation Targets are achieved | Ambassadors         | Contemporaneous with step 9              | Established monthly Renovation Targets are achieved |
| <b>Interim Goal 5: Compile and assess the results of the Renovation Program and make necessary improvements within 2 months</b>   |                     |  |   |
| 11. Identify and fill any gaps in Renovation Program  | Ambassadors and RPT | 2 months after step 10                   | Renovation Program gaps are documented and filled.  |



## Renovation Program Scoreboard

| Action   | Deadline Date | % Complete and Date |
|--|---------------|---------------------|
| 1. Form Renovation Program Team  |               |                     |
| 2. Develop Renovation Program projects and prioritization                            |               |                     |
| 3. Building Project budget and Contributed and Borrowed Portions determined          |               |                     |
| 4. Capital campaign programs and/or consultants researched                           |               |                     |
| 5. Approvals obtained and Capital Campaign and Borrowing levels finalized            |               |                     |
| 6. Capital Campaign and construction and mortgage loans are finalized and negotiated |               |                     |
| 7. Identify and recruit Capital Campaign Ambassadors                                 |               |                     |
| 8. Train Ambassadors   |               |                     |
| 9. Implement Renovation Program and manage to interim monthly targets                |               |                     |
| 10. Track performance of Renovation Program  |               |                     |
| 11. Identify and fill gaps in results of Renovation Program                          |               |                     |



## Appendix A – The Strategic Planning Team

The Strategic Planning Team (“**Strategic Planning Team**”) was led by our clergy, **Fr. George**, facilitated by **Bill Marianes**, and consisted of the following faithful and hard-working members (in alphabetical order):

Tina Babalas  
Alex Brown  
Bill Brown  
Pam Brown  
Carol Bearse  
David Cornetta  
Maria Decoulos  
Robert DeVasto  
Stephanie DeVasto  
Lia Fahey  
Nathan Fry  
Judy Gray  
Tony Gray  
Deirdre Heisler  
Christina Katos  
Demetri Katos  
Don Khouri

Chris Kokkinos  
Brian Mackintosh  
Charlie Marge  
Ghada Massabni  
Maura Mimos  
Demetrios Papathanasiou  
Meli Papayannis  
Nector Ritzakis  
Martin Stephenson  
Teri Stevens  
Penelope Tzougros  
Olympia Wheeler  
Anthony Wilson  
Maria Zallas  
Jim Zaharias  
Mandy Zervoglos.

The Strategic Planning Team and its Facilitator devoted many hundreds of hours of work over many months to do the work to develop this Strategic Plan. The volunteer Strategic Planning Team members thank God for our many blessings, and we are thankful for the opportunity to be stewards of Christ’s church and this Parish. The Implementation Teams formed to achieve this Strategic Plan will include the Strategic Planning Team and many more individuals who will volunteer to lead and work on our four Strategic Goals. We humbly and respectfully thank all our co-workers in advance for their dedication and stewardship.



## Appendix B – Effective Parish Assessment (EPA)

### EPA 2 RESULTS (60 responses)







## Summary Results

|                           | <u>%</u><br><b>favorable</b> | <u>%</u><br><b>unfavorable</b> | <u>%</u><br><b>neutral</b> | <u>% I don't</u><br><b>know</b> |
|---------------------------|------------------------------|--------------------------------|----------------------------|---------------------------------|
| 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

| <b><u>Vision &amp; Planning</u></b> | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|-------------------------------------|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                          |

| <b><u>Leadership &amp; Teams</u></b> | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|--------------------------------------|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                          |



| <b><u>Stewardship &amp; Generosity</u></b> | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|--|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                          |

| <b><u>Parishioner Engagement</u></b>   | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|--|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                           |



| <b>Ministries</b>             | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|-------------------------------|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                          |

| <b>Operational Effectiveness</b>    | <b><u>% favorable</u></b> | <b><u>% unfavorable</u></b> | <b><u>% neutral</u></b> | <b><u>% I don't know</u></b> |
|-------------------------------------|---------------------------|-----------------------------|-------------------------|------------------------------|
| 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%                          |



## Appendix C – Stewardship Dashboard Results 2021-23

| Metric                                      | 2023      | 2022      | 2021      |
|---|-----------|-----------|-----------|
| Number of Stewards                          | 161       | 178       | 193       |
| Total Stewardship Income                    | \$216,256 | \$217,405 | \$217,328 |
| % of Operating Expenses Paid by Stewardship | 75%       | 70%       | 73%       |
| Median Stewardship Contribution             | \$500     | \$600     | \$600     |
| Proxy Tithe Stewardship %                   | 0.61%     | 0.70%     | 0.70%     |
| \$ Invested in Charities / Ministries       | \$6,242   | \$2,438   | \$5,538   |
| % Invested in Charities / Ministries        | 2%        | 0.80%     | 1.90%     |
| % Top 10 Stewards Contribution              | 32%       | 33%       | 25%       |
| % Top 20 Stewards Contribution              | 45%       | 46%       | 39%       |



## ENDNOTES

---

<sup>1</sup> II Corinthians 5:10

<sup>2</sup> See Simon Sinek, [Start With Why - How Great Leaders Inspire Everyone To Take Action.](#) @Ted.com

<sup>3</sup> This is a slightly modified expression of belief offered by famed author and philosopher Mark Twain

<sup>4</sup> Acts 14:15

<sup>5</sup> John 1:46

<sup>6</sup> Matthew 28:19-20

<sup>7</sup> St Athanasius Academy of Orthodox Theology, *The Orthodox Study Bible*, (United States: St. Athanasius Academy Septuagint, 2008), 1468

<sup>8</sup> Acts 1:8

<sup>9</sup> Matthew 28:19

<sup>10</sup> 2 Corinthians 13:5

<sup>11</sup> Matthew 5:1-16

<sup>12</sup> Proverbs 29:18

<sup>13</sup> Matthew 5:16

<sup>14</sup> Matthew 10:1, 5-8

<sup>15</sup> 1 Corinthians 12:28

<sup>16</sup> Luke 10:1