

St Raphael Orthodox Church

Strategic Planning Day 5

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

Proverbs 29:18

Bill Marianes





[Stewardship
Calling.com](https://stewardshipcalling.com)

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

WHY? STEWARDSHIP STRATEGIC PLANNING BIBLE RADIO & PODCASTS KEYNOTES & LEADERSHIP RESOURCES

PERSONAL

BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING

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

METROPOLIS OF BOSTON – FOUR PARISH STRATEGIC PLAN

ST. SOPHIA JEFFERSON, PA STRATEGIC PLAN

WARREN, OH – ST DEMETRIOS STRATEGIC PLAN

SAINTS RAPHAEL, NICHOLAS & IRENE – CUMMING, GA

ST. RAPHAEL – IOWA CITY

CHRIST THE SAVIOUR – HARRISBURG, PA

St. Raphael – Iowa City

Below is the Power...

...offered to the entire community December 17, 2023

...aknesses, Opportunities & Threats (SWOT) of the St

**Strategic
Planning**

**Scroll down
to St.
Raphael –
Iowa City**

<https://stewardshipcalling.com/st-raphael-iowa-city/>

St Raphael Orthodox Church

WHY Statement

**To participate in the healing,
transforming, and unifying
light of Christ for the
salvation of the world.**

St Raphael Orthodox Church

Core Values

- **Service & Outreach**
- **Worship**
- **Loving Community in
Fellowship**
- **Orthodox Faith**

St Raphael Orthodox Church Mission Statement

**The Mission of St. Raphael
Orthodox Church is to live the
Orthodox Christian faith by
worshiping, growing, loving, and
serving together as a Christ-
centered community.**

St Raphael

Orthodox Church

STRATEGIC AREAS OF FOCUS

- 1. Stewardship, Generosity
& Engagement**
- 2. Church Culture**
- 3. Facilities**



**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?

10 Stewardship Calling Strategic Plan Elements



1. SWOT Analysis (Strengths, Weaknesses, Opportunities & Threats)
2. Statement of Why
3. Core Values
4. Mission Statement
5. Strategic Areas of Focus
- 6. Vision Statement**
- 7. Strategic S.M.A.R.T. Goals**
- 8. Interim Goals & Interim Actions**
- 9. Accountability Scoreboard**
10. Cadence of Accountability



Strategic Goals Are Biblical





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

2. preach as you go

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

3. heal the sick

4. raise the dead

5. cleanse lepers

6. cast out demons

Matthew 10:1, 5-8

Gaylord Opryland

the largest non-gaming in-hotel exhibition space.



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

4DX Strategies Example



- 1. Identify a high-level Wildly Important Goal (the “War”)**
- 2. Set the fewest number of Battles necessary to win the War**

The War



move Customer Satisfaction “top box” score of 5 (on 1 to 5 scale) from 42% to 55% by year end

4DX Strategies Example

Opryland research:



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

4DX Strategies Example

To win the WAR, Opryland research showed:

WAR

Top Box Guest Satisfaction
from 42% to 55%

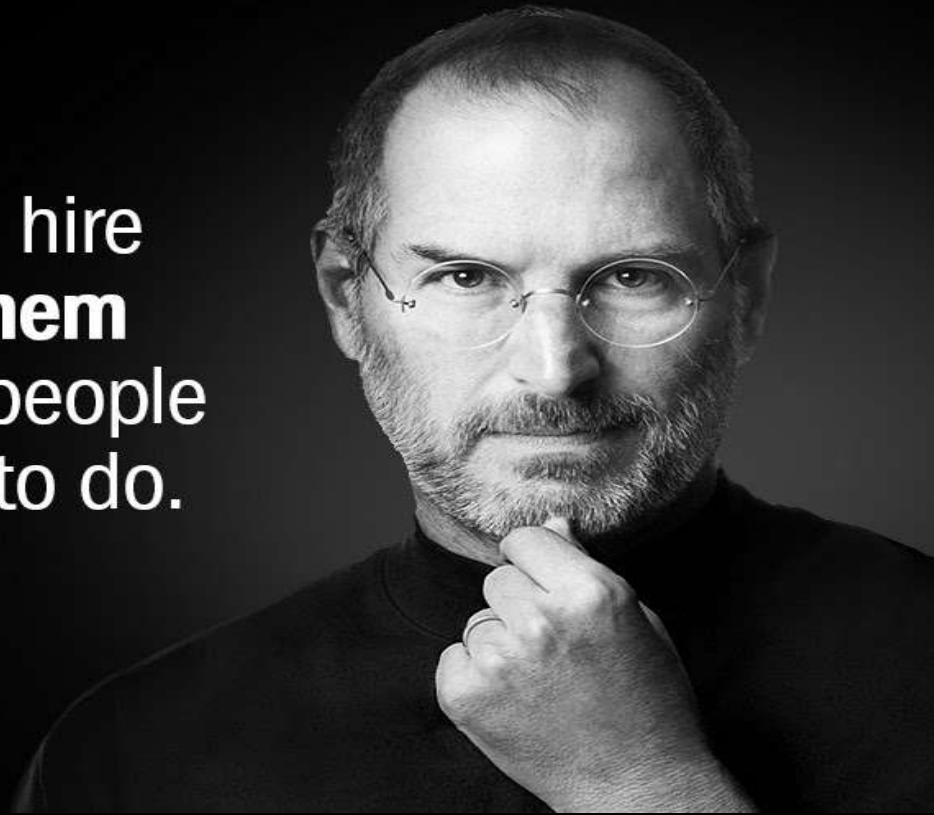
Problem Resolution
from 47 to 60

Arrival Experience
from 50 to 60

F&B Quality
from 43 to 58

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

– *Steve Jobs*



4DX Strategies Example

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

4DX Strategies Example

WAR = Guest Satisfaction
from 42% to 55%

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

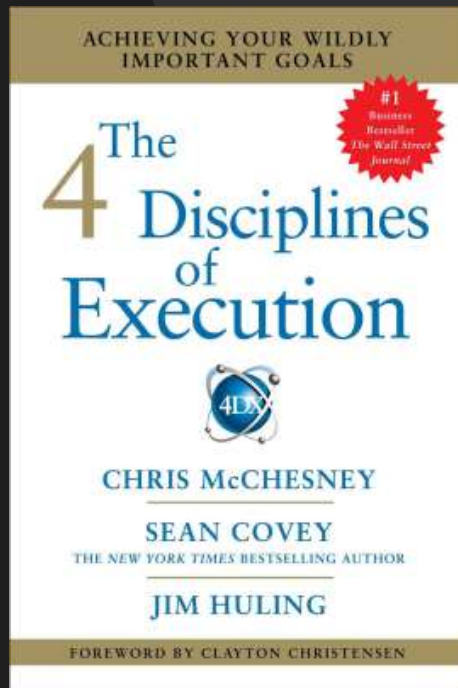
Wildly Important Goals

~ Human beings are genetically hardwired to do a very small number of things at a time with excellence¹

~ Focus on the most important things that largest scale impacts

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

Wildly Important Goals



- ~The most important objectives that can only be achieved with special attention
- ~ Focus on “*the few things that can change everything*”
- ~ Define:
 1. Starting Line (where you are now)
 2. Finish Line (where you want to go)
 3. Deadline (by when)

S.M.A.R.T. Goals

The “S.M.A.R.T.” goal process helps ensure our Strategic Wildly Important Goals can be realistically achieved

S



SPECIFIC

M



MEASURABLE

A



ATTAINABLE

R



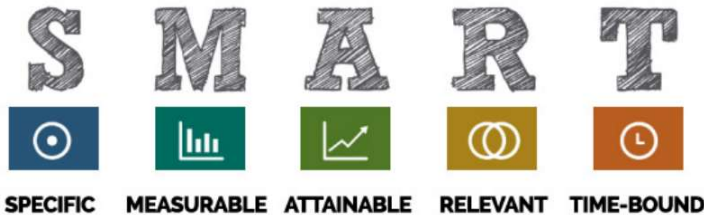
RELEVANT

T



TIME-BOUND

SMART Goals



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

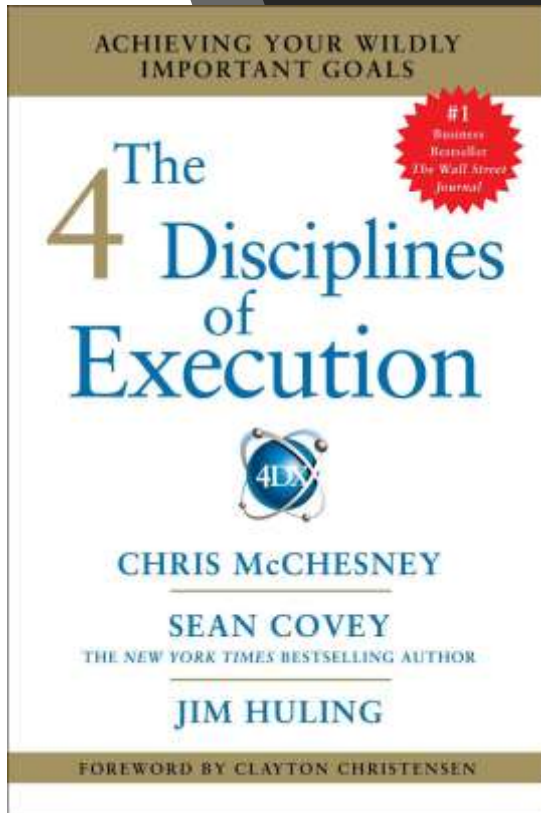
Measurable: Can you measure the success of the goal?

Attainable: Is the goal attainable within a reasonable time?

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

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

1. Determine your WIGs
(Wildly Important Goals)



2. Act on Lead Measures

3. Create a compelling scoreboard

4. Create a cadence of accountability



Act On Lead Measures

~ Lead measures are

1. PREDICTIVE of the Lag Measure changes

2. INFLUENCEABLE - directly by the team

~ Applying disproportionate energy on Lead Measures helps achieve your Lag Measures

~ *“Managing an entity by looking at year end data (a lag measure) is like “driving a car by looking in the rearview mirror”¹*

¹ W. Edwards Deming – father of the Quality Movement

Act On Lead Measures



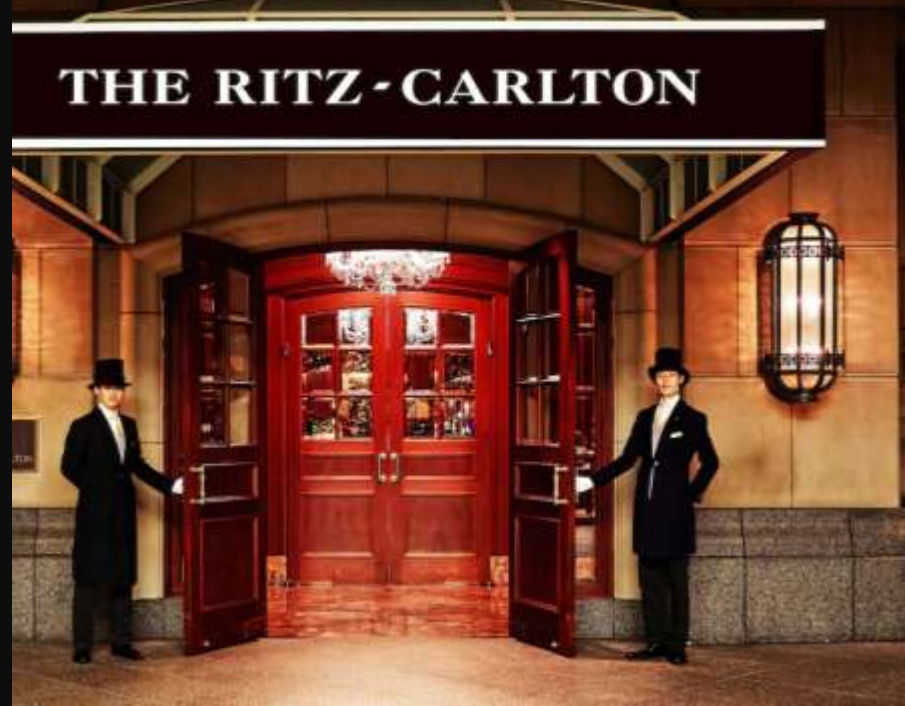
**I have been losing
the same 25 pounds
for 25 years.**

Very unsuccessfully!

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



THE RITZ-CARLTON



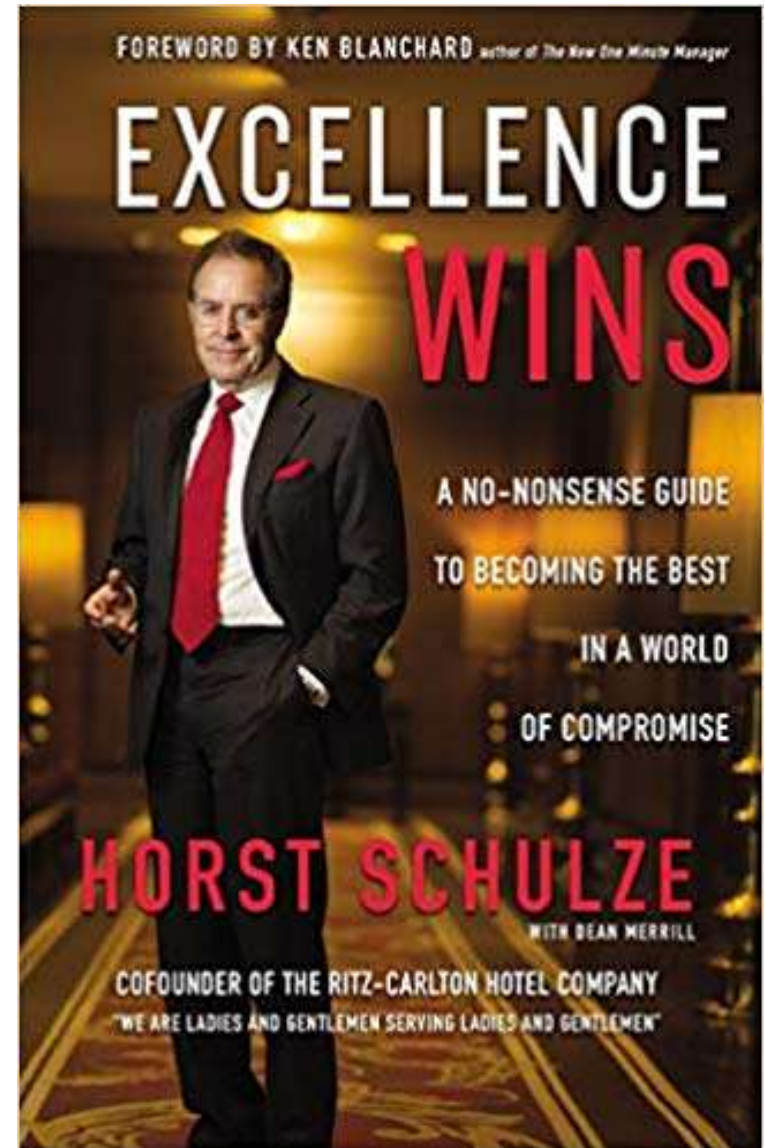
How did Horst Schulze focus on Lead Measures to create the most premier hotel chain?

Andy Stanley Leadership Podcast
Part 1 with Horst Schulze:

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

Andy Stanley Leadership Podcast
Part 2 with Horst Schulze:

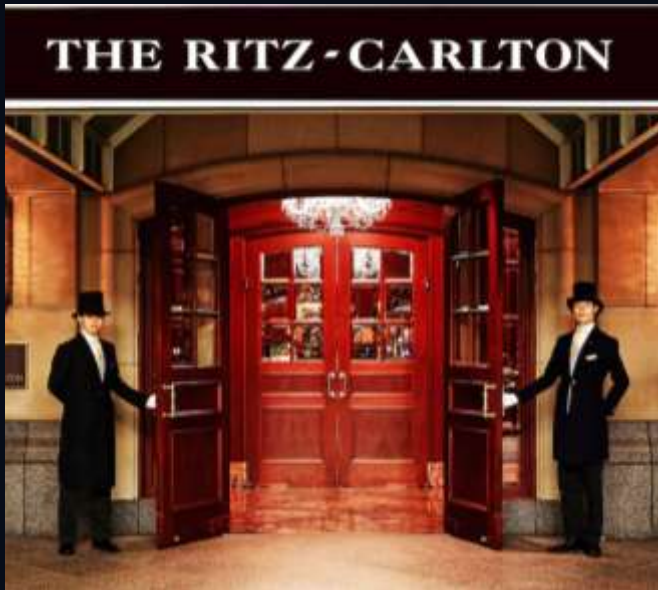
<https://podcasts.apple.com/us/podcast/building-vision-with-horst-schulze-part-2/id290055666?i=1000448382130>



Act on Lead Measures Using Empirical Data

~ What are some important
Lag Measures for the Ritz?

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



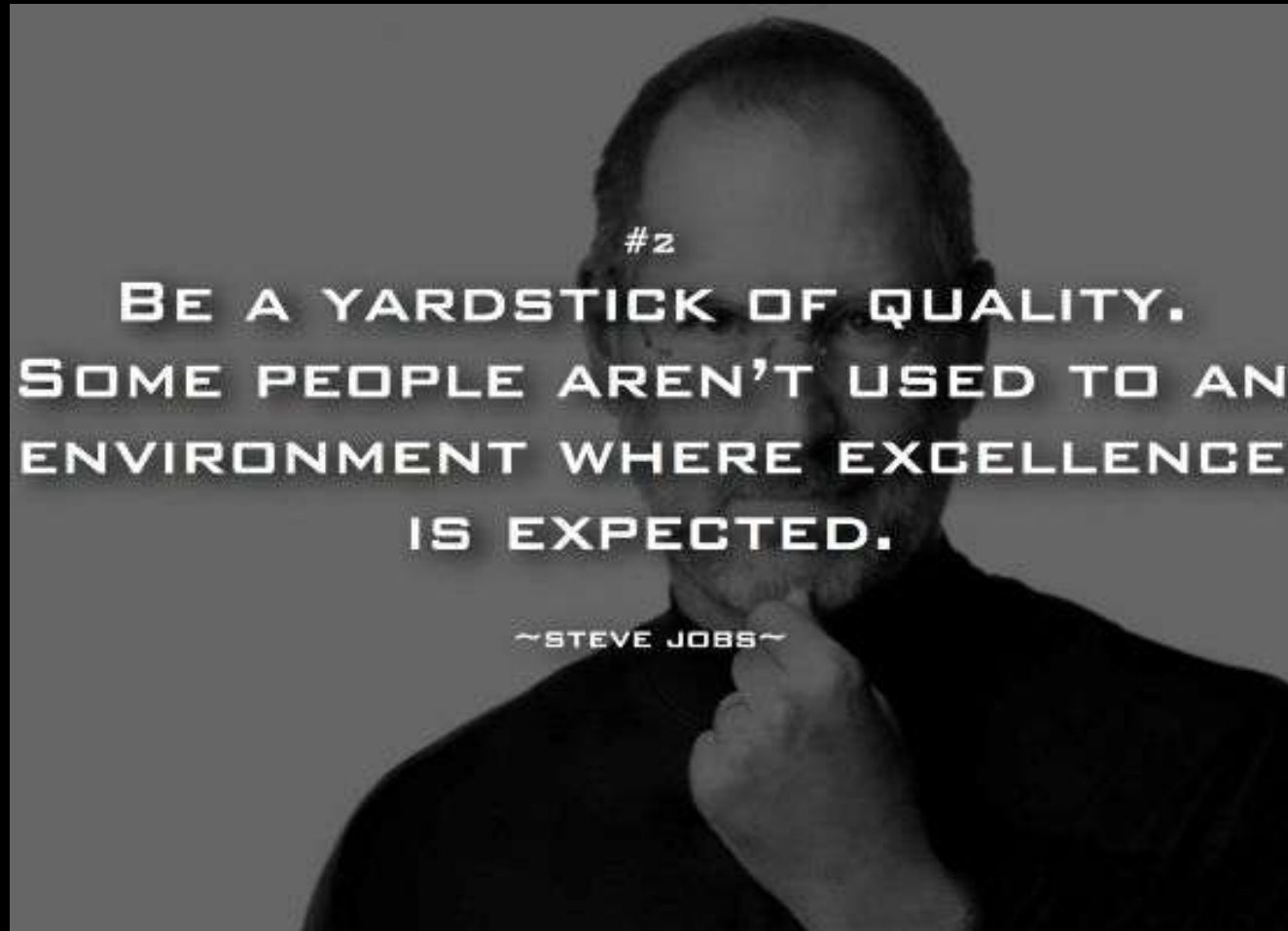
Act on Lead Measures Using Empirical Data

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

**EMPLOYEE
SATISFACTION**



What Are Our Expectations?



#2

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

~STEVE JOBS~

SAMPLE



Example of S.M.A.R.T. Goal & Action Plan

Stewardship & Engagement SMART Goal 1

We will research, develop, and implement a best practices and effective adult and youth Stewardship Ministry Engagement Program (the “Stewardship & Engagement Program”) with a comprehensive communications plan that will achieve the following “Stewardship & Engagement Targets” within 22 months:

(a) Transition the adult and youth parishioners to becoming percentage givers on their way to becoming tithers;

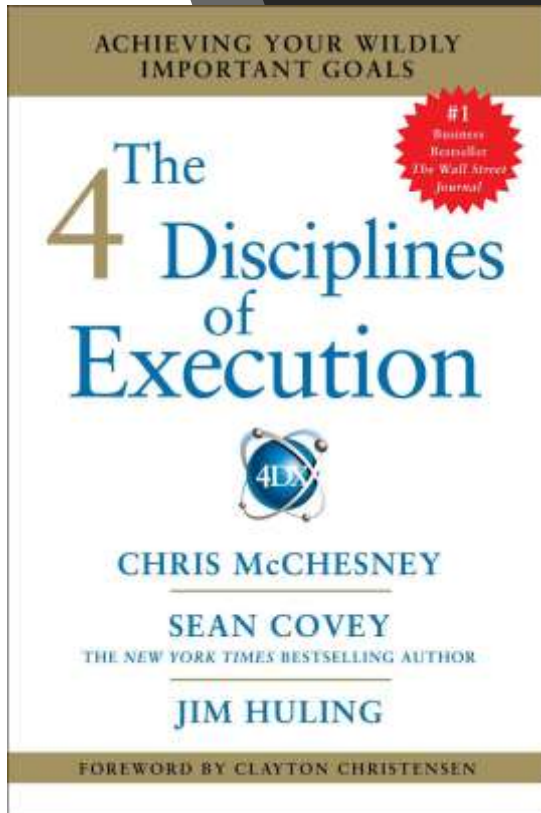
(b) Increase the adult and youth ministry engagement by at least 25% through implementing pathways for parishioners use their talents and gifts; and

(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 10% of all other operating expenses to be given to parish-chosen external charities and philanthropies, and

(ii) at least \$16,000 annually added to the building fund and maintenance account.






1. Determine your WIGs
(Wildly Important Goals)

2. Act on Lead
Measures

3. Create a compelling
scoreboard

4. Create a cadence of
accountability

A roll of yellow measuring tape is shown, partially unrolled, with black markings and numbers. The numbers 3, 4, 5, 6, and 7 are visible on the tape. The tape is coiled around a central point, and the background is a dark, textured surface.

You cannot
master what you
do not measure!

Compelling Scoreboard

~ Highest engagement comes when people know the score

~ The best scoreboard is:

1. designed for and by the players
2. only shows critical information



Compelling Scoreboard Questions



1. Is the scoreboard simple?
2. Can the team see it easily? (visibility drives accountability)
3. Does it show the most critical data
4. Can everyone quickly tell if they're "winning"

A Church Compelling Scoreboard

FIRST WEST SCOREBOARD

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

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

Stewardship & Engagement Action Plan

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

~ Answers strategic planning question #4:

How will we get there?

~ For each step identify:

1. the specific action
2. who does it
3. completion deadline
4. how we know it is completed

Action Plan



Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 3 months			
1. Form Stewardship & Engagement Program Team (S&EPT).	SPT and S&EPT Goal Co-Captains	1 month after Start Date	S&EPT members agree to serve
2. Determine adult and youth stewardship and ministry engagement and percentage giving and tithing key definitions and effectiveness metrics.	S&EPT	1 month after step 1	Definitions and metrics determined
3. Analyze the adult and youth parish baseline on those key stewardship & ministry engagement and tithing effectiveness metrics and survey/research parish impediments to achieving increased stewardship, ministry engagement, and tithing success.	S&EPT	1 month after step 2	Parish baselines and parish impediments determination are finalized
4. Identify at least 3 stewardship & engagement and 3 percentage giving/tithing programs for both youth and adults to consider from both inside and outside the Orthodox ecosystem.	S&EPT	Simultaneous with steps 2 & 3	At least 3 stewardship & engagement and 3 percentage giving/tithing programs are examined

Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 2: Develop the most effective Stewardship Program within 3 months</u>			
5. Evaluate researched adult and youth stewardship & engagement and tithing for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.	S&EPT	1 months after step 4	Evaluation of alternative stewardship & ministry engagement and tithing programs is completed
6. Modify or develop new adult and youth stewardship & engagement and tithing program for utilization at the parish (the “Stewardship, Engagement & Tithing Program”) and establish monthly performance benchmarks and comprehensive communications strategy and plan.	S&EPT	2 months after step 5	Stewardship, Engagement & Tithing Program is finalized, and monthly performance benchmarks are determined
<u>Interim Goal 3: Recruit and train Ambassadors within 2 months</u>			
7. Identify and recruit personal visitation ambassadors/small group leaders (“Ambassadors”) who can implement the Stewardship, Engagement & Tithing Program.	S&EPT	1 month after step 6	Ambassadors are recruited
8. Train Ambassadors to implement the Stewardship, Engagement & Tithing Program.	S&EPT	1 month after step 7	Ambassadors are trained

Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 4: Implement the Stewardship, Engagement & Tithing Program to achieve the Stewardship & Engagement Targets within 12 months</u>			
9. Implement Stewardship, Engagement & Tithing Program to achieve the Stewardship & Engagement Targets.	Ambassadors	12 months after step 8	Stewardship, Engagement & Tithing 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

Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 5: Compile and assess the results of the Stewardship Program and make necessary improvements within 2 months</u>			
11. Obtain and compile qualitative and quantitative data from Stewardship, Engagement & Tithing Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.	Ambassadors and S&EPT	1 month after step 10	Stewardship, Engagement & Tithing Program assessments are completed
12. Finalize and deliver Stewardship, Engagement & Tithing 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 S&EPT	1 month after step 11	Analysis is completed, and Stewardship, Engagement & Tithing Program is refined accordingly

Agenda –SAF Team Meetings

1. Zoom 1: Determine S.M.A.R.T. Goal
2. Zoom 2: Determine Action Plan
3. Zoom 3 (if necessary): finalize S.M.A.R.T. Goal and Action Plan
4. Before the first meeting each of you **MUST** review sample S.M.A.R.T. Goals from other parishes in your SAF that can be found here:

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

(Bonus points to anyone who uses the samples to come up with a first draft S.M.A.R.T. Goal for your SAF)

Sample S.M.A.R.T. Goals

Stewardship
Calling.com

Stewardship Calling

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

The screenshot shows the website's navigation menu with 'STRATEGIC PLANNING' highlighted in a yellow box. Below the menu, a 'SAMPLE S.M.A.R.T. GOAL & ACTION PLANS' link is also highlighted in a yellow box. The main content area features a large graphic with the letters 'S', 'M', 'A', 'R', 'T' and the words 'ACTION PLAN'. Below this, a list of sample goals is visible, with 'ST. RAPHAEL - IOWA CITY' highlighted in a pink box. The text on the page includes: 'Here are sample d Stewardship Callin category. Parishes and Action Plans d would like to see e Bill@stewardshipc', 'COMMUNICATIONS & TECHNOL', and 'EDUCATION & SPIRITUAL GROW'.

Strategic
Planning Tab

Sample
S.M.A.R.T
Goals & Action
Plans

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

SAF Teams

Stewardship	Culture	Facilities
Karen Kuntz	Jing Kees	Lynne Lovetinsky
Irakliy Surguladze	Sam Holen	Madalyn Steffen
Russell Lovetinsky	Alli Rockwell	Mike Darjania
Nate Legue	Austin Collins	Jenny Hope
Becky Morey	Evren Sasmazer	Kathy Nolan
Michael Michalopoulos	Iulian Vamanu	John Michalski
Inna Powers	William Steffen	Fr. Symeon Kees
Jeffrey Powers	Demitri Likomitros	Jerome Deister
Adam Wolfe		

SAF Team Co-Chairs

	Co-Chair	Co-Chair
Stewardship	Inna Powers	Jeffrey Powers
Culture	William Steffen	Alli Rockwell
Facilities	John Michalski	Kathy Nolan

SAF Team Meeting Schedule (all begin 7:00 p.m. Central)

<https://us02web.zoom.us/j/88223752303>

Meeting ID: 882 2375 2303

	Stewardship	Culture	Facilities
Zoom 1 - Goal Determination	1-6-25	1-2-25	1-3-25
Zoom 2 - Action Plan Determination	1-27-25	1-30-25	1-28-25
Zoom 3 (if necessary) - Finalization	2-25-25	2-27-25	2-24-25

St Raphael Strategic Area of Focus ZOOMs

<https://us02web.zoom.us/j/88223752303>

Meeting ID: 882 2375 2303

One tap mobile

- +16469313860,,88223752303# US
- +13017158592,,88223752303# US (Washington DC)

Dial by your location

- • +1 646 931 3860 US
- • +1 301 715 8592 US (Washington DC)
- • +1 305 224 1968 US
- • +1 309 205 3325 US
- • +1 312 626 6799 US (Chicago)
- • +1 646 558 8656 US (New York)
- • +1 564 217 2000 US
- • +1 669 444 9171 US

Don't Leave Your Teammates Hanging

- ~ You devalue your team if you don't timely respond
- ~ Prioritize this eternally salvific church work more than your "day job"?
- ~ Make this transformational work a priority and don't leave your brothers and sisters teammates hanging



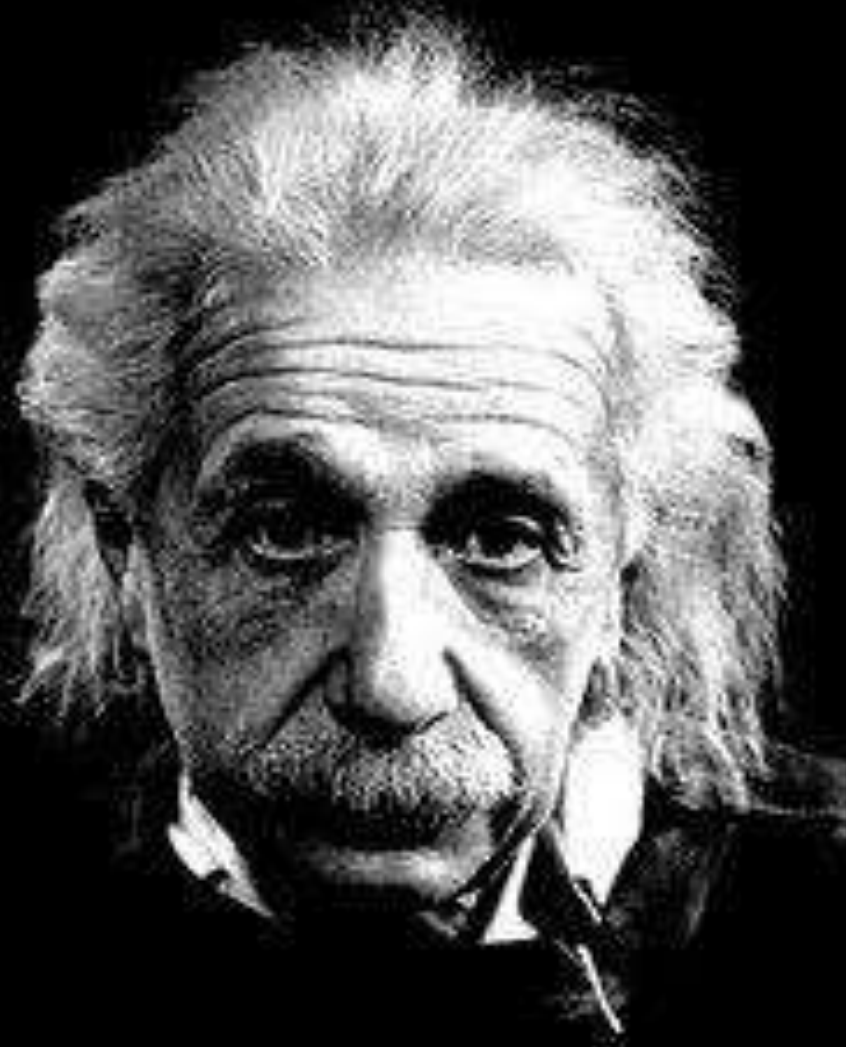
Sun Tzu



“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”

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

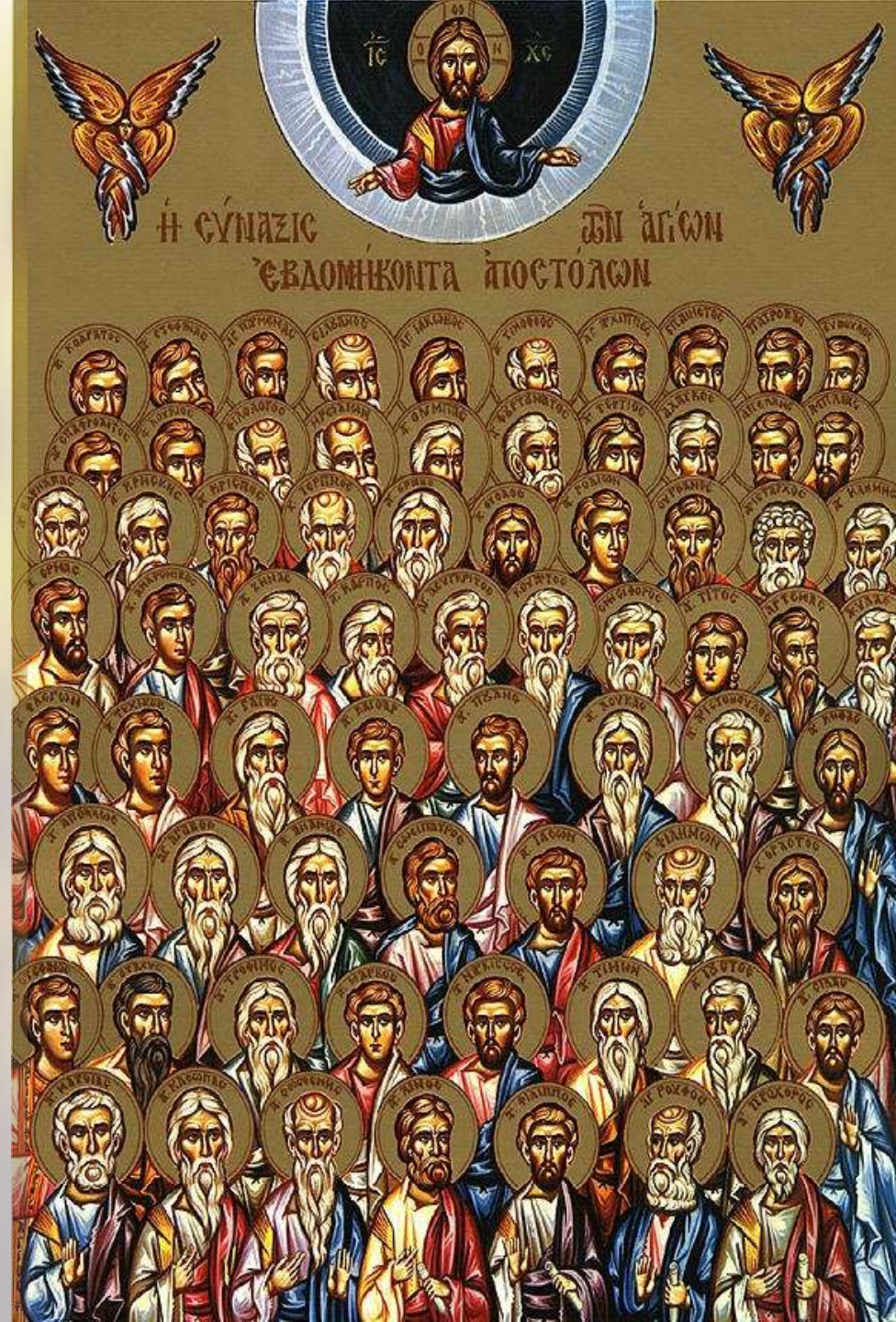


St Raphael Orthodox Church

Final WHY Statement

**To participate in the healing,
transforming, and unifying
light of Christ for the
salvation of the world.**

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



Luke 10:1



QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES

Any Questions?

St Raphael Orthodox Church

Strategic Planning Day 5

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

Proverbs 29:18

Bill Marianes

