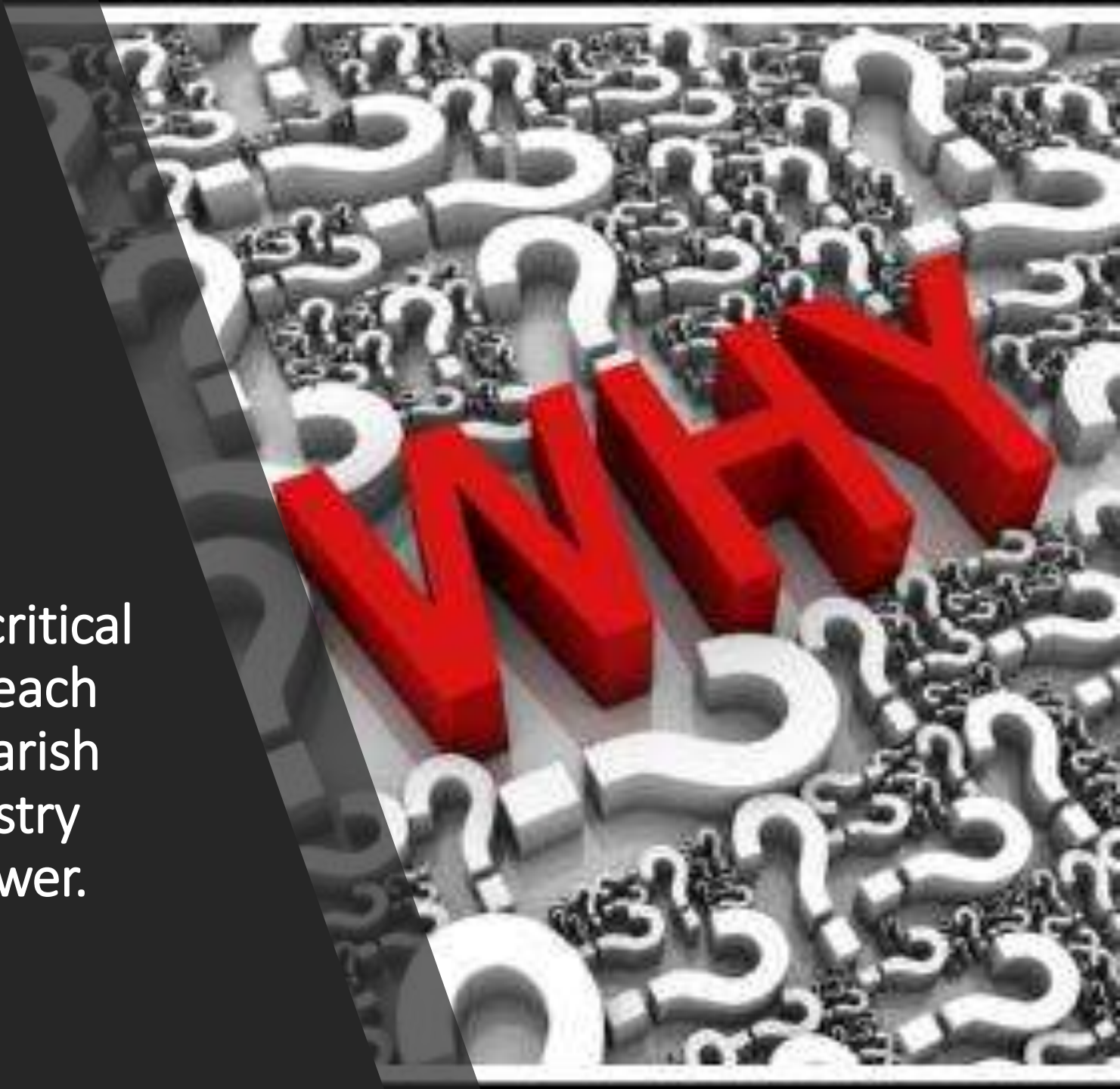


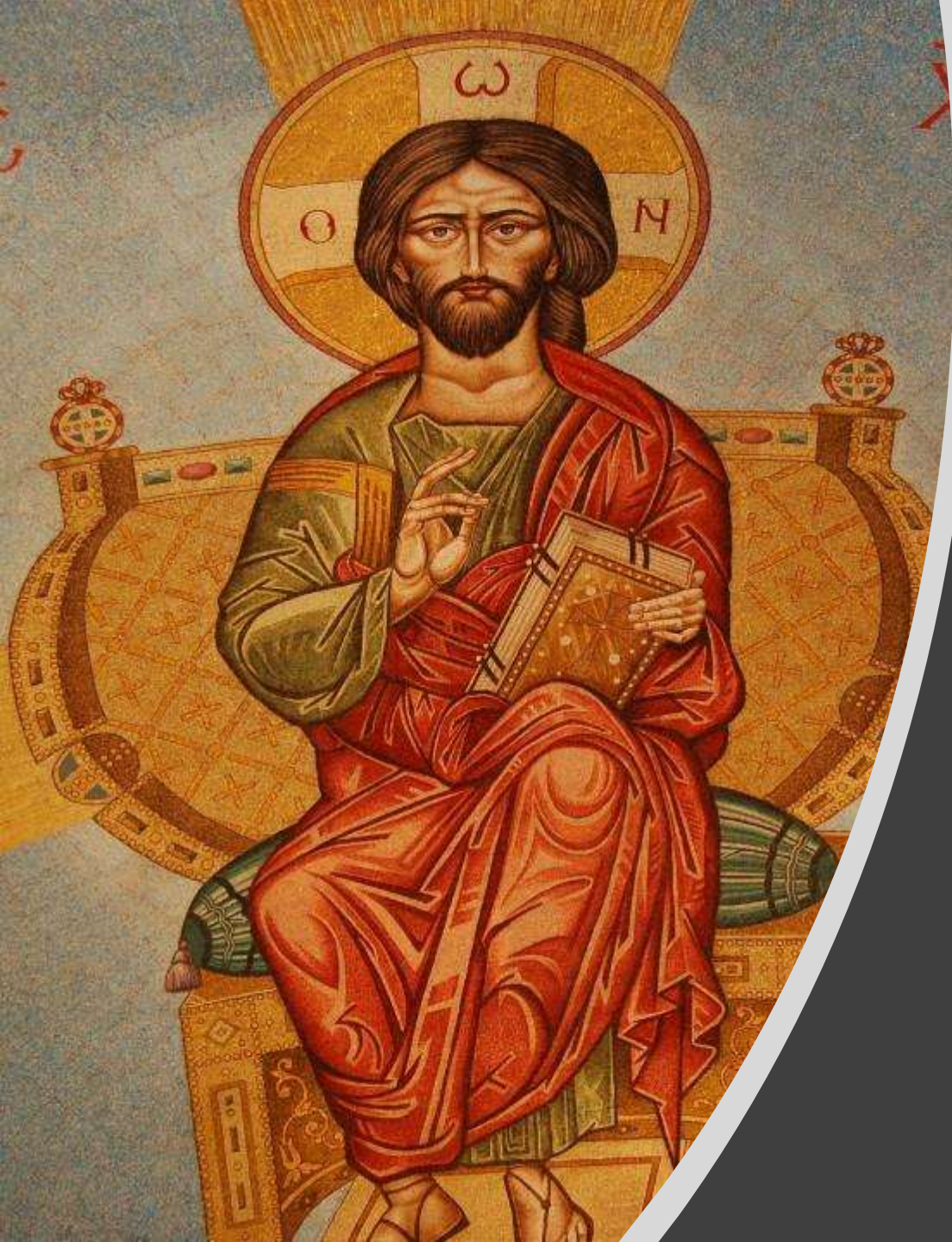


Vision & Parish Strategic Planning

Bill Marianes

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

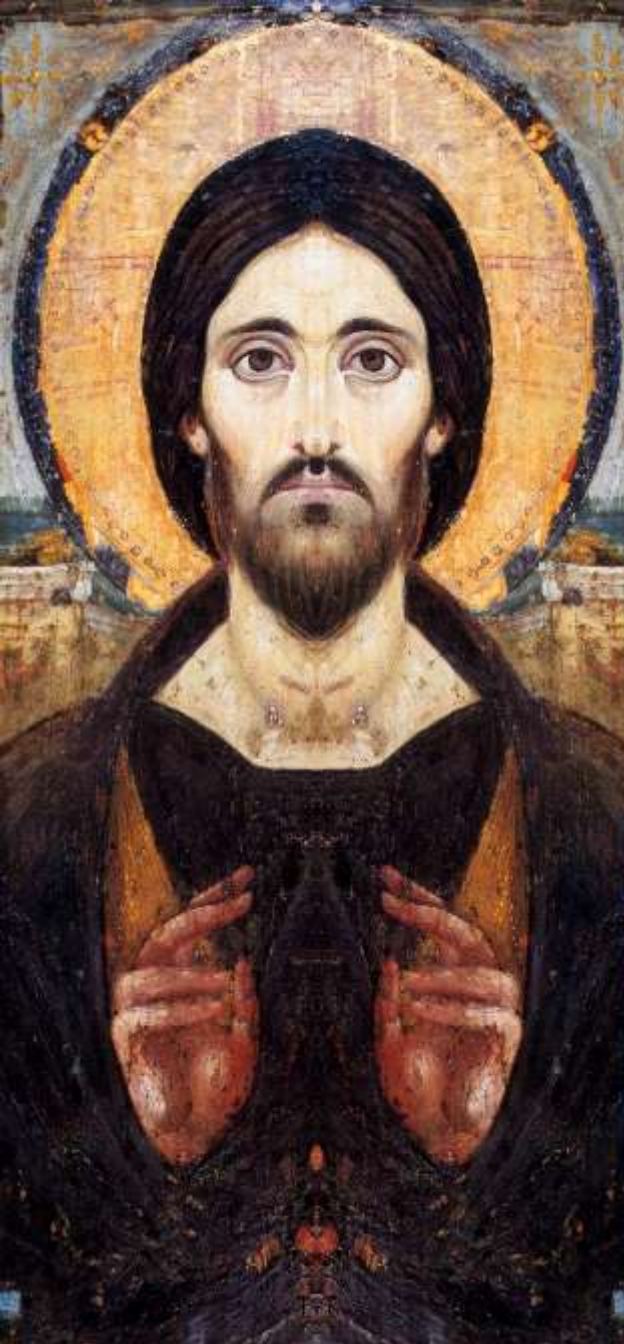




Why Do This?

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

Orthodox Divine Liturgy
II Corinthians 5:10



**Christ's
possible
very
difficult
question**



What did **you** do,
for **My** church and **My** people,
under **your** watch,
given all of the gifts **I** gave **you** ?

“The domain of
the Leader is the



The work of the
leader is
change.”



Dr. James Kouzes

Μετάνοια

Metanoia



“a transformative change of heart”



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



**Consensus Vision and
Strategic Planning**

A journey ...

... 450,000+ airlines miles over 30 years

*...presentations to over 1,000 Parishes of
all Orthodox jurisdictions*

*...a financial stewardship analysis for
over 275+ Parishes*



Stewardship Calling has completed Strategic Plans for over 26% of U.S. Orthodox Christians



GOA Metropolis of San Francisco
Ukrainian Orthodox Church of the USA
GOA Metropolis of Atlanta
OCA Diocese of New England
GOA Metropolis of Chicago
OCA Diocese of Midwest
Sts. Mark, Mary, Philopater Coptic (Troy, MI)
Annunciation Cathedral (Atlanta, GA)
Sts. Raphael, Nicholas & Irene (Cumming, GA)
Dormition of the Theotokos – (Sommerville, MA)
Orthodox Christian Prison Ministry

St. John The Divine (Jacksonville FL)
St. Mary (Wichita, KS)
St. John The Baptist (Beaverton, OR)
St. Nicholas (Ann Arbor, MI)
St. Nicholas (Grand Rapids, MI)
Holy Trinity (Grand Rapids, MI)
St Nicholas (Lexington, MA)
St. Demetrios (Warren, OH)
St. Raphael (Iowa City, IA)
St. Sophia (Jefferson, PA)
St. Demetrios (Saginaw, MI)
Holy Trinity (Indianapolis, IN)
St., Luke (E. Longmeadow, MA)
Holy Trinity (Concord, NH)
Christ the Saviour (Harrisburg, PA)

(Many more currently in progress)

Strategic Planning is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18

A process to:

1. manage the “busyness” of our Church without turning our Church into a “business”
2. define our strategy to allocate our resources to achieve our vision





**Must answer
4 questions:**

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

The 4 Ps of



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

1. SWOT / EPA / FSA
2. Statement of Why
3. Core Values
4. Mission Statement
5. S.M.A.R.T. Goals
6. Vision Statement
7. Interim Goals & Interim Actions
8. Success Timeline
9. SMART Goal Accountability Process (“SMART GAP”)
10. Strategic Plan



10 Strategic Plan Deliverables



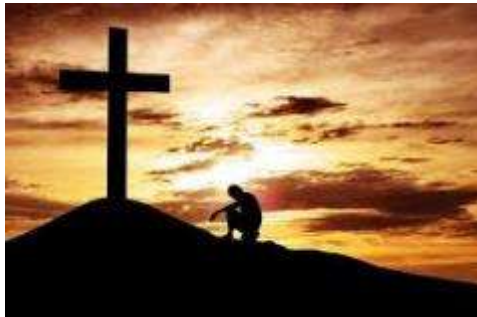
3 Critical Rules of Strategic Planning



Date your Vision



Marry your Mission



Die living your WHY
and Core Values



Question 1:

**WHY do we
exist?**

WHY Statement

Answers strategic planning question #1:

Why are we here?

~ An articulate, compelling and inspirational reason why our parish exists and why anyone should care, or want to join us.



A Statement of Why is Biblical



***“Friends, WHY
are you doing
these things?”***

Acts 14:15

**To help people and
parishes discover and
live their stewardship
callings,**

**so that they may have
a good account before
the awesome judgment
seat of Christ.**





Welcome!
To Sts. RNI Greek Orthodox Church

WHY Statement

**To welcome all on a
transformational journey to
a life of purpose and
salvation.**



Core
Values

Core Values Are Biblical



GOD'S Core Values

I
THOU SHALT HAVE
NO OTHER GODS
BEFORE ME

II
THOU SHALT NOT
MAKE UNTO THEE
ANY GRAVEN IMAGE

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

IV
REMEMBER THE
SABBATH DAY TO
KEEP IT HOLY

V
HONOR THY FATHER
AND THY MOTHER

VI
THOU SHALT
NOT KILL

VII
THOU SHALT NOT
COMMIT ADULTERY

VIII
THOU SHALT
NOT STEAL

IX
THOU SHALT NOT
BEAR FALSE
WITNESS AGAINST
THY NEIGHBOR

X
THOU SHALT
NOT COVET

CHRIST'S Core Values

THE BEATITUDES

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

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

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

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

Blessed are the merciful
for they shall obtain mercy.

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

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

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

Matthew 5:3-10



1. Beliefs shared by the stakeholders

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

3. Provide a framework for decisions



Welcome!
To Sts. RNI Greek Orthodox Church

Core Values

Intentionally Orthodox
Community
Agape Love
Christ-focused



Question 2:

**Where are
we now?**

Where Are We Now Assessment is Biblical





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

Test yourselves!”

2 Corinthians 13:5

Three Not Mutually Exclusive Discovery Options



**Stewardship
Calling**

Financial Stewardship Analysis for Churches (“FSA”)

	HELPFUL	HARMFUL
INTERNAL	S STRENGTHS	W WEAKNESSES
EXTERNAL	O OPPORTUNITIES	T THREATS



Financial Stewardship Analysis

- ~ Validated financial analysis tool to help understand what
 - ~ is happening financially at the parish
 - ~ are the most critical areas to focus on
 - ~ areas are less important or misleading
 - ~ are the good and bad trends over the last 3 years
 - ~ are the 7 items the Parish Council must track and report on to the parish
- ~ Validated over 20 years of working with over 275 Orthodox parishes

For More Information About A Financial Stewardship Analysis

Stewardship Calling

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

www.stewardshipcalling.com

WHY?

STEWARDSHIP

STRATEGIC PLANNING

INTERNET RADIO & PODCASTS

KEYNOTES & LEADERSHIP

RESOURCES

PERSONAL

EFFECTIVE CHURCH MODEL

STEWARDSHIP TRAINING
VIDEOS

ST. SOPHIA – JEFFERSON, PA

METROPOLIS OF SAN
FRANCISCO – IGNITING THE
FLAME OF TRUE CHRISTIAN
STEWARDSHIP PROGRAM

TITHING AND PERCENTAGE
GIVING

PLANNED GIVING

DIRECT ARCHDIOCESAN
DISTRICT & METROPOLIS OF
NEW JERSEY – IGNITING THE
FLAME OF TRUE ORTHODOX
CHRISTIAN STEWARDSHIP

OCF SUMMER LEADERSHIP
INSTITUTE

FINANCIAL STEWARDSHIP
ANALYSIS (FSA) FOR

Financial Stewardship Analysis for Churches (“FSA”)

Financial Stewardship Analysis (FSA) for Churches

How are you doing financially? Most parishes have detailed financial statements, but it is so easy to get lost in the minutia and miss the big picture. By focusing on the key performance indicators (KPIs), metrics that define the church's financial health, and making meaningful comparisons, parish leaders can be unclear about what the church is doing well or poorly. By focusing on less relevant metrics (e.g., average pledges, percentage of budget for ministries) and not appreciating the more relevant financial stewardship metrics and benchmarks?



Recommended Parish Financial Dashboard

Stewardship Calling Recommended Parish Financial Dashboard

ITEM ¹	THIS YEAR	LAST YEAR	PRIOR YEAR
The following are reported monthly			
Total Income			
Total Stewardship Income			
Total Expenses			
Net Income or Loss			
% of Expenses Covered by Stewardship			
Number of Stewards			
Median Stewardship Pledge ²			
(add any other critical line item the PC needs to watch here)			

The following are added to the report each quarter

Total Expenses invested in parish chosen charities and ministries			
% of Total Expenses invested in parish chosen charities and ministries			
Proxy Tithe % Analysis ³			
% of stewardship income from top 10 stewards			
% of stewardship income from top 10% of stewards			
% of stewardship income from top 20 stewards			
% of stewardship income from top 20% of stewards			

¹ ALL columns include only "month to date" numbers as of the end of the previous month

² Use median NOT average because major donors skew averages

³ Divide median stewardship contribution by \$8,175 (tithe of median U.S. Orthodox income)



Recommended Parish Financial Dashboard

Item	2023	2022	2021
Total Income	\$ 464,641	\$ 453,696	\$ 381,626
Total Stewardship Income	\$ 341,457	\$ 288,538	\$ 282,969
Total Expenses	\$ 454,719	\$ 516,581	\$ 315,224
Net Income or Loss	\$ 9,922	\$ (62,885)	\$ 66,402
% of Expenses Covered by Stewardship	73%	64%	74%
Number of Stewards	135	133	122
Median Stewardship Pledge	\$ 1,200	\$ 900	\$ 1,214

Item	2023	2022	2021
Total Expenses invested in Parish Chosen charities and Ministries	\$ 11,712	\$ 38,117	\$ 11,189
& of Total Expenses invested in Parish Chosen charities and Ministries	3%	7%	4%
Proxy Tithe Analysis	1.40%	1.06%	1.43%
% of stewards income from top 10 stewards	40%	35%	42%
% of stewards income from top 20 stewards	60%	58%	59%

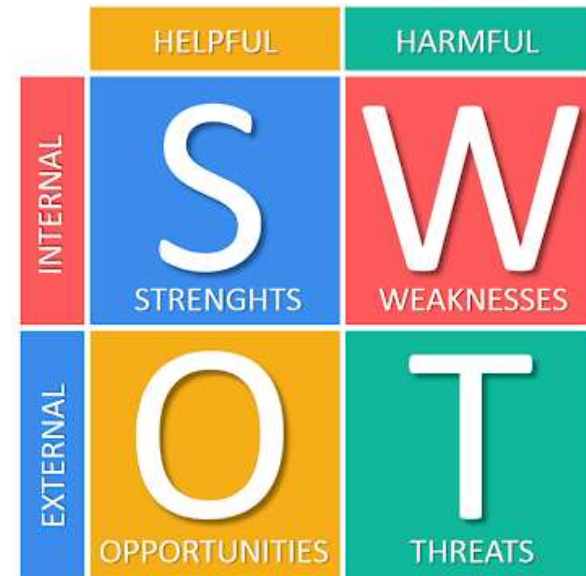
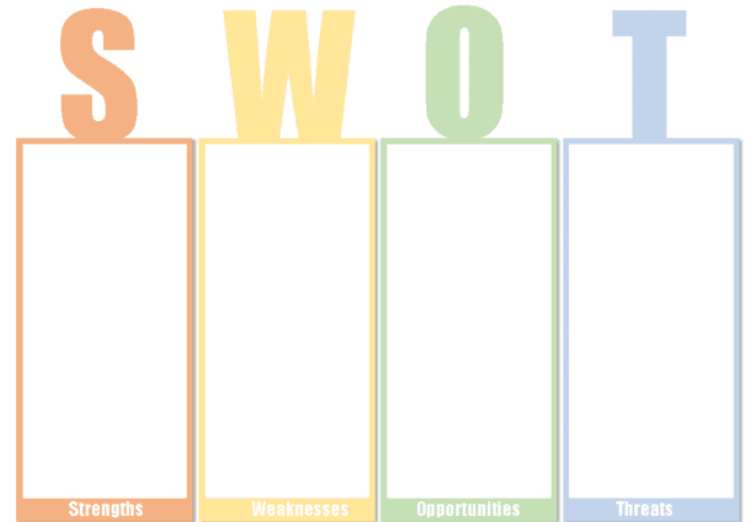
SWOT ANALYSIS

Answers strategic planning question #2:

Where are we now?

~ First focus on INTERNAL Parish Strengths and Weaknesses

~ Second focus on EXTERNAL Opportunities and Threats that our Parish faces



THE ORTHODOX PARISH

A Living House of Faith



Vision & Planning



Leadership & Teams



Stewardship & Generosity



Parishioner Engagement



Ministry



Operational Effectiveness

Personal Faith Formation



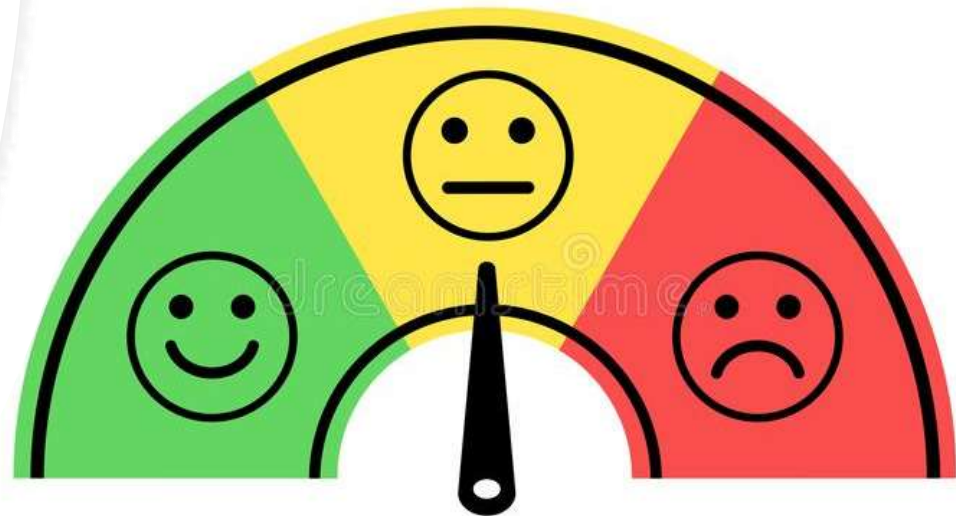
- ~ Doctors can assess your personal health.
- ~ Financial planners can assess your financial health.
- ~ Until now, your Parish lacked similar empirical and validated assessment tools to assess its operational health and effectiveness.
- ~ After 20+ years of working with over 500 Orthodox parishes, the **Orthodox Ministry Services (OMS)** team developed its **Effective Parish Assessment (EPA)**.
- ~ The **EPA** is a reliable, easy, and empirical way to assess the health and operational effectiveness of your Parish.

Effective Parish Assessment

The EPA online assessment evaluates in greater depth the 30 Building in the 6 Pillars of operational effectiveness and parish health.

Each Pillar and Building Block assessed will be color coded based on survey responses:

- Green = Good
- Yellow = Caution
- Red = Critical





STEWARDSHIP
CALLING

Effective Parish Assessment Sample Results

6 Pillars & 30 Building Blocks



Vision & Planning

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



Leadership & Teams

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



Stewardship & Generosity

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



Parishioner Engagement

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



Ministries

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



Operational Effectiveness

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



Summary – EPA 2

EXAMPLE ONLY



	EPA2	EPA2	EPA2	
	<u>% favorable</u>	<u>% unfavorable</u>	<u>% neutral</u>	<u>% I don't know</u>
Vision & Planning	51%	18%	31%	20%
Leadership & Teams	72%	7%	21%	11%
Stewardship & Generosity	43%	33%	24%	30%
Parishioner Engagement	51%	25%	24%	15%
Ministries	42%	29%	29%	21%
Operational Effectiveness	59%	17%	25%	21%



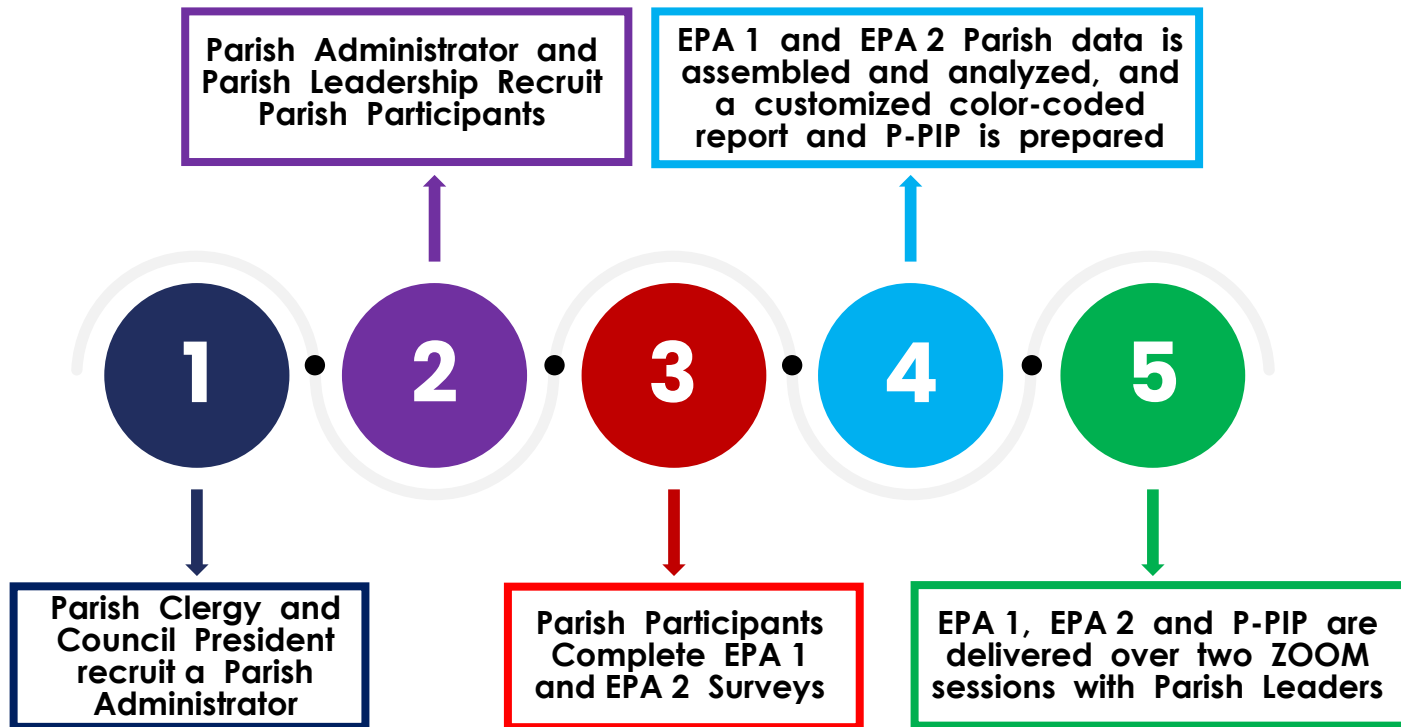
EPA 2 – Example, Building blocks for 1 pillar only

Stewardship & Generosity



Stewardship & Generosity	% favorable	% unfavorable	% neutral	% I don't know
Giving & Tithing	43%	33%	24%	24%
Stewardship Campaign	53%	25%	21%	23%
Capital Campaign	30%	39%	31%	44%
Planned Giving & Endowments	24%	49%	27%	46%
External Philanthropy	43%	33%	24%	24%
Transparency & Accountability	65%	17%	18%	17%

THE 5 STEPS IN THE EFFECTIVE PARISH COHORT JOURNEY





Question 3:

**Where do we
want to be?**



Mission

Statement

A Mission Statement Is Biblical



The Great Commission Mission Statement

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



Matthew 28:18-20

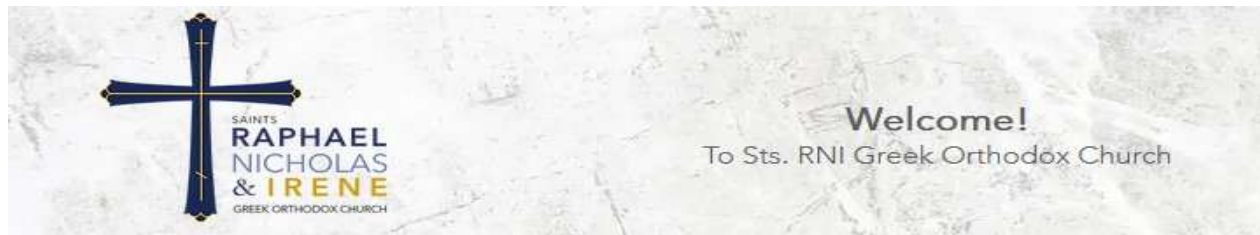
Mission Statement

Answers strategic planning question #3:

What do we do?

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





Mission Statement

Sts RNI is a welcoming family who develops intentional Orthodox Christians through worship, education, outreach, and service.



VISION

A Vision Statement Is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18

Vision

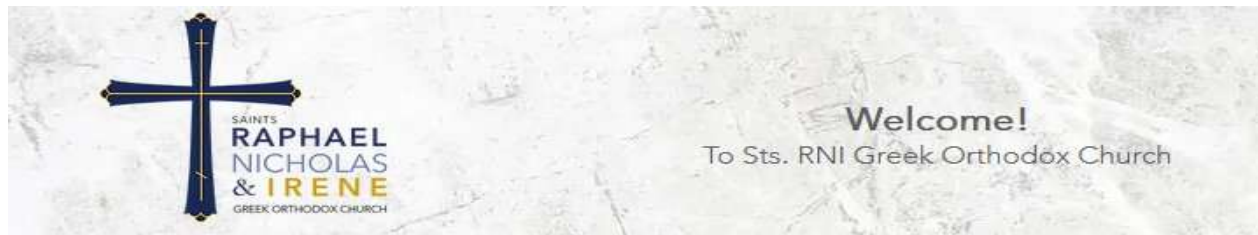
Acts 1:8

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



A Vision should be:

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



Vision Statement

We will

- (a) measurably improve our Adult and Youth Stewardship & Ministry Engagement and Religious Education Ministry within 36 months; and**
- (b) Establish and Implement a Viable Building and Capital Campaign Strategy to Have a New Church within 54 months.**




Question 4:

**How will we
get there?**

Strategic SMART Goals Are Biblical





These twelve
Jesus sent out,
charging them...

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

2. *...preach as you go*

3. *...heal the sick*

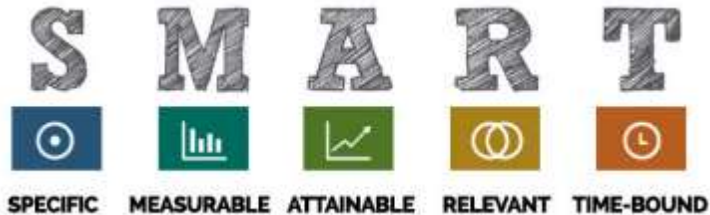
4. *...cleanse the lepers*

5. *...raise the dead*

6. *...cast out demons*

Matthew 10:1, 5-8

SMART Goals



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

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

Measurable: Can you measure the success of the goal?

Attainable: Is the goal attainable within a reasonable time?

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

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

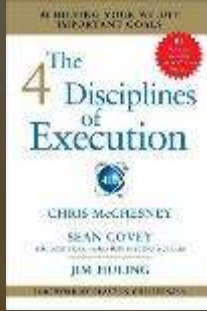


The 5 Step Stewardship Calling Vision & Strategy Success Plan

1. S.M.A.R.T. Goals
2. Interim Goals
3. Interim Actions
4. Step-by-Step Action Plans
5. "SMART GAP"

(S.M.A.R.T. Goal Accountability
Process)

The Power of FOCUS



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

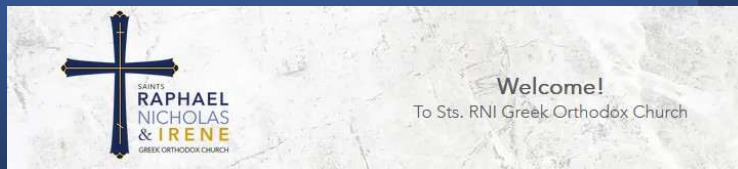
¹ MIT neuroscientist Earl Miller: “Trying to concentrate on two tasks causes an overload of the brain’s processing capacity.”

Stewardship & Engagement S.M.A.R.T. Goal



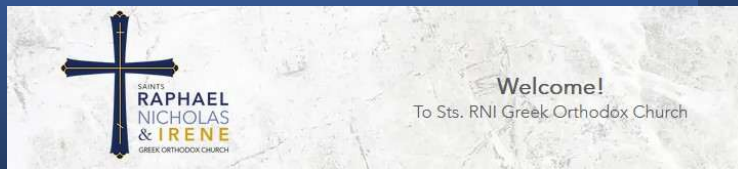
We will research, develop, and implement a best practices and effective adult and youth Stewardship & Ministry Engagement Program (the “Stewardship & Engagement Program”) with a comprehensive communications plan that will achieve the following “Stewardship & Engagement Targets” within 34 months:

- (a) Transition all adult and youth parishioners to intentionally give a percentage of their income on their way to becoming at least tithers (10%);**
- (b) Increase the adult and youth ministry engagement so that at least 90% of parishioners use their time and talents in ministry so that we can become a full participation parish; and**
- (c) Cover solely through financial stewardship all parish operating expenses plus at least an additional 10% of operating expenses to be given to parish-chosen external charities without negatively impacting the capital campaign.**
- (d) Implement a planned giving campaign in which at least 25% of parishioners participate**



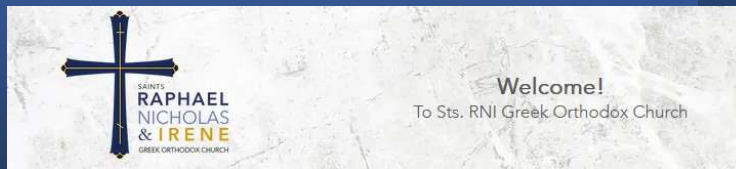
Stewardship & Engagement Action Plan

<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, tithing, ministry engagement, and planned giving 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, tithing, ministry engagement, and planned giving metrics, survey/research parish impediments to achieving increased stewardship, tithing, ministry engagement, and planned giving success.	S&EPT	1 month after step 2	Parish baselines and parish impediments determination are finalized
4. Identify at least 3 engagement, 3 percentage giving/tithing, and 3 planned giving programs to consider from both inside and outside the Orthodox ecosystem.	S&EPT	Simultaneous with steps 2 & 3	At least 3 stewardship & engagement, 3 percentage giving/tithing, and 3 planned giving programs are examined



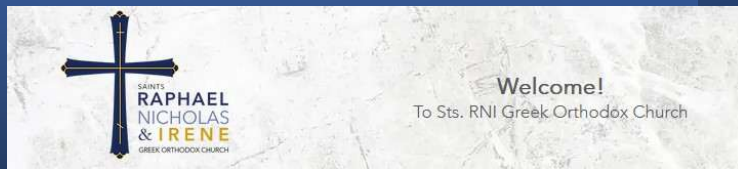
Stewardship & Engagement Action Plan

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



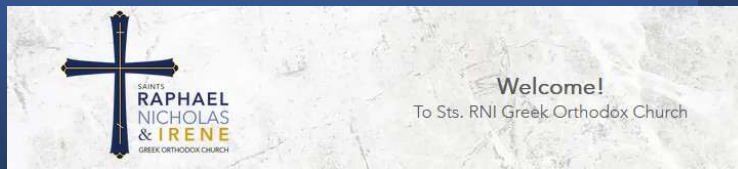
Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 4: Implement the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within 24 months</u>			
9. Implement Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets.	Ambassadors	24 months after step 8	Stewardship & Engagement Program is fully launched
10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship & Engagement Targets are achieved	Ambassadors	Contemporaneous with step 9	Established monthly Stewardship & Engagement Targets are achieved



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 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 Program assessments are completed
12. Finalize and deliver Stewardship & Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship & Engagement Program more effective based on information identified in step 11.	Ambassadors and S&EPT	1 month after step 11	Analysis is completed, and Stewardship & Engagement Program is refined accordingly



Stewardship & Engagement Action Plan

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



IN PERSON SUMMARY OVERALL TIMETABLE¹

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

² **SPT** =
Strategic
Planning Team

¹ Subject to Pascha, Festival and Holidays

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

ZOOM SUMMARY OVERALL TIMETABLE¹



Finalize SPT² SP Element Determination Strategic Goal & Action Plans	≈ 2 months from start
Second retreat	≈ 4 months from start
Public Rollout	≈ 5-6 months from start
	≈ 7 months from start
	≈ 8 months after start

¹ Subject to
Pascha, Festival
and Holidays

² SPT =
Strategic
Planning Team

<u>TASK</u>	<u>TIME</u>
Pick and Recruit SPT & Solicit “Where are we now” Data	1-2 months after start
Why Discovery Zoom	3 months after start
SWOT Determination	2-3 weeks later
Core Values, Mission Statement & Strategic Area of Focus Determination	2-3 weeks later
Second retreat	7 months after start
Public rollout event	8 months after start

“Two are better than one, because they have a good return for their labor.

If either of them falls down, one can help the other up.

But pity anyone who falls and has no one to help them up.”

**ONE
TEAM
ONE
DREAM**

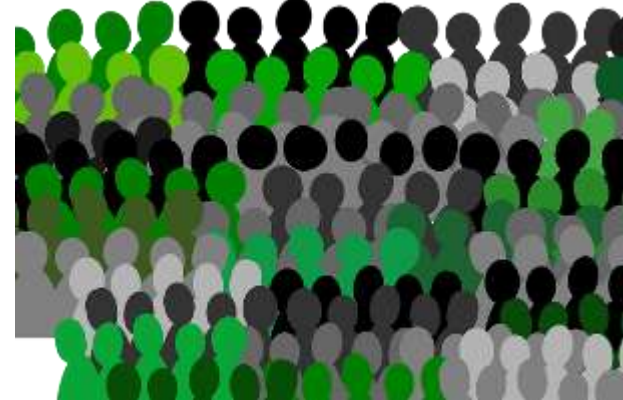


Ecclesiastes 4:9-10

It Takes 3 Teams

Community

Community-wide input throughout, including the beginning and in the Strategic Goal formulation



Strategic Planning Team

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



Implementation Team

A larger diverse group of parish faithful who actually do the work and implement all of the Strategic Goals and Action Plans and who are accountable for the achievement of the Strategic Plan



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

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



Romans 12:5

Two Process Keys



Rules of Engagement & Consensus

Sun Tzu



“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”

Who Owns The Problem?

“Any time the majority of people behave a particular way the majority of the time, the people are not the problem. The problem is inherent in the system.

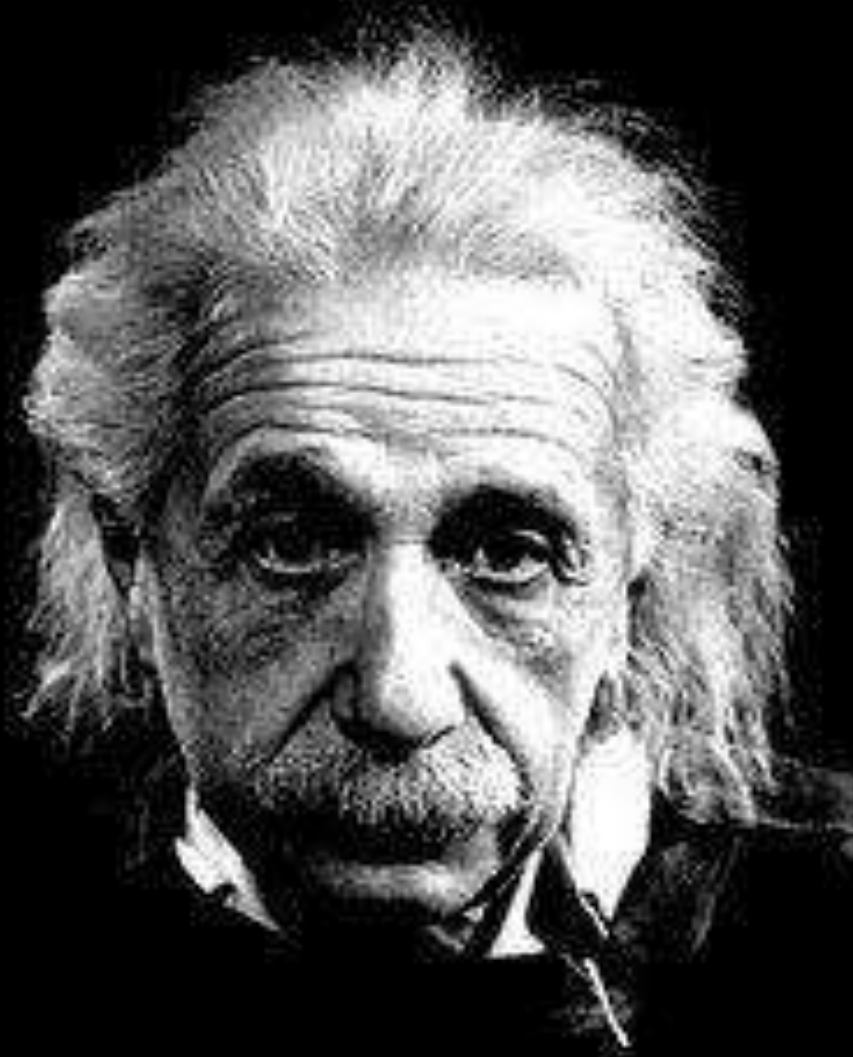
As a leader, you own responsibility for the system.

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

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



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



The 4 Deliverables From the



Strategic Planning Process

1. Comprehensive Strategic Plan

10 elements - SWOT / EPA /OCAI Analysis; WHY; Core Values; Mission Statement; S.M.A.R.T. Goals; Vision Statement; Interim Goals & Interim Actions; Success Timeline; SMART Goal Accountability Process (“SMART GAP”); Strategic Plan

2. Inspired Teams

3. Consensus Decision Makers

4. Energized & Improved Culture



QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES

Any Questions?

Vision & Parish Strategic Planning

Selected SPT Criteria

YES:

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

SPT members must be willing to dedicate a fair amount of time over the next 6 -7 months

NO:

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

Rules Of Engagement

ROEs

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



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



Consensus

Consensus

A group of business professionals in a meeting, with text overlaid on a dark background. The image shows several people in business attire sitting around a table, engaged in discussion. The text is white and stands out against the dark background.

~ Seek the “common mind” through respectful dialogue

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

~ Consensus is achieved once:

(a) the discussion has been full and fair

(b) everyone can live with the modified proposal