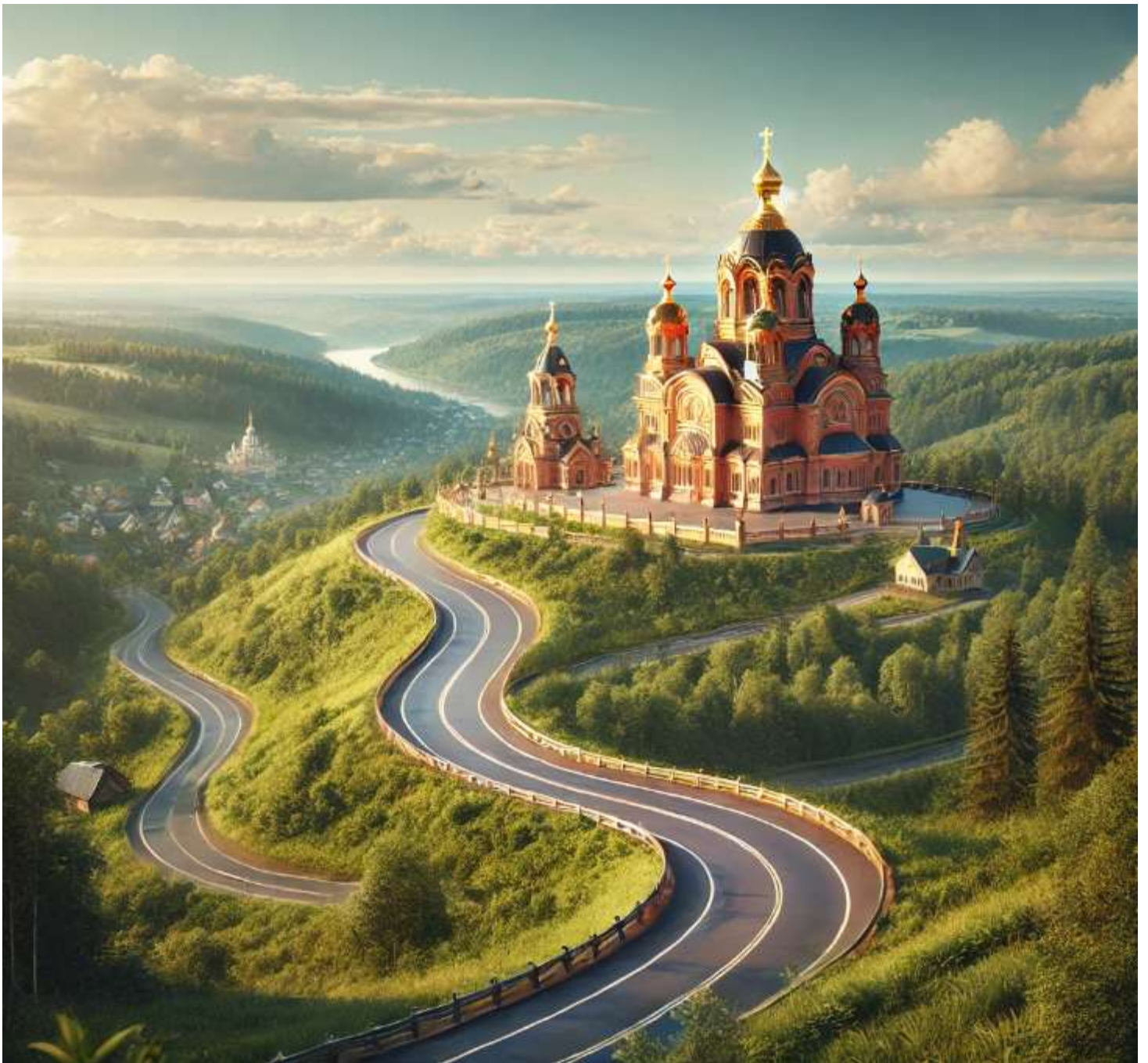


**A Roadmap for American  
Churches and People of Faith:  
W.W.J.D. (What Would Jesus Do?)**



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# PREFACE. Your Roadmap Journey Begins.

## Why This Roadmap?

I begin by giving all glory to God!

My Roadmap is for you if you want to make your church healthier, more effective, and better able to fulfill its WHY and calling. Want proof? The Faith Communities Today “FACT 2020” report examined 15,278 parishes/congregations from 80 U.S. denominations (Hartford Institute for Religion Research, 2021). The nine best practices of the healthiest parishes that are growing and spiritually vital are listed below. Next to each best practice, I direct you to the Chapters from my Roadmap in which I explain how your parish can achieve this result:

<b><u>NINE BEST PRACTICES</u></b>	<b><u>LOCATIONS OF ROADMAP ANSWERS</u></b>
1. have strong leadership that fits well with the parishioners	Chapters 3, 4, 5, & 6
2. have a clear and compelling mission	Chapters 7 & 13
3. be innovative and open to change	Chapters 3, 6, 7, 8, & 13
4. be active in the local community	Chapters 10 & 11
5. have more vibrant worship that is thought-provoking and stimulating	Chapters 14 & 15
6. have a community of parishioners that represents a diversity of ages, genders, races, and other differences	Chapters 10, 11, 12, & 15
7. be good at incorporating new people	Chapters 7, 9, 10, & 11
8. have significant lay involvement, including contributing financially and volunteering	Chapters 9, 10 & 11
9. live out their faith commitments in everyday life and tell others about the parish	Chapters 10, 11, 13, & 14

My Roadmap is also designed to help you better discover and live your WHY and calling so that you may have “a good account” when you stand before Christ (II Corinthians 5:10). The first fourteen chapters of my Roadmap systematically present in detail the top **S**<sup>3</sup> three challenges your parish is facing in **S**ervant leadership, **S**tewardship and engagement, and **S**piritual formation and religious education. I will then present the

latest and most relevant data/research and best practices to address each of those S<sup>3</sup> challenges.

For those interested in Christian Unity, Chapters 15 and 16 will provide a Roadmap to unify all the Orthodox Christian Jurisdictions in the United States. In Chapter 17, I will provide a high-level Roadmap for unity between the Roman Catholic and Orthodox Christian Churches in America. If you are “triggered” by even thinking about Chapters 16 and 17: (a) please do not let that interfere with your improving the health and effectiveness of your parish (and your personal life) by implementing the solutions in the first 14 Chapters, and (b) at least read Chapter 15 and see if that affects your thinking.

My Roadmap is the result of over thirty years of working with over 1,000 American Orthodox Christian parishes, completing strategic plans that cover over 26% of Orthodox Christians in America, traveling over 450,000 airline miles and many hundreds of thousands of more “ZOOM miles,” and reviewing the latest research from many other empirical sources. The title is “A” Roadmap and not “The” Roadmap. This means I am offering what I believe to be the best empirical information and solutions I could identify at present.

However, I have total humility and no arrogance and do not suggest this is the only roadmap. Indeed, I am confident there are many others. I encourage you to consider everything offered in my Roadmap and feel free to use, revise, or start over and chart your own roadmap for your Christian parish. What I do not want you to do is nothing. I hope to prove that the challenges are too significant and the stakes too high for lethargy and inaction. My Roadmap is written as a personal letter to you to open a dialogue with you and all parish leaders. As long as I am alive, I welcome your questions, comments, and suggestions.

However, please make no mistake about my sense of urgency. Christianity is declining in America by virtually every observable metric. For example:

- ~ approximately 70% of your youth leave the church when they leave your home,
- ~ only about 20%-25% of Christians attend church once a month,
- ~ some Denominations (like my Orthodox one) have lost over 47% of the adults born into the faith,
- ~ clergy shortages are epidemic, and
- ~ financial issues plague most parishes.

I will present many more sobering statistics, but please do not tell me we are on the right path. The reality by virtually every empirical metric says otherwise. You may be happy with your personal faith, but if you are a leader, this massive tragic decline is on you (and me). We do not need a new Savior; we merely need a course correction and a new Roadmap to get closer to the One we were given!

## Beliefs And Biases.

I believe Jesus Christ is exactly who He says He is. I am thus His unabashed follower. Stating this from the beginning is essential because it inevitably colors everything else in my Roadmap and life. This confident belief explains why I retired early from a highly blessed law practice after 36 years in two global law firms of 1,100 and 1,600 lawyers each to work nonstop for the rest of my life for free, trying to support and grow Christ's churches.

Consistent with the teachings of our Savior, I try to love all people, regardless of religious affiliation or the absence thereof. So, I have no animus toward anyone who does not follow Jesus Christ. However, I will not apologize for my beliefs. And when asked, I will share them with enthusiasm and vigor.

I believe that the **Άγιον Ευαγγέλιον** (Holy Gospel) is the inspired word of God. The Greek word for Gospel means literally (and appropriately) "the good news." Thus, we mere mortals are left to prayerfully and, with the guidance of the Holy Spirit, attempt to discern the "good news" of the Holy Gospel as faithfully as possible.

I am also a lifelong member of the Greek Orthodox Church. I believe in its teachings and its unbroken connection to the church Christ founded. The word "orthodox" translates to "true teaching" or "true praise." Except for graduating from a Roman Catholic High School (Bishop Noll Institute), receiving my B.A. and Graduate Leadership certificate from a formerly Methodist University (Northwestern), an M.B.A. and J.D. from a formerly Methodist University (Emory University), chairing the Board of an Episcopal school (St. Martin's), and receiving my Doctorate in Strategic Leadership from a non-denominational Christian University (Regent University), most of my religious experiences and work have been within the twelve Jurisdictions of the Eastern Orthodox Church. I have also been blessed to help parishes in the Coptic Orthodox Church, Episcopal Church, Anglican Catholic Church, and other Jurisdictions.

If you have an interpretation question regarding a term I use in my Roadmap, you can consult the Orthodox Study Bible or the teachings of the Eastern Orthodox Church. However, I have attempted to read and apply research and best practices from all Christian denominations and researchers to my work with parishes. Thus, and very importantly, my Roadmap is designed to be helpful to any American Christian Church, Denomination, Jurisdiction, parish, or person of faith.

Having said all that, I am, nevertheless, first and foremost a follower of Jesus Christ. As proud of my faith and Greek heritage as I am, I cannot and will not denigrate any other follower of Jesus Christ who may speak a different language, have a different faith tradition, or follow a different path toward the Lord. If this love for all gets me in trouble with someone within my or their faith tradition, so be it. That is not my problem.

To be clear, I am first and foremost a "**Oneness In Christ Disciple**" ("**OICD**"), as explained in significant detail in Chapter 15 of my Roadmap. The teachings of Holy Scripture from the beginning (Genesis 1:26), through the teachings of Christ (John 17:21-22) to the instructions from St. Paul (Galatians 3:27-28) and the clear affirmation in the Nicene Creed developed by the heirs to the Apostles in the Council of Nicaea, all point

directly to Oneness In Christ, together with God, and the Holy Spirit (collectively, the “**Holy Trinity**”). Thus, the true north of my life and beliefs is my journey to “**theosis**,” which Fr. Thomas Fitzgerald, of blessed memory, described as follows:

Theosis describes the spiritual pilgrimage in which each person becomes ever more perfect, ever more holy, ever more united with God. It is not a static relationship, nor does it take place only after death. On the contrary, theosis is a movement of love toward God which begins for each Christian with the rites of Baptism, and which continues throughout this life, as well as the life which is to come. Salvation means liberation from sin, death, and evil. Redemption means our repossession by God. In Orthodoxy, both salvation and redemption are within the context of theosis. This rich vision of Christian life was expressed well by Saint Peter when he wrote in the early pages of his second Epistle that we are called “to become partakers of the Divine nature.” It was also affirmed by Saint Basil the Great when he described man as the creature who has received the order to become a god (Fitzgerald, n.d.).

## **The DD And OICD Decision – Which One Are You?**

In Chapters 15, 16, and 17 of my Roadmap, I speak first to **Oneness In Christ Disciple** (OICDs). However, I also address these Chapters to brothers and sisters who are so staunchly dedicated to their particular Denomination, Jurisdiction, or faith tradition that they expend enormous energy and many words to explain why their interpretations, beliefs, and traditions are correct and all others are not. I call these brothers and sisters **Denominational Disciples (“DD”)**. This is not intended to be a disparaging term and is merely descriptive. To them, being a DD supersedes affiliating with or honoring anyone else who is an OICD but not in their Denomination.

I believe you can be an OICD and firmly committed to your Denomination as long as you do not feel the need to criticize, disparage, correct, belittle, or explain why those of a different Denomination are wrong. Explaining the beliefs and practices of your Denomination can be helpfully instructive without being divisively destructive and contrary to OICD. The Apostles threaded that needle faithfully in the early church while remaining OICD, and I believe you and I can do the same. They chose a version of the model I recommend, namely “respectful affiliation” rather than “absolute subjugation.”

I love and respect DDs but chose a different Roadmap and path. I believe a path was given to you and me by Jesus Christ himself. At the end of His earthly life, Our Lord prayed for followers like you and me: “...*that they all be one, as You, Father, are in Me, and I in You; that they also may be one in Us... that they may be one just as We are one*” (John 17:21-22).

Yes, I am extremely proud of my Greek Orthodox faith and deeply humbled that His All-Holiness Ecumenical Patriarch Bartholomew several decades ago bestowed the Archon Officion (title) of “Exarchos” (“Exarch”) of the Ecumenical Patriarch, Order of St. Andrew to this sinful and unworthy servant. For my remaining days, I intend to faithfully serve my Patriarch, Archbishop, Metropolitans, all Orthodox Bishops, clergy, and all the

faithful to the best of my abilities and consistent with my fundamental OICD beliefs and Core Values.

However, with no disrespect intended to anyone, I declare my permanent, primary, and preeminent loyalty to Jesus Christ and what He taught. History has repeatedly proved that church leaders can and do change their minds, opinions, words, practices, and positions. However, the Lord's truth is unchanging. Pastor Andy Stanley once humorously concluded: "When somebody predicts their own death and resurrection and pulls it off, we should go with whatever that person says" (Stanley, 2018).

However, I recognize that the only thing some people hate more than the truth is the person who speaks it. While I always ask for forgiveness, I accept that consequence for those who might take offense at the truth I will speak in my Roadmap to the best of my abilities and understanding. I agree with an articulate South African Christian evangelist and entrepreneur, Vusi Thembekwayo, who said:

I genuinely get worried when people like me because I am almost sure that I am doing something God doesn't want me to do. Because if it is something God wants me to do, many people are probably not going to like me. But I would prefer to be loved by God rather than loved by men. When you have the courage to speak the truth (supported by Holy Scripture, facts, and empirical data) you must expect to be misunderstood and sometimes hated (Thembekwayo, 2024).

So be it. Welcome to my journey and Roadmap to a different promised land.

## [Preparing You For Your II Corinthians 5:10 Moment.](#)

I have become faithfully obsessed with a passage of Holy Scripture that changed my life. I hope it may change yours. By my repeated use and reference to this passage throughout my Roadmap, I wish you to become equally obsessed thinking about this incredible moment in your eternal life. It is a prayer from II Corinthians 5:10 (repeated in the Orthodox Divine Liturgy), where St. Paul teaches: "***For we must all appear before the judgment seat of Christ, that each one may receive the things done in the body, according to what he has done, whether good or bad.***"

The version of this prayer in the Orthodox Divine Liturgy begins by selfishly asking that the "*end of our lives be Christian, without pain, blameless and peaceful.*" It then turns to the above Scripture and humbly asks for "***a good account before the awesome judgment seat of Christ.***" (Some translations use the words "defense" and "dred" instead of "account" and "awesome"; however, I will use the translation I grew up learning as a young child in St. George Greek Orthodox Church in East Chicago.)

Please stop and reflect on this prayer and passage of Holy Scripture. First, it means you will live forever. That is a settled issue. I jokingly add that the only question is whether you will like where you are.

However, the second meaning of this passage is even more sobering and is what I call "**The Big Ask.**" One day, you will stand before Christ to account for your life.

Throughout the rest of my Roadmap, I will obsessively refer to that magical time as your “**II Corinthians 5:10 Moment.**” When I refer to this moment in your eternal life, I wish to remind you of this promise of an audience with Christ and a call to consider the consequences of the choices you make in your earthly life. What is the story of your life that you want to share with the Lord (who already knows it)? My Roadmap is about giving you a potentially much better account and story to tell the Lord.

Obviously, we do not know what that encounter will be like. However, in a moment of hubris, I challenged myself to think of the most difficult question Christ could ask. Over four decades as a lawyer have prepared me to create the most challenging cross-examination and negotiation questions. Christ doesn’t need to hire a lawyer to get the best question. He certainly would not retain this sinful and unworthy servant if he did. And, of course, there is that nagging concern that there are NO lawyers around our Lord.

Nevertheless, the most challenging question I could conceive is Christ asking us individually: “What did you do for MY church and people, under your watch, given all the gifts and blessings I gave you?” Imagine replaying every moment of your life and reviewing all your positive and negative decisions and actions. What would your net ledger look like in answer to that question at this moment in your life?

My obsession with my II Corinthians 5:10 Moment causes me to begin each day asking myself, “What will I do today to hopefully give me a ‘good account before the awesome judgment seat of Christ’?” I end each day reflecting on the day, asking myself: “What did I do today to have a ‘good account’ or what did I do today that was a withdrawal from my account.”

I challenge you to consider your II Corinthians 5:10 Moment and decide what you want to change right now so that you will have a “*good account before the awesome judgment seat of Christ*” and hear, “*Well done, good and faithful servant; you have been faithful over a few things, I will make you ruler over many things. Enter into the joy of your Lord*” (Matthew 25:23).

## [A Few Keys To This Roadmap.](#)

It has taken me a lifetime of research and in-the-field experience to discover and write my Roadmap. While I cite many sources and research, I have endeavored to write my Roadmap in plain English and as colloquially as possible. I want this to be like speaking to you in person rather than reading a scholarly publication, although some portions may sound more formal.

I focus on what I call “**Practical Applied Theology**” (“**PAT**”), which seeks to take sound theology and Biblical understanding and describe it in the most accessible and helpful manner possible. This is critical if you want ordinary people to apply it daily. I will provide you the references so you can “fact check” me and study further; however, I confess to not always rigorously following APA 7 citation format when an easier reference access would be more helpful.

I provide a Glossary and Index of Defined Terms, which I use throughout my Roadmap to make reading easier. I do not expect everyone to read my Roadmap from cover to cover, although that will provide the best parish and personal guidance. Instead, I expect that the relevant Chapters or sections will be read by those who seek guidance in that area. Accordingly, many concepts, phrases, quotes, or stories are repeated in multiple Chapters and sections, not because of lack of proofreading or inefficiency, but to underscore their applicability in various contexts. If something is true, it ought to be frequently helpful. For example, I will unapologetically bludgeon you repeatedly to think about your II Corinthians 5:10 Moment.

## The Ironic Challenge of Unity - For Those Faithful and Brave Enough.

Christ started one Church, not many. In the intervening almost two thousand years, men and women have fractured and divided our Lord's "ONE, holy catholic and apostolic church" (as we read in the Nicene Creed). I believe this to be a sinful shortcoming of humanity and not our finest hour. I do not think the division will serve you or me well in our II Corinthians 5:10 Moments. Accordingly, my Roadmap tackles the seemingly Gordian knot of reuniting what man has divided.

To that end, I start with the first Church. The historical record is relatively clear that the original Church was unified (with a few smaller divisions, disagreements, and schisms) until approximately 1054 AD, when the Eastern Orthodox Church and Roman Catholic Church divided. In my opinion, this was among man's worst accomplishments. The subsequent divisions of the various Protestant denominations that have broken away from the Roman Catholic Church compounded the felony of 1054. Thus, I humbly offer my Roadmap first to unite all the Eastern Orthodox Churches, then the Oriental Orthodox Churches, and also to heal the division of the original Church, what Pope Paul VI called the "**East and West lungs of Christ's original Church.**"

Having asked for a "preemptive pardon" from my Archbishop, I tackle Orthodox Unity in Chapters 15 and 16 and Roman Catholic and Orthodox Unity in Chapter 17 of my Roadmap. I recognize several things about this endeavor. First, those of you who are Denominational Disciples (DDs) will find it troubling and challenging. I ask for your forgiveness if I offend you. However, I do not apologize for challenging you to depart from the divisiveness of DD. Instead, I invite you to prayerfully read these three chapters and see if any part of the case for **Oneness In Christ ("OIC")** resonates with you.

Second, I am quite confident this OIC unity will never be realized in my lifetime. At seventy years old, the miles in the front windshield of my life are substantially fewer than those in my rearview mirror. With this in mind, you will understand my urgency to complete my Roadmap as I diligently prepare for my II Corinthians 5:10 Moment.

I sincerely thank my faculty advisors (and good friends), Dr. Barry Doublestein and Dr. Russell Huizing, for pushing me to tackle this monumental challenge. They reminded me that many laughed and derided: (a) Lord Balfour for his 1917 Balfour Declaration roadmap to create a Jewish State that was eventually realized in 1948, after his death,

and (b) President John F. Kennedy for declaring America would land on the moon before the end of the decade of the 1960s, which he too was not alive to see.

My Roadmap is my “moonshot” toward the heavens to restore Christ’s original “ONE, holy catholic and apostolic church.” I will explain that I believe God, Moses, Christ, the Apostles, St. Paul, and the early Fathers of the Christian church made the case for OICD crystal clear. You can judge for yourself if you agree. No worries, the Lord, not me, will be the ultimate judge.

I offer everything in my Roadmap with the utmost humility. Although the stridency of my advocacy and the words chosen will, at times, no doubt seem to be the antithesis of one who is humble, I sincerely believe my Roadmap is the best advice I can give given what little I know now. I have no doubt I could improve it each additional day of my life as I learn more and as the world changes.

Moreover, I am confident there are many who are much wiser and more faithful than me. I hope God also calls them to improve my Roadmap or create a different and better one to take you further than my limited vision can see. I welcome all such efforts to criticize, improve, revise, or repudiate advice in my Roadmap, but only if it is replaced with a well-reasoned and thoroughly researched better alternative.

I acknowledge the discomfort I may cause you DDs who are highly motivated to explain why your beliefs and practices are perfectly correct, superior to others, and most Christ-like. While I find such discussions distracting and repulsively divisive at worst, I am confident that my opinions are irrelevant to you. However, I implore you to please leave your confirmation biases aside and prayerfully read and challenge yourself to see if there is any truth in what I offer in humility.

If you find no truth, then carry on unchanged. But I pray you will experience a μετάνοια (metanoia) transformative change of heart on at least one critical belief or practice and improve your life and II Corinthians 5:10 Moment by becoming an **OICD (Oneness In Christ Disciple)**.

## [A Few Terms To Help You On Your Journey.](#)

While I have provided a glossary of defined terms, a few require specific calling out at the outset. I use “**parish**” to describe individual-specific church communities and “**parishioners**” to define their participants. (I detest the phrase “member,” which smacks of a club, not one of Christ’s parishes). I also reject the notion that a “church” or “parish” is a building. We believers in Jesus Christ are His “church,” and we remain as such regardless of in which space we may be found.

Parishes are the most intimate bodies of believers because this is where the people live, pray, and raise their families. Some parishes are independent, and others belong to larger organizations that are interchangeably referred to as **Denominations, Churches, Faith Traditions**, and other phrases of similar import. Within American Orthodoxy (what I call the “**American Orthosphere**”), the 12 Eastern Orthodox and 6 Oriental Orthodox branches are often referred to as “**Jurisdictions**.” I am saddened that



we have many different words to describe Christ's ONE, holy, catholic, and apostolic church.

I sometimes subdivide parishioners into three humorously described buckets:

1. "**PIPs**" or "**Parishioners In Pews**" who show up in church with some regularity,
2. "**APIPs**" or "**Absent PIPs**" (parishioners who were PIPs and for some reason have either stopped coming or reduced their frequency/participation or attend another church in the area but have not moved away), and
3. "**FPIPs**" or "**Future PIPs**" (individuals who might join the parish in the future if properly evangelized and catechized).

The term "**steward**" should be synonymous with parishioner. However, I recognize that not every PIP contributes time, talent, treasures, and tithes. Thus, many parishes call those who make such contributions "**stewards**."

Please note that while I refer to parishes, most of the tools and techniques discussed herein equally apply to independent or affiliated Christian ministries. Thus, a ministry attached to, or separate from, a parish should undertake leadership training, education, strategic planning, stewardship development, etc., just as the parish should. For the economy of words, parish and ministry are likely interchangeable in most places.

In keeping with the Orthodox tradition, I call the "Board of Directors" that runs a parish the "**Parish Council**" or "**PC**." I am aware the governing lay group within other denominations uses various names (e.g., Vestry, Board of Trustees, Elders, Executive Boards, etc.), all of which are subsumed by my use of the term **Parish Council**.

Unless otherwise indicated, all quotations from the Holy Gospel come from:

- (a) **Old Testament:** Maximos, M., Najim, M., Pentiu, E., & Sparks, J. N. (Eds.). (2008). *The Orthodox study Bible*. St. Athanasius Academy of Orthodox Theology.
- (b) **New Testament:** *New King James Version*. (1982). Thomas Nelson.
- (c) **New Testament Holy Scripture Commentary:** Allen, J., Najim, M., Sparks, J. L., & Stylianopoulos, T. (Eds.). (2008). *The Orthodox Study Bible*. St. Athanasius Academy of Orthodox Theology.

All website references and other URLs provided were accurate and available when my Roadmap was published. However, due to the dynamic nature of the internet, specific pages and links may not be available in the future.

## [Merely My Lap.](#)

Let me close this Preface by saying I also believe that among the two greatest gifts God gives us each day of our lives is, first, the gift of twenty-four hours, and second, the

gift of free will to decide what we will do with His first gift. Dear brother or sister, I pray your reading of my Roadmap is a productive use of your free will and prepares you for a better II Corinthians 5:10 Moment.

By definition, I believe no learning or research is ever complete. The minute I release my Roadmap, some data will change and become obsolete, new and better strategies will be developed, and advanced lessons will be learned to improve results. I welcome those and encourage you to do the same. God-willing, I will finish my Doctorate in Strategic Leadership one week after my 70th birthday, yet I am confident my education is nowhere near complete. I pray that the Lord allows me to continue to learn new and better things every day until I enter the Kingdom Eternal. I embrace the philosophy of “living and learning until you die.”

There is only one book I am aware of that was fully divinely inspired and is consistently true without needing updating. That is the Holy Gospel. In contrast, my Roadmap merely represents the best that this sinful and unworthy servant could have compiled from a lifetime of research and experiences. This is the record of my lap (to date) and is only helpful if you take the baton and run a better next lap in the relay of the generations of humanity.

I end this preface to your journey using my Roadmap as I began by giving **all glory to God!**

# CHAPTER 1. Your Three Critical Questions.

## Introduction.

“You cannot teach adults new things. You can merely create the environment where they discover the truth for themselves.” Variants of these words attributed to my Greek “ancestor” Socrates are the foundation of American legal education. A million years ago, when I started law school, I was immediately captivated by the fact that the professors did not lecture. Instead, they used the “Socratic Method” to ask us questions so that we could discover and discern the truth of a case and, as importantly, learn how to think creatively and apply the law to endless and ever-changing sets of facts.

My most challenging law school professor explained that if he told me something, I might be able to memorize and remember it for a short time. But that factoid would eventually be forgotten unless I learned how to think. This requires examining the facts and finding a roadmap to a destination where your question is answered or your problem is solved. Once discovered, your roadmap lesson is a gift that lasts a lifetime. In that spirit, I now ask you three of the most critical questions I believe every human must answer.

### **Question 1: Is Jesus Christ who He says He is?**

Brother or sister, how you answer this critical question will change the trajectory of your life. You notice I used the present tense intentionally. This provides a hint for my answer. I firmly believe Christ is my Lord, Savior, and true north. However, I want you to prayerfully and thoughtfully consider this question for yourself before reflexively answering. Because if you answer in the affirmative, then you are inexorably committing to following the teachings, example, and leadership Jesus Christ taught us. This will mean you inevitably have to change your life and actions.

Perhaps Lyle Rollings said it best:

The Greatest Man in History, Jesus:  
Had no servants, yet they called Him Master,  
Had no degree, yet they called Him Teacher,  
Had no medicines, yet they called Him Healer,  
Had no army, yet kings feared Him,  
Won no military battles, yet He conquered the world,  
Did not live in a castle, yet they called Him Lord,  
Ruled no nations, yet they called Him King,  
Committed no crime, yet they crucified Him,  
Was buried in a tomb, yet He lives today.

I feel honored to serve such a Leader who loves us! (Rollings, 2008).

By one estimate, approximately 117 billion people have inhabited the earth (Kaneda & Haub, 2022). It would be hard to argue anyone had a more significant impact on humanity and the world than Jesus Christ and God the Father. In a fun and colloquial manner (and yes, we Christians can have fun as we defend our beliefs), comedian Pete Holmes described the different arguments between a belief in God and atheism (Holmes, 2024):

Some people think God created the universe. Some people think nothing created the universe. Which is the funniest guess? And the nothing people make fun of the God people and say: "God doesn't exist." OK, maybe. But you know what definitely doesn't exist? Nothing! That's the defining characteristic of nothing, that it doesn't exist.

So, what are we talking about? Either you think it's God, something you can't see, touch, taste, or photograph, and science can't prove, or you think it's nothing, something you can't see, touch, taste, or photograph, and science can't prove. But I think we can all agree that if your nothing sometimes spontaneously erupts into everything, that's a pretty magical nothing.

And ask the nothing people, "What happens when you die?" They'll tell you: "Nothing. You go into nothing."

I respond, "You mean you merge back with your Creator? That's heaven!"

So, my first Roadmap question asks if you believe the Son of God, Jesus Christ, is exactly who He says He is.

## **Question 2: Why are you here?**

This is an equally profound question each Christian must answer. Throughout the Holy Gospel, you are reminded of the fact that you were intentionally created in the image and likeness of God (Genesis 1:26). Of course, the Holy Scripture uses the plural "US," giving us an early insight into the Holy Trinity of our Creators, God the Father, God the Son, and God the Holy Spirit. Thus, when you look into the mirror, you should see the image and likeness of God. And when you look at any other human, you should see the image and likeness of God regardless of their appearance.

Indeed, and tellingly, Holy Scripture informs us that we humans were the only things made in our Creator's image and likeness (Genesis 1:1-31). Don't miss this. Of the trillion to the trillionth power times infinity of things God created, which is to say everything, He made only one thing in His image and likeness. You! And me. And all of humankind. Given this, you should logically ask why you were so carefully crafted and chosen from the clay of creation. The Captain of a team who picks a player always has a reason and role for that player. It is no different for you and your Captain.

You are reminded that you have a unique purpose and calling throughout Holy Scripture. For example:

1. ***“I beseech you to walk worthy of the calling to which you were called.” (Ephesians 4:1)***
2. ***“For you see your calling, brethren...” (I Corinthians 1:26)***
3. ***“Therefore, brethren, be even more diligent to make your call and election sure, for if you do these things, you will never stumble.” (2 Peter 1:10)***
4. ***“But seek first the kingdom of God and His righteousness, and all these things shall be added to you.” (Matthew 6:33-34)***
5. ***“And He said to them, ‘Go into all the world and preach the gospel to every creature.’ (Mark 16:15)***

I cite Ephesians 4:1 in every presentation and ask every audience member if they know the *“calling to which you have been called”* by their Creator. The Orthodox Christian explanation (exegesis, for you theologians) of this passage explains that St. Paul implored his followers to both fully appreciate what gifts they were given by their Creator and what they were to do with those blessings in gratitude and as a way of life (Orthodox Study Bible, 2008). Bob Buford, in his excellent book Halftime, challenges you to discern your calling by suggesting you spend the first part of your life trying to be “successful” and the second part trying to be “significant” (Buford, 2015). The time in between is what he calls “Halftime,” although it rarely comes halfway through your earthly life.

Allow this sinful and unworthy servant to offer a brief testimonial that might help you and explain why I have been loudly beating the drum of WHY for over four decades. I was named “The Orthodox WHY Guy” because my obsession with asking everyone to discover and live their “WHY” dates to the beginning of my legal career in 1981. When I was interviewed by a communications expert who asked me what I did, my WHY response was: “I am a problem solver and dream facilitator” (Asher, 2001). The fact that I was a lawyer using the tools of the legal trade did not change my WHY in each client interaction, which was to help clients solve their problems and facilitate their dreams.

Later in life, I was called to leave my blessed and successful legal career and global law firm to spend the rest of my life working for free in my Stewardship Calling ministry and live my WHY “To help people and parishes discover and live their stewardship calling so that they may have a ‘good account before the awesome judgment seat of Christ.’” In a 2005 commencement address at Stanford University, Apple founder Steve Jobs made the critical point that you can only connect the dots of your life by looking backward at your past experiences, lessons learned, skills cultivated, and excellence achieved (Jobs, 2005). While not necessarily a man of faith, Steve Jobs explained how all the noteworthy events of one’s life (both good and bad) were for one’s education and development to prepare them for what came next and what they ultimately were to do with their life.

Applying this to my Roadmap and journey explained why I studied strategic planning when getting my M.B.A., helped run a strategic planning subsidiary at one of my global law firms, performed strategic plans for a Christian school whose Board I chaired, and worked with countless clients on their strategic plans. My “connect the dots” moment occurred after four decades of these seemingly random experiences when I received a call from a Bishop asking me to help him develop a strategic plan for his Diocese. Only then did I understand why God had prepared me with these experiences that seemed out of place for a mergers and acquisitions lawyer. God planned for me to use the skills I had developed for His churches. Thus began the now extensive vision and strategic planning I am blessed to perform for Christ’s churches.

In Acts 14:15, Sts. Paul and Barnabas urgently asked the early faithful, “*Men, why are you doing these things.*” These people were turning away from Christ’s teachings at that moment. These Saintly Disciples called them to examine their actions and decisions to determine if they aligned with God’s will and the purpose He gave them. I know how hard it is to contemplate this. When I turned 60, I realized how blessed I was to have such a great law practice and to serve as the Managing Partner of the Atlanta office of a prestigious global law firm with incredible partners, clients, and colleagues. Yet the words of Sts. Paul and Barnabas made me wonder if I was fulfilling my calling.

As I prayerfully contemplated my Ephesians 4:1 calling and reflected on what I would say to the Lord when I stood “*before the awesome judgment seat of Christ,*” I discovered that if I submitted myself fully to the Lord and answered three questions, I could find my new calling. I affectionately refer to this inquiry as my Stewardship Calling **G.P.S. Model**: (a) the God Positioning System (to find God’s calling for one’s life), (b) the double entendre reference is to a Global Positioning System (to find where I should be on my Roadmap), and (c) the triple entendre reference is to the three questions I ask: 1. what am I Good at, 2. what am I Passionate about, and 3. what makes me Smile (brings me joy).



We tend to be Good at things we have done often and have plenty of repetitions. We are Passionate about the things the Holy Spirit has inspired us to feel fulfilled in doing. And the Smiles come from an attitude of gratitude and joy through feeling we accomplished something meaningful as we all look to hear “well done, good and faithful servant” (Matthew 25:23). I have been blessed to help myself and others find their WHY in the triangle depicted at the intersection of the above Stewardship Calling G.P.S. Ven diagram.

In all humility, I confess that my G.P.S. “connecting the dots” (Jobs, 2005) journey to “significance” (Buford, 2015) in search of the “calling to which I had been called” (Ephesians 4:1) in pursuit of a “good account before the awesome judgment seat of

Christ” (II Corinthians 5:10) led me to leave a fulfilling legal career early after only 36 years. This new journey was in pursuit of even more meaningful and hopefully righteous service to other faithful Christians, parishes, and ministries on their own G.P.S. journeys. The most frequent question asked of me when I announced my reTirement (or reFirement as I refer to it) was how I could walk away from a lucrative career and everything I had built to work for free. I understood who was a “believer” (or not) when I saw their expressions after I humbly explained that I was not walking away from anything but instead running to what the Lord had called me to do.

### **The Master In The Art Of Living**

This life policy statement is most often attributed to James Michener, although I could not find a proper citation proving his authorship. However, some evidence shows that it was first found in Jacks (1932). Regardless of its authorship, I embrace and live it every day. It is hung on my wall, repeated in many of my presentations, and adopted as our family motto that answers this second question I asked you:

The master in the art of living makes little distinction between his work and his play, his labor and his leisure, his mind and his body, his information and his recreation, his love and his religion. He hardly knows which is which. He simply pursues his vision of excellence at whatever he does, leaving others to decide whether he is working or playing. To him, he’s always doing both.

I choose to live by having no distinction between my personal, professional, or spiritual goals and life, as my daily actions address all simultaneously. I am truly blessed in that way.

A while back, I had my “burning bush” (Exodus 3:2) moment. I had the unmitigated gall and audacity to negotiate a deal with God in that monumental spiritual engagement with the Creator. (That is what M&A deal jockeys do!) I told God that from that day forward, I would say “yes” to whoever He put in my path who asked for my assistance, consistent with my WHY and Core Values. But I also “warned” Him that, as a result, He better be careful who He sent my way because I would say yes to their request. Thus, I told Him whatever happened after that was “on Him.” The next day, the Bishop I referred to earlier called me to develop the strategic plan for his Diocese. Because of my deal with God, I said yes. And as they say, the rest is history.

I shared with you some of my personal Roadmap journey and how when you give your life to the Lord and use all the gifts and talents He gave you, significance and the G.P.S. Calling become clear, and all the dots of your life connect. In that regard, I pray you have your “burning bush moment” and reflect on your WHY and calling. I do not know you, and yet I believe that if you are reading this, you are not called merely to lead your parish, whether as clergy, laity, or in any official capacity you serve. Instead, I believe you are being called to lead people closer to Christ and each other. And I cannot imagine a more significant calling.

In his excellent book Thinkertoys: A Handbook for Creative-Thinking Techniques, Michael Michalko said:

We do not choose:

to be born;  
our parents;  
our historic epoch;  
the country of our birth;  
the immediate circumstances of our upbringing...  
to die...or the time or conditions of our death.

But within this realm of choicelessness, we do choose how we shall live:  
with purpose or adrift,  
with joy or joylessness,  
with hope or despair,  
with humor or sadness,  
with a positive outlook or a negative outlook.

No matter how indifferent the universe may be to our choices or decisions, these choices and decisions are ours to make. We decide. We choose.

In the end, our own creativity is decided by what we choose to do or what we refuse to do. And as we decide and choose, so are our destinies formed. (Michalko, 2006).

I have been blessed to help countless parishes, dioceses, national churches, and even the **Assembly of Canonical Orthodox Bishops of the United States of America** (“**ACOBUSA**”) discover their WHY. The ACOBUSA’s WHY is “To bring people close to Christ and each other.” Throughout my Roadmap, I will repeatedly use this simple but powerful WHY Statement. However, if you or your parish has its own WHY, please substitute that when I discuss your WHY. And if you do not have a personal WHY Statement and a parish WHY Statement, I pray after reading my Roadmap, you will be inspired to discover and live your stewardship calling and WHY.

I don’t want you to miss the critical and life-changing importance of discovering and living your and your parish’s WHY as you simultaneously deal with the tyranny of the urgent in your life. This is why my second Roadmap question asks if you know your WHY and if you are living it.

### **Question 3: What will you say to Jesus Christ when you stand before Him at the end of your life?**

In the Preface, I confessed my obsession with the “**Big Ask**” and your **II Corinthians 5:10 Moment**. After the selfish requests about the end of your lives, we pray for a “*good account before the awesome judgment seat of Christ.*” The essence of this Big Ask should be life-transformational for you, so please do not miss it.

As I mentioned in the Preface, knowing that II Corinthians 5:10 assures you that you will live forever, you should wonder, after you pass from this earthly life to the Kingdom Eternal, what will you say to the Lord when you make your Big Ask good account for your life? What if the question Christ asks you is the most difficult one I asked you in the



Preface: “What did you do for My church and My people under your watch given all the gifts that I gave you?” Given all the talent, abilities, experiences, education, people in your life, mistakes you made and learned from, significant accomplishments of your life, financial resources, and everything else the Lord gave you, what did you do for His church and His people?

## Your Need For A **μετάνοια**.

Please think about this. Close your eyes if it helps. Imagine standing before your Lord and Savior, and He asks you this difficult question as you review the “video of your life.” Ask yourself whether what you accomplished is the best you could do in keeping with the Lord’s teachings. Ask yourself if you can imagine any circumstances and situations in which you could have done more or better. Consider whether there was any more love you could have shared. Was there any better use of your income, net worth, or assets that you did not use to their full potential?

Could you have given more or better from the “first fruits” that you earned or received that would have been life-changing in the hands of someone else in greater need? Ask yourself many similar questions, but remember that you will not be conducting a self-examination one day. It will likely be your Lord asking. So, what would your answer be if this was the moment that you met your Maker and appeared before Christ’s awesome judgment seat? Would you have any regrets?

Fortunately for you, this is not that moment. But this could be the moment that you undertake what we Greeks call a **μετάνοια** (pronounced “met-annoy-ya”). This is a transformational change of heart. I pray that you will take this moment of reflection and use it to revise your roadmap and trajectory of your life so that when you stand before Christ and make the Big Ask, your account will be strong and righteous.

Because of my hope that you will embrace this good habit on your roadmap, I ask you to begin each day in prayer by asking what you will do that day to give you a better account before the awesome judgment seat of Christ. Then embrace the good habit of ending each day in prayer while reflecting and replaying the video of the day to consider what you did to give you a better account or what you did, which could be a withdrawal from your good account before the awesome judgment seat of Christ.

Every time you contemplate this most precious and critical time in your eternal life, it can be a “**II Corinthians 5:10 Moment**” rehearsal or reminder. Indeed, imagine how better prepared you will be when you make the Big Ask and your II Corinthians 5:10 Moment at the forefront of your mind every moment of every day and in every interaction you have. Indeed, the Holy Scripture calls you to imagine that everyone you interact with might be an Angel or a Saint sent by God (Hebrews 13:1-3). If so, what would you want your interaction with that Angel or Saint to look like?

Once you embrace this **μετάνοια** (transformational change of heart) and reconsider that every interaction is one for which you will have to account to the Lord, you cannot help but rethink the way you live your life and conduct yourself. When you realize that perhaps you did something that was not in line with what you want to discuss when you make your Big Ask to your Lord, you experience your II Corinthians 5:10 Moment that

allows you to assess how you are living. When you can habitually learn to live every moment in a way that best prepares you for your Big Ask “good account,” you increase the likelihood you will hear the Lord respond: “*Well done, good and faithful servant you’ve been faithful over a little I will set you over much*” (Matthew 25:21).

Working on your II Corinthians 5:10 Moment can also help you align your WHY with the life you want to lead. Since you have the choice about the purposeful and faithful way you live, you can stop worrying about the 50, 60, 70, 80, or 90 years you have on this earth. Instead, as you look at the roadmap of your life, consider that you are playing an infinite game, cast your eye on the horizon of eternity, and decide where you want to live and how. So, my third Roadmap question asks what story you want to tell when you stand before the Lord in your II Corinthians 5:10 Moment.

### Your Matrix Moment.

Brother or sister, this is your final chance “**Matrix Moment.**” As Morpheus said in the famous movie The Matrix (Wachowski & Wachowski, 1999):

After this, there is no turning back. You take the blue pill - the story ends, you wake up in your bed and believe whatever you want to believe. You take the red pill - you stay in Wonderland, and I show you how deep the rabbit hole goes.

If you do not believe Jesus is who He says He is, that you have a WHY given to you by your Creator, and that you will get a chance to account for your life before the awesome judgment seat of Christ, then there is no need for you to read further. Put this Roadmap down, take your blue pill, and go in peace, as I wish you well wherever you end up. However, if you answered these three critical questions in the affirmative, I will offer you the red pills in my Roadmap for American Churches and People of Faith by focusing on W.W.J.D. (What Would Jesus Do).



(Wachowski & Wachowski, 1999)

# CHAPTER 2. The State Of Our World Informs Our Judgments And Actions.

## Introduction.

You love your parish, or you would not be reading my Roadmap. As the data in this Chapter will show, Christ's beloved Church is facing unprecedented headwinds because our world is changing, and likely more dramatically and radically than ever before. Understanding our current location, headwinds, and trends requires focused attention to empirical data, not just anecdotal experiences. This is what I will present now.

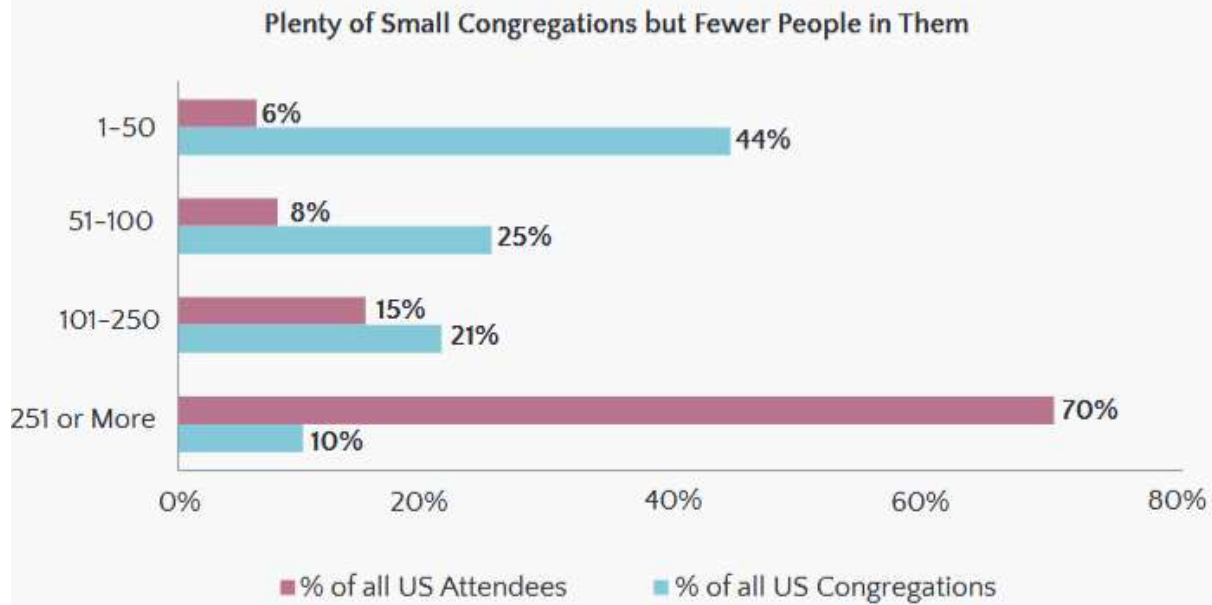
Christ's timeless Church is not of this world but is nonetheless in this world. As a result, your parish is subject to the vicissitudes of the exponential changes we are experiencing. Because things are so dynamically changing, you, as a leader, must build the creativity and the capacity to deal with that. I believe we live in a “**VUCAD**” world. This world is simultaneously **V**olatile, **U**ncertain, **C**omplex, **A**mbiguous, and **D**isrupted. That is the world in which you lead people closer to Christ and each other.

In a survey described in Robert Anderson's and William Adam's book, Mastering Leadership, 1500 leaders were asked to identify the top two challenges for their organizations. The top two challenges they chose were “**escalating complexity**” and “**building the creative capacity and leadership to deal with it**” (Anderson & Adams, 2016). Some believe the world in which you live has gotten crazy and is getting crazier by the moment. I prefer to consider it excitingly dynamic. In response to this dynamism, leadership scholars Drs. James Kouzes and Barry Posner, in The Leadership Challenge, eloquently state, “**The domain of leaders is the future**” (Kouzes & Posner, 2017). Thus, to begin my Roadmap for American Christian Churches and People of Faith, we will start with essential data and then shift to an analysis of what it means for your parish.

## Selected Church Challenges Data.

One of my favorite quotes attributed to the father of the quality movement, W. Edwards Deming, is, “In God we trust. All others must bring data” (Oxford Essential Quotations, 2018). If I am to provide a valuable Roadmap, I must begin to diagnose where our American Christian churches are today. Let's start with The 2020 Faith Communities Today (FACT 2020) analysis (Hartford Institute for Religion Research, 2021).

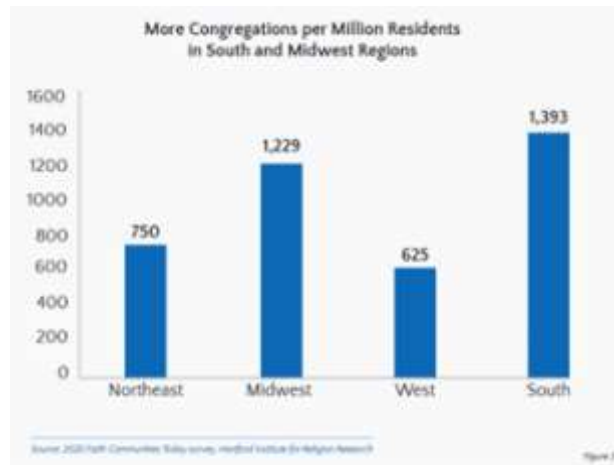
The FACT 2020 report analyzes one of the largest-ever surveys of 15,278 religious communities from 80 different denominations and faith traditions. FACT 2020 estimated there are between 350,000 and 375,000 congregations of all faith traditions within the U.S. The vast majority of U.S. parishes are relatively small, with 70% having 100 or fewer weekly **Parishioners In Pews** (“**PIPS**”) attending their parishes. In contrast, only 10% of U.S. parishes have over 250 PIPs. Given this data, far more PIPs attend larger parishes (approximately 70% of all PIPs). In contrast, the smallest parishes with 100 or fewer parishioners represent only 14% of all PIPs. The chart below from the FACT 2020 report demonstrates this data.



Source: 2020 Faith Communities Today survey, Hartford Institute for Religion Research

Figure 2

The so-called “Bible Belt” continues to be dominant, with half of all parishes in the U.S. in the South, which represents only 38% of the U.S. population. In contrast, the Western United States contains 24% of the population but only 14% of the parishes. The rest of the demographic distribution of parishes is represented in the FACT 2020 chart below (Hartford Institute for Religion Research, 2021):



Source: 2020 Faith Communities Today survey, Hartford Institute for Religion Research

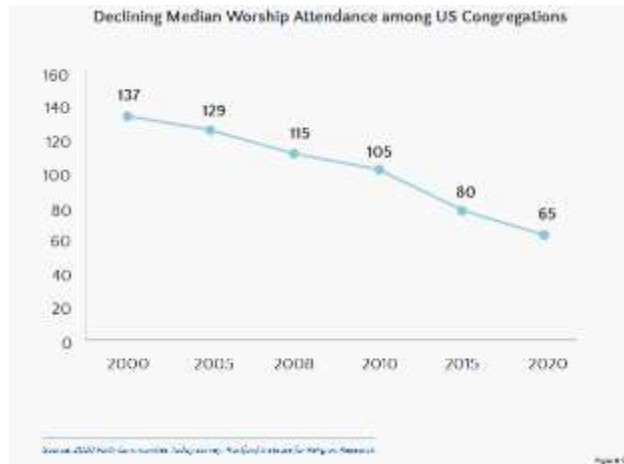
Figure 3

The vast majority (85%) of a typical parish’s congregation’s median income of \$120,000 annually comes from individuals (an average of \$2,000 per person). Approximately 30% of parishes supplement direct stewardship with outside fundraising

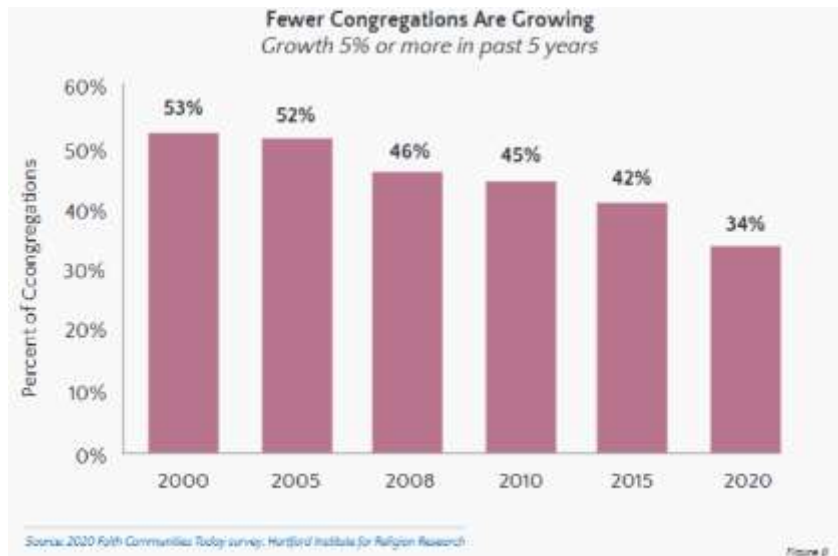
or rental income. Interestingly, only 15% of parishes have any endowment income, a fantastic opportunity I will discuss in Chapter 3 of my Roadmap.

### Trends That Raise Concerns and Present Challenges for Flourishing.

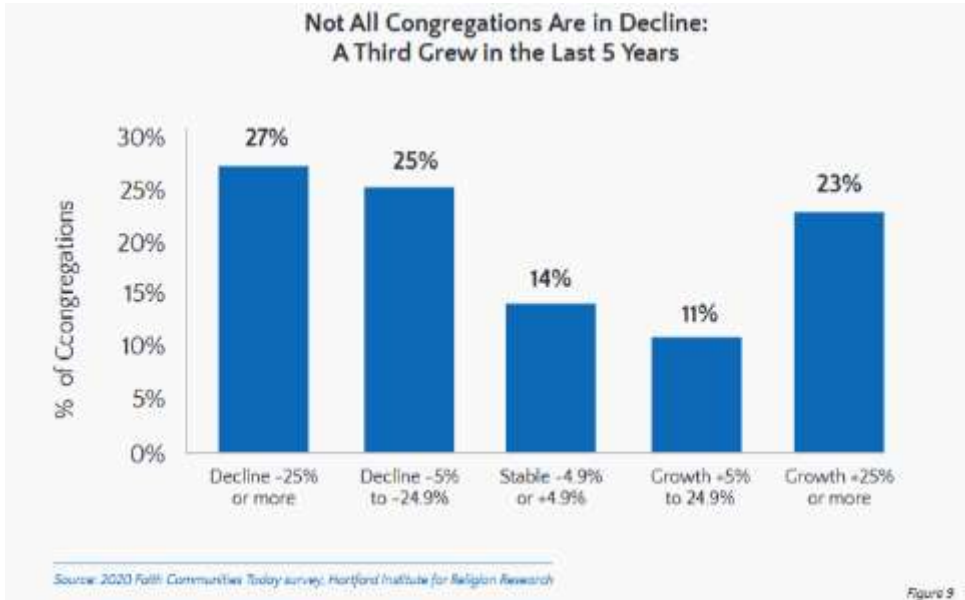
The FACT 2020 data presented a significant change, with lower PIP attendance. Over the last twenty years, the median PIP attendance has decreased by over 50%, as represented by the chart on the right (Hartford Institute for Religion Research, 2021). This significant decline in attendance means that a larger percentage of parishes are increasingly small.



The data represents a double whammy with lower PIP attendance and an increasing number of small parishes, which all point to many declining parishes. Over the five years, from 2015 to 2020, the median rate of growth declined by 7%, as indicated by the chart below:



However, there is some good news. Between 2015 and 2020, approximately 34% of parishes grew by 5% or more, with 23% of parishes growing by 25% or more, as represented in the chart below (Hartford Institute for Religion Research, 2021):



## Size Matters.

Unfortunately, smaller parishes suffer the most in declining attendance and growth. Additionally, the data show that most of the overall decline occurred in medium-sized parishes, as indicated by the chart below (Hartford Institute for Religion Research, 2021):



I could present endless data showing our Christian parishes face challenges in America. Among the many causes of these challenges, the U.S. is experiencing an aging population, lower birth rates, significant secularization and religious antagonism, declining smaller parishes, and, regrettably, the same three critical **S<sup>3</sup>** challenges. These repetitive problems were the reason my Roadmap became necessary. My research reached the

same conclusions as other Christian research organizations. It shows that parishes repeatedly discover the same root causes of their biggest challenges, namely, the “**S<sup>3</sup> Challenges**” of **S**ervant Leadership, **S**tewardship & Generosity, and **S**piritual Formation and Religious Education.

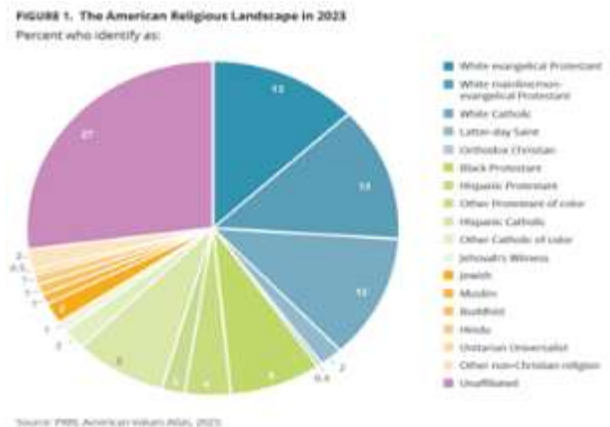
## A Surgical Snapshot of 12 Christian American Orthosphere Jurisdictions.

As I discuss in greater detail in Chapter 3, I have completed my Stewardship Calling **Financial Stewardship Analysis (“FSA”)** of over 275 parishes in the American Orthosphere (which I define as the over 2,000 Orthodox Christian parishes of all 12 Eastern Orthodox Jurisdictions throughout the United States). Through that detailed statistically significant analysis of the actual financial statements over a rolling period of at least three years, I discovered that in the average American Orthosphere parish:

- a) Only approximately 52% of their income comes from their parishioners through direct stewardship.
- b) At least 28% of their income comes from the generosity of total strangers, either through their ethnic food festivals, church hall rentals, or other special event fundraisers open to the public.
- c) An additional 20% of their income comes from the vast and increasing number of “nickel and diming” fundraising activities of their parishioners rather than their annual stewardship (which reduces the actual stewardship contributions from these same parishioners).
- d) The typical American Orthosphere Christian gives between 0.5% to 0.8% of their annual income to the church rather than a 10% tithe.
- e) Gone are the days when the early immigrants started the American Orthosphere parishes and covered all its expenses. Now, 99% of American Orthosphere parishes depend on an endless array of fundraisers from their parishioners and the general public.

The chart to the right presents a doubly tragic picture of Christianity in the U.S. and the American Orthosphere. It was produced in the 2023 American Values Atlas survey from the American Religious Landscape (Public Religion Research Institute, 2023).

First, notice how fractured Christianity is in America. I will address the crisis of the loss of Oneness In Christ (“**OIC**”) in Chapter 15 of my Roadmap.



Second, notice that the most significant slice of the pie in America in 2022 is represented by the 27% of NONEs who now claim no religious affiliation. Third, from the American Orthosphere perspective, notice that ALL Orthodox Christians (both on the Eastern and Oriental sides of the Orthodox house) only represent 0.3% of Americans. What makes this tiny rounding error on the face of Christianity in America worse is that 100 years earlier, in the 1922 version of this report, Orthodoxy represented 0.5% of Americans. Thus, we have not only failed to make disciples of all nations, but we have also lost disciples in our nation.

In his book [A Church At The Crossroads](#), Michael Bakalis provides extensive additional data about the challenges within the American Orthosphere. Because Orthodoxy remains a statistical rounding error in American Christendom, and because the American Orthosphere Jurisdictions are not adept at gathering, nor transparently reporting, reliable data, it is not easy to get an accurate picture of how challenging the American Orthosphere numbers are. I provide additional financial and stewardship data in Chapter 10 of my Roadmap; however, below is a high-level summary of some of the American Orthosphere data I share with parishes using my Effective Parish Assessment (discussed in Chapter 7 of my Roadmap):



The above is extremely sobering data everyone must acknowledge is NOT the story you would want to tell the Lord in your II Corinthians 5:10 Moment before the awesome judgement seat of Christ.

### [We Live In Exponential Times Of Great Change.](#)

In 2006, Karl Fisch, Scott McLeod, and Jeff Brenman presented empirical data regarding the speed of change in the world to their high school faculty colleagues. They produced an early YouTube video called "Did You Know?" (Fisch et al., 2006), released under a Creative Commons license, encouraging the data to be updated, which I have



done from time to time. This data shows we are living in exponential times. In addition, the speed of change is unimaginable and is rapidly accelerating. Here is an example of some of the latest data:

How long did it take for various technologies to reach 50 million users?

Telephone	= 75 years
Radio	= 38 years
Television	= 13 years
Internet	= 4 years
Pokémon Go	= 19 days!

Can you imagine what our Lord and Savior Jesus Christ could have done if He reached 50 million people in a mere 19 days? He did not, but your parish can!

Smartphones today have more processing capability than the mainframe computers that NASA used to send men to the moon. You have that capability and power in your pocket or purse. And this is lucky because Google reports processing 99,000 Google searches every second. Yes, you read that right, every second! That is about 8.5 billion Google searches per day and 2 trillion per year. Remember that Google only owns 92% of the global search market, and this is before AI, which means there is a lot more search activity than the above numbers indicate. We are living in exponential times!

During some of my live Igniting The Flame programs, I challenge the audience to tell me at which college the football coach at my alma mater, Northwestern, played football. After the usual heckling of “I didn’t know Northwestern had a football team,” within 30 seconds, people have the answer. Do you know how long it would have taken to get that answer pre-Google and before smartphones? Because of the technology you put in your pockets and purses, unlimited amounts of information are accessible immediately. We are living in exponential times!

Let us explore some facts about email since you are undoubtedly a prodigious user of this technology. There are approximately 2.76 billion email users worldwide. Statista estimated that approximately 347 billion emails were sent and received daily worldwide. Some days, it feels like I get all 347 billion of them. Interestingly, emails started proliferating beyond military and government ARPANET use in the 1980s when the Mail Transfer protocol was created to replace the older File Transfer Protocol. In about 40 years, this technology has become the lifeblood of communication until texting came along. We are living in exponential times!

There are over 1 billion Gmail accounts. Here’s some data you need to consider. Approximately 61% of all emails go directly to spam and are never seen. The recipient never reads an additional 19% of emails. This means about 20% of your parish emails are actually read. Please tell me again how effective it is to keep sending emails to your parish or ministry. Because of the sheer volume (and the advent of spam filters), most emails your parish sends out are never read. We are living in exponential times!

You are no doubt familiar with YouTube. It currently has an estimated 2.7 billion worldwide users and is the second most visited site globally. I found it staggering that 8.3 hours of video content is uploaded to YouTube every second of every day. That's essentially 500 hours of content per minute. 8.3 hours of content has just been uploaded to YouTube. Another 8.3 hours of content has just been uploaded to YouTube. Another 8.3 hours of content has just been uploaded to YouTube. Do you get it? And how much of that content do you think is righteous and uplifting Christian content? It's not enough, in my opinion. We are truly living in exponential times!

Facebook began in October of 2003. The last report I saw showed it had 3.07 billion active monthly users. There are many more Facebook accounts, but approximately 38% of the global population is actively using Facebook. One measure shows that Facebook traffic represents 56.33% of all Internet traffic. Put another way, if Facebook were a country, it would be the largest country in the world. It would be more than twice the size of China or India and over 8.8 times larger than the United States. We are living in exponential times!

In 2005, 13% of couples married in the U.S. met online. By 2017, 39% of couples in the U.S. met online. So much for all your parish's young adult gatherings and activities to help them find their spouses. The advent of new technologies requires a tremendous sense of awareness and willingness for change in the history of our American Christian churches. We are living in exponential times!

In America, 97% of adults text. Amazingly, text messages have a 98% open rate compared to the 20% email open rate. Equally staggering is the data that shows 95% of all text messages are read in under 3 minutes. Please consider what this means to the way your parish communicates. Of course, you must continue to use snail mail and email. The greatest efficiency will be achieved with the added use of text messaging. However, please continue to pay attention, as new technologies will come soon and be even more effective than texting because we are living in exponential times!

As a parish leader, you must be attentive to the inevitable future of innovation and continue to proactively use the best and most effective technologies to bring your faithful closer to Christ and each other. I hope this brief exposition of the pace of change has convinced you of the exponential times in which we live. The question is, what does this mean for your parish? Former Chairman and CEO of General Electric (GE), Jack Welch, famously said: "If the rate of change on the outside exceeds the rate of change on the inside, the end is near." He followed up this call to action, concluding, "Change before you have to."

Ironically, after all the years of Jack Welch driving change in GE that once led to it having the highest market capitalization of any company, in 2017, GE took its eye off the ball of change and was forced to cut its dividend to \$0.12 per share. As much as anything, GE's story is a poignant reminder of the need to focus on and embrace exponential change constantly.

And all the exponential pace of change I have outlined is before we have the "benefit" of the massively accelerating impact of **Artificial Intelligence** ("AI") that will inevitably disrupt and change the way our parishes and lives operate. Increasingly,

philosophers and historians are suggesting we are entering the “**Fourth Industrial Revolution.**” The first such “industrial” revolution arose from steam engines, the second from electricity, and the third from the advent of electronics. But this fourth revolution is the integration of “biotic and abiotic” and “conscious and non-conscious” spheres (DuToit, 2019). Welcome to the new revolution and exponential times of AI!

Recent Pew Research Center national surveys in the U.S. found twice as many Americans are “more concerned” than “excited” about AI. One respondent identified their ethical concern about AI (Pew Research Center, 2022) as follows:

It’s removing the human race from doing the things that we should be doing. It’s scary because I’ve read from scientists that in the near future, robots can end up making decisions that we have no control over. I don’t like it at all.

The Pew Research Center Report poignantly describes the significant ethical challenges people will face in the 21st Century this way: “**One of the key ethical questions about scientific and technological breakthroughs to enhance the mind and body concerns whether Americans see such developments as moving beyond limits set by God, nature or reason**” (Pew Research Center, 2022). Throughout my Roadmap, I will repeatedly discuss the possible impacts of AI and advanced technologies in the various applicable parish contexts you must consider. The bottom line is that as rapidly as the world has evolved in the last several decades, we are on the verge of an even more rapid proliferation of new information, methods, and ideas that will require the focused attention of parish leadership.

## [The Challenge of Social Media.](#)

A current focus of attention is on the social media explosion and addiction. This is a central issue for all parishes, and I submit parishes can provide solutions. To underscore the order of magnitude of the problem, allow me to share some of the highly challenging social media data (Mastermind, 2025):

1. Approximately 4.8 billion people use social media worldwide.
2. 210 million individuals are estimated to suffer from social media addiction.
3. 54% of teenagers struggle to give up social media.
4. About 30% of U.S. social media users self-identify as addicts; this rises to 78% for ages 18-24.
5. Americans spend an average of 2 hours and 24 minutes daily on social media.
6. 40% of users feel anxious without access to their profiles, indicating mental health risks.
7. 70% of teens feel anxious when disconnected, linking usage to mental health issues.

8. 39% of individuals aged 55-64 report feelings of addiction, showcasing a generational divide.
9. 59% of females report feeling addicted, compared to 41% of males.
10. In collectivist cultures, the prevalence of addiction is 31% versus 14% in individualist cultures.

This data presents both a challenge and an opportunity for your parish. Obviously, caring for the needs of your parish youth (and some adults) resulting from this addiction is critical. At the same time, you must meet your parishioners where they are. Thus, if your parish does not have a robust, constantly evolving, and effective social media strategy, you are missing an opportunity to bring so many youth and adults closer to Christ and each other.

## [How To Deal With Change in Christian Churches - Πάντα χωρεῖ καὶ οὐδὲν μένει.](#)

Once again, my ancient Greek ancestors understood the concept of change, saying: “Πάντα χωρεῖ καὶ οὐδὲν μένει.” (“**Everything changes and nothing stands still.**”) Italian philosopher and controversial strategist Niccolò Machiavelli acknowledged the difficulty of change by saying: “There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success than to take the lead in the introduction of a new order of things” (Machiavelli, 1532). To overcome this potential challenge, the “**change management**” discipline focuses on consistently renewing the direction, structure, and individual and organizational interactions and performance to serve the dynamically changing needs of any organization and its external and internal stakeholders. Perhaps nowhere is this more problematic than in Christian parishes.

Founding Pastor of the very large Saddleback Church, Rick Warren, famously talked about change using two different expressions of the same concept: “Every church leader chooses how he will lead a flock: as a risk taker, as a caretaker, or as an undertaker while it slowly dies” (Warren, 2013). Put another way, he said: “The leaders of a church will either be risk takers, caretakers, or undertakers.” Proverbs 12:1 teaches us that learning, including the education resulting from innovation and trial and error, is a critical pathway to discernment. To believe otherwise is to presume improperly the infallibility of one’s own thinking.

Matthew 7:7 is also essential in our understanding of the Scriptural innovation process. “*Ask and it will be given to you; seek, and you will find; knock and it will be opened to you.*” This trinitarian three-phase approach to trial and error and discovery in Matthew 7:7: (a) starts with inquiring during the “asking” phase, (b) identifies research to be done, including trial and error, during the “seeking” phase, and (c) ultimately follows God’s will that will be revealed to one seeking to discover The Path in the “knocking” phase (Orthodox Study Bible, 2008).

Please understand that many parish leaders are unwilling to experiment and take some thoughtful and calculated risks, which will negatively impact the parish due to the inevitable vicissitudes of change. I am not suggesting changing your parish's fundamental theology. I am focusing only on change and experimentation on the operational side of the parish.

In my live Igniting The Flame retreats, I ask what the biggest challenges are that parishes face. I get many valid alternative ideas and suggestions. However, I propose that the formula on the right represents the biggest parish challenge. Any questions?

$$\Delta S = S_f - S_i = \int \frac{dq_{rev}}{T}$$
$$\Delta S = \frac{q_{rev}}{T}$$

After I present this formula, I get the usual nervous laughter from parish leaders. I confess that I did not understand this formula either since my degrees are only in psychology, business, and law. However, this is the formula for the scientific concept of Entropy, which measures the degree of disorder or randomness in any system. Essentially, everything moves from an orderly state to a disorderly state, and Entropy measures that change.

The point for all parishes and parish leaders is that you cannot stop change. Change is as inevitable as earthly death. Thus, the only choice is to make positive and beneficial changes. If you do not make positive changes, by definition, the only alternative is you will get negative changes.

I am always tragically struck by parish leaders who do not want to change anything because they like it just how it is. Regrettably, their obstinance prevents the parish from dynamically improving its operations (not theology) to adapt to the ever-changing environment and needs of the parishioners. I like to humorously ask such parishioners, if they lived in ancient times would they have objected to using electricity, lights, or heating and air conditioning when those were first available in their parish?

I presented just a smattering of the accumulated data showing the exponential pace of change. Your parish must adapt and positively utilize change to bring people closer to Christ and each other. Entropy assures you that because change will inevitably happen around you and your parish, you have the choice to ensure it does not end up moving you in the wrong direction.

A good roadmap helps, but only if the parish leadership is willing to embrace the great gift God gave us of free will. I cannot tell you the number of parishes I am asked to visit by a Bishop all over the country where I have to report back that he will need to clear his calendar for the parish's closing in the future. Dear brother or sister, just as you cannot stop the inevitable changing of your body, you must adapt your parish's operations to meet your parishioners' ever-changing circumstances and needs.

Here is another way to look at the biggest parish challenge of Entropy. I submit that your parish ultimately has an "unemployment" and "underemployment" challenge.

Let me define my terms because I'm not discussing their work life. Unemployment is represented by your parishioners not involved in any ministries or services. Vis-à-vis your parish, they are "unemployed." They may show up occasionally but are not genuinely engaged in the services or ministries and are not partaking in any sacraments offered. The underemployed are those who are doing some things but could do a lot more. In this state of devolving Entropy, finding the path for re-engagement is what I will explore in Chapters 9, 10, and 11 of my Roadmap.

## How David Used Data And An Ever-Changing Reality To Vanquish His Adversary.

While some believe the story of David defeating Goliath was a miracle, David's incredible, innovative thinking in a rapidly changing environment made his victory inevitable. David had killed more formidable adversaries than Goliath. "*Your servant has killed both the lion and the bear; this uncircumcised Philistine will be like one of them...*" (1 Samuel 36). David also had faith in God to support his confidence in his innovative battle plan. "*The Lord who rescued me from the paw of the lion and the paw of the bear will rescue me from the hand of this Philistine.*" After David had made his persuasive case, King Saul gave his blessing to pursue this seemingly impossible quest. "*Go, and the Lord be with you*" (1 Samuel 36-37).

According to Malcolm Gladwell's scientific analysis, David's weapon of a stone projected from a sling was extremely lethal at up to 200 yards, by which time the slung stone could reach a speed of 78-90 miles per hour (Gladwell, 2013). This is roughly equivalent to the stopping power of a .45 caliber gun. Because of David's innovative thinking and research, he did not use the stones he always carried for his sling. Instead, David selected five stones from the Valley of Elah made of barium sulfate, which was twice the density of the ordinary stones David possessed. Such hard stones slung at the speed of a .45 caliber gun were no match for a heavily laden immense Goliath who suffered from acromegaly.

Goliath's acromegaly caused him to experience near-sightedness and possibly double vision, thus making it harder to focus on a smaller adversary running toward him from a distance. One might speculate why David selected five stones, given his expert marksmanship. However, the Holy Scripture provides the answer to what David knew. Namely, Goliath had four brothers. This leaves one to surmise that David was planning for any ever-changing possibility. David's innovative strategy and indefatigable spirit (and, of course, faith in the Lord God) made his victory inevitable and may explain why he felt comfortable hurling harsh insults at Goliath:

This day the Lord will deliver you into my hands, and I will strike you down and cut off your head. This very day I will give the carcasses of the Philistine army to the birds and the wild animals, and the whole world will know that there is a God in Israel (1 Samuel 46-47).

I love telling David's story from this perspective because it shows that no matter what challenges your parish is experiencing, faith in the Lord, plus

significant data gathering, preparation, practice, creativity, and using the ever-changing circumstances, can lead to victory. I have lost track of the number of times I have challenged parish leadership to this kind of creativity given new and rapidly changing realities and alternatives, and they responded with exceptional insights and solved their previously perceived insurmountable issues. You are the David of your parish. If you act like him, you can get the same results!

### The Value Of A Fresh Outside Perspective.

Often, those within an organization (or relationship) fail to see what outsiders with different perspectives see clearly. Whether due to arrogance, stubbornness, lack of foresight, fear of change, or other perceived valid reasons, resistance to the inevitability of change often leads to suboptimal results. However, organizations do not change unless the people who comprise and lead them do. Organizational Development pioneer Kurt Lewin observed the behavior of individuals was the result of their personal factors force multiplied by social and other environments. Thus, change is often a team sport, not merely an individual exercise.

Do you remember the last time the light bulb went on in your brain, and you saw something clearly for the first time after someone shared a unique perspective or experience? Or perhaps you have struggled with colleagues who cannot visualize what is clear to you. When experienced outsiders share proven best practices or question ineffective organizational activities, how leaders and teams react is an element of “organizational learning” that involves processes that integrate group learning, participation, and systemic thinking.

Ancient Greek thought leader Socrates said: “All I know is that I know nothing.” The Socratic method used by law schools constantly asks questions from different perspectives and scenarios to help groups and individuals think and see things differently. These questions/examples allow for deeper group-applied learning. Repeatedly asking why something is the way it is (the “**5 Whys**” or “**7 Whys**”) can help identify the “root cause” of a challenge and possible effective solutions. This questioning approach is often difficult for busy insiders with limited time, hyper-focused perspectives, or biases.

### The Enemies Of Change – Fear, Confirmation Bias, And Blind Spots.

The well-documented fear of change and the unknown contribute to the inability to identify or try innovative solutions. However, proven change management techniques involving patiently and personally helping resisters modify their focus to longer-term benefits with a detailed action plan help overcome reticence and generate enthusiasm. I ask parish leaders to be willing to explore diverse examples and contexts woven into a tapestry of validated change management theories supported by outside experts to optimize results.

Common antagonists of effective change management include “**Confirmation Bias**” and “**Groupthink**.” Confirmation Bias is the psychological desire of groups to favor

information consistent with their beliefs and exclude or differentiate contrary information. Similarly, as Irving Janus so eloquently explained, “Groupthink” is an insider group dynamic that discourages team members from sharing creative or alternative ideas because of the overwhelming desire for harmony and consensus (Janus, 1982).

The shared perspectives of experienced outside professionals can help overcome these internal blind spot limitations. Change management research has also identified techniques for changing the lines of sight of transformation resistors by change agents re-positioned as allies who cast a positive and bright future longer-term vision with clear goals, action plans, and exciting new opportunities. Ray Noorda, CEO of software/services company Novell, once famously said: “**Cause change and lead; accept change and survive; resist change and die**” (Winn, 2020). Leading change (like seeking forgiveness) is sometimes hard to do internally but nevertheless essential.

## Persuasive Transformationalists – The Parish Leader We Need.

Through my church work, I have developed a theory about certain incredibly effective leaders whom I refer to as “**Persuasive Transformationalists.**” A Persuasive Transformationalist is a person who is part visionary, part advocate, part organizer, part team builder, part alchemist, and always persistent at effectively using proven leadership approaches and change agency techniques to inspire followers to make transformational changes enthusiastically and do things they might otherwise never do regardless of personal risk.

These Persuasive Transformationalists are unique but most effective at generating loyal followers and believers. For example, approximately 85% of the global population believes in an ultimate Persuasive Transformationalist, whether their Deity’s name is Jesus, Muhammad, Buddha, or Ishvara (World Population Review, 2024). I submit that **Leadership is simply shepherding people, organizations, or industries on an essential journey to a new and better destination.** However, given rampant resistance to change, the most impactful leaders must become Persuasive Transformationalists. This change process must begin with everyone on the journey experiencing what the ancient (and modern) Greeks called a μετάνοια (metanoia), a transformational change of heart and mind.

I love asking the change opponents what they think about their mobile phones, the internet, and whether they text. They quickly explain how essential these technologies are to their existence and daily lives. They are often surprised to learn that (a) texting only surpassed phoning nine years ago, (b) their cell phone “appendage” is only sixteen years old, and (c) the World Wide Web “ether-world” in which they live, work, and obtain most of their information, entertainment, goods, services, and interactions, was publicly available under 30 years ago. And yet, you cannot imagine how you survived without these tools.

Leading anyone to a new destination inevitably requires change and different strategies from the status quo. Since many people hate to change more than a root canal, a Persuasive Transformationalist must possess and deploy all the skills of a visionary,



advocate, organizer, humble team-builder, and alchemist while maintaining an unparalleled dedication and persistence unseen in most humans. The formula totals more than 100% of characteristics because persuading people to enthusiastically change as they journey to a new “promised land” requires more than 100% effort. Accordingly, a critical discipline of leading is finding a Persuasive Transformationalist formula to drive needed change.

The vision cast by a Persuasive Transformationalist frequently encounters initial significant resistance since at least 70% of change efforts fail outright (Scott, 2019). And change opponents gleefully share their “parade of horrible” consequences befalling those on a change quest. Change opponents generally scoff when told they are already changing rapidly, given the exponential transformation of their world, until they are asked to give up relatively new technologies upon which they have become dependent (e.g., their cars, smartphones, the internet).

Persuasive Transformationalists confront the paradox of living in an exponentially changing world while remaining resistant to change. While academics seek solutions to leadership problems, even the best problem-solving suggestions meet with change antagonism. So how do you, as a parish leader, get others to join the journey to a better place while so many parishioners instinctively and enthusiastically resist change? The answer lies in the alchemy of a Persuasive Transformationalism leadership approach. Want further proof?

1. Why do “rational” adults risk death to save people they do not know? Yet first responders do it every day. According to numerous different Statista data, Persuasive Transformationalists convinced over (a) 1.04 million people to become firefighters, (b) 1.4 million Americans to serve in the military as of 2021, and (c) 1.86 million brave souls to join U.S. police forces as of 2020.

2. Why would anyone invest their life savings or work at a start-up business when, according to the U.S. Bureau of Labor Statistics, 20% fail in the first two years, 45% in the first five years, and 65% in 10 years? Yet entrepreneurial Persuasive Transformationalists did that for almost 850,000 new ventures between March 2020-2021.

3. Why do people buy Powerball or Mega Millions lottery tickets when, according to the published data, the odds of winning are more than 1 in 302 million? (This is worse than the odds of dying from a lightning strike!) But Persuasive Transformationalists create a vision for lottery players of a new life where their net worth has seven+ digits to the left of the decimal point

Scholars offer many transformational change theories in the approximately 4.8 Billion leadership books written annually globally. A survey of recent leadership classics points to specific essential characteristics of the best Persuasive Transformationalist leaders. The challenge is to create a practical model or formula to understand such essential leadership characteristics.

So, is there a “right equation” a Persuasive Transformationalist can use if a change is necessary but challenging to achieve? As it turns out, I submit that as a leader, you must be:

1. fully committed to a compelling WHY and Vision,
2. trustworthy, trusting, and transparent,
3. lovingly dedicated to your teams and helping others,
4. doggedly persistent, authentic, and humble enough to admit mistakes and frailties, and
5. engage everyone you lead to embrace a personal μετάνοια (change of heart).

Importantly, I believe the above five attributes are conjunctive, and you must possess all of them to be a positive and effective Persuasive Transformationalist. This Persuasive Transformationalist equation aligns perfectly with the validated “Five Practices of Exemplary Leadership” offered by Drs. Kouzes and Posner, which we will explore in Chapters 3 and 4 of my Roadmap. This approach helps Persuasive Transformationalists succeed in also providing the elements of “Authentic Leadership” (i) by providing a compelling, positive, and hopeful vision, (ii) backed by the confidence engendered through trust and resilient dedication, and (iii) fueled by optimism and hopefulness. However, since execution is always the key, the effective Persuasive Transformationalist must first experience a personal μετάνοια transformational change of heart. Leaders cannot persuade others to do anything they do not model themselves.

Endless examples exist of Persuasive Transformationalists leading people on a journey they would never take if pure logic and the neocortex in their brain solely controlled their decisions. But they do not. Scientists have proven that over 100 million neurons in your gut and an intricate enteric neuron system between your gut and limbic and reptilian brain influence your decisions (Gershon, 1998; Marianes, 2013). This is where a μετάνοια helps transform your heart and mind.

Leadership research and experimentation identify effective roadmaps for those journeying to a new destination. My Roadmap is an attempt to offer you and your other parish leaders such a guidebook. By standing on the shoulders of leadership scholars whose research provides proven formulas, Persuasive Transformationalists who are change agents and who cause others to experience a μετάνοια transformational change of heart and mind can lead people, parishes, and other organizations to a promised land with an unimaginably brighter future. Are you ready?

## Who Owns Your Parish’s Problems?

Before we begin your transformational journey through my Roadmap, ensuring you understand who owns your parish problems is critical. In my decades of church work, I love asking parish leaders who is responsible for whatever parish problems they are

facing. They usually either give me a specific person's name or suggest it is those pesky parishioners who just "don't get it."

When I ask them if they have asked the faithful what they think and then listen to their ideas, I typically get a lot of excuses. Some are valid, and others are not so much. But every parish leader must listen to the people they lead and those they lost along the journey to discover their thoughts. This is true even when they speak to a constant complainer (the person whom former Vice President Spiro Agnew called a "nattering nabob of negativism").

In such cases, I ask parish leaders to consciously challenge themselves to ask, "where is the truth in what this person is saying?" If you are honest and self-reflective, you will always find some truth. Sometimes, the truth is that you are trying to address their concern, but your communication strategies have been ineffective, which is why they have not reached this individual.

I also love sharing wisdom from one of the gurus of management, W. Edwards Deming, who once said:

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.

And as a leader, you own responsibility for the system. So, if you find yourself blaming the people, you should look again (McChesney et al., 2012).

This may be challenging and hard for you and your other parish leaders to hear. However, this is the kind of philosophy best-in-class leaders embrace. Rather than blaming the masses of people who are behaving consistently, the best parish leaders ask the people their opinions and then look introspectively to see what change the leader must implement.

There is one challenging conversation I have with many clergy in traditional churches, such as my Orthodox Denomination. They often complain about the many late-arriving **PIPS** ("**Parishioners In Pews**") or those who have stopped coming altogether **APIPs** ("**Absent Parishioners In Pews**"). When I give these clergy the Deming quote from above and ask them to apply it, I get extraordinary resistance. These clergy leaders want the parishioners to conform to what they offer precisely how they are offering it. They will almost always cite the need to remain consistent with history or their faith traditions as their basis.

I understand this tendency as a matter of human nature's resistance to change and the response from ancient and hierarchical religions where there is not extensive flexibility in the liturgical service. Yet some parishes in that same Denomination do not experience the same APIP disengagement or PIP late attendance. I urge the clergy to 1. go on a journey of discovery by asking the PIPs and APIPs what can be done to address the root causes of their late arrival or departure and 2. engage with clergy of their Denomination who have successfully dealt with these challenges. Whenever you see a

recurring problem in your parish, you need to own it and figure out how to fix it. One way to start is by building the most effective teams you can. It is not just one person trying to do it all. These attitudes of driving groups to achieve positive and transformational change are the passion of Persuasive Transformationalists.

At the end of the day, one of my older Greek ancestors, Heraclitus, is reported to have accurately concluded: **“Change is the only constant in life.”** He made this profound pronouncement sometime between 540 BC and 480 BC, well before the exponential times in which we currently live. Thus, my dear parish leader, you must constantly change!

## CHAPTER 3. What is Leadership?

### Every Parish Problem Is A Leadership Problem.

You read that right. I firmly believe that every parish problem is a leadership problem. This is true even if you think it is a process, program, system, or team failure. I submit that any problem results from a leader failing to lead in the most effective manner possible. In other words, if you think you have a problem other than leadership, think again.

At this point, someone usually rejects my position by citing uncontrolled acts of nature (notice I will not refer to them as “acts of God”). Yet best-in-class leadership anticipates possibilities and has contingency plans in place. When the U.S. government shuttered churches (improperly, in my opinion) during the SARS-CoV-2 pandemic, you might ask how a leader is responsible for such a thing. Leaders might not be responsible for being forced to close, but they are accountable for having a contingency plan for any time their parish is required to close its doors. I would add that the failure of Christian churches and jurisdictions generally to have effective lobbying and litigation strategies explains why churches were forced to close but not liquor stores! Preparedness extends to all lawful means to fulfill your WHY and Mission.

Nevertheless, some parishes I work with in Florida never skipped a beat when they were forced to close and shifted everything online seamlessly. This is because they had contingency plans for hurricanes or other closure events. The best leaders are constantly scanning the horizon, identifying any possible threat or opportunity, and building contingency plans ready to go in any such case.

If your parish struggles with something, the leaders have not prepared or appropriately responded. However, even if you have the wrong or unprepared leaders, you must ascertain if they can be trained to lead better or need to be replaced. I am not suggesting you kick ineffective leaders out of the parish. We lovingly work with, and for, all parishioners whom God has entrusted to us.

However, some individuals might not have the God-given gifts or ability to be trained and thus must transition merely out of parish leadership positions they cannot execute. There is undoubtedly another ministry or task to which their gifts are better suited. They may even be great managers if they are not great leaders. (More on that distinction later.) Nevertheless, a great leader helps make smooth transitions in leadership teams when it is in the best interest of the parish. It is sometimes challenging to do, but great leaders lead.

The best leaders ensure they have exigency plans to deal with any people, processes, programs, systems, teams, or external challenges. Additionally, timely course corrections are the hallmark of great leaders so that the ramifications of any adverse event are diminished or not felt. If you are a parish leader and do not have the necessary contingency plans or make the necessary course corrections, then your absence of effective leadership is part of the problem, and you should seek assistance or training.

I do not mean to start with a negative tone; I merely mean to elevate the importance of leadership to the top of all parish leaders' minds. I also want to help you begin a heartfelt assessment if you are part of the problem. The most effective leaders I have known or seen always surrounded themselves with the best and brightest people they could find. Thus, when I was blessed to lead a law firm office, department or team, or a non-profit Board or team, my first objective was to recruit people smarter and more capable than me who had skills I did not possess so we could have a leadership team worthy of those we led. I have discovered that better intellect, wiser judgment, and more significant experience never threaten the best leaders. Instead, they relish those relationships and flourish by getting better themselves through learning from others' greater gifts.

### Leaders Surround Themselves With Better Iron Workers.

UCLA Basketball coach John Wooden won 10 NCAA Championships in 12 years, including one stretch of seven in a row. He was undoubtedly the best men's college basketball coach. He had great life and leadership lessons he imparted to all his players. I have embraced many of them in my own life with excellent results. Among Coach Wooden's philosophies was his belief that "Whatever you do in life, surround yourself with smart people who'll argue with you." He borrowed this philosophy of excellence from the Holy Scripture, discussing iron sharpening iron when struck together (Proverbs 27:17).

I'll never forget someone who observed a "spirited discussion" with one of the smarter and better people I surrounded myself with. After listening to 30 minutes of a vociferous debate, the observer admitted to finally realizing that the two of us loved each other and were committed to helping each other become better through learning. As we will learn later in my Roadmap, when we explore the elements of effective leadership and how to overcome dysfunctions within organizations and teams, you should not fear, and indeed seek, "productive" disagreement and conflict.

The better and the smarter the people around you, the better and more intelligent you will become (if you pay attention and learn not to resist). Commonly attributed to motivational speaker Jim Rohn is the conclusion that individuals who surrounded themselves with people who were more intelligent and better than themselves experienced a 15% increase in their performance. In contrast, those who surrounded themselves with poor performers saw their performance drop by as much as 30%.

Think about who is in your inner circle. Do not dump your friends. But always seek to upgrade your teachers, mentors, and fellow "iron sharpening iron workers." There is never an end to your leadership and learning journey on earth, just as there is never an end to your journey to theosis.

Good character and habits develop trust, and trust is an essential ingredient for leadership. Indeed, as will be discussed later, trust is at the foundation of all effective leadership. People can tolerate a mistake or two (especially when acknowledged with humility) but will not accept a loss of trust and confidence and still consider you a leader. If you have any problems, challenges, or issues in your parish or ministries, you have a

leadership problem. And perhaps that problem includes your leadership training, skills, and practices.

### “Lead, Follow, Or Get Out Of The Way.”

The above quote is one of my favorites and was always plastered on my wall and used in all my Igniting the Flame live retreats. It is commonly attributed to Thomas Paine (with little evidence that he said it). It is often publicly repeated in more “colorful” terms by General George Patton (“We herd sheep, we drive cattle, we lead people. Lead me, follow me, or get the hell out of my way.”) And the most famous modern advocate of this axiom was the visionary and inspirational leader, Ted Turner, who founded and owned Turner Broadcasting, WTBS, CNN, CNN Headline News, TNT, Cartoon Channel, Turner Classic Movies, Atlanta Braves, Atlanta Hawks, Atlanta Chiefs, and the MGM/UA Entertainment Company Library of over 4,000 films.

In the interest of full disclosure, Mr. Turner was a client of my law firm, and I was blessed to represent many of his ventures. On the front of his desk, he had prominently two signs that said, “Either lead, follow, or get out of the way.” Not one, but two. More interestingly, they did not face him. They faced whoever entered his office. This dynamic leader was challenging anyone who entered his domain to embrace his bias for leadership action or followership loyalty.

This willingness to teach everyone how to lead transformationally was one of the many things I admired about him. When Mr. Turner told us we were going to start a Headline News Service before the date a competitor announced they were going on the air, most of us were dumbfounded. What is a Headline News Service? How can we possibly hire the necessary on-air talent in such a short time with such limited resources? How can we get satellite transponders, studios, and other equipment in place to do this 24/7/365? Who is going to carry the feed?

There were countless questions we all took turns asking. The answer was always the same. Either lead, follow, or get out of the way. And this rag-tag assembled team did lead. And in December 1981, only six months after I had started lawyering, CNN Headline News went on the air. I remember often sitting in Executive Vice President Burt Reinhardt’s office (right off the studio), where he simultaneously monitored four televisions with the competitors’ live content and the CNN Headline News on-air feed and paid attention to my advice and questions. Occasionally, Burt would fly out of his chair to correct something going over the air live. Heady times. However, Ted Turner’s visionary and transformational leadership inspired those around him to lead and follow. (And yes, as a lawyer, I had to help get some folks “out of the way” who did not understand the WHY, Mission, and Vision).

## Superman Is A Myth.

Notwithstanding the enormous reputations of visionary, larger-than-life military or business figures, Drs. Kouzes and Posner point out in The Leadership Challenge that leaders always mobilize others to act and work hard to achieve shared goals. In this way, they note that “Leadership is a relationship between those who aspire to lead and those who choose to follow” (Kouzes & Posner, 2017).

Superman and superwomen are myths. To be sure, visionary, transformational leaders can be very inspirational and sometimes seem superhuman. However, leaders cannot perform all the extraordinary actions necessary for achieving transformational goals. Thus, a leader must provide a clarion call to action to “mobilize the troops” and inspire committed followers to accomplish a shared goal that might otherwise seem individually unimaginable. Kouzes and Posner remind us that followers expect their leaders to excite them and bring energy and enthusiasm to the task. But it first begins with a call to action.

## Aristotle & Leadership.

If you are not interested in understanding the development of modern leadership theory, you can skip to the next section. However, you will miss a lot of foundational evolution. Scholars have traced some of the earliest definitions of leadership to Aristotle’s writings. He identified (1) the “*politikos*” focusing on the characteristics of one’s status and power, and (2) “*eudaimonia*” focusing on individuals and groups pursuing the proverbial righteous “life well lived” (Adkins, 1978, p. 299). Under an ***Aristotelian Definition***, *politikos* closely relates to some of the “Trait Approach” leadership models of the 1930s (Northouse, 2022, p. 3). Similarly, *eudaimonia* closely aligns with the “Transformational” and “Authentic” leadership models that gained prominence in the 1980s (Northouse, 2022, p. 185).

Aristotle’s leadership teachings focused on “ethical action” as essential in the pursuit of the “highest good” (Adkins, 1978). Aristotle’s concept of the highest good focused on the loftiest possible virtuous purposes or objectives (Kraut, 2022). Thus, the Aristotelian definition of leadership focuses on the leader’s trust and integrity as a catalyst for achieving highly virtuous objectives. Ethics and integrity appear as critical elements in virtually every definition of leadership. Dr. Peter Northouse wrote an essential leadership treatise entitled Leadership Theory and Practice. In it, he devotes an entire chapter to discussing leadership ethics (Northouse, 2022). Some foundational references to leadership ethics trace back to Aristotle (384-322 BC) and his teacher, Plato (427-347 BC) (Northouse, 2022).

## The Leadership Pyramid Inversion.

Regardless of the timelessness of some ancient leadership definitions, new models evolved following specific world events, philosophies, and additional research. For example, the “Authentic Leadership” model arose from the perceived failures of public



and private leaders to maintain the integrity and authenticity demanded of leaders (Northouse, 2022, pp. 221-251). The times often define the leaders.

The historical pyramidal definition of leadership has been inverting throughout the past century. In the early 20<sup>th</sup> century, the “Trait Based Leadership” model featured strong and influential leaders at the top of an organizational pyramid (Northouse, 2022, pp. 27-55). This pyramid folded in half with the shared leadership/followership models such as the “Leader-Member Exchange Theory” (Northouse, 2022, pp. 157-184). Eventually, the leadership pyramid completely inverted with some 21<sup>st</sup>-century theories such as “Servant Leadership” (Northouse, 2022, pp. 253-283) and “Inclusive Leadership” (Northouse, 2022, pp. 322-350). The purpose of my Roadmap is not to fully discuss all leadership theories but to use the historical progression to apply the current most relevant leadership model to parishes.

As one can see, modern leadership definitions and models evolved from a “top-down” approach through a “middle-in” period until they achieved an “inverted pyramid” more closely resembling the ancient Aristotelian Definition. This definitional migration follows rapidly changing socio-cultural phenomena, and thus, the leadership model du jour may remain relevant in an ever-changing world.

As the pace of modern life, technological innovation, and globalism increase exponentially, leadership definitions will likely continue to evolve. One scholar identified at least 66 different leadership theory domains (which I will not explore in my Roadmap, so “fear not”) (Dinh et al., 2014, p. 55). Nonetheless, the modern leadership definitions diligently explained by Drs. Northouse, Winston, and Patterson (Northouse, 2022; Winston & Patterson, 2016) remain closely aligned with the ancient Biblical Logos and Aristotelian Definitions to bring order from this definitional chaos. These more recent leadership definitions focus on leaders with integrity and trust, using wisdom and reason to inspire and lead followers to pursue enthusiastically common goals focused on virtuous objectives.

Scholars have commented on the relative dearth of research and discussion of followership. The importance of understanding followers underscores the reality that one cannot be a leader without followers. However, a followership definition should logically follow a leadership definition. In its simplest historical sense, followership is identifying someone joining the quest of another. While followership is the other side of the leadership coin, both sides must be present for the coin to have value. A leader with no followers only leads themself. “If you think you’re a leader and you turn around, and no one is following you, then you’re simply out for a walk” (Kouzes & Posner, 2010, p. 62).

### **The Followership Side Of The Leadership Coin.**

In defining followership, Northouse reverses his leadership definition and focuses on individuals willing to accept a role to achieve some goal or task (Northouse, 2022, p. 353). This straightforward approach aligns with the Aristotelian Definition in its focus on individuals who follow someone with integrity to pursue a critical and virtuous goal. Giardino (2019) identifies these followership characteristics as people who demonstrate

self-directedness, courage, loyalty, judgment, and engagement. Indeed, a greater focus on followership may lead to better overall organizational outcomes than merely focusing on leadership (Kellerman, 2019, p. 45).

## **Position Matters.**

One must understand the distinct roles followers play. Followers who are indentured servants differ fundamentally from charitable organization volunteers or executives pursuing a corporate vision. Differences in personal circumstances, power, and influence change the followership dynamic. Significant scholarship distinguishes between power derived solely from titles and positions in contrast to those who inspire others (Northouse, 2022, p. 12). Lay leaders, clergy, and Bishops should consider this.

Critically, followership is not synonymous with subordination (Chaleff, 2003, p. 15). The difference between business employees and unpaid non-profit parish volunteers exemplifies another dichotomy. The former receives a financial quid pro quo for their followership, whereas the latter does not. Of course, committed business followership can also result from a passionate belief in an organization's WHY and Mission. Conversely, some volunteers may begrudgingly follow instructions of clergy or lay leaders without a commitment to the WHY or Mission of the parish.

Thus, understanding the value proposition and motivations is critical to differentiate the followership observed. The fully committed "all in" mentality of Christ's Apostles exemplifies unparalleled uncompensated followership. I leave it to a theological explanation to explore the question of the degree to which the Apostles were ultimately "compensated" in the Kingdom Eternal and thus motivated by the ultimate purpose.

## **The Leadership "Times They Are A-Changing" (Dylan, 1964).**

Significant shifts in the leadership/followership relationship have occurred throughout history due to geopolitical, technological, and other changes. Two World Wars and critical global events changed the workforce composition and inevitably altered leadership/followership dynamics. For example, married women in the U.S. workforce grew from 5% in 1890 to over 60% in 1990 (Goldin, 1991, p. 741). These external drivers of change similarly impact parishes.

As a result, generational shifts in values and perceptions of leadership and followership occur. Whyte (1956) studied the attitudes of pre-1950s men. He identified those who followed leaders' orders, uprooted their families and relationships, and moved to wherever they were told. In stark contrast, Leinberger and Tucker (1991) interviewed Whyte's original "organizational men" and their adult children. Significant differences in the followership values of the subsequent generation became apparent. This new generation was unwilling to make the same sacrifices as their parents, placed greater importance on discovering meaning in their lives, and did not merely focus on work (Leinberger & Tucker, 1991). This cultural shift helps parish leaders understand that older

parishioners have vastly different volunteerism and ministry engagement attitudes than their children and grandchildren.

Recently, Smith (2021) examined the “five generations” in the current workforce with their differing values. Anderson et al. (2017) researched the differing generational attitudes of followers/employees in Transformational Leadership, Information Processing, Leader-Member Exchange, Authentic Leadership, and Ethical Leadership models. Two of the most studied groups are the Millennials (born between 1981 and 1996) and Baby Boomers (born between 1946 and 1964).

Research has found that Millennials and Baby Boomers both appreciate challenging and meaningful work (Anderson et al., 2017, p. 256). However, there is a marked contrast between the preference of Millennials to “work to live” rather than Baby Boomers, who supposedly “live to work” (Anderson et al., 2017, p. 255). Further, Millennials do not react as positively to creative approaches like Transformational Leadership (Anderson et al., 2017, p. 248). These attitudinal and workforce shifts caused researchers to conclude leadership theory must adapt and continue to evolve (Anderson et al., 2017, p. 256). This is the key point of this part of my Roadmap. Hopefully, this is a wake-up call for parish leadership to embrace the changing demographics, perspectives, and interpersonal dynamics and adapt their parish leadership approach accordingly.

Similarly, due to the unprecedented disruption of the global SARS-CoV-2 global pandemic, it remains too early to determine if there will be an acceleration in corresponding changes to the leadership/followership dynamic. For example, the United States recently experienced the highest monthly job resignation rates in the last 20 years (U.S. Bureau of Labor Statistics, 2022). This disengagement phenomenon has been named “The Great Resignation” (Jiskrova, 2022, p. 525). It is unknown how long this trend will continue and what changes will result in followership roles and relationships in parishes as a result. However, it is safe to assume that parishes, like every other organization, will inevitably feel the impact of such cultural shifts in leadership/followership relationships.

### **Transformational Followership Through Inspirational Leadership.**

Notwithstanding the rapidly changing times, specific leadership approaches can redefine followership relationships and lead to loyalty and excellence. Dynamic followership can arise from a collaborative and empowering leadership style (Hill, 2014). Ed Catmull demonstrated dynamic leadership at Pixar Animation Studios through a dedication to “transformational innovation” and inspiring a form of “collective genius” rather than siloed individual followers working alone (Hill et al., 2014, p.176).

The different followership models at highly innovative companies like Pixar and Google are described as a “paradox of innovation.” This approach allows leadership to empower passionate followers to perform meaningful work (Hill et al., 2014, p. 178). Like Aristotelian philosophy, a fundamental differentiator of this type of followership is the belief that they are “creating a world to which people want to belong” (Hill, 2014).

I respectfully submit that parishes can be one of the best incubators for such environments. Imagine gathering a group of young adults, presenting them with a challenge the parish faces, and cutting them loose to brainstorm and identify solutions. I had the opportunity to do just that with a group of young adults at a parish the night before I presented my live Igniting The Flame program.

The conversation was so electric and engaged that it continued well after midnight when I excused myself for the 6:00 a.m. wake-up call for the next day's retreat. My departure did not stop the creative engagement of these young people Fr. Joseph had gathered as I received several texts with new ideas at 2:00 a.m. and again around 3:00 a.m. Several of those young people changed their plans for Saturday and showed up at my Igniting The Flame program. They then stayed for several hours afterward, continuing to brainstorm ways to address the parish's problems. As it turned out, several had unique and specialized expertise that would be perfect but had never been asked to use it to help their parish.

### [The Leadership / Management / Team Member Continuum.](#)

Now that the brief leadership history lesson is over, let us explore a critical topic: parish leadership. What is the difference between leadership, management, and team members? We start on the most foundational basis, team members (i.e., "ministry members" in parishes). These are the parishioners who perform the necessary ministry or parish tasks. They are the "worker bees" who get the job done and execute all the action steps that must be accomplished to achieve a desired result.

In turn, team/ministry members are organized under "managers." These are the ministry leaders or people running individual programs within your parish and the people parishes hold accountable to achieve whatever the ministry or parish activity is focused on achieving. Often, managers may also be team members executing actions; however, they have the added duty of organizing and overseeing all the team members and ensuring they are working together, with the necessary resources, to achieve the desired end by some deadline.

At the top of the parish pyramid are the leaders. They always include the clergy leading the parish as God has called those faith leaders to tend to His sheep and help the faithful on their journey to theosis and oneness in Christ. Assisting the clergy are another group of leaders (usually elected by their peers) to serve on a "**parish council**" (i.e., directors, vestry, elders, or any of the other many names used to define the ultimate leaders of a parish in American Christian churches). They are the legal Board of Directors, but ultimately, they are called to be "leaders."

The primary job of parish leaders is to fulfill the parish WHY, act consistently with its Core Values, help achieve the Mission, and accomplish its Vision. That is a mouthful that we will unpack, particularly in Chapter 7 of my Roadmap, where I discuss each of these strategic plan elements. However, the parish council leaders (which, in my definition, include the clergy) are ultimately focused on the parish's future and what changes or improvements must be made to get there faithfully. They leave it to the

managers/ministry leaders to lead the teams in performing the necessary tasks. The parish council leaders help provide guidance and support to ensure the managers have the resources to help the parish fulfill its WHY.

At this point, anyone who has served on a parish council is saying, that's not what we do. "We are firemen/firewomen and put out countless parish fires and often make thousands of little decisions as we micromanage every detail of the parish." That may be what parish councils have done, but that is not what they should do. The fact that there is a disconnect between what the leaders should do and what they do is the reason my Roadmap starts with the issue of the first of the **S<sup>3</sup>** challenges, **Servant Leadership**.

Plain and simple, nothing will be optimized in a parish if the leaders don't act like servant leaders. Indeed, suboptimality will reign when leaders micromanage managers who get frustrated and either quit or take it out on team members. When team members get frustrated over micromanagement from above, they complain incessantly until they disappear. As I often jokingly say, the 13<sup>th</sup> Amendment to the U.S. Constitution freed the slaves and the parish volunteers.

Please do not read this as a criticism of the people who are elected to be leaders. For the most part, every such elected parish council leader or clergyman is a fine person motivated by the right instincts and objectives. Indeed, they're so motivated that they take on the thankless job of leading as volunteers with no compensation and are subject to a lot of criticism leveled at them from every direction and for every decision they make.

God bless our volunteer lay leaders and our paid clergy leaders. But note it is upon you as a leader to take the current leadership team (including yourself) from where they are to where they need to be as the best leaders of Christ's exemplary parish and fulfill its inspirational WHY Statement (discussed further in Chapter 8 of my Roadmap). While each parish should have its own WHY Statement, the generic phrase I will use throughout my Roadmap as a possible WHY is "to bring people closer to Christ and each other."

## [So, You Think You Are A Leader?](#)

Current management thought-leaders, Drs. Kouzes and Posner define a leader articulately in several ways (Kouzes & Posner, 2010, 2017). First, they say a leader leads by example. In other words, leadership is not about personality but behavior. This also means a leader will own the parish's WHY and Vision and lead the managers but not manage the team members. This is a significant challenge for most parish councils, who always seem to want to micromanage every aspect of the parish. The best parish council leaders exemplify the key elements of Servant Leadership modeled by our Lord and Saviour and discussed in greater detail in Chapter 5 of my Roadmap.

Proverbs 29:18 reminds you that "*where there is no vision, the people will perish.*" And so, I ask you, as a parish leader, what's the Vision for your parish? Where will your parish be, and what will it look like three to four years from today? Not what does it look like now or what did it look like yesterday. Where are you leading your parish and parishioners? What is it that you hope to accomplish in the next several years? Have you identified a Vision that is inspirational, visualizable, and catchable? I am talking about

creating a future for your parish, not just micromanaging the details of the current ministries and activities. While I will explain this in greater detail in Chapter 8 of my Roadmap, guru of leadership and management Peter Drucker put it articulately when he said, “The best way to predict the future is to create it” (Cohen, 2009). You are the creator of the future of your parish. What will it look like?

## Moving the World From 249 BC To 2025 AD – Using IS, IM, and TL to Find Your Parish’s Promised Land.

Impact is one thing all parish leaders desire. Christianity’s founder, Jesus Christ, boldly challenged His followers to be global transformationalists by making “*disciples of all nations*” (Matthew 28:10). Yet throughout history, transformational leaders faced rejection. Walt Disney heard a mouse cartoon would scare women. Industrialists told Henry Ford his idea of a car was trash. Colonel Sanders’ chicken recipe was rejected 1009 times. The Beatles were turned down because guitar groups were passe. Before earning a net worth of \$1 billion+, J.K. Rowling’s first Harry Potter book was rejected 12 times (Laroya, 2015). All twelve Apostles were tortured, imprisoned, and martyred before Christ’s Church became the dominant organizational force for good for the last almost 2,000 years.

Key differentiators motivating great leaders include **Intellectual Stimulation** (“**IS**”) (seeing things differently) and **Inspirational Motivation** (“**IM**”) (elevating expectations) (Sosik & Jung, 2018). As far back as 249 BC, mathematician/inventor Archimedes concluded, “*Give me a lever long enough and a fulcrum on which to place it, and I shall move the world.*” But what are the levers and props (fulcrums) needed to be a parish leader or world changer? I submit one way to look at it is that your parishioners are the levers, and your inspirational parish WHY and Vision are the fulcrum.

Unlocking the impact inherent in your parish teams requires understanding how to motivate and lead them. Among countless leadership models (Northouse, 2022), **Transformational Leadership** (“**TL**”) focuses on having an extraordinary impact (Pawar, 2016). TL is potentially so powerful and effective that the data show it:

- (a) reversed the trends in declining and plateaued churches (Christopherson, 2014),
- (b) provided a direct correlation between improved church scores in the Natural Church Development assessment (Rumley, 2011),
- (c) positively impacted business/financial performance and new product development (Morris-Phillip, 2021; Strukan et al., 2017), and
- (d) enhanced entrepreneurship and performance (Ocak & Ozturk, 2018).

**TL** advocate Burns (1978) introduced modernity to Archimedes world changers by focusing on the first “**DEI**” of **D**eveloping, **E**mpowering, and **I**nspiring people. Decades later, Bass (1999) identified the research and expansion of **TL**, allowing leaders to quickly move followers up Maslow’s (1943) hierarchy of needs to become “self-actualizers”

meeting their potential. Research proves **TL** results in higher levels of human enthusiasm, energy, performance, and results (Pawar, 2016). This leadership style can be helpful when a parish needs to make a more significant transformational change (e.g., moving, merging with another parish, undertaking a massive new building project, etc.).

## What Is Intellectual Stimulation (IS) & Inspirational Motivation (IM), And How Can You Use It In Your Parish?

In *The Hound of the Baskervilles*, Sherlock Holmes said he would know what good was when he saw it. Similarly, U.S. Supreme Court Justice Potter Stewart defined “obscenity” by saying he would know it when he saw it (Jacobellis v. Ohio 378 U.S. 197). So, how can we recognize **IS & IM** and enhance them in our parishes?

**Intellectual Stimulation** is “innovative, creative, and novel ways of doing the conventional” (Anjali & Anand, 2015, p. 28). **Inspirational Motivation** is a creative, optimistic, encouraging, confident, and transformative environment focused on a clear Vision (Ameen et al., 2021). Using Sosik’s and Jung’s (2018) Full Range Leadership Development model, I briefly examine several **IS&IM** cultivation techniques and suggestions to unleash the Archimedes global world changers in your parish.

3M scientist Spencer Silver failed to invent a stronger and tougher adhesive. Instead, he discovered microspheres that stuck lightly to surfaces. 3M scientist Art Fry was frustrated when the scraps of paper marking the church hymns he sang kept falling off. Silver and Fry practiced **IS&IM** by partnering to create the now ubiquitous Post-It® notes (3M, n.d.).

Silver’s and Fry’s failure plus creativity produced a global sticky notes market estimated to be \$2.879 billion by 2028 (Market Insights Plus, 2024). Thus, not every mistake is a failure, and not every failure is unproductive. One key **IS&IM** difference is the perspective of seeing a failure to solve one problem as a solution to another opportunity. In the inevitable and productive operational experimentation that must happen in the best-run parishes, failures should be celebrated and not condemned to ensure thoughtful risk-taking and high levels of parishioners’ service remain a priority. Consider the following IS&IM Actions and Steps:

### **IS&IM Action 1. Re-examine Critical Assumptions for Accuracy and Talk Positively About the Future.**

Everyone makes assumptions based on prior experiences and observations. The problem is in blindly adhering to them (sticky notes, pun intended). An **IS&IM** exercise to embrace as part of a **TL** process is regularly scheduled examinations of all significant assumptions and underlying parish strategic decisions assessed against positive future desired outcomes. What is not scheduled is rarely done.

Everyone suffers from confirmation biases, the human tendency to believe/cling to one’s favorite hypothesis/solution (Klayman, 1995). When confirmation biases exist in parishes, we exclude alternatives and creative ideas and adhere to our underlying assumptions and past practices.

Confirmation biases that expand to entire parishes become “Group Think,” a psychological drive for consensus in cohesive groups that represses disagreement and prevents examining alternatives (Janus, 1972). Individuals and parishes that consciously practice high **IS&IM** consistently re-examine and reassess their assumptions and biases as they pursue their positive future Vision.

### **IS&IM Action Steps:**

1. Write three current critical assumptions about your parish that are keeping you stuck where you are.
2. Write the positive/lofty future parish Vision you see and the critical assumptions/challenges keeping you from achieving it.
3. Next to each of the Step 1 assumptions, write why they may no longer be true or how they can be overcome.
4. Next to each Step 2 challenge, identify what positive results or consequences will occur when they are overcome and you achieve your Vision.

## **IS&IM Action 2. Seek and Look at Things From Different Perspectives And Articulate A Positive Future Vision.**

Anyone who has argued with their spouse/child/best friend has learned the lesson of seeing things from different perspectives and how they impact opinions. Great leaders capably move between 50,000 feet of motivational **IM** future Vision and the 1-foot **IS** tactics necessary to accomplish it. Pursuing with charisma and enthusiasm an ultimate **TL** ideal future Vision and goals drives behavior (Barnett & McCormick, 2003).

### **IS&IM Action Steps:**

1. Build a consensus Vision among your parish leadership and teams about the brightest most transformational future Vision possible.
2. Write three perspectives that limit your points of view and inhibit achieving your parish’s Vision.
3. Identify three people with different perspectives and ask them to tell you what they see about the items in Steps 1 and 2 to challenge your assumptions.

## **IS&IM Action 3. Suggest New Ways To Accomplish Tasks And Exciting Images Of Key Considerations.**

The movie Apollo 13 featured NASA engineers challenged to fit a square air filter into a round slot using what was in the spacecraft to avoid the astronauts’ death. (Watch a clip of this scene: [https://www.youtube.com/watch?v=ry55--J4\\_VQ](https://www.youtube.com/watch?v=ry55--J4_VQ)).

Everyone travels to unknown destinations using a **Global Positioning System** (“**GPS**”), which is a quintessential **IS&IM** story. When Russia’s Sputnik satellite beat the



U.S. into space, Johns Hopkins University professors William Guier and George Weiffenbach discovered how to identify Sputnik's location in space using the Doppler Effect. Thereafter, they were challenged/inspired to reverse the process and determine the location of something moving on earth by pinging a moving satellite (LandAirSea Systems, n.d.).

Future **IM** possibilities from reversing existing processes or examining them from different perspectives allow your parish Archimedes World Changers to discover inspirational new ways to achieve something better.

### **IS&IM Action Steps:**

1. Identify an instance when you/someone in your parish did something different and achieved a better result.
2. Determine the process used to think of that innovative alternative.
3. Identify a significant challenge/need/opportunity in your parish and inspire a team to use the step 2 innovative process to identify creative ways to redeploy/improve existing products/solutions/ideas.

### **IS&IM Action 4. Encourage Creative, Nontraditional, And Aspirational Thinking That Challenges The Status Quo.**

The Holy Gospel discusses iron sharpening iron to mean people can push each other to more significant improvement (Proverbs 27:17). Laying out each automobile part gets you nowhere. However, after assembly, the possibilities of where a vehicle can take you are endless. Nontraditional and aspirational thinking encourages examining things beyond the normal frame of reference, whereas true "devil's advocacy" is contrarian thinking (Sosik & Jung, 2018).

Using devil's advocates to challenge ideas/assumptions intentionally helps sharpen them and discover and fix flaws. The Roman Catholic Church uses an "Advocatus Diaboli" ("Devil's Advocate" a/k/a "Promoter of the Faith") to argue against the canonization of a potential Saint and thus identify any character flaws (Krautter, 2013). Debaters/lawyers use this technique to strengthen their arguments by identifying challenges to their position and the most effective responses. Great leaders have a devil's advocate (or two) to help them test and improve their ideas.

The joke "How many Xs does it take to change a lightbulb?" points to stagnant thinking that requires re-examination. Change resistance is among the strongest human tendencies (Dent & Goldberg, 1999). Parish teams often fear that challenging long-held beliefs/practices may have adverse personal or theological consequences. Old ideas and ineffective strategies are rarely revisited without a formal process and permission to speak candidly. I know a decision should be re-examined when someone in a parish tells me, "That's how we've always done it."

Appropriately challenging current strategies help achieve the critical objectives of inviting fresh thinking, new ideas, alternative viewpoints, creativity, and freedom to imagine a different future by encouraging teams to seek innovative best practices.

### **IS&IM ACTION STEPS:**

1. Identify a “sacred cow” and long-held practice (unrelated to the timeless theology of your faith tradition) and recruit a trusted, knowledgeable team to debate how it is no longer optimal or effective.
2. Discuss changes to the practices consistent with current realities and experiences.
3. Establish a formal process by which others are free to serve as respectful and fervent devil’s advocates to stress-test your ideas and ensure iron sharpens iron.

In short, an amazing Vision is possible through an **IS&IM** process re-examining assumptions while looking at a glorious future from different perspectives, encouraging nontraditional thinking, and reimagining new ways to address your challenges and long-standing practices. Accomplishing lofty objectives does not require recruiting an army of Einsteins. You only need to harness the power of your parish’s existing Archimedes World Changers.

An inspiration to undertake this **IS&IM** journey is encapsulated in this short commercial: <https://www.youtube.com/watch?v=mfftHaK9tYY&t=5s> (Jobs, 1997). So, here’s to the round pegs in the square holes Archimedes World Changers that can unleash the power of **IS&IM** and a **TL** process to take your parish to an unimaginably better destination.

### **My Dozen Critical Leadership Principles.**

Anybody can receive a title and be called “leader.” But if you do not act consistently with what it means to be a true leader, then the title will mean nothing, and you won’t have followers. That’s a key part of leadership. As Drs. Kouzes and Posner say clearly: “Leaders don’t decide who leads. Followers do. If you think you’re a leader and you turn around, and no one’s following you, then you’re simply out for a walk” (Kouzes & Posner, 2017). I love this because I know so many so-called leaders with titles who are out for a walk and don’t seem to understand that their failure to develop leadership skills puts them in the uncomfortable position they find themselves in.

This concept is difficult for parish council members and parish leaders to embrace. They get so excited about being elected or appointed to serve in a leadership role that they make critical mistakes. These are the top 12 initial significant rules that I ask parish leaders to embrace.

1. God is in charge. He may have allowed you to take the baton for this lap around the track, but remember who you work for and who you belong to. He created you, and one day, if you are lucky, have faith, and live right, you will be reunited with Him. Never forget He is your boss and entrusted His people to you. Do Him proud and lead to the best of your abilities. Parish work is Godly work. If you do not have the time to prioritize it, do not volunteer or serve.

2. Your Lord and Savior Jesus Christ delivered a master class on leadership training. Just do what He says and follow His lead and example. When in doubt, the answer is always the subtitle for my Roadmap: W.W.J.D. (What Would Jesus Do?).
3. God inspired the Holy Scriptures as your leadership manual. It is all in there. You may have to do some translating, and you will need to bring it into your modern-day context. However, all leadership tools, techniques, and practices you need are in the Holy Scriptures, including the ability to learn from other people's mistakes. Study the Bible intently and for your entire life.
4. Always know your and your parish's WHY and Core Values. Never do anything contrary to either. Remain the staunchest defender of those true North principles that will drive all decisions in your parish. If you don't know why you do what you do, you will have difficulty inspiring others to join you on this difficult journey
5. Titles do not make you a leader. Neither do awards, medals, plaques, or winning elections. Anyone can be given a title or award. Get over yourself and get out of your own way. Practice Christ's humility and stay focused on creating a compelling Vision people are willing to follow, and you too can become a parish leader.
6. You are not God. Stop thinking you are in charge of, and responsible for, everything and everybody. You are not. You will make mistakes. Many mistakes will come from working hard and trying new and creative things. That is fine and good. Just learn from each one and move forward. A former law partner who had been a Navy Seal sent me a two-letter email once when we failed to achieve the desired result. It merely says "**CM.**" When I asked him what that meant, he said it was Navy Seal code for "Continue Mission." That is excellent advice for your parish leadership journey. At all times, CM!
7. Do not think what you've learned about leadership in your business or work life translates perfectly to parish leadership. Some of it does. Some of it needs to be adapted, and some is entirely inapplicable. Do not assume what worked in business will work in your parish. Do not assume the opposite, either. Do your homework, gather the research and data, try new things, and adapt. Always drive change. Never assume you are doing things as perfectly as they can be done. Be the change you wish to see.
8. Never think your leadership learning journey is over. It never is and never will be. Keep studying and reading, taking classes, and challenging yourself. Indeed, I tell parish councils to pick 12 leadership books a year and have one parish council member read them thoroughly and prepare a talk about them monthly to help everyone learn. I have been leading lawyers and businesses for 44 years, and when I hit the ripe

old age of 68, I enrolled in the Doctorate in Strategic Leadership program, for which my Roadmap is my final work product. I hope to graduate from this program one week after my 70<sup>th</sup> birthday. However, I have already identified the educational classes I need to take next. Lifelong learning is a continuous leadership learning process.

9. Servant Leadership is the most effective form of parish leadership and requires complete submission to the interests and needs of those you serve. They may have elected or appointed you, but all parishioners are now who you serve, not the other way around. Servant Leadership is so critical that it will be addressed in greater detail in Chapter 5 of my Roadmap.
10. Dive for loose balls. This was the coaching tip I gave all the young men and women I coached in church league basketball for 15 years. Never let the ball roll off the court without diving to retrieve it. This is another way to apply “Grit” to everything you do in parish leadership. (See the discussion of Dr. Angela Duckworth’s work on GRIT in Chapter 4 of my Roadmap.) You must show continued stamina and effort over long periods
11. The Holy Spirit has your back and was there to guide the Apostles on Pentecost. It remains the gift that keeps on giving from our Lord when he passed back to the Kingdom Eternal. Pray for assistance and seek the wisdom that the Holy Spirit will reveal to you. Remember the Lord’s promise in the Holy Scripture: *“Ask, and it will be given to you; seek, and you will find; knock, and it will be opened to you.”* (Matthew 7:7). This is a promise, so accept the gift of the Holy Spirit and ask for help when you need it. Not to suggest any holy similarity, but even in the Harry Potter series, the omniscient and prescient Headmaster Dumbledore always said, “Help will always be given at Hogwarts to those who ask for it” (Rowling, 2002). If that works in a fantasy world, it works in our Christian real world. So, act as if you believe and discover the path toward theosis to lead yourself, your family, and your parishioners closer to Christ and each other.
12. In all you do, give all glory to God!

There is much more to be said about leadership in parishes, so please read on to the subsequent Leadership Chapters 4-8 in my Roadmap.

# CHAPTER 4. Elements Of Exemplary Leadership.

## Leaders Create Culture.

In addition to casting a Vision for the future, a crucial duty of parish council leaders is to help create and maintain the values, culture, and ethics of the parish you lead. This is easier with a new parish where culture can be created from whole cloth. However, most parish leaders inherit a parish organizational structure, history, procedures, and parishioners with specific values and ethics that define its culture. To provide transformation and improvement, new leaders must cause the current team to empty (zero) themselves of their previous biases and behaviors and pursue a transformational change of heart (μετάνοια) as they embrace new righteous Core Values that will define the desired cultural outcome.

### **Culture**

Schein & Schein (2017) have a comprehensive definition of culture that focuses primarily on a parish's "accumulated shared learning," producing sufficient results for it to become a part of the parish's DNA that is shared with new members (p. 6). Cambridge University Press (n.d.) defines culture as "the way of life" that includes one's customs. The Greek origin of the word culture is Πολιτισμός which focuses on a "way of life."

### **Ethics**

Cambridge University Press defines ethics as "the study of what is morally right and wrong." However, the origin of ethics is from the Greek word ἠθικός, which focuses on one's "character." It ultimately derives from the Greek root word ἦθος, which focuses on how one practices morality.

### **Values**

Cambridge University Press defines Values as how one decides "what is right and wrong" and, thus, what is appropriate behavior. The Greek origin of values is Αξίες which focuses on one's worth or actions.

## How Did Biblical Leaders Present Values To The World?

Holy Scripture provides countless examples of people living their values. A notable example is Job, who we learn was "true, blameless, righteous, and God-fearing" (Job 1:1). Regardless of Satan's testing of Job, this man of God upheld the values firmly embedded in his ethos. Ultimately, Job loses everything, including his family, health, and wealth, yet he continually shows complete respect toward God and His values. Through his difficult journey, Job becomes an example of one living their values to define right vs. wrong.

Another cultural lesson comes in Matthew 5:17, where the Lord makes clear He did not come among us to abolish and eliminate the "Law" or the "Prophets" but to "fulfill"

them (Matthew 5:17). The “Law” to which Our Lord refers is the “Torah” or the old Hebrew Bible. Similarly, the people of the day were intimately familiar with the teachings of the “Prophets,” called the “Nevi'im.” The “Law” and “Prophets” our Lord references are what we often refer to today as the Old Testament and which define Jewish values and culture. Therefore, our Lord affirms in Matthew 5:17 that the Core Values demanded by the Ten Commandments, the Torah, and the teachings of the “Prophets” remain applicable. Our Lord does this even as He adds a new “commandment” that we “*love one another*” (John 13:34). The cultural clarity of righteous Core Values Christ establishes continues to this day for those who aspire to be His disciples.

Our Lord attacks some established cultural norms by “zeroing out” and replacing incorrect understandings and values of the day. Perhaps no better example exists than the “Parable of the Good Samaritan” (Luke 10:25-37). In the culture of the time, Samaritans and Jews could not interact in any way. Indeed, the Jews believed Samaritans were complete aliens to be hated in every way and always avoided. (Bindley, 1931). Against this backdrop, Jesus tells the Jews that the Samaritans should be treated as their “neighbor” (Luke 10:36-37). He goes further to instruct His Jewish audience to “go and do likewise” by caring for any Samaritan (or other person) who needs help, just as the “Good Samaritan” cared for the injured Jew left for dead (Luke 10:37).

The Orthodox Study Bible’s explanation (exegesis) of Titus 2:11-15 focuses on Christ’s imperative to embrace an ethical and righteous culture not merely because of the existing Jewish laws. Instead, the Lord calls His disciples to focus on ethical behaviors that lead to eternal life with Christ (OSB, 2008, p. 1648).

The “zeroing” process by which all Marine candidates are first evaluated regarding their capabilities and character is explored by Yaroslaski & Tripodi (2006). Like the well-established process of “zeroing” a gun sight to ensure it shoots straight, Marine Corps leaders create a culture where individuals are re-oriented to embrace a different culture and set of values. They learn to abandon personal well-being and begin to feel responsible for all their actions and all Marines, both past and present (Yaroslaski & Tripodi, 2006, p.72). This reorientation creates a sense of responsibility, a corresponding set of ethics and values, and a new culture of what it means to be a member of this elite group.

## [The Divine Path To Ethics And Culture.](#)

The Old Testament has many examples of such a zeroing of humans and helping them commit to a new higher calling and corresponding values, including Noah and Moses. However, this process is precisely what Christ did and what He taught His Apostles to do. Christ made himself “*of no reputation taking the form of a bondservant*” (Philippians 2:7). This passage teaches that Christ “emptied himself” (or zeroed himself) and merely embraced a human self (OSB, 2008, page 1613). In this way, the Leader of all humbled Himself to become one with His subjects so that He could more effectively teach the culture, values, and ethics He desired. He did all this, not as a superior deity making demands on subordinate humans but by using human nature.

In John 21:15-18, Christ asks the Apostle Peter three times if Peter loves Him. Christ was asking for more than a rote affirmative response. As the explanation of this passage states, Christ was asking for a type of “self-emptying” and unconditional love, which lays aside one’s prior selfish being in favor of an all-encompassing loving culture (OSB, 2008, p. 1467). This was common with the Lord from the beginning of His public ministry when He asked all Apostles to leave their prior lives, values, and families and instead embrace His new culture and ethics. His simple words were “*follow me*” (Matthew 4:19; Matthew 19:21; John 1:43; Luke 9:59; I Corinthians 11:1). However, implicit in these two simple words was a request to empty oneself of who they were and what they had previously believed. Essentially, they were called to join Christ and “*die to the past*” (Colossians 2:20).

## The Human Path To Ethics And Culture.

We have seen how military and divine leaders can create compelling cultures, ethics, and values. But is such a powerful objective achievable in today’s parishes that are not as structured and controllable? Cameron & Quinn (2011) suggest changing a culture is possible only if the very foundation and roots change through a personal “μετάνοια.” Ellwanger & Gehrke (2020) define the Greek word μετάνοια as a person changing their mind about something or changing what they believed in their heart. The Merriam-Webster dictionary simply defines μετάνοια as a “transformative change of heart” (Metanoia, n.d.).

Christ constantly called for all to experience a μετάνοια transformational change of heart. For example, this transformation is the theme of the “Parable of the Tax Collector” (Luke 18:10-14) and the “Parable of the Good Samaritan” (Luke 10-25:37). The Old Testament similarly describes the μετάνοια transformative change of heart many times, as far back as when the three Wise Men saw the baby Jesus. Everything changed for them at that moment, and they “*fell down and worshiped Him*” (Matthew 2:11).

However, perhaps nowhere can we see a more remarkable Scriptural μετάνοια change of heart than when Christ appears to His Apostles (and others) after His death. Our Lord called everyone to a meaningful transformation of the heart. He leaves them with the culture-crashing notion that they will live the rest of their lives traveling the world to “*make disciples of all nations*” (Matthew 28:19).

It is hard to imagine a greater requested μετάνοια and transformative change of heart than to give up one’s entire life and focus on the calling of traveling to the “*ends of the earth*” (Acts 1:8) to make disciples of Jesus Christ. This is certainly not what you ask of yourself or other parish leaders. In the end, as in the beginning, Christ called for all followers to embrace a new culture, ethic, and righteous Core Values through a personal transformative change of heart so that you may live the life to which you are called (Ephesians 4:10; Cameron & Quinn, 2011).

So, what is the culture in your parish today? Again, Cameron & Quinn (2011) provide a clear and precise definition of an “enduring, slow-to-change, core characteristic of organizations” (p .20). However, Cameron & Quinn (2011) also advanced a persuasive

conclusion that Core Values are a vital element of culture. In other words, establishing Core Values is critical to defining culture. Thus, when a parish leader works to clarify and enculturate a parish's Core Values, you make considerable progress toward creating the culture you seek. Since most successful parishes will create a dominant culture, the embedded Core Values are something you, as a leader, must help influence and constantly reinforce (Cameron & Quinn, 2011).

Scholars have identified 15 characteristics of stewardship theory, each of which drives the leader-follower relationship (Caldwell et al., 2008). Among them are the traits of being an "integrator of shared interests" and "virtue ethics based upon a commitment to society-based virtues and rights." These values help parish leaders personally live stewardship values that inspire parishioners with a focus on more enhanced group-centered outcomes.

So-called "Level 5 Leaders" are among the most effective leaders. They inspire the best followership focused on optimal organizational success and stewardship principles (Collins, 2011). They do not seek individual accolades as a leader. Instead, they focus on parishioners and more holistic perspectives, needs, and benefits, not merely maximizing a particular metric at your parish. Trustworthiness due to ethical leadership behaviors and global stewardship now extends to caring for the dual environments of parishioners and your environment and planet (Caldwell et al., 2008; Collins, 2001; Collins & Collins, 2005). This conclusion has been repeatedly echoed by Orthodox Ecumenical Patriarch Bartholomew, the "so-called "Green Patriarch."

Regardless of the dimension of a parish or its culture that one examines, it is indisputable that the leader helps create, maintain, and positively metastasize a parish's culture. Thus, every priest and parish council member must consciously determine the culture they wish to establish and foster.

### **Five Best Practices Leadership Habits.**

After establishing the desired parish culture, the critical question is: what are the best practices of the most effective leaders? Whether you are clergy, parish council, or ministry leaders, Drs. Kouzes and Posner posit five best practices each leader must embrace that we will explore briefly. The five habits include:

- 1. Model The Way**
- 2. Inspire A Shared Vision**
- 3. Challenge The Process**
- 4. Enable Others To Act**
- 5. Encourage The Heart**



## **1. Model The Way.**

At the beginning of my leadership career, I decided that no one would work harder than I would. In that way, the team would see their leader willing to do whatever was necessary and exhibit whatever effort was required for the team to succeed. I am not suggesting this is right for everyone, as it imposes several personal sacrifices. However, if your parishioners see you living your parish's WHY consistent with its (and your) Core Values and working tirelessly alongside others, you can inspire them to be as dedicated as possible. I always say, "Your actions speak so loudly I can't hear what you are saying."

All of us have worked for "leaders" who did not work very hard. I put the word leader in quotes because their violation of the rule of modeling the way through hard work makes them hypocritical when they ask you to go the extra mile (Matthew 5:14). However, when you see your leader willing to do any task necessary to help the team succeed, their exemplary behavior can be inspirational. This is why so many military leaders lead the charge rather than watch in safety from a command center or mountaintop. This is why Mother Teresa asked no one to do anything she was not prepared to do herself. Modeling the way includes clarifying what you and the parish stand for, which is why I keep stressing the importance of a WHY and Core Values discovery process.

Outstanding research has determined that the most significant indicator of success and personal development is not IQ (measured intelligence), EQ (emotional intelligence), or talent. The key to success is "GRIT," which is defined as personal passion and perseverance for long-term goals and sticking with them for years (Duckworth, 2013, 2016). Dr. Angela Duckworth's research shows that the ability to change can grow with grit (Duckworth, 2013, 2016).

After a lifetime of excellence, Princeton women's ice hockey head coach Cara Morey famously said, "It's not the failure that matters, it's how you respond to failure that matters" and "trying is more important than failing" if only a coach can motivate their coachees to embrace grit (Morey, 2022). Thus, the impact of a parish leader can be transformational and a force multiplier of results because leaders/coaches can help followers/coachees realize that failure is not a permanent condition but rather a gateway to a growth mindset that leads to a new and brighter future with grit (Duckworth, 2013, 2016). Plain and simple, if a parish leader does not model the way, they cannot lead any parishioners anywhere. You are called to model the way by living your and your parish's Core Values and WHY and thus serve as a role model.

## **2. Inspire A Shared Vision.**

Secondly, parish leaders must share an inspired vision and be able to articulately describe the exciting possibilities of a future destination of where the parish is going. This is one reason why it is so critically important that parish leaders stop acting and thinking like micro managers and committee workers (e.g., deciding what will be served at the banquet). A leader (clergy and parish council) must focus on the future and operational changes that must be made for the parish to go where it needs to go over the next several years. Thus, leaders must excite people to make the change for the future.

And notice it must be a shared Vision, not merely the Vision that the parish council or priest sees. It is impossible to force volunteers to do anything. Thus, commanding

people to commit to specific actions is unproductive and ineffective. However, if a parish leader can gather parishioners together to envision and share a picture of the parish's future, then inspiring them to achieve it becomes much easier. This is why I strongly advise against small groups of just parish leaders developing a parish Vision or strategic plan. It must represent whatever diversity exists in the parish, and the new Vision must be shared, seen, and "caught" to become a reality.

Thus, this single Kouzes and Posner principle incorporates three physical responses and reactions. The Vision must be seen and shared, and it must inspire. Seeing, sharing, and inspiring are three different responses that must be joined together in pursuit of an agreed-upon and noble WHY and consistent with shared Core Values to become worthwhile.

### **3. Challenge The Process.**

Challenging the process is the third critical practice of exemplary leadership within any parish. I confess this is a favorite for change agents (like me) and the greatest fear of those who abhor change. Now, this principle sounds a little threatening because everybody likes to work together collegially. However, the reality is that it is only when we ask questions, challenge ourselves and each other, and imagine other or better ways of doing something that the creative juices and different Godly-inspired visions can help us see a different future.

Now, please let me be clear. I am not suggesting experimenting with the core theology of a parish. There should be a denominationally approved process for doing such critical acts. However, I suggest that everything else, and certainly all operational elements of a parish, should be continually put under the microscope, examined, and experimented on. How will you ever get better results if you do not ask questions and push forward, seeking better alternatives? One of my favorite exercises is to take a decision a group I have been a part of has made and spend some time at the end with everyone shooting at the decision or idea. We try and creatively think of all the ways it might be wrong, too limited, or may have missed something.

The Holy Gospel discusses iron sharpening iron to mean people can push each other to more significant improvement (Proverbs 27:17). Laying out each automobile part gets you nowhere. However, after assembly, the possibilities of where a vehicle can take you are endless. Nontraditional and aspirational thinking encourages examining things one at a time beyond the normal frame of reference, whereas true "devil's advocacy" is contrarian thinking (Sosik & Jung, 2018). Please refer to the previous Chapter 3 discussion of using devil's advocates to intentionally challenge ideas/assumptions that help to sharpen them and discover and fix flaws.

The government uses exhaustive FBI background checks to identify weaknesses in certain federal employees. (I participated in two FBI background checks of friends seeking Federal judgeships and can attest to the thoroughness). However, the overwhelming desire for consensus, collegiality, and Groupthink often works against challenging the process of any decision in a parish council. This can lead to the avoidance of addressing critical weaknesses and shortcomings.

Thus, parish council members and ministry leaders should always ask what we

can do better or how to do what we are doing more effectively. Church consultant Thom Rainer looked at some of the churches that he worked with that failed, and it often was the result of the fact that the leaders weren't leading by focusing on the future. They were merely trying to maintain the status quo. Leaders must lead and must challenge all operational assumptions.

And for those in hierarchical churches who decry change (especially converts to those faiths), please remember that the early church had no air conditioning, emailed bulletins, online giving, pews to sit in, carpeting to walk on, sound systems to hear, internet streaming of services, and so many other things that modern parishes take for granted. I can assure you that the first time each of these "innovations" were proposed, there were those who argued against them because it was a change and not what had been done before. And yet now we cannot imagine church without these innovations that make worshiping easier and more interactive. So, the next time you think nothing should change, think again or destine your parish to the decline of those that never improve. By challenging the process, results, and everything you do, you can always find a way to improve.

#### **4. Enable Others To Act.**

Empowering and enabling others is critical if you want your parish to do more than only what you personally are capable of doing. Every parish I work with always tells me that Alfredo Pareto was right. For those who do not remember the Pareto Principle, you certainly have heard it applied. It is often referred to as the "80/20 Rule." This truism states that 80% of the work is done by 20% of the people, and 80% of the money is contributed by 20% of the donors. This principle has been validated repeatedly in many different contexts. Yet leaders do not realize their failure is causing them to be overworked and burned out. Remember when I said every problem in a parish is a leadership problem? This is one example.

The root cause of the 80/20 crisis is that parish leaders are not empowering, authorizing, encouraging, training, supporting, and mentoring others to act. It is most often due to ego. How frequently have you heard (or said), "No one can do this as well as I can." "No one knows as much about this as I do." "No one cares about this as much as me." If you have said any of those, you are admitting your failure as a leader. It means you have not done what St. John Chrysostom advised about finding successors (which I will discuss shortly).

The next generation of leaders is waiting. They are in your pews and want to get in the game. But as long as you (or anyone else) hoard the power, position, or authority because of the false ego of your own exceptionalism, the longer you will suffer. Hear that? This is a self-inflicted wound that you can heal. How about that for tough love?

You, your parish council, and other leaders should ask, "Who am I training to take my place? Who am I mentoring to lead next time?" Or, in a more unfortunate situation, "If I get hit by a bus tomorrow, who will take up the baton and run this lap of the race?" As soon as you obtain any leadership position, you should immediately start thinking about who you will train and mentor to replace you one day. Only the insecure fails to do that. If you believe a successor might be better, you are admitting your weaknesses.

When I became managing partner of my global law firm's Atlanta office, among the first things I did was identify my successor. When I told people who it was, I frequently heard, "Hey, you just got into this 4-year position, so why are you talking about your departure?" Others told me the person I picked was unprepared to be a leader. My answer to these doubters was, "We'll see because I have four years to ensure they are ready." I did that from day one, engaging him in as many leadership opportunities and decisions as possible.

For this reason, I strongly suggest that every ministry has co-leaders. Two heads are better than one (because you have two brains, four arms, and four legs working). Plus, there is always a backup when someone needs a break or help. Holy Scripture teaches in Ecclesiastes 4:9 the value of two workers because "*they have a better return for their labor.*" This passage describes how "*one can pick the other up if they fall.*" If there is redundancy in ministry, there is far less likelihood of failure or the ball being dropped. This is another reason this fourth leadership rule requires developing future leaders.

Moreover, since God has given different gifts to people, how empowering is it when you encourage your fellow parishioners to use those gifts? And believe it or not, at times, they can do it better or more efficiently than you can. Yes, there will sometimes be a learning curve. However, you had a learning curve when you did something for the first time. The more you train and mentor, the better the results will be.

In the Greek Orthodox tradition, when someone dies, we say to their family, "May their memory be eternal." Of course, as we contemplate their eternal lives and souls, there is a theological foundation to that expression. At the same time, those who create mentees and future leaders ensure their dreams and efforts succeed and live longer, if not eternally. Give, and you shall receive. Train, and you shall benefit. Develop others, and you will become a force multiplier of good.

## 5. Encourage The Heart.

The final Kouzes and Posner leadership rule often sounds touchy-feely to some. Yet the best leaders understand the role the heart plays in everything (not just medically). A leader's heart includes compassion for those who follow and those you serve. It includes showing appreciation for everything everyone does to further the Mission. I have never met anyone who hates praise. They may hate false praise. And some (like me) get uncomfortable with public praise.) However, a genuine acknowledgment of sacrifice or effort and results can be highly reinforcing. Do not forget that your Creator "**DOSE's**" you with hits of **D**opamine, **O**xytocin, **S**erotonin, and **E**ndorphins when you help or serve others or do something righteous. (See the discussion of the DOSE effect in Chapter 10 of my Roadmap.)

This is just one more way God reinforces the best behaviors in you. So, lead with your heart and humanity, and you will find more loyal followers. This also means acting with trustworthiness and sincerity to show what you value when you see it in others. Any important work is hard. And when the heart is engaged, the work becomes easier and more fulfilling. Great leaders know this truth. This is why you hear from the followers of great leaders how much they love working with them. When used correctly, that powerful

emotional centrifugal force of love extends the orbit of a follower or volunteer. Use this force of good wisely, and your work will be rewarded.

At the end of the day, I continue to advocate that as a parish leader, you are not only bringing people closer to Christ but also helping people become closer to each other and better fulfill their WHY and calling. You want to focus on those celebrations as an exemplary leader. The researchers all agree that the leader's focus on the future and changes necessary to make things better secure their position as true leaders and not merely people with titles.

I remind you that Pastor Rick Warren challenged church leaders to be risk-takers, or else they will be caretakers who become undertakers of their parish. And again, I am not speaking about taking risks in your theology. But to bring people closer to Christ and each other means you must transport them from where they are to where they need to be. This is change, and that is what leadership is all about. In Thom Rainer's excellent book, [Autopsy of a Deceased Church](#), he outlines his twelve ways to keep your parish alive (Rainer, 2014). And none of the required actions conflict with anything preached in my Roadmap or the great wisdom of Drs. Kouzes & Posner or many others. In an ever-changing world, we must change to avoid atrophying or dying.

### [St. John Chrysostom's Leadership Lesson.](#)

The one leadership principle I teach every chance I get is the wisdom of a 4<sup>th</sup> century Saint who effectively taught church leaders about establishing culture and values. I always like to humorously point out that St. John Chrysostom was the greatest lawyer that ever lived. I say that because he studied law. Now, as far as we know, he never practiced law. However, I call him the greatest lawyer to show that one of us made it to Sainthood. I have no such expectations for myself or any other lawyers I know, but St. John Chrysostom gave you the perfect roadmap for being a leader within your parish. This wise Saint, in his homily *On Living Simply* said:

The most basic task of the Church leader is to discern the spiritual gifts of all those under his authority, and to encourage those gifts to be used to the full for the benefit of all. Only a person who can discern the gifts of others and can humbly rejoice at the flowering of those gifts is fit to lead the Church (Chrysostom, 1964, p. 44; Kostakis, 2018).

Let's unpack this quickly. St. John Chrysostom tells you that as a parish council member, ministry leader, or clergyman, the first thing you should ask yourself when you look at anyone in your parish is: What gifts does this person have? What might God have called them to do? How can I encourage them to use those gifts? And how can I encourage them to use those gifts fully to benefit everybody? This is the essence of outstanding leadership. You are a talent developer. God has called all your parishioners. Thus, you don't have a volunteer problem. You have a leadership problem because you have not engaged in the process of developing your followers to do what God has already called them to do.

St. John Chrysostom also proved his legal training by getting in our faces at the end when he says only a person who can discern the gifts of others and cause them to be used “is fit to lead the church.” Those are fighting words, as we would say. So, think of parish leadership fitness as directly correlated to how you develop talent.

A fun and productive exercise I ask all parish leaders to try is the next time you see or meet any parishioners, first think of what gift or talent God has given them. After you complete the talent identification phase, your next question is if there is a way they might use it for the parish. If they say yes, thank them and immediately get them with whoever can help them use their God-given talents. If they say that they cannot, then thank them anyway and let them know as soon as they are able Christ’s church could use their gifts. In this way, you will become a talent magnet and prove, according to St. John, your fitness to be a parish leader.

Perhaps current parish leaders can embrace this 4<sup>th</sup>-century wisdom to help each parishioner identify a unique stewardship calling. A WHY discovery or similar process might help many of the faithful. There are also Christian Skills Builder aptitude surveys and tools that can assist you in the talent development process. Genuinely inspirational leaders can change the world by helping followers zeroing out everything else inconsistent as they embrace a transformative *μετάνοια* change of heart to live according to righteous Core Values.

The offer of the faith in Christ is consistent. However, how we act on and deliver it and practice it, as well as the ministries and services we offer, can be ever-changing. This is why the job of leaders today in the Christian Church of modernity is so much more challenging than it was 20, 30, or 40 years ago. But St. John Chrysostom, thank God, gave us the solution for best leading within our parish.

## **Trust And Talent: Two Sides Of The Same Coin.**

Coach Bill Belichick, one of the greatest professional football coaches ever, once famously said: “Talent will determine the floor. Character will determine the ceiling.” Similarly, the greatest college basketball coach, John Wooden, repeated that trust is a key element of leadership and begets trust. No great team is formed, and thus, no great accomplishment is realized unless and until the foundation of trust is established. Perhaps there is no better place to test this than in the elite fighting force of our time, Navy Seal Team 6. The best of the best of the best.

Simon Sinek, a leadership motivator, explains that trust is the foundational bedrock of the best leaders and highest-performing teams. The unimaginable becomes achievable once trust is established between and among any group, regardless of size. Simon explains briefly how the Seals pick which of them to join this most elite group. Please watch: <https://www.youtube.com/watch?v=zP9jpxitfb4&t=3s>

No one will follow a leader they do not trust. So, the question is, what are you doing to create a safe and trusting environment in your parish teams? Simon Sinek goes on to discuss empirical research on Navy SEAL Team 6, where they explored the variables to determine who is invited to join, finally focusing on the two variables of talent and trust. Clearly, everyone wants the upper right quadrant, the highest performer who engenders the most trust. It is also never a surprise that the people you do not want on your team are on the opposite spectrum: lower left-hand quadrant, low performance, and low trust. However, the surprising data showed that trust was so critical that the better choice was to take someone with a little less talent who scored high on trust.



This does not mean you want people who cannot perform or execute well. However, if you must choose between people who can perform excellently vs. people who can be trusted, trust is the more critical factor. You can always train someone to perform better or more competently. But trust is foundational to your Core Values and ethos. So, ask yourself, what are you doing as a parish leader to earn the trust of your followers and teams and to re-establish and re-support any missing trust? As it turns out, building and keeping trust is essential to being a great leader. Period. Full stop. End of discussion.

### Four Promises Of Leaders.

In their phenomenal book Mastering Leadership, Robert Anderson and William Adams conclude that leadership is a conversation. Thus, how you show up to and engage in your conversations determines the level of effectiveness and trust you will experience as a leader. In other words, as a leader, you are not there to tell people what to do. You are there to engage in dialogue with people to help them, and you discover what they can best perform and how.

Thus, according to Anderson and Adams, leaders succeed or fail depending on whether they clarify their roles and keep their promises. One measure of success is your alignment with the parish's WHY, Core Values, and Vision and how you execute against the strategic and tactical goals to achieve the Vision as a team. As a result, what the Anderson and Adams research shows is that four universal promises of leadership require you as a parish leader to:

1. Set the right direction and create meaningful work.
2. Engage all stakeholders and hold them accountable for performance.
3. Ensure the process and systems facilitate focus and execution.
4. Lead effectively by maintaining trust to achieve and sustain the desired results.

The rest of my Roadmap's leadership chapters will explore how to fulfill the above four leadership promises.

## Essential Ethics.

Trust is impossible without ethical behavior. Thus, to build trust, one must ensure their greatest commitment to ethics, professionalism, and what we call righteousness in church-world. One way to do this is to discuss what is acceptable or not. This leads to a Code of Ethics that can be taught and enforced.

Research shows that 95% of major companies within the United States and abroad had some form of a written code of ethics or conduct by whatever name they used (Sharbatoghlie et al., 2013). Indeed, while most global organizations have codes of conduct, ethical codes, or business codes, my research and work with over 1,000 American Orthosphere parishes suggest that most parishes do not have such critical and foundational documents.

Kyle Fedler advocates that to be a “moral human,” one must act appropriately (Fedler, 2006). In this way, ethics is much more than a particular action. It extends to individuals’ thoughts and emotional responses, which must exist in effective 21<sup>st</sup>-century ethical models. Accordingly, parishes must enculturate codes of ethics formally and informally. Parish councils must lead the modeling and enforcing of the desired ethical behavior. External compliance audits identify and discourage misconduct, enhance trust, and integrate ethics into corporate operations. Many ethicists and scholars talk extensively and authoritatively about the need to enculturate corporate codes of ethics formally and informally as they ensure senior management takes the lead in modeling and enforcing the desired behavior (Grigoropoulos, 2019).

So, my questions to you include:

1. Does your parish have a Code of Conduct or Code of Ethics?
2. Is it written, published, and widely shared with everyone (not merely the parish council and other leaders)?
3. Is it constantly updated to be most current?
4. Do all leaders affirm it both verbally and in writing?
5. Is it enforced and in such a way that those watching it can see it is accurate and part of parish culture?

In addition to signing and affirming the parish Code of Conduct, parish leaders should also sign a Conflicts of Interest disclosure. This document identifies any actual or potential conflicts they might have that can affect their independence or work on the parish council. For example, they must disclose if they or any family member has a contract with or receives any form of compensation or benefit, directly or indirectly, from the parish.

While parishes should avoid electing parish council members with family members who are either employed by the parish or also on the parish council, this is sometimes unavoidable in smaller parishes. In such cases, these conflicts must be disclosed in



advance, and the impacted parish council must recuse themselves and abstain from voting or participating in the discussion on any matter in which they might have an actual or perceived conflict of interest. Notice this abstention requirement applies even if they only have an “appearance” of a conflict where someone might question a parish council member’s independence. I will briefly cover the three legal duties all parish council members must uphold in Chapter 6 of my Roadmap, all of which establish and reinforce trust.

## M<sup>2</sup> - The Quickest Route To Losing Talent.

OK, this section is simple and quick. Do you want to know the fastest way to run off a volunteer (or any worker)? The answer is **M<sup>2</sup>**. You have all experienced M<sup>2</sup> and understand its effect on you. **MicroManaging** (a/k/a M<sup>2</sup>) is a recipe for disaster. M<sup>2</sup> is where a leader or manager so closely observes, controls, intervenes, instructs, corrects, changes, or excessively supervises a team member’s work that their autonomy is negatively impacted, and they become frustrated, unmotivated, and less productive. Legendary Apple founder Steve Jobs once famously said: “We don’t hire smart people and tell them what to do. We hire smart people so they can tell us what to do.” No one wants to work for someone constantly M<sup>2</sup>ing them. No one wants to be around or marry someone constantly M<sup>2</sup>ing them. (Although this is not a marriage or relationship book).

Yes, you must encourage everybody to be engaged. And yes, you should hold them accountable for the performance and results they agree to obtain. Of course, as a leader, you also need to ensure they have the right processes, systems, resources, and talent. However, you need to lead effectively by demonstrating that you trust them to do what they say and deliver the results they agreed to provide. Nothing conveys the lack of trust more than M<sup>2</sup>.

I was blessed to close many billions of dollars of outsourcing transactions. In such deals, the customer party outsourcing a function or operation would tell the vendor what results they wanted. They would then leave it up to the vendor to determine how to achieve those results. I represented both entities outsourcing major functions and vendors delivering the outsourcing solutions. I told my vendor clients to ask their customers to “manage the results, not the processes.” In other words, Mr. Customer, hold me, the vendor, accountable for producing the results, benefits, or output I promised, and then let me figure out how best to do it.

This same approach is an invaluable tool in parish work. Sharing your experiences and what you have seen that has worked or not worked is fine. But do not assume you know everything or even the best way to do the things you want done. Indeed, perhaps the reason something you tried did not work was because you or your parish executed it poorly. If someone wants to try again with better execution, learn not to say, “We already tried that once” or “It will never work that way.”

Moreover, do not presume your expertise makes you all-knowing and that someone with different experiences might not come up with an improvement. I remember vividly that at the huge and successful Atlanta Greek Festival, most of our parishioners who were restaurateurs would laugh at the gyro sandwich booth where I volunteered for over 30 years. Virtually the entire team in our Gyro booth were professionals (engineers, doctors, dentists, lawyers, accountants, etc.). We had NO restaurateurs. The very successful restaurant owners would constantly come to try and “help” us by sharing what we were doing wrong and how they did it in their successful businesses. We listened and learned but constantly adapted and created our own methods, much to their chagrin. And yet, each year, the gyro booth sold more product than any other food items run by restaurant professionals.

Indeed, after three years, I figured out a way to combine two steps in the gyro sandwich-making process that the restaurant owners laughed at. That is, until we proved that by combining two steps into one, we produced more products consistently and rapidly. So yes, even a megafirm corporate lawyer (trained in process management) could improve something as “simple” as making a gyro sandwich.

It was clear that none of our professionals would give up their day jobs. And it was also clear that the restauranteurs had forgotten more about running best-in-class restaurants than we would ever know. But we could use our God-given intellects, observational skills, and willingness to experiment, try, fail, and learn to make something better. By letting us go and not M<sup>2</sup> everything we did, the parish Greek Festival became more profitable and successful. (I’ll spare you the story about the apoplectic fits from the restauranteurs when the “professionals” told them we needed to replace the cash registers with online and iPad ordering.)

Within your parish are people with vastly different gifts from those God has provided you. Please empower your people to take responsibility and do what is necessary to be successful. Learn to focus on managing the results, not the processes and how they do their work. The best and brightest are willing to learn but unwilling to be M<sup>2</sup>ed. If you do, the good ones will leave, and you will have to do everything.

One of the most common complaints I hear from parish volunteers regarding why they quit volunteering is because parish leaders are not engaging and empowering them. So, please work with your ministries to ensure alignment with the goals they should accomplish and then cut them loose to deliver those results. The only thing you need to say thereafter is, “How can I help you achieve that,” not “Let me tell you exactly what you need to do and how you need to do it.”

## [Team Breakdowns And Dysfunctions.](#)

I am always amazed by the 4x100 and 4x400 relay teams in the Summer Olympics. In this event, you have some of the fastest people in the world running either a 100- or 400-meter leg of a four-person relay. The blinding speed at which they traverse the oval

track is beautiful as they waste no motion. Everything is intentional and the most efficient it can be.

However, what distinguishes the Olympic champions from the non-medalists is more than the overall speed of their runners. Indeed, the most critical aspect of the race is the three times the baton is handed from one runner to the next. It must be accomplished while the handing-off runner still runs at a blinding speed. The recipient runner starts from a dead stop and must reach record speed in record time. The baton must be perfectly delivered within a narrow zone of the track, or the team will be DQd (disqualified).

In some Olympics, the team with the fastest individual runners does not win. In every such case, it was because of a slight delay in the smooth passing of the baton. Sometimes, the baton is handed off too late (outside the legal transfer zone), and in some cases, the baton is dropped. Your heart breaks for all four runners in the relay in such cases.

So, what does this sports metaphor have to do with parishes? Great leaders ensure extraordinary processes that include efficient and proper succession and handoffs. In virtually every instance, I have seen a breakdown in the performance or effectiveness of a parish, it is a leadership challenge. This is why I repeatedly say every parish problem is a leadership problem. More often than not, the leadership challenge results in a breakdown in a team's performance. They not only failed to operate at maximum efficiency and excellence, but there is also often a failed or ineffective handoff.

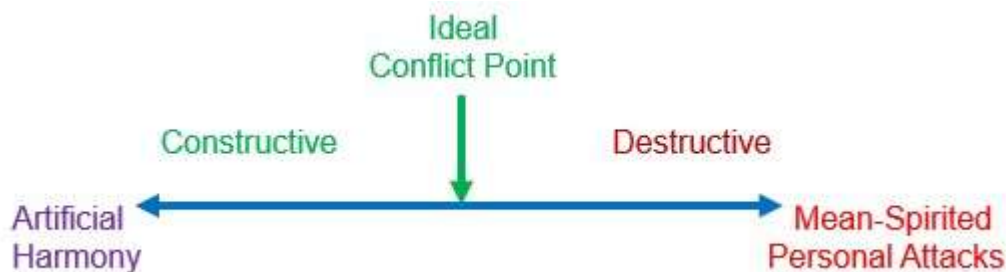
Studying the characteristics of high-performing teams is a passion of mine, and I often see little to no effort placed on team dynamics and performance in parishes. Frequently, parish ministry work reminds me of a little kid's soccer game where all the small children from both teams are clumped together, surrounding the ball and trying to find and kick it while most often missing the ball and kicking each other.

Indeed, the issue of team development is so critical that in designing the Effective Parish Assessment (discussed in Chapter 7 of my Roadmap), it was clear that a vital Pillar to be examined at each parish needed to focus on both Leadership and Teams. Whenever I work with a dysfunctional parish, I find a dysfunctional team (or two or three). Yes, I also always find some aspects of less-than-optimal leadership. However, even the best leader has trouble leading a dysfunctional team to success. While much has been written about team excellence and failures, among my favorite books are Patrick Lencioni's The Five Dysfunctions of a Team and The Advantage. While every team leader should read these books, allow me to offer my high-level summary of Patrick's five key messages on the top five team dysfunctions (Lencioni, 2002, 2012).

**1. Lack Of Trust.** I cannot repeat too many times the critical importance of trust in any team or parish. If the parish council and other leaders or team members do not trust each other, they will not succeed or progress. Trust requires vulnerability and welcoming the opportunity to be open and productively discuss failures, errors, weaknesses, and even fears. The previously discussed Groupthink kills team effectiveness and productivity. To be blunt, research and personal experience have repeatedly shown that ego is the number one team killer.

People do not appreciate those who are arrogant, self-centered, show no compassion or grace for others, and lack empathy or willingness to look at others as equally made in the image and likeness of the same God who created them. Throughout history (and the Bible), we see the horrendous consequences of those egotistical and failed leaders. This is a reason for the effective team rule of “check your ego at the door.” For example, one of my 15 Rules of Engagement in strategic planning retreats that I will address in Chapter 8 of my Roadmap is that everyone is equal and should feel free to speak. Otherwise, the highest position or alpha personality in the room will dominate the team. The consequence is significantly reduced effectiveness, productivity, and the joy of working together.

**2. Fear Of Conflict.** The highest performing teams have a productive, ideological conflict with respectfully passionate and unfiltered debate around important issues. A little discomfort can be helpful to ensure the best decisions are made and the team members are all committed to the final course of conduct. The simple model below underscores this point:



Notice that on the far left is the state where everyone is either silent or tacitly agrees with little to no dialogue or disagreement just to “get along.” In such situations, it is unlikely the decision will be optimal because there was no vetting, analysis, or discussion of ways to improve it or alternatives. This will shock some, but I believe those who constantly remain silent are more divisive than those who always object (although neither extreme is productive). I say this because if God has given you the power of observation, thought, and a voice, and you do not use it, I find it more sinful than someone who tries to use it too much. My favorite expression (and it is another of my 15 Rules of Engagement in strategic planning) is “get in the game or go home.” Parishes do not need complacent compliance.

Of course, the group that gets rightfully pilloried the most constantly offers mean-spirited attacks, as represented on the far-right side of the above diagram. I need not go into any more details about their toxicity to a team, as you have assuredly seen it. The trick is to pull the bully aside with a loving intervention to help them see the error of their ways and get better at offering constructive criticism. While the notion of an ideal conflict point in the above diagram is perhaps illusory, there is a range where the dialogue and debate must be not only permitted but solicited to identify the best possible solution.

I am stressing Patrick Lencioni’s dysfunction number two heavily because I often see this as the breakdown in the parish teams I assess. Either they are complacent and going through the motions, or they are near verbal fistfights. Coach John Wooden of

UCLA offered the best answer to this challenge, “Whatever you do in life, surround yourself with smart people who will argue with you.” Throughout my life, I have been blessed to have some partners in my law firm and my ministry who are wickedly smart and willing to challenge me so we can reach the best possible solution.

This was also the secret to the leaders’ success in my favorite genre of “mafia/mob movies.” The “Consigliere” had a distinguished and coveted role in the mafia. He was the most trusted advisor to the DON (head of the mob family) and perhaps the only one who could always say what he felt and was free to disagree with the boss without getting “whacked” (killed for those faithful souls who do not appreciate this genre). In that role, the disagreement was always respectful but sincere and unapologetic (and often in private). It was the proverbial “iron sharpening iron” (Proverbs 27:17). I have been blessed to play that role for some major church leaders in my ministry. It was not always easy, but it always led to better results and a more effective team.

One such example is often spoken about in my Metropolis. I was blessed to be the consigliere to our Hierarch (who is also a beloved friend). We were in a Metropolis Council meeting with the elected leaders. While we usually carefully planned all significant decisions to be sure we had done our homework and were aligned, he surprised everyone with a spontaneous decision on the fly. I knew that the decision he announced was wrong. It was an action that should not have been taken so that we could remain consistent with our WHY, Core Values, and governing documents. I immediately saw most leaders leaning back in their chairs. They recognized the mistake but were too afraid to say anything. We were clearly a dysfunctional team at that moment. Of course, many of them looked at me, and I imagined I could see the thought bubbles over their heads saying, “You’re his consigliere, so do something.”

When I caught the eye of the leader, I very subtly nodded my head left and right, saying “no,” giving him the private signal to retreat. Instead, he doubled down and called me out publicly, asking why I was nodding no. I politely suggested that the decision might benefit from further research and analysis, which was lawyer doublespeak for “what a stupid idea.” I think my beloved “boss” (Bishop) sensed my less-than-candid response, and “triple dog dared me” (for all my Christmas Story movie fans) to tell him and everyone else why I thought his decision was wrong. It was time to put up or shut up.

As calmly as this passionate advocate could, I explained the inconsistency with our WHY, Core Values, and applicable rules. But the Bishop wanted to argue or call my bluff to see if I would stand down. Since I call all bluffs and was honestly convinced there was a better way to proceed, I continued to explain my position. There was about a 10-minute back and forth between us (with everyone sitting back in their chairs, glad someone else was willing to prosecute the case). The Holy Spirit intervened, and we both realized we were getting nowhere. We agreed to pause the decision and consider it further later.

While that might seem like a mission accomplished, understanding team dysfunction, I knew that was not enough. So, I stood up and went to the “boss” to ask for his forgiveness and hug it out. Interestingly, because we knew each other and worked so well together, and because he had great servant leader instincts, he had stood up at the same time to do the same thing. We met halfway around the large and packed conference

room oval table and smiled, publicly asked for each other's forgiveness, hugged, and even laughed.

For the first time in 10 minutes, everyone else in the room took a breath. This became a moment of personal growth for the Bishop and me. More importantly, it was a teachable moment of growth for the entire leadership team. It was clear that polite dissent was not only permitted but also valued and would lead to better team dynamics and decision-making. I have known some leaders with dysfunctional teams who intentionally stage one of these moments of productive disagreement to make the point that everyone should speak up.

As an aside, after we examined the decision, the boss realized what I was saying, and we course-corrected to a much better and more consistent solution that everyone enthusiastically supported. Respectful disagreement is essential, just as we must always ask for the Holy Spirit's intervention and guidance.

I can also attest to similar interactions that did not end as well. There is also at least one exception to this rule. For example, when your wife tells you that what you want to do is definitely NOT permissible, I have learned that is not the time to make Custer's last stand. Just retreat, survive, and live to "fight" for your opinion another day. But as I said before, my Roadmap is not about marital harmony.

There will be a few leaders who do not appreciate you are trying to help them. You cannot worry about their displeasure, but you should practice love and respect in your disagreement. In other words, disagree agreeably. In the fullness of time, they will either come around or not. And perhaps you will realize either they were right or there is another better alternative. Regardless, you must always act to the best of your ability. And when you are the leader, you must always welcome respectful dissent and new ideas. If you do, you will have a higher performing parish than if you demand everyone conform to your wishes.

**3. Lack Of Commitment.** Team members who do not commit to the decision or goal can become metastatic cancer cells. I do not mean they are bad people. Merely, they will kill team progress and effectiveness. It is a strong team that can embrace disagreement and temporary indecision while the discussion and debate seek the best ideas, alternatives, and perspectives to achieve clarity and buy-in. This is a strength of a consensus process, which allows for respectful debate until everyone has been heard and the compromise decision is one everyone can live with.

However, as Patrick Lencioni discusses, it is highly detrimental when the team makes a decision, and members who disagree with the answer go to work to defeat it or ignore the decision. Everyone has seen examples of this passive/aggressive behavior in parishes and other organizations. Once part of the leadership team ignores the supposed team decision or complains about it to others, extraordinary damage can be done to the parish. Thus, it is better to "table" or "park" a decision for later discussion and complete commitment than to force a decision. (Yes, "parking" discussions for later resolution, when consensus cannot be reached, is another of my 15 Rules of Engagement discussed in Chapter 8 of my Roadmap.)

When teaching this principle, I share the story of a parish council that split on a decision, with seven in favor and five against. They did not practice consensus, and the “majority” forced the decision on the minority. So did those in the minority go home and tell their spouses and friends, “Oh, I was so wrong. Fortunately, the ever-wise seven showed me the error of my ways.” Of course, they didn’t. Instead, they often tell everyone who will listen how stupid the majority’s decision was. (Sometimes character assassinations follow, which I horrifically find inappropriate but all too common in church-world).

However, after a productive discussion and exploring alternatives, a high-performing team can usually reach a consensus and then all commit to moving forward with that process. This is the Intel Corporation process of “disagree then commit” (Lencioni, 2002). In the meeting, respectful disagreement was welcomed until the consensus decision was made. At this point, all had to commit. The Intel team evidenced this commitment by “cascading communications” by every team member to all their subordinates and then the sub-subordinates, with everyone hearing about the appropriateness of the decision.

**4. Avoiding Accountability.** Patrick Lencioni appropriately identifies how often teams refuse to be accountable for their decisions or processes. If the team members are unwilling to respectfully remind one another when they fail to achieve the agreed-upon team performance standard, then accountability is masked, and group performance is impeded. This is why I always advocate that every parish strategic plan Strategic Goal, and Action Plan have a very visible scoreboard to all parishioners showing the progress made, or lack thereof.

The old expression “everyone plays differently when they keep score” is well understood by anyone who grew up on a playground. If the group were just shooting baskets, the level of competitiveness would typically be nonexistent. But the first time someone says, “OK, let’s pick teams and keep score,” almost everyone elevates their game and gets serious.

If the work of your parish is salvific and life-changing, you must be accountable for it, too. If you accept my default simplistic WHY Statement, your parish brings people closer to Christ and each other, then who wouldn’t want to excel at this critical work? If you’re going to succeed, it requires understanding the objective, why you have established it, and how you will measure its achievement. Without that level of diligence, you are just shooting around on the playground of life and not seriously bringing people closer to Christ and each other. Please remember that you WILL have your II Corinthians 5:10 Moment when you stand before the awesome judgment seat of Christ to account. So why not start being accountable and keeping score now so that when your earthly clock runs out, you will be more confident of a “winning score” on the eternal scoreboard?

**5. Inattention To Results.** While effort is critical, results make the difference at the end of the day. Much unproductive work does not get you to the desired endpoint. If you are on a journey and walking endlessly in circles, you will have exerted a lot of effort but gotten nowhere. This is why it is so critical to put first things first and last things last. Left to their own devices, the last things will often push their way up to the top of your list either

because they are easy (and you want to do something) or because a squeaky wheel advocates for them.

The most effective leaders always know their goals and metrics and work diligently to achieve them. However, in church-world, we often see the opposite. I cannot tell you the number of times I have heard Bishops, clergy, or parish leaders say something like, "I'm just so glad someone showed up to do this work," with the implicit statement that they will accept anything that person does. While we must be thankful if someone gives their time and talents, that does not mean we should tolerate insufficient effort or ineffective results on a team.

If I were added to the U.S. Olympic Team 4x100 relay team, I would undoubtedly enthusiastically give my best but would inevitably cause my team to lose. The current world record time is still Jamaica's (with Usain Bolt) at 36.83 seconds. Suffice it to say, if I were to run a leg in that race, my time would likely be measured in minutes (many minutes after the inevitable stoppage to catch my breath). We would lose so badly that I would still be laboring around the track while the medal ceremony was celebrated.

In that circumstance, my inattentiveness towards the result would let the entire team down (not to mention our country). So, by all means, celebrate anytime someone gives you their best. However, do not penalize a team by poorly pairing the members with massively different skills and abilities. Find something else for the underperformers to do at which they can excel.

In my Stewardship Calling strategic planning process, I always have the teams develop scoreboards to unambiguously identify how the team is doing in achieving the Strategic Goal and how much time is left. I will confess that the teams often abandon that accountability, partly explaining why they fail to meet their timetable or endpoint completely. But if you are not keeping your score somehow as you proceed down a task or road, you will not know how far behind (or ahead) you are on the stated end goal. In writing my Roadmap, I established obsessive time goals for each Chapter and segment (in keeping with my OCD personality). However, it always informed me how I was doing, when I could take an unscheduled break, or when I needed to pick up the pace.

If bringing people closer to Christ and each other or your parish's alternative WHY Statement is essential, you show it by holding yourself accountable. And accountability extends not just to the short term but to the long term. As much as we avoid setting short-term accountability goals, we abhor longer-term ones. Indeed, sometimes we can more easily achieve short-term goals but fail over the long term if we do not have those hard-to-achieve goals in mind when we plan what we will do.

Among my many failings were the 15 years I coached church basketball for my parish's youth. Everyone thought I was wildly successful because we had more points on the scoreboard at the end of almost every game than our rivals. Yes, we went six years in a row as undefeated Gold Division Champions. And yes, because my rules included that if the child (and their parents) were not in church on Sunday, the child could not play on Saturday; they all showed up in church.



But it wasn't until decades later, when I measured my success (or lack thereof) using a different scoreboard, that I realized my longitudinal failure as a church league basketball coach. Most of the kids I coached are not actively engaged in their parish today (as far as I have been able to assess). I may not know entirely how each one is progressing on their journey to theosis; however, I have seen enough of them to know that I failed to use this lowercase "m" ministry of church basketball as a tool to instill a love of their faith. Yes, I taught them Christian principles in conducting ourselves on and off the court. However, something was lacking in what I might have been able to do to keep more of them closer to their faith.

So, what are your ministries' and parish's long-term and short-term goals? How are you measuring their attainment? And what are you doing to periodically assess progress and make course corrections along the way rather than waiting until the end to discover your failure? The element of inattentiveness to results is undoubtedly one of the primary dysfunctions of underperforming teams. The lack of accountability to the highest standards and metrics of performance excellence is an epidemic in parishes. It is no wonder your parish is experiencing the challenges it faces. Anything less than the best for God's house and people should never be acceptable. Our parishes, dioceses, and national churches must shed the imprisoning cloak of no or low expectations and mediocrity.

### High Performing Parish Teams: wego = wedo = wedid = wegood.

Dear brother or sister, please do not underestimate the importance of building high performing teams in your parish. I would encourage you to spend your first parish council meeting or ministry gathering, preferably even offsite, learning about each other and creating all the elements of what it means to be a successful team. Secondly, create clarity around what you are trying to accomplish and pursue a lockstep focus on a few specific critical strategic goals.

Of course, your parish has got to do many different things in its ministries. However, as a leader of your parish, if you do not periodically and systematically judge yourselves on what you accomplished and where you failed, you will not be leading effectively. Do you know WHY your parish exists and why anyone should join you (your WHY Statement)? Do you know the Core Values that drive the decisions of your parish? Do you know what you do (your Mission Statement)? Do you know how you will succeed and where you will be in three to five years (your Vision Statement)? How about knowing what is essential right now and who must do each task?

You must communicate all the above elements over and repeatedly. The researchers say it takes repetition at least seven times before something moves from short-term to longer-term memory. You will see me deploying this principle throughout my Roadmap when I repeat themes, conclusions, or quotes. So, please communicate effectively, constantly, and clearly to your parishioners so they understand how effectively your teams are performing.

In a phenomenal book called Leaders Eat Last, leadership guru Simon Sinek once said, “Leadership is not about being in charge. It is about taking care of the people in your charge” (Sinek, 2014). And that’s really what I want you to start to focus on as leaders of a parish or team. You must have trusting teams that use creative conflict, commitment, accountability, and attention to results to excel. This includes being vulnerable and openly discussing and admitting your failures, errors, weaknesses, and even fears.

We need to learn to subvert our “personal egos” to “team **“wegos.”** (Yes, I made that term up to signify putting the team first.) However, wegos will build team trust and reduce productive conflict avoidance to achieve more robust team decisions and results. **To conclude, “wego” leads to “wedo” which results in “wedid” and makes you feel “wegood.”**

### Top 4 Qualities People Want In Leaders.

Everyone likes simple numbered lists when trying to understand complex ideas. Thus, I will briefly share the results of excellent leadership research studies performed over decades by Drs. Kouzes and Posner. They gave thousands of people the following list of qualities of leaders and asked them to vote for the top seven characteristics they would like to see in their leaders. Take a few moments to look at the list and identify the top seven qualities you believe leaders should possess:

Ambitious	Honest
Broad minded	Imaginative
Caring	Independent
Competent	Inspiring
Cooperative	Intelligent
Courageous	Loyal
Dependable	Mature
Determined	Self-Controlled
Fair Minded	Straight forward
Forward-looking	Supportive

Interestingly, after many thousands of responses, four characteristics came to the top (Kouzes & Posner, 2017). Please pay attention and assess yourself with respect to these four most critical aspects of leadership.

**Honest (85%)**

**Forward-looking (70%)**

**Inspiring (69%)**

**Competent (64%)**

The number one quality leaders are looking for in leaders is honesty. If you're not honest or trustworthy, you can never lead effectively. Unless you are trusted, people will not follow you when they have a choice.

Second on the list is being forward-looking. People want to follow leaders with a vision of where they are going. This is why I constantly remind leaders that if they are not looking forward to the future, they are not viewed as fulfilling their leadership role. The primary job of leaders has changed as the pace of life has increased. People are less willing to follow someone who wants to stay in the same place and not respond to changing circumstances, needs, technologies, and opportunities. A manager can effectively keep people in the same place doing the same thing for so long. However, a leader must lead people on a journey with a roadmap to a new and better future destination.

Close behind, forward-looking is inspirational. Followers want to be genuinely inspired by their leaders. That does not mean every leader must be a charismatic extrovert and out there beating their chest and shouting from the top of soap boxes. Mother Teresa, in her quiet humility, inspired people to be better, just as the more vocal and visible Billy Graham, Pat Robertson, Dr. Martin Luther King Jr., Nelson Mandela, and Greek Orthodox Archbishop Iakovos, etc. have done. Some people are inspired by their dedication to practice and their craft. Each person has unique gifts and ways to communicate most effectively. Being the most genuine version of yourself is essential. However, if you wish to lead, you must inspire others to follow you.

Finally, and in a close fourth place, we want our leaders to be competent. We want people who do something well and are confident in what they do. However, that does not mean that the leader must be qualified in every activity and function of the parish. If they lack a specific ability, then competency is manifested by recruiting someone with greater talent in the areas in which they are weak so that all tasks are performed with equal excellence.

I summarize these top four characteristics of leaders by stating simply that followers want their leaders to be **Trustworthy** (Honest, Inspiring, and Competent) and **Forward-looking**. You must understand and act on this list of two (or four) most desirable leadership characteristics to grow as a leader. If you are weak in one of these attributes, then take classes or study under mentors, but do something to improve your competency in each of these four elements each month and year, and your leadership influence and effectiveness will rapidly accelerate.

For those OCD folks who want to know how the rest of the leadership attributes scored in Kouzes's and Posner's research, here are the remaining characteristics in order of the voting with the percentage of respondents who identified it as a top seven attribute:

Intelligent = 42%  
Broad minded = 40%  
Dependable = 37%  
Supportive = 36%  
Fair Minded = 35%  
Straight forward = 31%  
Determined = 28%  
Cooperative = 26%  
Ambitious = 26%  
Courageous = 21%  
Caring = 20%  
Loyal = 18%  
Imaginative = 18%  
Mature = 16%  
Self-Controlled = 11%  
Independent = 6%  
(Kouzes & Posner, 2017).

## Succession Planning And Succession Management.

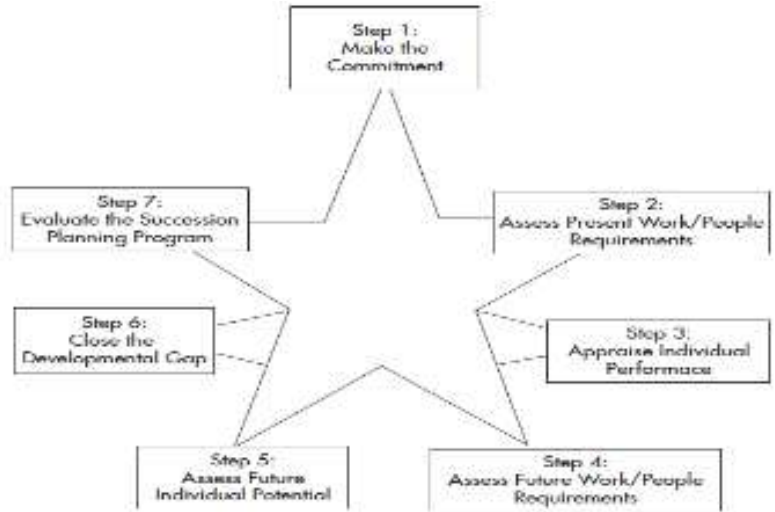
Succession planning focuses on identifying, recruiting, and training successors to current key individuals and leaders (Rothwell, 2016). In addition, best practices also include the element of "succession management," which focuses on ensuring the full development of the right talent when needed (Rothwell, 2016, p. 6). For purposes of my Roadmap, I will use the broader term **Succession Management** ("SM") because it entails ensuring the right person is appropriately trained and ready when needed. While leaders and executives of organizations underscore the critical importance of SM, surveys have identified that less than 50% of organizations have succession plans, thus leaving them vulnerable (Meinert, 2018). And parishes are almost always devoid of SM processes.

At its core, SM focuses on a parish managing its talent pipeline and key team members (Barnett & Davis, 2008, p. 721). This includes identifying:

1. the roles and responsibilities of each key team member,
2. the skills and training needed,
3. the metrics and processes to evaluate performance and remediate challenges,
4. additional training or support needed,
5. their availability timelines,

6. the readiness of their possible replacements, and
7. all training and support needed to ensure the highest level of talent performance using Succession Management (“SM”) best practices (Barnett & Davis, 2008; Rothwell, 2016).

Indeed, William Rothwell, in his excellent book Effective Succession Planning: Ensuring Leadership Continuity and Building Talent From Within, identified numerous unique steps needed in an effective SM process. A logical sequence and progression of individually focused initiatives are identified in a “seven-star model” pictured to the right (Rothwell, 2008, p. 74).



One way to review performance is by assessing all talent using a typical nine-box model comparing an employee’s potential ability against their current performance. The two matrices below identify the different categories focusing on a similar nine-point assessment with slightly different labels.

Potential	LOW PERFORMER HIGH POTENTIAL	MODERATE PERFORMER HIGH POTENTIAL	HIGH PERFORMER HIGH POTENTIAL
	LOW PERFORMER MODERATE POTENTIAL	MODERATE PERFORMER MODERATE POTENTIAL	HIGH PERFORMER MODERATE POTENTIAL
	LOW PERFORMER LOW POTENTIAL	MODERATE PERFORMER LOW POTENTIAL	HIGH PERFORMER LOW POTENTIAL
Performance			

(Gupta, 2022)

Potential Assessment	High	"Rough Diamond" Low Performer/ High Potential	"Future Star" Moderate Performer/ High Potential	"Consistent Star" High Performer/ High Potential
	Moderate	"Inconsistent Player" Low Performer/ Moderate Potential	"Key Player" Moderate Performer/ Moderate Potential	"Current Star" High Performer/ Moderate Potential
	Low	"Talent Risk" Low Performer/ Low Potential	"Solid Professional" Moderate Performer/ Low Potential	"High Professional" High Performer/ Low Potential
		Low	Moderate	High
		Performance Assessment		

(Caruso, 2012)

## Next Steps For Parish Team Succession Assessment And Needs

Here is one step-by-step process for a parish to implement SM:

1. Create a detailed duties description for every significant role in the parish that includes any required skills, education, experience, etc.
2. Outline the performance standards and evaluation criteria for that role.
3. Identify the profile of characteristics and Core Values the ideal candidate would possess to align with WHY and Core Values of the parish or applicable ministry.
4. List any future skill sets necessary to deal with anticipated changes the parish or ministry will likely experience.
5. Research the desired education and training candidates should receive to enhance deficient skills and develop best-in-class talents.
6. Establish a disciplined and rigorous self-evaluation process for each leader.
7. Implement a companion 360-degree evaluation process for all leaders, which includes evaluations of the leader by their supervisor(s), critical reports, peers, and any other identified stakeholders.
8. Constantly reassess the position by examining evaluation criteria used by the other parishes or Christian churches both inside and outside your specific Denomination.
9. Create a final outline assessment of position readiness for each leader candidate.

While the above is not an exhaustive list, it might initially seem overwhelming for parishes with no SM processes. In keeping with the title and theme of my Roadmap, I urge parishes not to let the details of task excellence keep you from starting down the path. At a minimum, look at every leadership position and undertake the first five steps from the above list. Later, you can move to the evaluation and assessment steps six and seven. Eventually, you can assign someone to do the best practices assurance assessments in steps eight and nine.

However, the key is to begin. Every leader of any activity or ministry of your parish should be charged with helping to achieve your parish's WHY and work toward the Vision. At a minimum, given my simple model WHY of bringing people closer to Christ and each other, every leader plays a pivotal role in the parish's future and the journey to theosis your parishioners are pursuing. Given the sacredness of the role and responsibilities, we should ensure they are as well prepared as possible for their tasks.

The Holy Scripture demonstrates the righteous conduct of Moses both as a judge and as one who follows the advice of his father-in-law, Jethro (Sherley, 2019). Moses builds a leadership succession plan by sharing control with others. Preparing successor judges/leaders who are well-trained and adequately guided in critical ethical and righteous Core Values is essential to creating the desired culture (Exodus 18:13-24).

Parishes can use many different tools to ensure the best SM and readiness of all their talent and leaders. While I do not sell anything, I have discovered that Lifeway Christian Resources is a leading provider of resources parishes can use. Two such robust parish tools are:

1. Spiritual Gifts Survey, a self-assessment survey to identify God-given gifts

and talents, available here: (<https://s7d9.scene7.com/is/content/LifeWayChristianResources/Spiritual%5FGifts%5FAssessmentpdf.pdf>), and

2. Spiritual Gifts List identifies corresponding Holy Scripture references for specific skills and abilities (<https://s7d9.scene7.com/is/content/LifeWayChristianResources/Spiritual-Gifts-List-pdf.pdf>).

Regardless of what tools a parish uses, intentionally focusing on SM and developing new leaders is critical for the long-term success of any parish.

## Coaching.

Coaching is as old as the sixth day of the creation story. From the moment God created man and woman, He began coaching humanity to bring out the best in them. Just as humans have evolved, so too has the discipline of coaching. And yet, the lack of coaching is one of the most significant weaknesses in parish life. The International Coaching Federation defines coaching as “partnering with clients in a thought-provoking and creative process that inspires them to maximize their personal and professional potential.”

Another way to view coaching is “unlocking people’s potential to maximize their performance” (Whitmore, 1992, p. 10). Again, the emphasis is on the coachee’s desire for self-development and self-learning vs. being taught. It focuses on the internal desire for betterment for various complex external reasons. Thus, a coach helps you bring out the best in yourself.

Others define coaching as a process (a) for coaches to provide guidance and support rather than instructions to help people learn to adapt or (b) to unlock a person’s potential and thus enhance their performance. A significant difference between coaching and training/mentoring/discipling is the exercise of God’s great gift of free will that allows the coachee an unfettered right to set their personal plan/agenda of what they want to achieve/discover with the assistance of a coach. Since I believe understanding your God-given Why is most critical, a Christian coach can lovingly help bring out the best in someone based on how they choose to excel on their journey to live their calling.

However, the key differentiator is the coachee is in control and sets the direction, agenda, and parameters of the relationship rather than the coach. In addition, the coachee must be ready and willing to engage in this potentially transformational process. This definition stands in stark contrast to the original dictionary definition that focused on the more educationally proactive tutoring, instructing, or training, which has now evolved to include those providing career advice (Oxford University Press, 2024).

A specific subset of “Executive Coaching” evolved as a process of collaboration between a coach and an executive coachee to achieve coachee-established self-development goals instead of merely performance evaluation (Bartlett et al., 2014). To be successful, the coachee must want to change and be willing to engage in self-examination and correction after trust is established with the coach (Bartlett et al., 2014). Put another way, Stoltzfus (2005) explains coaching as a disciplined process by which the coach

“believes in people (coachee) to empower them to change” (p. 7).

Tomei and Mele (2023) simply defined coaching as a way to help people manage and enhance their internal capabilities and resources, and they traced its popularity to those who sought wisdom at Cambridge University or Oxford University. Linguistically, distinctions are drawn between coaches and (a) tutors/educators who impart their knowledge, (b) clergy who can help change behavior, or (c) mentors who share their experience with neophytes (Tomei & Mele, 2023).

Finally, in differentiating coaching from other forms of personal improvement, Evers et al. (2006) suggested: (a) training is a more rigid process by which the trainee must adapt themselves to the trainer’s processes and information, and (b) mentoring is more about imparting expertise from one with greater experience to a novice (p. 174). In contrast, the coach may not be an expert in the coachee’s environment or domain but has the trust, respect, patience, and ability to avoid dominating the relationship to be an effective supporter of personal development and evolution (Evers et al., 2006, p. 174).

To summarize, Wiater (2023) advanced a three-legged stool for leadership balanced on a “golden trifecta” of legs consisting of training, mentoring, and coaching, which each provide separate strengths and benefits (p. 107). While articulated using different definitions, examples, and language, the above discussion demonstrates the common Core Values and foundational precepts of controlled, personalized self-improvement that allow coaching to be the powerful tool it has become. However, exploring a concept’s origins helps to understand it.

At times, our parents coached us as they taught, mentored, and supported us. Along our leadership journey, we hopefully added coaches to help us achieve our goals in our faith expedition, school, professions, and other areas. Coaches come in and out of our lives to help us achieve our agenda of becoming better at life.

Only one person in history needed no coaching, and we crucified Him. The rest of humanity can benefit from coaches, as did the 12 Apostles, who required intense coaching and training for years to be able to coach the early Christians. Now, almost 2,000 years later, the Christian church they coached into existence remains a global force for good. Just as Moses was coached by his father-in-law on achieving his goal of being a more effective judge (Exodus 18), Christ coached the Apostles to answer their question of who He was (Mark 8:27-29).

## Clergy And Lay Leaders Coaching Needs And Benefits.

The Lord’s coaching of the earliest clergy remains equally critical today. All clergy and most parish leaders could benefit from coaching, and yet I never find that as a priority in parishes. Regardless of your leadership position, work, status, location, education, or experiences, if you want to achieve your goals, including the II Corinthian 5:10 Moment “Big Ask,” then coaching can be invaluable.

As of this writing, one estimate identified approximately 34,200 coaches in North America (up 47% from 2019) who produce a staggering 99% satisfaction score among



those they help, with an estimated ROI (Return On Investment) of 14.46% (Zhou, 2025). In an experiment to determine coaching's impact, Olivero et al. (1997) provided 31 managers with specific training followed by one-on-one coaching, which resulted in a 22.4% productivity increase when they received training but an 88% increase after they received coaching. Alternatively, Fillery-Travis and Lane (2020) cited other studies finding a 5.7 times ROI from coaching in the form of tangible outputs capable of quantification (p. 29).

As potentially relevant as such items are in the business world, assessing ROI in the Christian church environment is not as easily quantifiable and may require more qualitative data, which is not as abundant. Of course, one can measure the benefit of church coaching in specific areas and tasks. If the coaching of evangelization ministry workers leads them to develop more seekers or the coaching of stewardship ministry workers helps them to produce more volunteers and donations, correlative metrics can be calculated. Indeed, the author's Stewardship Calling coaching ministry has produced countless quantifiable examples of the success of Servant Leadership and Stewardship & Generosity coaching.

### Special Needs For Clergy Coaching.

Christians seeking to fulfill their II Corinthians 5:10 "Big Ask" often seek spiritual and life coaching from the clergy God called. So, are those who lead people closer to Christ properly cared for? Duke Divinity School's Clergy Health Initiative identified that U.S. clergy are among the most overworked and stressed-out professionals, which creates many mental health and financial challenges. Indeed, in a survey by The Hartford Institute, almost half of 1,700 clergy confirmed they were considering leaving that calling. According to Columbia Theological Seminary data, approximately 25% of U.S. clergy work 60 hours or more while feeling they are not doing enough for their flock.

In the Lilly Endowment-funded Greek Orthodox Clergy Initiative research, over 50% of clergy reported working over 60 hours per week, and because of no financial coaching, 47% of clergy reported they could not cover a \$5,000 emergency expenditure, 37% have significant medical debt, 28% reported no personal savings, and 23% have seminary education debt of \$20,000 or more they found challenging to repay. Another study found clergy to be more obese and in poorer health than their general population counterparts. The bottom line is that our clergy leaders need coaches and help in many areas.

To travel anyplace new requires the bravery to explore the previously unimagined, along with the coaching and courage to fail until mastery is achieved repeatedly. Only someone free of whatever fear limits them will undertake this heroic journey into the unknown destiny of their calling. Yet many do not appreciate the freedom available to pursue what they are called to do. So, how do we break through the impasse of fear, shortsightedness, or lack of confidence?

Everyone knows people who encourage them to achieve their goals. Clergy provide critical salvific coaching and leadership when needed most, whether in times of

loss, ill health, lack of faith, or other challenges. D.R. Silva, the author of Hyper-Grace, concluded, **“My job as a Christian is not to get people to heaven when they die, it’s to get heaven to people while they’re alive”** (Silva, 2014). Thus, Christian lay leaders must ensure clergy are properly coached to help them coach others on the journey to theosis and salvation as we look forward to our “good account before the awesome judgment seat of Christ.”

Church leaders have come to understand how transformational coaching can become a preeminent vehicle to re-invigorate the leaders of missional programs and ministries by listening, asking questions, and encouraging Christ-centered fulfillment of what the coachee determined was God’s calling (Ogne & Roehl, 2008).

### Seven Habits Of Coaching.

Seven habits of great coaching summarized by Ogne and Roehl (2008) included:

1. listening first,
2. caring for people,
3. celebrating progress and the journey,
4. strategizing how to achieve a worthy vision,
5. helping guide people to achieve and succeed in the way they wished to do so,
6. creating additional coaches (coaching disciples), and
7. always challenging how we can better fulfill God’s calling for us, our people, and our churches (Kraft, n.d.).

As to this last point, Ogne and Roehl (2008) made clear the importance of a coach creating and leading willing and high-performing teams by aggressively challenging them to a significant and shared vision. As a powerful example of how coaching can be transformational in other than operational settings, Ray (2020) created a coaching and support program for women of faith who had suffered domestic violence. Invoking all the elements of best-in-class coaching infused with the Christian principles and invocation of the Holy Spirit, women of faith supported by coaches with the right tools positively addressed the domestic violence challenges they faced (Ray, 2020, p. 4).

### Uniqueness Of Christian Coaching.

Specifically focusing on the target audience of coaching church and ministry leaders, Bell (2022) identified four major characteristics to improve the coach/coachee relationship and effectiveness, namely:

1. the coach is the coachee’s servant in keeping with Greenleaf’s (1970, 1977) servant leadership scholarship,

2. the foundational necessity of earned trust between coach and coachee,
3. complete clarity and effectiveness of communications between coach and coachee, including honoring the ICF Code of Ethics (International Coaching Federation, 2021),
4. always asking the right open-ended questions (and follow-up questions) just as the Lord taught and modeled (pp. 94-99).

A critical nuance in Christian coaching is that it is not merely focused on a coachee's desires for personal growth but a prayerful development of what God has called the coachee to become (Adeleye-Olusae, 2011, p. 100). Indeed, a Christian coach must perform all the functions of coaches previously discussed with the often-added responsibility of grounding their supportive journey of coachee development in pursuit of a revelation of the endless potential for growth and service God has invested in each of His creations (Adeleye-Olusae, 2011).

In a specific application, Boakes (2020) defined coaching as "...unlocking a person's potential to maximize their own performance" (p. 321) and then explained how coaching represented a particular methodology and style to enhance the ministry of an Archdeacon. Having established a critical part of the value proposition for Christian coaching, acknowledging the true roots of coaching requires exploration in the following section of its historical Biblical foundation.

### [The Altar Call To Action For Christian Church Leaders.](#)

Humans most fear the unknown, change, death, and public speaking. However, if you value the salvation of your and your family's souls and want to know Jesus and His teachings better, we must invest in the clergy who will coach us through our journey to theosis/oneness with Christ and God. To ensure their readiness at the highest levels, clergy need a spiritual father to whom they confess their sins and coaches who help them improve themselves and their ministries.

If we invest in coaching to help our clergy (and critical lay leaders) achieve their goals of leading us closer to Christ and each other, we can receive a great (eternal) ROI, help answer our Why and avoid "if only" regrets as we pass faithfully to the Kingdom Eternal. What a way to go!

A coaching audit helps leaders determine a parish's readiness to implement coaching. While every coaching element does not need to be present in your parish, the presence of one or more elements that can show coaching efficacy is sufficient to establish coaching readiness (Hunt & Weintraub, 2007, p. 49). The parish must have established a trusting culture since the success of coaching is likely as dependent on trust as any other variable (Hunt & Weintraub, 2007, p. 57). From a cultural perspective, coaching is also more successful when the team members are valued rather than merely seen as a cog in the wheel. Thus, coaching for clergy and key parish leaders can be an effective improvement force multiplier to bring people closer to Christ and each other.

## CHAPTER 5. Servant Leadership.

At the beginning of my Roadmap, I asked you the critical question of if you believe Jesus Christ is who He says He is. If you answered in the affirmative and studied his Bible teachings, then you have already read the greatest leadership book ever. Period. There has never been a greater leader in human history! Even non-believers must concede this fact because no other leader started a movement that has already lasted almost 2,000 years (and remains the dominant force in humanity). Thus, one must first study Christ's story to study leadership truly (Roberts, 2023a).

### The Search For The Leadership Holy Grail (LHG) And Servant Leadership (SL).

Humans are constantly seeking the **Leadership Holy Grail** (“LHG”) of the ultimate leadership processes, activities, methods, or approaches that are the most effective. Humankind is also in pursuit of the secret ingredient of best practices to provide optimum leadership results. The Gospel of Matthew shares a tremendous inspirational, motivational talk toward that end. On a hill overlooking the Sea of Galilee just behind Capernaum is a place now called the Mount of Beatitudes.

There, Christ aimed a motivational missile at everyone by explaining that they were to be the light, but not just any light. Those who follow Jesus are to be the light for the “whole world” (Matthew 5:14). However, since we discovered that light points people in a direction, it is what Christ said next that you must not miss. The light all believers are to become by their good works and deeds is not merely for their benefit but so that observers in darkness might see the glorious light of their Father in Heaven (Matthew 5:16).

Thus, the motivation derived from being the light points toward something bigger and better. This inspires people to be in service of something greater than oneself. The Lord had a more personalized opportunity to teach this message to his team of Apostles when two of them (St. John and St. James) sought recognition and honor greater than the others (Matthew 20:22). In that critical “teachable moment” when the other Apostles expressed displeasure at the recognition they might not receive, the Lord provided the foundation for what Dr. Robert Greenleaf would later make a career discussing, **Servant Leadership** by **Servant Leaders** (Greenleaf, 1970, 1977). (For simplicity, I will use the abbreviation “SL” to mean both **Servant Leadership** and **Servant Leader** as the context requires.) The Lord shone the light of wisdom on the pursuit of vainglory that drives people toward darkness rather than being the light of the whole world. “*Whoever desires to become great among you, let him be your servant*” (Matthew 20:26).

### St John Chrysostom's Model For Servant Leaders (SL).

An essential SL element is helping you discern your calling (WHY) and how you can live it by serving others through using your gifts. A true SL recognized and granted sainthood by virtually all Christian religions was St. John Chrysostom, who lived in the 4th

century BC. He offered a clear definition of an SL, which I cite many times in my Roadmap because of its applicability to many contexts.

The most basic task of the Church leader is to discern the spiritual gifts of all those under his authority and to encourage those gifts to be used to the full for the benefit of all. Only a person who can discern the gifts of others and humbly rejoice at the flowering of those gifts is fit to lead the Church (Chrysostom, 1964, p. 44; Kostakis, 2018).

Note St. John's poignant criticism of any SL not exemplifying these characteristics by suggesting they lack the fitness to serve as a leader. Recent SL scholars have echoed the importance of asking followers what they are trying to do, listening carefully to their responses, and providing beneficial guidance (Greenleaf, 1977).

Being a servant requires great strength since it runs counter to human nature, which seeks personal recognition, satisfaction, and benefit. Yet, as far back as possibly 450 BC, people were taught to: "...*be strong and do not let your hands be weak, for there is a reward for your work*" (II Chronicles 15:7; Maximos et al., 2008, p. 498). Thus, motivation must include the standard elements of human resources incentives with a healthier dose of emphasis on the demanding work of bringing the light among darkness in pursuit of recognition for something much bigger than oneself. Does this work in modern life?

Leading through serving others to achieve a vision is the essence of SL. At its core, SL maintains that: "The servant-leader is servant first...It begins with the natural feeling that one wants to serve, to serve first" (Greenleaf, 1977, p. 27). This leadership model is the multi-dimensional and holistic engagement of people relationally, ethically, emotionally, and spiritually to achieve their WHY and live their purpose fully (Eva et al., 2019).

## [An Exceedingly Brief History Of The Journey To Servant Leadership \(SL\).](#)

A historical review of Western civilization identified the roots and origins of SL over 2500 years ago in ancient Greece/Rome (Valeri, 2007). The greatest SL example is Jesus Christ, who fully served everyone He led (including giving His life for them) and created an organization that remains the most dominant global force, even if somewhat fractured into various divisions (Roberts, 2023a). Indeed, the Lord's exact words were, "...*the Son of Man (Christ) did not come to be served, but to serve, and to give His life as a ransom for many*" (Matthew 20:28).

More recently, scholars have identified different articulations of the elements of effective SL: (1) listening, empathizing, healing and humility, awareness of environment/impacts, persuasion, conceptualization of vision, foresight, stewardship, commitment to people's growth, and building communities (Greenleaf, 1970, 1977; Spears, 2010); (2) love, humility, altruism, vision, trust, empowerment, and service (Patterson, 2003). While the words differ, the essence between these two and other

articulations is strikingly similar. Moreover, these SL elements are not isolated and are often interdependent and interrelated, with one element supporting and cross-fertilizing others (Patterson, 2003).

For decades (or perhaps millennia), businesspeople labored under the impression that the only way to lead was a hierarchical model in pursuit of another Holy Grail of maximizing shareholder wealth. The **Hierarchical Leadership** (“**HL**”) assumption was that leaders were born, and thus, upon discovering one, we were duty-bound to follow them, even if into an abyss. This model has mostly been repudiated (except in communist or socialist totalitarian countries, and we can see what that does for those followers). Thus, it merits no further discussion here.

In the mid-1970s, Dansereau, Graen, Haga, and others presented a crack in the Hierarchical model with the **Leader-Member Exchange** theory (“**LMX**”) (Dancera et al., 1975). LMX focuses on the dyadic relationship between leader and follower. In such dyads, some followers were “in,” and others were “out” with the leader at any given time. The same “in/out” principle applies to groups of followers depending on their relationship with the leader. This useful addition allowed humanity to take the next step toward an LHG (Leadership Holy Grail).

In the 1970s, Robert Greenleaf upended the HL and LMX Models and leadership pyramid with his SL model, which dared to put the follower first and above the leader. Imagine Greenleaf channeling a prophet of almost 2,000 years earlier named Jesus, who paradoxically said He was both God and man, placed on earth to serve and save mankind. How odd that sounded to the Jews, pagans, and others who believed in a different kind of retributive God(s) more akin to a harsh king.

Thereafter, Bass, Bryman, and others, in 1985 - 1992, proposed a 4th LHG model focused on **Transformational Leadership** (“**TL**”) (Bass, 1985, 1999, 2006; Bass & Avolio, 1993; Bass & Riggio, 2006). In TL, the leader concentrates on helping followers achieve their full potential in pursuit of the motivational realignment of the organization. When people pursue transformational goals, individuals’ inspiration, motivation, and intellectual stimulation are critical.

Transformational Leaders must play three-dimensional chess simultaneously, focusing on 1. stakeholders/shareholders/investors, 2. the followers/employees essential to do the work, and 3. a lofty transformational Vision of change from the status quo. After this TL 4<sup>th</sup> LHG, instead of seeing a single leadership abyss, you might feel stuck in the ever-pulling centrifugal force of quicksand experienced by *Indiana Jones in the Kingdom of the Crystal Skull*. The only way Indiana could extricate himself from the quicksand was to be pulled out by grabbing a snake. Since he feared snakes, the TL saving Indiana Jones told him to think he was grabbing a rope. This was a hierarchical act in demanding behavior, with an LMX exchange with a follower and SL putting his needs first.

Around 2005, the concept of **Authentic Leadership** (“**AL**”) appeared. AL sounds ostentatious, as if all previous leadership approaches were somehow inauthentic. AL focuses on the genuineness of the leader/follower relationship as they jointly pursue a grand Vision. (Cue the *Raiders of the Lost Arc* theme music.) This authentic leader acts

with self-discipline and clear values focused on connected relationships in the passionate pursuit of an inspiring purpose.

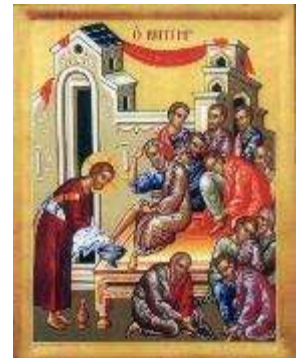
This AL model opened us to examine the leaders' mindfulness, motivations, and authenticity. I heard echoes of my Greek upbringing and my immigrant father saying, "Γνώθι σαυτόν" ("know thyself" attributed to my very ancient (maybe) ancestor, Socrates). Thousands of years later, a Brit named Will Shakespear translated this authenticity need in Hamlet as "to thine own self be true."

As it turned out, 5 LHG models (HL, LMX, SL, TL, and AL) were not enough as Sosik and Jung introduced **Full Range Leadership Development ("FRLD")**. At its core, FRLD acknowledges that everything is personal in leadership. An essential part of FRLD that starkly contrasts some other theories is the abandonment of the assumption that leaders are either predisposed to or stuck with any particular leadership approach. Like "free-range chickens," the FRLD leader can roam, morph, and adapt to their circumstances and environments and deploy a combination of leadership styles and behaviors as the situation dictates.

FRLD accepts that we begin as unique individuals, whether as leaders or followers. Individuals move from the personal to being nested in two-person dyads. Those dyads expand and connect into groups that eventually become organizations. But in this migration from one to many, I wonder if we "buried the lead," as they say in the newspaper business.

## [A Desirable Servant Leadership \(SL\) Model For Parish And Parishioner Leadership.](#)

The Orthodox icon on the right depicts a seminal act of SL with Christ washing His disciples' feet (John13:1-5). The significance of this act should not be lost on those of us living in modernity who are used to washing our feet daily and covering them with socks and shoes. In Christ's times, the feet were largely exposed to the dusty terrain and soil, and foot washing lacked frequency. Thus, the feet of the Apostles were unimaginably (for us) dirty. This made the Lord's act of humility even more impactful and illustrative of true SL.

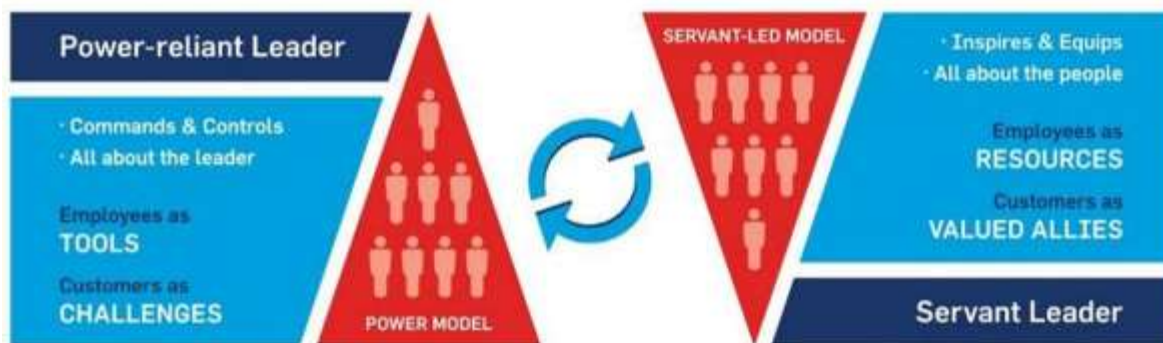


SL is often considered a paradox due to a simultaneous focus on serving and influencing as a form of moral leadership (Northouse, 2022). Indeed, true servant leaders consider themselves a servant first and a servant of all those they lead and who benefit from their leadership. (Greenleaf, 1970, 1977). Thus, SL organizations are different because of a preeminent focus on loving and serving others out of joy and not obligation. This engaging collective work can lead people and organizations to a better shared future vision while simultaneously valuing people and other traditional applicable measures of success (e.g., performance, effectiveness, satisfaction, etc.) (McGee-Cooper & Trammell, 2010, pp. 130-144).

Research has shown how SL flips the historical hierarchical organizational chart and builds critical interpersonal relationships that enhance team cohesion and performance. Indeed, effective SL creates a symbiotic triad of relationships between the servant leader, team members, and those in the environment they serve (Lemoine et al., 2023). As a result, SL has proven benefits in enhancing employee motivation, attitudes, and feelings of well-being and performance. And it can produce compounded results such that the whole can exceed the sum of the parts. The impact of followers in SL environments changes the behaviors of others for the benefit of the entire community (Lemoine et al., 2023). Indeed, growth in moral influence among followers of SL has been researched and identified. Thus, SL can be a super-spreader of optimal behaviors that ripple through an organization and extend to those whom the organization serves and the broader community/world (Berry, 2019).

The following “Flip the Organizational Chart Diagram” explains SL well and is courtesy of a Creative Commons open-source license granted by the Servant Leadership Institute.

## Flip the Organization Chart™



The world can become a brighter place through serving and sharing the SL light with others. “A candle loses nothing by lighting another candle. And when it does, the light in the world doubles.” The first part of this quote is attributed to many people of faith but may have been first offered by Roman Catholic priest Fr. James Keller, who in 1945 formed The Christophers and began one of the first weekly television shows of faith.

## Servant Leadership In Ancient Greek Warriors And Paralympians.

Greeks and warriors always love to talk about the Spartans. A famous saying is attributed to the soldiers of ancient Sparta, Greece: “Come back with your shield, or on it.” The Spartan mothers shortened the admonition in referring to their son’s shield: “Either this or on this.” In ancient Greece, those killed in battle were carried home on top of their shields (Hammond, 1979).



This leadership philosophy embedded in Spartan youth was not just because of their fierce warrior reputation. It contained a critical SL component. The shield was not meant to protect the warrior. It was carried on the left hand and was meant to protect the man to his left side. If a Spartan warrior were to lose or break his spear in battle, there was no punishment. But the loss of the shield led to being ostracized, or worse, as it was deemed to be a betrayal of the duty to protect his comrades on his side (Carlson, 2023).

A key essence of SL is protecting and caring for those entrusted to you. Indeed, trust is “at the root “ of all SL (Greenleaf,1977). Because your shield was meant to protect the person on your left, the SL value they were creating partially explained why they were so invincible. You shielded and protected the person on your left while the person on your right shielded and protected you. In this way, each warrior was the servant and leader of the other.

I was blessed to be a volunteer working at the 1996 International Paralympic Games. The Paralympics immediately follow the Olympics every four years. They are the competition for world-class athletes with one or more “disabilities.” The picture on the right indicted me so significantly that I felt I must include it in my Roadmap. It is an example of one of the longer-distance speed races where the Paralympic times are generally only a few seconds slower than the regular Olympic record times. The athlete on the right (in red) is blind. However, since degrees of blindness vary, they also wear blindfolds. You should wonder how a blind athlete can run at almost a world record time around an oval track they cannot see. The answer is represented by the world-class sighted runner (in yellow) on the left who runs side-by-side tethered by a small band by which the sighted athlete keeps the blind athlete in his lane around the oval.



The sighted athletes are themselves world-class competitors and leaders in their field. And yet, as servant leaders, they ensure those who are “differently abled” can exhibit athletic excellence as they represent their country and family and compete for medals and glory. The bond between sighted and blind athletes who train together extensively models the elements of SL (International Paralympic Committee, n.d.).

## **The Greenleaf SL Revolution.**

In the 1970s, the modern father of the SL movement, Dr. Robert Greenleaf, first identified ten critical characteristics of servant leaders (Greenleaf, 1970; Northouse, 2022; Spears, 2002). As you read this list, think of ways you could model this in your parish:

1. Listening first and deeply
2. Empathizing with what followers think and feel
3. Healing the personal well-being of followers

4. Awareness of the environment and impacts
5. Persuasion through clear and persistent communications
6. Conceptualization of the organization's vision
7. Foresight of the future
8. Stewardship over the organization and people
9. Commitment to the growth of people
10. Building a Community of shared interests

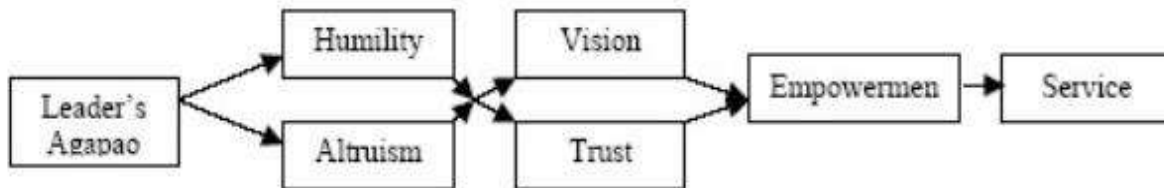
Expanding on Greenleaf's SL model, Spears (2010) elaborated on the ten SL attributes that can be highly instructive for parish leaders:

1. LISTENING – to different perspectives, what isn't said, and even their inner voice while they reflect on the totality of information,
2. EMPATHY – the need to understand what people are feeling and why,
3. HEALING – transformation can come after the healing necessary to overcome the impediments and issues one is facing,
4. AWARENESS – one must be acutely and honestly aware of themselves and what is happening around them,
5. PERSUASION - leadership provides positional authority, whereas SL includes persuading others to act in a certain way,
6. CONCEPTUALIZATION – while leaders must manage operations and results, it is critical also to see the big dream and how to achieve it,
7. FORESIGHT – seeking possible futures given past experiences and current challenges and resources,
8. STEWARDSHIP – facilitating each person's pursuit of their calling or destiny through persuasion and encouragement,
9. GROWTH OF PEOPLE – help each person grow the active engagement and support,
10. BUILDING COMMUNITY – seek to create better organizations, communities, and world.

Each of these characteristics and behaviors is perfectly aligned with how a parish leader should conceive of their responsibilities. As you re-read the expanded list, ask yourself how many of these attributes are you modeling and how many of them are you teaching in your parish training programs.

## Patterson Servant Leadership Model.

I was blessed to have as one of my DSL professors, Dr. Kathleen Patterson, who has continued Dr. Greenleaf's research and has more succinctly summarized the ten attributes without changing or reducing the essential meaning. The self-explanatory diagram below shows the seven elements in sequence and how they interrelate (Patterson, 2003; van Dierendonck & Patterson, 2010).



*Figure 1, The model of constructs, This model details how the servant leadership constructs work together beginning with agapao love and ending with service.*

Instead of reviewing these elements in greater detail here, I will expand on them by comparing them with my previously developed Stewardship Calling Six Building Blocks of Servant Leadership model discussed next.

## The Stewardship Calling Six Building Blocks Servant Leadership (SL).

Several decades before beginning my formal DSL studies, I took my many years of leading organizations and my work with many clients and hundreds of Orthodox Christian churches and ministries and developed the Stewardship Calling Six Building Blocks of Servant Leadership (Marianes, n.d.) These six specific elements (each building on the preceding one) were present in the most effective parish servant leaders I studied and with whom I worked. My goal was to distill the most succinct list of essential ingredients for parish leaders. Fascinatingly, and no doubt providentially, my Stewardship Calling Six Building Blocks of SL summarizes and aligns perfectly with the far more extensive and validated SL research of Drs. Greenleaf, Spears, Patterson, and many others. Here is how I describe the Six Building Blocks:

**1. LOVE.** The Lord gave His Apostles and us His Great Commandment of love (John 13:34-35) as one of his last instructions. He defined you as His "disciple" by the degree to which you followed this foundational value. If you don't love your people, if you don't love Christ, if you don't love God, if you don't love others, dear brother or sister, it is impossible for you to be a parish SL. You must go into this mission field with love in your heart and love of service to others to be an effective SL.

**2. TRUST.** All leadership research has identified this essential building block of trust. How will anyone follow you if they do not trust you? If you start by first building a foundation of love and then act consistently by walking your talk of the WHY and Core Values while protecting and having the backs of those you lead, trust can blossom. But without trust, you will never lead volunteers.

**3. HUMILITY.** Servant leaders must show humility, which is one characteristic the early leadership literature did not focus on. Understanding both the psychology and biology of how humility engenders personal trust and integrity in someone is extremely helpful in advancing the case for humility. Jim Collins's Good To Great research on the best entities and the type of "Level 5 leader" he identified as most successful blended the essential building blocks of "extreme personal humility" alongside an intensity of personal will and dedication (Collins, 2001). When one sees Christ washing the feet of the Apostles and understands the abject ultimate act of humility He demonstrated, the importance of this building block is established.

**4. COURAGE.** Drs. Kouzes's and Posner's research confirmed my experience that being forward-looking and driving change within an organization is critical for successful SL (Kouzes & Posner, 2010). Accordingly, courage is the necessary condition precedent. It takes no courage to leave things as they are. However, charting a new course and roadmap into the unknown and an uncertain future requires courage. Courage, when built on a foundation of love, trust, and humility, can lead followers to want to join the cause.

**5. TEAM.** Everyone knows that without followers, one is not truly a leader. In some organizations, followers may be conscripted or bought with a paycheck. However, in the volunteer-centric world of parishes, joining a team is a true choice and exercise of free will. Teams will not effectively form in the church-world until the SL has demonstrated the preconditions of love, trust, humility, and courage. This is why each Stewardship Calling SL element builds on the previous ones to form the ideal SL.

**6. VISION.** Driving a team forward requires an inspiring Vision the team can see and want to be a part of realizing. At the same time, the parish Vision cannot be only what the SL desires. Leadership requires building a team around an inspiring Vision.

Much more has been (and will be) written by scholars and students of leadership regarding each SL building block. However, over three decades of parish work in the American Orthosphere have confirmed the necessity of each of these six SL building blocks. I am often asked how one could assess these building blocks, which resulted in creating the Stewardship Calling Parish Servant Leader Test and Score. It is extremely short and simple and is meant to be completed as an honest self-assessment first.

Think about each specific statement to the right and record your score from one to five, where five is you always demonstrate that characteristic, and one is you never demonstrate it. This begins as a self-scoring mechanism not to be shared publicly. Thus, it is critical to be honest with yourself. The purpose of this exercise is for candid self-assessment against a standard of SL excellence that can hopefully lead to further self-reflection, study, and work to improve those of the six elements in which you are performing not at the highest level to become an even better and stronger SL.



**Parish Servant Leader Score**

5 = Always  
4 = Mostly  
3 = Sometimes  
2 = Rarely  
1 = Never

LOVE	I love unconditionally _____
TRUST	I do what I say _____
HUMILITY	I admit my mistakes _____
COURAGE	I persevere regardless of danger, difficulty or uncertainty. _____
TEAM	I support my people _____
VISION	I lead to a righteous destination _____

However, a way to expand the effectiveness of this tool is to ask others whom you trust, who know your leadership style, and who will be honest with you to also score you on a one to five scale in each of these six building blocks. You can then compare those scores with your own. This is not a full 360 SL assessment (discussed below) but is a beginning step focused on improving your parish performance in six critical SL building blocks.

## Servant Leadership 360 Evaluations.

Paul Wong (together with various colleagues) developed an SL 360-degree evaluation tool for you to assess your SL excellence by obtaining feedback from superiors, peers, subordinates, and yourself. The SLP-360 (Wong & Page, 2003a) is a validated tool I have used to assess a person’s SL strengths and opportunities for improvement. To evaluate your SL abilities, I typically use the 62-question Servant Leadership Profile-360 (SLP-360) survey tool (Wong & Page, 2000, 2003a, 2003b; Wong et al., 2004; Wong et al., 2023). I typically deliver this comprehensive SLP-360 via an online survey by Survey Monkey to evaluate the SL characteristics of a critical parish or ministry leader (including clergy). I survey the leader’s supervisor, peers, and subordinates in those situations for a more robust 360 evaluation.

Each question is a statement about the leader, where they are rated on a 7-point Likert scale between 1 (Strongly Disagree) through 4 (Neutral) up to a maximum score of 7 (Strongly Agree). In evaluating the SL scores, it is helpful first to examine the average of all respondents and then compare the self-reported scores of the servant leader being evaluated to those of the other evaluators. An average score of 5.6 or above is evidence of a strong SL, whereas a score below 5.6 identifies areas for improvement (Wong et al., 2004).

Importantly, several questions are negative factors such that a reverse scoring means a score of 2 or less is consistent with good SL, and a score above 2 identifies an area for improvement (Wong et al., 2004). In the debriefing guide for the SLP-360, Wong and Page (2003a) identify that an SL assessment ideally looks at positive qualities consistent with SL scholarship and the absence of negative behavioral characteristics

that detract from SL. In this regard, positive behavioral attributes and personal characteristics include SL concepts such as:

- 1) servanthood,
  - 2) leadership,
  - 3) visioning,
  - 4) developing others,
  - 5) empowering others,
  - 6) team building,
  - 7) shared decision-making, and
  - 8) integrity
- (Wong & Page, 2003a, p. 5).

On the other end, the negative SL qualities to be avoided include (a) abuse of power and control, and (b) pride and narcissism, which are scored by reversing the scoring (where a 1 is positive and a 7 is negative) (Wong & Page, 2003a, p. 5). The inclusion of these negative characteristics (e.g., abuse of power or pride) allows an evaluator to disqualify a person from SL excellence based on a high negativity score, even if other subscale attributes of SL are present (Wong & Page, 2003a).

When standing in the center of a 360-degree round object, one can observe the totality of their surroundings and imagine how they might interact with each point on the circle. This all-encompassing perspective can be positive or challenging and enlightening as it provides a roadmap for growth. A 360-degree “magic circle” is even postulated to be a metaphorical barrier that can divide real and virtual worlds (Fairfield, 2009). However, being in the middle of a circle of people can provide multiple touchpoints.

When a parish leader wants the best assessment of their bearings, using a variety of methodologies to gather the perspectives of the diverse group with whom they interact (e.g., supervisors, peers, subordinates, those served, etc.) and comparing it to their self-perception provides robust feedback and valuable assessments of skills, performance, and specific attributes being assessed (Craig & Hannum, 2006). Indeed, the opportunity for diverse individuals to work with the evaluatee effectively provides actionable insights (Borman, 1997).

As valuable as the assessments of others can be for a person, the potential inconsistencies between their self-evaluations and those of the other 360 assessment participants can often provide some of the most fertile growth opportunities (Craig & Hannum, 2006). The unique ways people at different organizational levels assess one another provide alternative perspectives that can be considered and acted upon (Borman, 1997). Indeed, when evaluations occur across multiple organizational levels, even different performance ratings may be equally valuable and useful (Borman, 1997).

In my experience using the SLP-360 within the American Orthosphere, I have found reasonably good consistency between honest self-evaluations and the survey responses of superiors from those individuals I have observed who have an SL heart or training. Generally, peers and subordinates tend to be more gracious and softer in the evaluations. This underscores the importance of the evaluatee selecting peers who are willing to provide the most honest assessment.

Everyone loves to be praised, but praise does not lead to improvement. Thus, I have found it critical to ensure that the most honest and forthright evaluations occur for the maximum benefit of the SL being evaluated. If you wish to elevate your SL abilities, performance, and areas for improvement, I cannot recommend undertaking an SL 360 evaluation highly enough.

A 360 assessment is not the only vehicle for improving performance. In research cited by Toegel and Conger (2003), one meta-analysis concluded performance decreased after one-third of 360s, and another study concluded that one-half of 360 participants failed to demonstrate a positive effectiveness response after their 360. Nevertheless, the more effective 360s include those where (i) participants know they are accountable for results from the feedback, (ii) follow-up activities are scheduled to ensure accountability and performance enhancements, (iii) they are repeated rather than as one-time events, (iv) feedback for development is delivered separate from appraisals of one's performance (Toegel & Conger, 2003, pp. 15-16).

Conducting an SL 360 with a particular and narrower focus area may provide meaningful insights into that performance aspect, much like zooming in with binoculars or a camera lens providing more detailed information. This motivation leads us to undertake a 360-assessment focused especially on SL, which I believe all clergy and parish council and ministry leaders should undertake.

### [Some Powerful Impacts Of Servant Leadership \(SL\).](#)

SL is not just a theoretical leadership or management construct. Instead, it is based on the observed natural desires of people to serve that can be cultivated and learned, even if some are more predisposed to SL than others (Speers, 2010). One reason SL has delivered positive results (empirical, psychological, developmental, etc.) is that by flipping the typically hierarchical pyramid to emphasize an interpersonal relationship with and commitment from the followers, the process of symbiosis creates an interconnected triadic relationship among servant leader, follower, and those they all serve (Lemoine et al., 2023). This leadership is extremely powerful in a parish environment.

In this way, SL becomes a self-perpetuating, potentially ever-growing force multiplier of committed personal energy to achieve a desired outcome or objective for a much broader community (Berry, 2019). Research has proven the efficacy of SL with positive results and outcomes in the parish, profit, and non-profit sectors (Amir et al., 2021). However, implementing SL in parishes introduces many unique cultural elements that can produce different impacts, applications, dilemmas, and strategies necessary to optimize SL administration and impact, particularly in parishes with parishioners from various parts of the world (Hofstede et al., 2010; Trompenaars & Voerman, 2010).

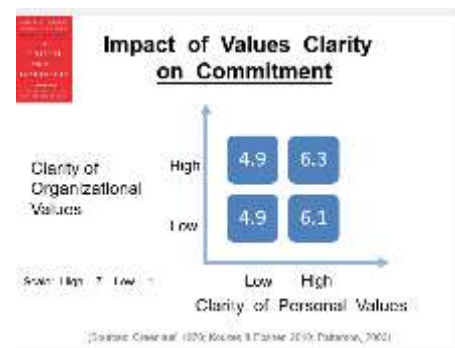
SL not only answers the call of all leadership scholars and faith leaders but satisfies a fundamental need inherent in humans through which psychological satisfaction is enhanced the more one's leadership behavior is aligned with SL (Paas et al., 2020). As it turns out, studies have shown that followers who get along with agreeable servant leaders

perform very well. Thus, the interrelationship between a parish volunteer’s and parish SL’s personalities may be part of the mystery of superior performance (Hunter et al., 2013)

The precepts of “social learning theory” suggest that influenceable parishioners/followers are likelier to emulate the SL characteristics of those who lead them. Subordinates thereby become more likely to serve others if they accept being served by their parish leaders, thus completing Greenleaf’s theory of the repeatability of a cycle of service (Bandura, 1977). Accordingly, parishioners/followers must be coachable and willing to trust a parish SL who inspires and reinforces them. Ultimately, significant evidence suggests followers do not serve leaders. Rather, a symbiotic relationship develops between leader and follower based on their common purpose, each finding the optimal role they can play in achieving that goal (Chaleff, 2009).

### Knowing Your Core Values Is Critical In Leadership.

Kouzes & Posner’s (2010) research provided another interesting element of the type of parishioner/follower best suited to work with a servant leader. As the model on the right indicates, aligning individual and organizational values produces the best results (a 6.3 on a scale of 7). However, the research also showed that it is far more critical for the individual parishioner/follower to have clarity of their own values than merely having clarity of the organization’s values alone (Kouzes & Posner, 2010). In this way, parishes can serve a vital role in helping their parishioners achieve clarity of their Core Values even before ensuring alignment with the parish’s Core Values. This is logical since so much of following a parish servant leader deals with alignment. This includes alignment of trust, loyalty, shared future vision, love of people, and serving others while building an empowered parish (Patterson, 2003).



### The Servant Follower (“SF”).

Researchers are pursuing how servant leaders (SL) can create servant followers (SF) (Roberts, 2023b). Indeed, as Crystal Davis pointed out succinctly since volunteers do not get paid, their job satisfaction is critical (Davis, 2017). The data shows that the most effective parishioners/followers are enthusiastic, intelligent, and diligent pursuers of the Mission of their parishes and ministries. This elevates the servant followers well beyond the prior notion of “subordinates.” Author Nicole Davis outlined the growing body of research focusing on the role of followers and their growing interrelationships with servant leaders (Davis, 2017).

This enhanced understanding of **Servant Followership** transcends the prior notion of merely “doing what I was told to do” mentality to empower parish followers to understand and align with parishes’ WHY, Core Values, Mission, and Vision. As Servant Leaders increasingly serve and integrate with their parishioners/followers (and other



impacted stakeholders), the interconnectedness of roles develops a mindset between leader and follower that elevates followers to a heightened level of servanthood. These individuals become **Servant Followers** (“**SF**”). The days of leadership research and scholarship ignoring followers are gone. As Chaleff, Greenleaf, and others have noted, the follower’s role has been elevated due to SL’s growing understanding and development.

The most inspiring leaders have their followers combine their best ideas and efforts to produce innovative solutions. According to Kouzes and Posner: “Leaders never make extraordinary things happen by themselves. Leaders mobilize others to want to struggle for shared aspirations, which means that, fundamentally, leadership is a relationship” (Kouzes & Posner, 2017). In this way, they define leadership not as a unidimensional or one-way interaction but as an interpersonal relationship among leaders and followers.

New parish, church, and global leaders worth following are simultaneously comfortable embracing constant change without sacrificing their fundamental faith beliefs and Core Values. Thus, effective parish leaders must be committed to experimenting, taking risks, and seeking ways to innovate continuously while remaining true to the timeless foundations of their faith tradition (Marquardt & Berger, 2000). The research verifies the expectation that parishioners/followers believe their parish leader will have a sense of the direction they will take the parish and that their parish has a viable and exciting future. This requires a vision, goals, and a creative or innovative path to make that vision a reality (Kouzes & Posner, 2017).

Scholars of SL, Drs. Kathleen Patterson, Bruce Winston, and others have written extensively on Christian faith leadership (Patterson & Winston, 2023), focusing on how Christ developed effective SL and SF in his Apostles. Scholars have identified how Christ’s followers are trained and learn to be SL themselves. These are examples of SF and include Elisha, Elijah, and many SFs in the Bible. Observing the SF stories and the SL examples further underscores my thesis that the Bible is the greatest leadership treatise. Indeed, the very concept of SF is perhaps one of the most visible messages in the Holy Scripture.

## [The Stewardship Calling Unified Servant Leader/Follower \(“USLF”\) Model And The 7<sup>th</sup> Leadership Holy Grail \(Part 1\).](#)

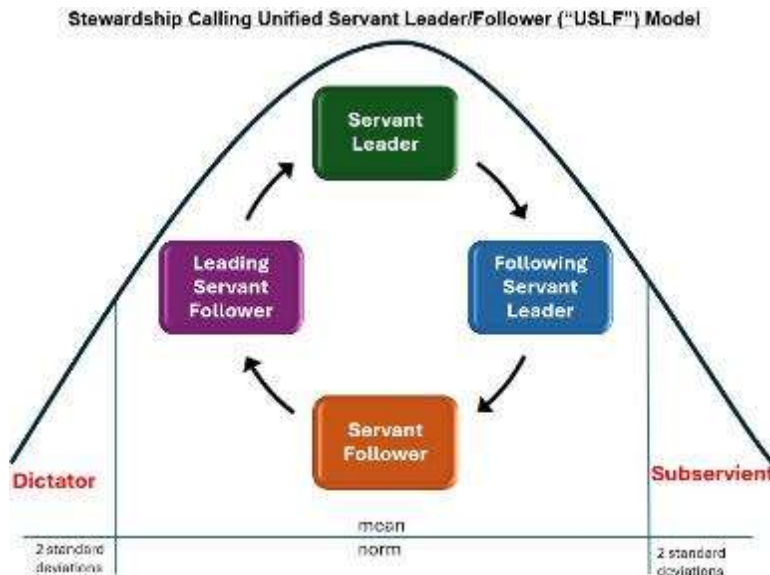
The more I observed and studied SL and SF in highly successful parishes and other relationships and organizations, the more I concluded we were trying to differentiate the undifferentiable. Or, put another way, perhaps the previously conceived leadership continuum line is a closed-loop circle. Let me provide a simplistic and practical example.

A dynamic SL priest is on a critical parish mission trip in the parish van with a few loyal and dedicated SF parishioners when the vehicle breaks down. Fortunately for the team, the parishioner SF driver is also a mechanic and can quickly diagnose the problem. However, he needs help to fix the van. The dynamic SL priest immediately volunteers because, while he is a dynamic clergyman, he has never studied car mechanics or worked on cars with his father. At that moment, the SL becomes a “**Following Servant Leader**”

(“FSL”) who will follow the servant leadership and instructions of the now “**Leading Servant Follower**” (“LSF”) driver/mechanic.

In a more complex hypothetical, the role reversal can last for an extended period. Witness what happened during the COVID pandemic when a traditional priest SL immediately became subservient FSLs of their technology and ministry teams LSFs as the parish migrated from a live to a virtual environment for many months. Many other examples exist in parishes, businesses, and non-profits where the best SL needs to subordinate, not merely as a leader practicing servanthood, but by becoming an FSL of a colleague or other person who had previously been an SF. That relationship shift remains as long as necessary until the transaction, situation, or event passes. Perhaps the LSF returns to the SF role or uses this event of inflection to become a more permanent SL.

This circular dynamic allows leaders and followers with a servant’s heart to migrate and shift between SL, FSL, SF, and LSF roles. If you accept my theory, perhaps too much is made of the separation between servant leaders and follower roles. Instead, a concept of circularity rather than a continuum might be better represented by the following picture:



As my Stewardship Calling USLF (Unified Servant Leader/Follower) Model identifies, two standard deviations from the norm on either end of the human spectrum are aberrant leaders or followers. The left extreme is a dictator, and the right extreme is a permanently subservient individual. However, within the two standard deviations of the human norm, one can see the cycle of SL and SF on the top and bottom, with the circle’s sides representing Servant Leaders who shift roles (FSL) to followers of their previous SF. The roles can migrate continuously and as needed so that the most effective team members become equally comfortable in the leader and follower roles as servants.

Thus, at any given time, the same person could be an SF following an SL in one context while simultaneously serving as a SL of another SF or SL. This circularity inspires everyone to consider first and foremost always being a servant, whether they act as an SL or SF, as their context and situation require. Thus, leadership training always teaches everyone the Christ-centered lesson of servanthood and allows a person's SL and SF status to change organically and episodically.

Some of the most successful leaders of exceptional sports teams routinely shift roles to support another team member. We have seen the football tight end run downfield to block for another wide receiver or the star point guard setting the pick for his center to get an open shot. My Unified Servant Leader/Follower Model also explains SL circularity in a flock of geese where the birds take turns leading the flock from the point of the V, only to eventually tire and go to the rear and draft off the leadership of a different goose now in the lead. This Unified Servant Leader/Follower Model cyclical transition also occurs in the best parishes where the priest or parish council president is never too good not to be a servant follower when needed.

The ultimate authority I cite in support of my USLF (Unified Servant Leader/Follower) Model are three passages from Holy Scripture where Christ himself suggests no one can be a leader unless and until they have mastered servanthood/followership described as being a "slave." *"And whoever desires to be first among you, let him be your slave"* (Matthew 20:27). St. Mark shortens it to: *"And whoever of you desires to be first shall be slave of all"* (Mark 10:44). St. Luke makes it even more explicit: *"Yet I am among you as the One who serves"* (Luke 22:27). The ultimate Leader makes clear that being servant/follower/slave is the essential skill to be acquired.

So, perhaps we might change how we think about teaching leadership and followership to emphasize the concept of the six elements of servanthood with the need to be both SL and SF fluidly as the circumstance requires. This presents an empowering (and perhaps revolutionary) concept that suggests real leadership training is always more about perfecting servanthood as the fundamental skill with less distinction between the role of leader or follower. Imagine a church where everyone is always willing to be a servant and then plays the role of leader or follower as the need arises and their gifts permit. Thus, a Unified Servant Leader/Follower training and practice might create an even healthier and more effective parish.

As I developed my USLF theory, what continually resonated with me was the following quote that has often been attributed to James Michener and some Zen Buddhist masters but is most likely originally authored by Lawrence Pearsall Jacks in his 1932 book Education Through Recreation. Regardless of original authorship, it has guided my life, was always framed and hung on my office wall, and I taught my daughters to embrace and live this philosophy (Jacks, 1932):

A master in the art of living draws no sharp distinction between his work and his play, his labor and his leisure, his mind and his body, his information, and his recreation.\* He hardly knows which is which. He simply pursues his vision of excellence at whatever he is doing, and leaves others to decide whether he is working or playing. To himself, he always appears to be doing both.

\*The phrase “**his love and his religion**” has been added over time, representing additional skills the master in the art of living must not distinguish between. I think that is a good addition, and it is on the version I have hung on my wall and in my brain.

I challenge you to follow this advice and consider developing your servanthood while simultaneously developing your servant leadership/followership. If you do, you will be the kind of representative of your Lord that will be most effective and righteous as you bring people closer to Christ and each other.

## [The Fiction Of Leadership And The 7<sup>th</sup> Leadership Holy Grail \(Part 2\).](#)

This is an odd subtitle for a Roadmap discussing leadership. The provocativeness is because leadership studies primarily focus on the person/persons at the top of an organization. Yet very few people ever have direct (or even indirect) interactions with such “top-floor” or “top-box” leaders. How often do the typical “**PIPs**” (**Parishioners In Pews**) ever have any meaningful contact or interaction with their Bishop? So how can the Bishop’s leadership style directly influence people so far removed from them?

Certainly, great leaders are instrumental in determining an organization’s culture (good and bad) that drives WHY, Vision, Core Values, and operations. However, the reality is that most followers do not directly follow the top leader. Instead, they follow subordinate managers (i.e., leaders in training) whose leadership styles and abilities may materially differ from the “top dogs.”

So, my first **Leadership Holy Grail (LHG)** challenge is that if your parish’s leadership is not in the “business” of developing consistent leaders throughout the parish, a particular leadership style may be more or less important. Evidence of this is the dynamic and growing international company, which was voted the best restaurant in America for eight years running. Chairman Dan Cathy regularly pronounces, “Chick-fil-A is a leadership development company disguised as a restaurant.” And because top leadership believes one of their primary jobs is developing other leaders, they become a force multiplier leadership tsunami.

Truth be known, in most parishes or other organizations, leaders have a relatively small number of direct reports they can effectively truly lead. While apocryphal stories of dynamic leaders like Elon Musk, Richard Branson, and Steve Jobs are the lore of great LHG Indiana Jones business epics, the reality is that almost all parishioners or followers in organizations rarely, if ever, even meet (let alone report to) the top leaders. Thus, the leadership abilities and strategies of the lower-level leaders may be the most important to focus on and cultivate.

Controversial philosopher and diplomat Niccolò Machiavelli reportedly wondered if it was better to be loved or feared. As it turns out, the answer is yes! We look for lovability and fearsomeness in assessing our leaders. It is easy to follow either extreme, whether out of reciprocity for those leaders who love us (Servant Leaders) or concern over the consequences from those we fear (Autocratic Leaders). Researchers have identified that respect is another dimension of judgment that can drive either resentment or followership.

While many variables are relevant in assessing the influence of leaders, warmth and strength top the list (Fiske et al., 1999).

Thus, one key of any new 7<sup>th</sup> dimension of LHG is the need to change your thinking from being a parish leader to being a “leader developer” and thus becoming a leader of leaders. In that singular change of focus, every leader can, directly and indirectly, reach countless individuals, many levels down, without ever interacting with them. While some leadership theories emphasize the need to enculturate leadership development, perhaps they understate the critical importance of this effort.

Put directly, a parish leader who is not developing other parish leaders is not a true leader. The longest-existing large organization in history, Christ’s church, provides another example of the ultimate leader investing heavily in His followers by teaching them how to make 70 more followers (Luke 10:1). Those 70 made 70 more, and the story and process continue until today.

### **If You Don’t Know Where You’re Going, You Won’t Know If You Get There.**

I re-emphasize another consideration of this 7<sup>th</sup> dimension of LHG, namely Vision. I submit that people stay in organizations for one of two foundational reasons: self-interest or passion for Vision. Understandably, most people also need a job that provides them with compensation, benefits, and freedom to live their lives outside of the work environment.

I do not mean to imply a negative exclusionary selfishness in acting out of self-interest. Maslow’s Hierarchy of Needs is valid (Maslow, 1943, 1954, 1962). Thus, before people seek the top level of self-actualization (to “be the best they can be,” according to an old U.S. Army slogan), they must first provide for their and their family’s physiological needs for food, shelter, clothing, and the other essential elements of life.



However, some are so attracted to the transformational Vision of a dynamic leader that they are willing to join a cause and even sacrifice significantly in pursuit of that Holy Grail goal. They may never meet the leader in person, but their belief in the leader’s TL Vision is enough motivation for self-sacrifice. Think of how many subsequent disciples of Christ were (and still are) willing to die for their belief in Him even though they had never seen or met our Lord. This later element of leadership may be underappreciated. Thus, another element of this proposed 7<sup>th</sup> dimension of LHG is the necessity of clarity of Vision in leadership.

The emphasis on Vision is not entirely unique to this 7<sup>th</sup> LHG. The need for clarity of an inspirational Vision is found in many other contemporary leadership theories and approaches to one degree or another. But even before Vision comes understanding one’s WHY and Core Values.

## If You Don't Know Why You're Doing What You're Doing, Then You May Be Doing The Wrong Things.

Sosik and Jung (2018) discussed the importance of a WHY, calling it a Personal Leadership Mission Statement. This returns us to the first element in the proposed 7<sup>th</sup> Leadership Holy Grail (LHG), which focuses on self-awareness. I concur with this critical need.

Many modern leadership scholars have proven that understanding a personal WHY and Core Values is the most potent follower force multiplier when aligned with an organizational WHY and Core Values. Thus, besides a parish leader being a developer of other parish leaders, they must also be a WHY discoverer and promoter. Here, we again return to that “know thyself” and “be true to oneself” ancient wisdom critical for parish health and growth.

Notice how this, too, changes the definition of leadership in the 7<sup>th</sup> LHG dimension. Before focusing on the operations or services offered, the spotlight must shine brightly on the personal WHY and Core Values, which then become the foundation for the parish's WHY, Core Values, and Vision that will likely inspire “**FPIP**” (**Future Parishioners In Pews**) followers who know their WHY and Core Values to align with this transformational parish Vision. When all these critical elements come together in a parish, followers/parishioners are inspired to commit to and sacrifice for parish leaders, including clergy and Bishops, who prove worthy to lead.

However, before I declare success with my possible 7<sup>th</sup> LHG dimension (that builds on the best of the previous 6 LHGs) and declare it THE “GOAT” (Greatest Of All Times) Leadership Holy Grail, we must consider at least two other essential dimensions: Time and Place.

## The Ticking Clock Drives Behaviors, So Time Matters.

This heading sounds like a “BGO” (Blinding Glimpse of the Obvious). Of course, time matters and drives our actions. In businesses, the time clock is a leveling agent. Whether meeting quarterly numbers of bosses or stock analysts or managing supply chain and other resources to ensure uninterrupted distribution, time is critical. The same is true in parish life, where time pressures constantly impact everything from services to ministries.

And yet, time is the one thing incapable of being manufactured or produced. You will never get back the time you spent reading my Roadmap. Thus, leaders (and leadership theories) must be more aware of time orientation and factors in shaping their leadership strategies and better investors of how they spend their time. I am always astounded at the amount of time parish councils waste on “committee work” that is not the root cause of the parish's biggest challenges rather than focusing on “board activities” of the future and strategy.

Dr. Phillip Zimbardo and his team researched and proved how time perspective is a powerful influencer of follower behaviors (Zimbardo & Boyd, 2009). Time is perceived

and managed differently in diverse cultures and by people who have inherently different time orientations. They discovered people have a default primary orientation based on time as follows:

1. **Past-negative.** A focus on negative or traumatic aspects of their past experiences that include regret or resentment.
2. **Past-positive.** A positive view of the past allowing for happy memories, traditions, and positive nostalgia.
3. **Present-hedonistic.** An emphasis on immediate gratification and current pleasure that often includes “living in the moment” with less consideration of consequences.
4. **Present-fatalistic.** Those who feel no control over their current lives are resigned to fate, external events, or forces that will shape their lives. This includes a fatalistic lack of hope for the present or future.
5. **Future-oriented.** An orientation willing to delay immediate gratification as they work toward a better future state by investing in their future.

There is much more to the research on how time orientation impacts individuals and their beliefs and decisions, including research that looks at the predictive nature of time orientation and religion. I recommend an interesting exercise for your parish council. Take the **Zimbardo Time Perspective Inventory** and learn how each person’s time orientation affects their decisions personally and for the parish. Disconnects about parish decisions often have their root in the differing time orientations of the parish council and other parish leaders.

To show the dynamism of research and leadership theories, a growing school of thought suggests a 6<sup>th</sup> time dimension they call the “**Transcendental Future.**” People who are strong in this time orientation contemplate the future, including time periods beyond their earthly death. With my II Corinthians 5:10 obsession that drives my daily life, unsurprisingly, when I took the Zimbardo Time Perspective Inventory, I scored off the charts in the Transcendental Future orientation.

How people in certain cultures perceive, react to, and manage their time and inherent time orientation are major drivers in follower behavior. It is potentially different for each person and culture. Thus, this time dimension should be more fully explored and exploited in every leadership theory. The time orientation of each follower becomes an integral part of the LHG.

The key point for leaders to take away from this discussion is to consider the time and cultural orientations/perspectives of those they lead. For example, I was born and raised in the U.S. and am a product of multiple American educational institutions with their attendant deadlines. Nonetheless, the time orientation of my Greek immigrant parents and ancestors strongly influenced me growing up.

How many times have I heard excuses about being late for events, meetings, or church services attributed to being on “Greek time” (which means “whenever”)? And yet, 40+ years in the law have reinforced in me the critical importance of adherence to deadlines and time schedules in decision-making and problem resolution. One can see

the conflict in parish councils when imperative individuals with time sensitivity must work with individuals with a laissez-faire “whenever” approach. Yet true SLs must respect the time orientation of those they lead.

### **“All Politics Is Local” (And So Is Leadership).**

Cultural differences implicating how leaders lead best are not limited to a time perspective. Full Range Leadership Development and other leadership theories often speak of “culture” to define the ethos within a parish or organization. Clearly, this can be a byproduct of leadership. However, other critical cultural elements remain to be added to any LHG, namely the evolution of different country cultures.

For example, there are vastly different responses to strong, dynamic, transformational leaders in the U.S., where the culture values such decisiveness compared with the vastly different, more passive expectations of certain foreign followers of their leaders. Thus, as a parish leader considers what leadership style to adopt, the cultural orientation, perspectives, and experiences of the parishioners they lead must influence the most effective leadership style/approach.

I will never forget raising an issue in the strategic plan for a parish of one jurisdiction, only to be told that in their ethnic culture, such matters are not discussed among the laity, and only the priest makes all such decisions. Understanding the cultural permissions and prohibitions of the parishioners and how they differ is a critical requirement for the most effective SLs.

### **Conclusion.**

As I end this Chapter 5 of my Roadmap in our “Indiana Jones style quest” for a **Leadership Holy Grail (LHG)**, one might again be inclined to agree with New York Yankees legend Yogi Berra, who reportedly said, “Anybody that ain’t confused don’t know what’s going on.” So, let us conclude our quest to find the LHG with as simple clarity as possible.

Here are a few key leadership conclusions for you to consider in your parish:

1. Leaders do not lead followers; they mostly lead managers who lead the followers.
2. Leaders lead others to the desired destination, so only ethical leaders with integrity who create other ethical leaders with integrity are true leaders.
3. No one can lead others without strong and honest self-assessment and clarity of their parish WHY and Core Values.
4. No one can be led effectively without a strong, honest self-assessment of their personal WHY and Core Values.
5. Leadership theories have evolved over time and continue to change.



6. There are many different formal definitions of Servant Leadership, and yet they all tend to coalesce around critical foundational elements that include Love, Trust, Humility, Courage, Teams, and Vision.
7. You should learn the art of servitude both as a Servant Leader and a Servant Follower and be prepared to assume the appropriate role at any time.
8. If you cannot clearly articulate and help people realize the Vision of where you are leading them, you will not lead any followers for long.
9. As Sun Tzu said in The Art of War, “Strategy without tactics is the slowest road to victory. Tactics without strategy is the noise before defeat” (Tzu, 2007).
10. Understanding the human, cultural, time, and other orientations of your parishioners/followers is critical in leading them most effectively.
11. Whatever leadership strategy you pick, be prepared to reassess and potentially adapt it as the circumstances change constantly.
12. There may not be any single perfect Leadership Holy Grail (LHG) style for every leader, follower/parishioner, or situation. However, Servant Leadership and Servant Followership have, over time, been proven to work well in Christian churches and be most clearly aligned with what Christ taught. Servant Leaders and Servant Followers are perfectly suited to bring people closer to Christ and each other.

## CHAPTER 6. Summary Of Legal Duties Of Parish Leaders.

There is another key element that I want to share briefly that is required by operation of U.S. law. If you are a parish council member (e.g., a board of directors member of an incorporated entity), you have three specific additional legal duties. They are generically referred to as 1. the Duty of Care, 2. the Duty of Loyalty, and 3. the Duty of Obedience. To be sure, law schools spend weeks on each of these legal duties. Time and space do not permit such depth here. However, if you are a leader of your parish, a short, high-level summary will alert you to their presence, and you should follow up with your parish legal counsel.

THE FOLLOWING IS NOT LEGAL ADVICE (which I am required to say at this point since I am only licensed in the State of Georgia and you and I have not established an attorney-client relationship.) As a result, I strongly recommend that each parish council (church board) receive more detailed instruction from a lawyer licensed in your State with the requisite expertise. You should also meet with a licensed insurance professional to help you understand what actions might be covered by your officers and directors' insurance and other insurance policies your parish must acquire, as well as what is not covered and leaves you exposed.

### Duty Of Care.

You are to act in good faith and diligently. This means you must act with "reasonable care" to make prudent decisions and avoid causing any injury or harm. Indeed, the law creates what is called the "prudent man" standard, which says you should do what a reasonably prudent person would do in each situation. In short, this duty means making thoughtful, informed decisions for the good of your parish by being reasonably diligent and using good judgment.

For example, before your parish acquires something significant, due diligence research should be conducted that might include costs and benefits, alternatives, and multiple providers, and ensure it is a wise investment that fits within the parish budget. Similarly, you should consider what is reasonable and prudent to avoid someone getting injured when they come on your premises or attend your events.

As a parish council member, you should understand the parish's business. Some of you are financially astute, while some of you are not so blessed. This does not necessarily mean you need to have the same expert level of understanding as your treasurer or accountant. However, as a leader of your parish, you are under the duty of care that gives you the obligation to at least: 1. understand the basic business of your parish, 2. ask questions, 3. actively participate in all the parish council meetings, and 4. provide strategic direction and oversee management.

You can consider this duty from a "3A" perspective:

1. Attend. You must attend parish council meetings and be prepared by reviewing all the information provided in advance. Be prepared to ask questions and discuss the best solutions.

2. Ask. It is OK not to know everything. It is not OK to avoid asking critical questions to understand what is presented to you. This is part of the due diligence necessary to make the most reasonable and best-informed decisions. If you do not understand financial statements, here is where you ask for explanations and seek additional training or guidance. If an important decision is being made, you must ensure the parish council asks the requisite questions to make the reasonably most informed decision. This may also mean the parish council brings in or hires an expert professional to answer your questions and provide advice.

3. Analyze. A parish council member has a critical responsibility of oversight. This requires thoughtful analysis of the advantages and disadvantages of every decision and inquiry about alternatives. This duty starts with making sure you have the right and reliable data, the answers to all the appropriate questions, and the consideration of the parish's situation and alternatives and priorities, after which you can evaluate the best decision.

I cannot overemphasize asking questions, securing facts, and then using your own best judgment in decision-making. I appreciate the pressure that you may feel in a parish council meeting where nobody wants to raise their hand and challenge whoever is presenting. However, suppose you do not understand something being discussed. In that case, you are not exercising your duty of care by sitting silently or just going along with everyone else (including those who demonstrate great confidence in a particular decision). If there is something that you do not understand, the legal duty of care requires you to ask questions and, in appropriate significant cases, to seek independent professional advice. You do not have to know everything, but you cannot hide behind your ignorance and what you do not know. Attend, Ask, and Analyze.

## Duty Of Loyalty.

The second duty of loyalty should come easy for Christians. It requires you always to put your parish first and act in the parish's (not your own) best interests. This means that if there is a decision to be made about something in which you or a family member might directly or indirectly benefit, you must "recuse" and not participate in any way in the discussion or decision on that matter. Any actual or potential conflict of interest must be avoided. In my legal world, we add that one should avoid "even the appearance of a potential impropriety." That means you cannot participate in that decision-making process in any way where your interests or those of any family member might be implicated.

This duty of loyalty requires that every decision be made objectively and that confidentiality be respected. The confidentiality aspect may sound strange, given my continued preaching of the critical importance of "ITA" (**Integrity, Transparency, and Accountability**) in all parish endeavors. However, there are some things that you, in your role as a "board member," are required to keep confidential. An easy example involves any personnel matters or the financial stewardship contributions made by individuals. Of

course, the clergy has the added responsibility of the “priest-penitent” privilege and confessional confidentiality obligations. Thus, ITA should be the default norm except where a legal or religious duty of confidentiality imposes a higher standard of privacy.

**CAUTIONARY NOTE:** I am intentionally not discussing the critical issues regarding the various State and Federal laws that require disclosures of certain things, such as the stated desire to commit a future crime, child endangerment/molestation, etc. These serious items have legal requirements of disclosure to appropriate law enforcement personnel that vary State by State, notwithstanding any priest/penitent or other confidentiality privilege. Given the critical importance of these legally mandated disclosure obligations, ALL clergy, youth workers, and parish leaders must receive appropriate legal education about the duties your State, religious Jurisdiction (and in many cases, Federal law) impose on you.

The acronym to remember when considering your duty of loyalty is “**CATCon.**”

1. **C**onflict **A**voidance requires one to avoid any situation where one’s personal interests (either directly or indirectly) might be implicated or interfere with the best interests of your parish. When in doubt, recuse (excuse) yourself and do not participate in discussions or decisions.
2. **T**ransparency in this context requires fully and completely disclosing any potential personal or conflict of interest you or a family member might have before you recuse yourself. As a U.S. Supreme Court Justice famously said: “Sunlight is said to be the best of disinfectants” (Brandeis, 1914). So, shine the light on any conflicts and then avoid participating in the decision.
3. **C**onfidentiality does not extend to the overall financial statements of the parish, which should be publicly available as part of your ITA. However, there are those pieces of confidential information (usually involving individuals) that should not be shared publicly. In my Greek world, the humorous old saying about violating confidentiality and this Duty of Loyalty is “telegram, telefax, tell-a-Greek.”

## **Duty Of Obedience.**

This third critical legally imposed duty requires one to ensure the parish complies with all applicable Federal, State, and Local laws, its Charter/Articles of Incorporation, Bylaws, other legal governing documents, and any mandates of its religious Jurisdiction. In other words, follow all the laws and rules.

While probably not yet part of the legal duty of Obedience, I submit parish council members should always adhere to the parish’s WHY, Core Values, and Mission. Thus, I believe that parish leaders should ensure that their decisions are aligned with the fundamental foundational principles of the parish.

Many parish leaders do not always know that it is likely incorporated under state law and thus has a legal document they filed with their Secretary of State. This document that forms the parish is usually either called Articles of Incorporation or a Charter. It forms a legal covenant of the parish that must be followed. Also, states require that legal entities

have a set of Bylaws that cover the more detailed operations of the parish and impose legal duties and obligations.

ALL parish council members must receive copies of the Articles of Incorporation/Charters and Bylaws when they begin service. Indeed, the first meeting each year should briefly review all applicable laws and the specific parish critical legal documents, and amend the later parish documents if something has changed. In addition, the best practice is to actually post these critical legal documents on the parish website or some other place where all parishioners have access to them.

Best practices parishes have personnel and other policy manuals developed by the parish council. These, too, must be followed under the Duty of Obedience. They also should be periodically reviewed and updated by the parish council and posted for everyone to see. In addition, I highly recommend that each ministry of a parish have a comprehensive operations and training procedure manual and handbook. This document describes what they do and how they do it, including any processes, procedures, rules, regulations, and limitations. The ministry policies should also anticipate possible interruptions or issues that might arise and have contingency plans for dealing with such occurrences.

For example, when the SARS-CoV-2 pandemic hit the United States and parishes were required to close, those that were not prepared ended up scrambling to figure out what to do. In contrast, some parishes I worked with in Florida and elsewhere had procedures manuals and contingency plans for what they would do if a hurricane hit their parish. Thus, when the government-mandated closures occurred, these parishes and their ministries merely pulled out their contingency plans and manuals and started executing the plans they had methodically prepared before the emergency. They hardly skipped a beat.

Another time, I was preparing to deliver my Igniting The Flame retreat at a parish when a church in that area was the victim of an anti-Christian terrorist bombing. Before I arrived, I inquired of the parish council President about what contingency plans they had in place. This parish council President (a former law enforcement officer) had his parish well-prepared with three well-trained and licensed law enforcement parishioners who had concealed carry firearms and a well-rehearsed security protocol to protect the safety of the parishioners. Whenever planning a highly visible religious event (including ethnic food festivals), ensuring there is enhanced security and protection is an investment well spent.

Parish leaders should systematically think about what they need to do in different situations and build a contingency plan and manual when they can calmly consider the facts and alternatives before an urgent crisis arises. Also, when a new leader takes over a ministry, providing them with these planning documents ensures they can get up to speed quickly and do not have to reinvent the wheel.

The Duty of Obedience also extends to the best and proper financial integrity policies and practices. This includes rules like having background checks performed on all parish employees, parish council members, finance ministry personnel, youth ministry workers, and other leaders. This also extends to best practices like (without limitation):

1. ensuring two different people must sign every check or disbursement,
2. complete separation of authorities to make sure that there is financial oversight,
3. ensuring the same person who counts any money is never the person who deposits it,
4. having financial dashboards publicly posted for complete Integrity, Transparency, and Accountability,
5. maintaining a formal written Corporate Delegation of Authority (CDA) Document that specifies who has what authority to sign which agreements at different thresholds and make investment decisions and expenditures, to name a few elements in such a CDA document,
6. formal “prudent man” investment guidelines for all parish funds that are periodically reviewed with strict compliance of all investments with such guidelines,
7. proper legal review of all contracts or agreements,
8. multiple checks and balances for all financial transactions, matters, and contracts, and
9. regular audits.

Best practices strongly recommend that each parish has a regular (hopefully annual or no less frequent than bi-annual) independent financial audit. I recognize that many parishes feel they cannot afford an independent audit from a financial professional and, therefore, rely on internal audits by parishioners who have some accounting expertise and no conflicts of interest. However, even an occasional independent audit will go a long way to ensure the parish is using the best financial practices, properly accounting for everything, and ensuring the various legal duties are being honored.

### **Ecclesial Governing Documents.**

Many hierarchical churches have ecclesial governing documents that parish councils/boards/elders, etc., must also follow as duties of their leadership. They vary widely by church jurisdiction, so I will use my Greek Orthodox Archdiocese as an example since we have a significant number of these ecclesial governing documents.

The Orthodox Church has Canons that have been adopted by Ecumenical Councils or various Bishops since the founding of Christ’s church. These Canons govern the parishes and their leaders, although there are precious few Canon scholars to help with interpretation when Canons sometimes seem to conflict. Clergy receive limited education in this field, and the seminary professors of Canon law can be consulted from time to time after graduation.

The Greek Orthodox Church in America also has an ecclesiastical Charter granted by the Ecumenical Patriarch (in addition to a State incorporation charter) that must be complied with. In addition, the Greek Orthodox Archdiocese has a document called its “Regulations” (formerly known as the “Uniform Parish Regulations”) that govern quite a few areas of parish life and operations.

I will not review all of the Parish Regulations in my Roadmap; however, in the parish council training program I routinely offer throughout the Greek Orthodox Churches and Metropolises, we review some of the most critical Regulations. Of relevance is Article 29 of the Greek Orthodox Archdiocese Regulations, which enumerates seventeen specific duties of parish council members they must all become aware of and follow. The first four such duties I will call out due to their importance (without suggesting the others are unimportant):

**1. You should attend the Divine Liturgy regularly.**

(And this means more than standing in the narthex attending to welcoming and other parish business matters. This Regulation is there to ensure the elected leaders are serving as trustworthy role models by actually partaking in the liturgical services.)

**2. You are to participate in the sacramental church life.**

(Recall the prior discussion about the five critical elements of exemplary leadership, which include leading by example. Parishioners must see their leaders participating in the sacramental life of the church.)

**3. Parish Council members are to “assist” the priest in the administration of the parish ministries.**

(The Proistamenos (head priest) is in charge, and the laity is there to assist and be his right and left arms and legs.)

**4. You must establish the appropriate parish ministries.**

(Later in Chapters 10 and 11 of my Roadmap, I will discuss the critical roles that such ministries play in the lives of the faithful.)

In addition to the Charter established by the Ecumenical Patriarch, the Regulations established by the Archdiocese, our Greek Orthodox Metropolises add some additional requirements and duties that parish councils must be aware of and follow. Much more can and should be said about adherence to ecclesial governing documents; however, for purposes hereof, I will leave it with the need for parish councils and other leaders to familiarize themselves with all such documents and rules to ensure they are fulfilling their fiduciary duties as parish leaders.

### **Selected Best Practices To Implement.**

There are many other specific duties that parish leaders must execute with excellence, including my following top 10:

1. Vision setting and ensuring alignment with the parish WHY and Core Values,
2. Constantly focusing on the future Vision and what needs to change,
3. Strategic Planning,
4. Ensuring sufficient financial resources to operate the parish and its ministries,
5. Developing talent and volunteers, including recruiting, training, and mentoring,
6. Leading the ministry managers and team members in developing best practices, policies, and procedures,
7. Always being the positive face of the parish such that when people see you, they know your parish,
8. Constantly pursuing leadership training and development for clergy and laity,
9. Complying with all duties of care, loyalty, and obedience, and
10. Adhering to the various laws, rules, and regulations that govern your parish, conduct, and performance.

The above briefly summarized some of the critical legal and other obligations. I strongly recommend that every year, all parish leaders go through a training program to review these and other items.

### **Don't Forget Comprehensive Parish Insurance.**

In today's litigious society, a parish must have professional assistance from a duly licensed insurance professional in your State. They should conduct a comprehensive audit of all your activities and operations and recommend the appropriate insurance coverage. I have no expertise in the insurance field and thus always defer to the appropriate insurance expert.

However, in over thirty years of serving on the legal committees at the Archdiocese, Metropolis, and parish levels, I have seen a lot of issues arise where the parish (or Diocese or national church) wishes they had appropriate or better insurance coverage. Thus, I believe every parish must have a comprehensive insurance review by an experienced professional annually. I am not covering every insurance policy that should be in place, but I submit at a minimum, your parish should have at least the following policies:

- (a) comprehensive property and casualty insurance,
- (b) full general liability insurance,
- (c) directors' and officers' insurance,
- (d) workers' compensation insurance, as required by State law,
- (e) health and medical insurance for employees,



- (f) youth protection insurance,
- (g) sexual misconduct insurance,
- (h) special events riders for your festivals, hall rentals, special events,
- (i) financial fidelity and financial integrity policies,
- (j) automobile insurance for any covered vehicles,
- (k) professional liability insurance if ministries require it,
- (l) specific insurance for any unique activities and operations and coverage required by the State of your jurisdiction.

Again, while I am not an insurance expert and cannot provide either legal or insurance advice in my Roadmap, I have always maintained a personal umbrella insurance policy myself. I recommend every parish leader personally acquire such an umbrella policy from the insurance company that provides your house or other personal insurance coverage. It can be added cheaply as an addition to a person's existing homeowners' policy. The right umbrella policy can provide additional personal insurance coverage in case something happens and the parish council/board members also get sued.

Finally, in addition to full officers and directors' insurance policies (D&O policy), every parish should make sure that its Articles of Incorporation/Charter and Bylaws have the most comprehensive indemnification protection for officers and directors to indemnify and hold them harmless from lawsuits against the parish unless they have any culpability. There is so much more a lawyer would like to discuss, but I sense the duct tape you wrapped around your head to keep it from exploding during a legal discussion is likely to break loose. Suffice it to say, always consult your lawyer!

# CHAPTER 7. Vision And Strategic Positioning & Planning.

## Scriptural Foundation Of Vision And Strategic Positioning & Planning.

Is your parish operating by design or default? Does it have a consensus clarity of its fundamental WHY (purpose), non-negotiable Core Values, a clear Mission of what it does, and Strategic Goals and Action Plans to achieve an inspiring and transformational Vision? If it does, then glory to God, and you can skip to the next Chapter (unless you want to assess what your parish is doing). However, if any of the above elements are missing, if it feels like your parish is wandering, or if it has been quite some time since you last evaluated your Vision and plans to achieve it, then read on.

I think it is critical to begin by setting the record straight. Businesspeople did not invent Strategic Planning (which you can refer to as Vision & Planning, Strategic Positioning & Planning, or whatever sounds better to you and your parish, all of which I will collectively define as “SP”). The SP discipline is as old as creation and was modeled by Jesus Christ. Indeed, as this Chapter will demonstrate, every aspect of what is included in SP is Biblical in its foundation. Thus, SP in parishes is completely consonant with the Lord’s teaching and what it means to be a Christian.

One of the essential practices for effective parish SP is faith in an inspiring Vision. Moses was perhaps one of the most inspirational and visionary leaders. He spoke with God; however, his gifts extended to inspiring an extremely diverse “rag-tag” group of followers to pursue a singular righteous Vision over an extremely long period of time as they faced and overcame incredible adversities and traveled massive distances. This requires great skill, faith, love, and patience. Moses cast an extremely large Vision for his followers by focusing on a “promised land” that was foretold by the ancient fathers in the Law and Prophets (what we call the Old Testament).

Amazingly, just as Moses led his people to this promised land, it was not for him to see with his own eyes: *“Then the Lord said to Moses, this is the land I swore to give to Abraham, Isaac, and Jacob...I show it to your eyes, but you shall not go there”* (Deuteronomy 34:4). This is not unusual in church SP as many times a priest or parish leader will begin an SP process that spans multiple years the final results of which they do not see under their leadership watch. However, as the Holy Scripture repeatedly instructs, visionary true leaders faithfully guide their followers on the journey to the ultimate Vision without focusing on the road or their benefit.

Even when he felt (or was) lost in the wilderness, Moses’s faith in the WHY and Vision God gave him was his true North and constant guiding light and encouragement. Just as Moses saw a better place for his faithful, any parish leader can also become committed and motivated to help achieve the unimaginable. Don’t take my word for it. In Jeremiah 29:11, we learn, *“For I know the plans I have for you,’ declares the Lord, ‘plans to prosper and not to harm you, plans to give you hope and a future.’ ”*

The necessity of a Vision is clear in every leader we study in the Bible. King Solomon explicitly called out the critical importance of Vision with his admonition reminder in Proverbs 29:18: *“Where there is no vision, the people perish.”*

We hear the critical importance of Vision repeatedly throughout the Bible. For example, the Orthodox Study Bible commentary notes that Jewish Academy teacher Jesus ben Sirach wrote Jewish manuscripts comprising his lectures that his grandson translated into Greek to facilitate widespread distribution. Sirach reminded his students and followers that words and faithful pursuit of a Vision are what allow one to be a Prophet who can inspire followers just as Drs. Kouzes and Posner have repeatedly concluded. Sirach says it clearly: *“By his faithfulness he proved to be a true prophet, and by his words, he was known to be faithful in vision”* (The Wisdom of Sirach 46:15).

St. Paul underscores the importance of faith in pursuing a Vision: *“Now faith is the substance of things hoped for, the evidence of things not seen”* (Hebrews 11:1). To supplement this understanding, the Orthodox Study Bible commentary of Hebrews 11:1 instructs:

This is not so much a definition of faith as it is a description of how faith works, especially during hard times... Things hoped for and not seen, a vision of the future, have encouraged the people of God throughout history... (The Orthodox Study Bible, 2008, p. 1666).

As I explain my unique Stewardship Calling parish SP process in this Chapter, I will begin each element by pointing out some of the many Holy Scripture passages that illustrate its importance. By the end of my Roadmap journey, I hope you will realize that SP for churches is not only historically called for but fully supported by the Bible. The fact that modernity has also confirmed the organizational benefit to SP is gravy.

## [Why Should A Parish Do Strategic Planning?](#)

My Stewardship Calling SP approach is a process to manage the “busyness” of your parish without turning it into a “business.” At its core, SP is a detailed process that defines your strategy to allocate your resources to achieve your Vision. Thus, the elements require articulating a clear Vision and marshaling whatever resources the parish has at its disposal presently (or can obtain in the future) and strategically allocating them in pursuit of the Vision.

Undertaking an SP for a parish is critical because, left to their past practices, most parishes like to either ignore or put band-aids on problems. Until the root cause of the issue is identified and addressed, all the band-aids in the world will not stop the hemorrhaging. For example, every time I hear a parish express concern about their financial situation, their usual idea is to schedule another fundraiser. This becomes a self-perpetuating downward cycle of addiction to the tyranny of the urgent rather than the systematic addressing of the root cause.

As we will discover in the Stewardship and Engagement Chapters 9, 10, and 11 of my Roadmap, failing to address the root cause of the problem means it will never stop causing agony over the long term. Accordingly, unless a parish is prepared and willing to engage in the hard work of continuing to dig until it identifies the real cause of its problems and the best way to address them, its efforts will be unsuccessful and unproductive.

A verbal Roadmap summary of my SP process includes the following:

1. finding the right time to begin the SP journey,
2. leading a diverse team,
3. managing by consensus,
4. gathering all necessary facts,
5. aggressively listening to all relevant messengers,
6. determining your parish WHY and Core Values to guide all actions in pursuit of long-term Mission, intermediate-term Vision, and Strategic Goals,
7. never let temporary setbacks deter you,
8. achieving a transformational change of heart shared by the parish,
9. celebrating successes along the journey,
10. staying faithful and awaiting the inevitable miracles.

My Stewardship Calling SP process has been uniquely designed for Christian parishes and answers four critical questions:

- 1. WHY does our parish exist?** What is our fundamental purpose for why your parish exists and why anyone should join you?
- 2. WHERE are we now?** A factual assessment of the current status of your parish and where it is strong and weak, what its resources are, and what is going on around you that needs to be watched and planned for.
- 3. WHERE do we want to be?** In the foreseeable future, what are the most significant strategic issues your parish must address to overcome your root cause challenges and put you in a healthier and better position?
- 4. HOW will we get there?** This is where the rubber meets the road and where you identify the most critical Strategic Goals that you must achieve and the step-by-step Action Plans to get you where you need to be.

### Differences In Strategic Planning Approaches.

I admit ab initio that my Stewardship Calling process will differ from the way others implement SP. I assure you that all divergences are highly intentional and the result of my

research and experience having done SP for over four decades and specifically completing SPs that cover over 26% of all Orthodox Christians in America.

For example, I believe many people confuse the Vision Statement and WHY Statement by saying the Vision is completely aspirational and never achievable. That is not logical to me because the very word Vision contemplates something you can see. I submit that for a parish Vision to be motivational in any way, it must be achievable and visualizable within about 3-5 years.

I know others allow Visions to extend 10 years or beyond, but given the exponential pace of change in our world and your parish, I am confident that any 10-year-old Vision will never be achieved, as too many things will change. Thus, as will be discussed below, I focus primarily on the WHY Statement as the fundamental purpose for which a parish exists. While perhaps the WHY is never fully achieved, it always remains the inspirational, true North motivation and driving force of the parish and its parishioners.

## [The Four Ps Of Strategic Planning And Four Questions That Must Be Answered.](#)

To do SP well, I advocate that **4 Ps** must be present:

1. **P**eople - The right diverse group of people must lead, develop, and implement the SP process, with input from everyone along the way. Recruiting representatives of the diversity of the parish brings all the necessary perspectives and ideas that can bring about a brighter future. In his insightful book *Groupthink*, Dr. Irving Janis described the evil of Groupthink, where the overwhelming drive for concurrence and agreement becomes so dominant in a cohesive in-group that it ignores alternative actions (Janis, 1972).

Everyone has seen (or lived through) examples of this phenomenon when new and creative ideas are excluded or squashed by the in-group that drives out dissenting voices and new approaches. This happens frequently in non-profit organizations where, to be honest, accountability and performance evaluations are less common than in the private sector. Having a broad, diverse, inclusive, and empowered group of faithful parishioners will help develop the best ideas, strategies, and teams to drive the difference needed.

2. **P**rocess - SP must be a comprehensive, inclusive, and methodical process with a detailed and enforced schedule. I discuss my recommended process and my belief that outside facilitation is essential in most cases in greater detail below. However, many parishes that hastily say they did SP, take shortcuts, and ignore any SP process they established. Expert external facilitation of the SP step-by-step process better ensures no critical step is overlooked or given short shrift.

In answering the listed four critical SP questions, my Stewardship Calling SP Process produces ten deliverables (all of which will be described in greater detail in this Chapter 7:

1. S.W.O.T. Analysis and/or Effective Parish Assessment
2. Why Statement
3. Core Values
4. Mission Statement
5. Strategic S.M.A.R.T. Goals
6. Vision Statement
7. Interim Goals, Interim Actions & Success Timeline
8. “Low Hanging Fruit” non-strategic goals for parish council to address
9. “SMART GAP” S.M.A.R.T. Goal Accountability Implementation Process
10. Strategic Plan

3. **Plan** - The above ten elements form a comprehensive SP that includes detailed Strategic Goals, detailed implementation Action Plans, and timeline scoreboards. To assist all parishes seeking to perform an SP on their own, I have attached as **Exhibit “A”** to this Chapter 7 my proposed final Strategic Plan template you can use by inserting your strategic planning elements where indicated by the yellow highlighting. In **Exhibit “B”** to this Chapter 7, I also included a sample strategic plan from a parish I recently completed.

4. **Performance** - SP must include a well-managed and persistent implementation plan with full accountability. This is critical as most SPs in nonprofits fail. Indeed, Harvard Business School professor Robert Kaplan suggested as many as 90% of SPs fail (Kaplan & Norton, 1996; Gibson, 2023). Most fail in this fourth step by not ensuring that the team is properly organized to ensure effective implementation. To help with implementation, I am a big proponent of the approaches found in the Covey organization’s Four Disciplines of Execution (McChesney et al., 2012). I concur with their constant emphasis on “the few things that can change everything.” This focus aligns with my philosophy of always addressing the “root cause” of any issues that are manifesting the symptoms and problems observed.

Unlike other SP consultants that may merely deliver a plan document, my Stewardship Calling SP process includes all the above ten deliverables, each of which serves an essential purpose. However, there are at least three other critical objectives I believe must be done to have a successful SP.

**1. Team:** Any successful SP process must ensure that a large enough motivated and dedicated team is organized through the process to achieve the Strategic Goals by executing the Action Plans and thus achieving the Vision. If your process does not set up an energized team, then as time goes by, the work efforts will diminish, and the enthusiasm will dissipate.

**2. Consensus:** Everyone in your process must learn how to make SP decisions using the consensus model that is integral to many Christian theologies. Consensus is essential if a community-wide enthusiastic engagement is to be achieved. This is important enough that it will be described in greater detail in its own section of this Chapter 7 of my Roadmap.

**3. Culture Change:** As important as anything, the SP process must transform the culture of your parish. This is not to say your parish culture is bad. However, stagnancy in parish cultures is an epidemic, and it is easy to keep doing the same things. This is especially true when leaders get tired or burned out or when resistance is realized. Ideally, when the SP process is complete, as close to 100% of your parishioners should be enthusiastically in favor of the changes to be achieved and the overall process. Once your parish gets in the practice of tackling significant challenges and overcoming them over time, it will transform into the kind of dynamic parish of Christ-followers that is unafraid of anything and will fulfill the Lord's vision for His church.

In short, arguably the best hockey player, Wayne Gretzky, got it right when he confessed, "I skate to where I think the puck will be," As I like to say: **"Proper SP is all about having the insight to use foresight, to avoid hindsight, to achieve perfect sight of the promised land of your Vision."** That's why it is critical to engage in a process that understands WHY you exist, Where you are currently, Where you would like your parish to be, and the comprehensive and methodical plan to get there while avoiding the previously cited exceedingly high failure rate in successful SP implementation (Bryson, 1988). If you believe Jesus Christ is who he says He is, and you want to lead people closer to Christ and each other, then nothing less than the best SP process is critical.

### Outside Facilitation And Challenging The Status Quo.

External realities sometimes drive or force change, including stakeholder customer opportunities/wishes and defensive strategies. Henry Ford said of his Model T, "Any customer can have a car painted any color he wants so long as it is black" (Ford, 1922). His decision was not out of arrogance or conceit. Black was the cheapest color, and a single color meant keeping the assembly line operating without stoppages to change colors. Those were all logical internal reasons in 1914. However, he missed critical insights from understanding that his customers wanted choices. Within eight years, the need for alternatives forced Ford to offer his Model T in maroon, grey, and green (Sullivan, 2023).

Outsiders with requisite skills and diverse experiences have seen many alternative ideas, approaches, perspectives, successes, and failures. With markets accelerating "four times faster than 20 years ago" and people being "825 times more connected than 20 years ago" (Fisk 2021), the right experienced facilitator with more "reps" (repetitions) and experiences can provide efficiencies, alternative insights, and proven approaches to help guide an organization's change initiatives.

An example of perhaps the most significant global change driven by defensive needs partnered outside consulting teams with insiders to develop the most transformational and dangerous invention of modern times. After Albert Einstein's 1939 letter to President Roosevelt regarding the discovery by Berlin chemists of how to split the atom (American Museum of Natural History, n.d.), the U.S. Military did not rely solely

on their own very capable and experienced internal “experts.” They mobilized a diverse and creative group of outside SP facilitators led by Dr. J. Robert Oppenheimer.

Under the Manhattan Project, this eclectic team coalesced to develop the great change instrument, the devastating atomic bomb that tragically killed over 100,000 people but ended World War II (Metcalf, 2023). Finding experienced outsiders who explore alternatives is a change management best practice recipe for better decision-making. To do this effectively, one must discover outside experts who can focus on the correct areas, trends, and alternative strategies (Hatch, 2018).

## Confirmation Bias & Disruption.

Socrates’s famous insight was, “The only true wisdom is in knowing you know nothing.” This is a sober reminder of how little we sometimes truly know, notwithstanding all the available data and information. Moreover, the human tendency to want to reach a quick and collegial agreement within organizations is strong enough to cause the refusal to evaluate alternatives because of the previously discussed Confirmation Bias and Groupthink. The escalation of the Vietnam War and the Bay of Pigs disaster are two examples of the psychological Groupthink tendency to discourage change, creativity, and other ideas/options. Research has repeatedly validated Groupthink’s limiting impacts and identified political motivations as another tendency to restrict the consideration of alternatives (Kramer, 1998).

The Confirmation Bias drive to look only at information supporting our preconceived notion and exclude contrary data explains why one may miss alternatives (Simkus, 2023). Additionally, inside perspectives often develop “knowledge resistance” based on rationalizing prior beliefs and experiences and excluding other points of view (Strömbäck, 2022). Because of their independence, external SP facilitators are more likely to look beyond homogeneous consensus conclusions. As a change management best practice, helping internal teams explore unique ideas and novel solutions in a non-confrontational fashion is a core competency of experienced SP facilitators.

Attributable to Albert Einstein is the wisdom that: “*The only source of knowledge is experience.*” Many individuals or organizations are experiencing challenges or issues for the first time or in a way they believe to be novel. However, what seems new to an insider may be an old hat for the right outsider. While we are encouraged not to reinvent the wheel, internal pressures (including economics, ego, and not rocking the boat) often prevent seeking the outside experience of others who can help traverse what seems like a long, dry desert road with alacrity and speed (Roberto, 2010).

## Change Vs. Status Quo.

Few things strike more fear in people’s hearts than the “C” word: Change. This has risen to the level where the number of “*how many (fill in the blank) does it take to change a lightbulb?*” jokes is a comedic epidemic. However, research proves how ineffective most change initiatives are within organizations (Weeks et al., 2004). The disruption to



continuity and stability and the incessant fear of failure and negative personal consequences make it perceived to be less risky to maintain the status quo. In 1979, “prospect theory” established that people frequently believed the potential for loss exceeded the benefit potential of gains (Kahneman & Tversky, 1979).

Raising alternative views and different ideas is sometimes perceived to have graver negative consequences for insiders than outsiders (e.g., demotion, firing, or being “shot” or run over by a tank) (Chavez, 2008). Outside SP facilitators often have greater freedom to challenge the status quo and ask the WHY question the requisite five (or more) times without negative consequences until the root cause of the problem is identified and addressed (MindTools, n.d.).

In addition, a critical change management principle involves assessing the optimal speed for change within an organization. For example, “complex adaptive systems change” focuses on engaging human activities not solely driven from the top down to consider the history and ability of an organization to effect change juxtaposed against external environments (Olson & Eoyang, 2001). To be most effective, this requires a partnership of insider historical perspectives subjected to the external SP facilitator's scrutiny and experience to find the acceptable organizational level of status quo pushback.

## Research And Reshape Perspectives And Alternatives.

Everything invented was new once. No less an internal “expert” than the Commissioner of the U.S. Patent Office, Charles Holland Duell, foolishly pronounced in 1902 that “Everything that can be invented has been invented (Morgan & Langford, 1981). Swing and a miss!

Fortunately, experimentation and research have continued to reorient the trajectory of every aspect of humanity. Reshaping change management techniques like “appreciative inquiry” allows insiders and external consultants to focus on further expanding or developing things that work well within an organization rather than merely obsessing over problems (Coghlan et al., 2003). However, not every organization has sufficient capitalization, incentives, or leadership to experiment and discover a brighter future. This is another place where outside SP facilitators can provide much-needed reshaping perspectives, research, and lessons learned from the experiments, successes, and failures of others (Sacolick, 2022).

Rarely does the first iteration of a new plan or idea yield the perfect solution. Scholars can point to the differences of opinion and approaches that disrupted even the early Christian Church (e.g., Acts 15:1-41). Experimentation and seeking alternatives are often critical. Having encouragement from an experienced outside facilitator can usually provide the confidence a parish needs to move forward. “*Now faith is the assurance of things hoped for, the evidence of things not seen*” (Hebrews 11:1).

## The Twin Ingredients Or Success: Rules Of Engagement And Consensus (“I Am OZ, Ahe Great And Powerful.”)

I am confident that some people who hear me say I recommend a parish **Strategic Planning Team (“SPT”)** of between 30 and 50 people (depending on parish size) stop reading because they see this is a recipe for disaster. It certainly can be problematic if the process is not well-managed and grounded in a Christian understanding of community that intentionally invites the Holy Spirit to be present and work through the people. To assist in this holy work, I believe it is essential to establish **Rules Of Engagement (“ROEs”)** for the entire process.

Indeed, when I lead a parish SP process, I send out the ROEs along with the invitation letter for parishioners to consider joining the SPT. They are told that if they agree to serve, these SPT candidates must agree to those ROEs. If any ROEs are unacceptable to SPT candidates, they should decline participation. This establishes the critical importance of the ROEs and the professionalism of the process.

At each SPT retreat, I always hand out the ROEs and remind them that at the beginning of each session, I will invoke them. If someone violates an ROE, I gently remind them. A second violation invites a more public rebuke. A third violation results in a personal conversation where I ask them why they are repeatedly disrespecting others, the process, and the rules they agreed to abide by.

This conversation would include an invitation for them to either rejoin and follow the ROEs or exit the process. Some reading this might find this harsh, although it is important to respect everyone else who is dedicated to the task. Everyone has participated in a session where a person with either an axe to grind, a fragile ego, or a toxic approach brings the entire team, discussion, and process to a halt. In medicine, doctors are trained to deal with the “cancer cell” before it metastasizes, which is best for the entire organism. (Yes, I know that it is harsh language, and I reserve it only for those extremely rare troublemakers who resemble it.)

In decades of doing parish SP, I only had to invite someone to leave once. It was at the opening retreat, and I got no further than reviewing the multi-month process we had agreed to implement before the “smartest guy in the room” (you know that kind of person) had to remind everyone who he was. Publicly and in a harsh tone, he announced, “This is not how SP is done.” Everyone was embarrassed at this rude treatment of a visiting facilitator (working for free). I knew from prior conversations that this guy was a bully who did this often in the parish. (I later found out there was a lot of debate regarding his inclusion in the SPT among those who knew him.)

I negotiated for a living, and I call all bluffs. So, I invited him to explain the authoritative sources that allowed him to conclude we were doing SP wrong. I will spare the back and forth; however, it became clear that he had no training or expertise in SP whatsoever and had merely seen it done once in his company. (He wasn’t even a part of the process used in that case.)

After patiently (for me) explaining to him the authoritative sources for the way we were going to do it, he said we were still wrong and that his one-off indirect experience was the only right way to do SP. The tone of his conclusion made everyone squirm. I saw the priest start to raise his hand, and knowing him, I expected him to try to apologize and calm things down. I never want a priest to use their “political capital” to protect me. So, instead, I just told the obstreperous “know-it-all all” that I respected his one experience but were going to do it the way we all (including him) had agreed when they agreed to serve on the SPT. And since I didn’t want him to feel uncomfortable or waste his time, he could leave the process now with no hard feelings.

It took a few seconds for everyone to understand that I was serious even though I was smiling lovingly. I then stood in front of the room, saying nothing, and looked at him, waiting for him to decide. Again, the Holy Spirit did what the Holy Spirit does, and he sheepishly said that it was all right and he would stay. I asked him if he agreed with the ROEs and process 100%. There was no need to allow him to sabotage from the inside. He expressed his sincere apology; I made him stand up, and I walked over to him, and we “hugged it out,” as they say.

Long story short, his epiphany was sincere, and he became one of the best and most enthusiastic SPT participants in the process. Sometimes, even bullies can change with the help of the Holy Spirit. However, in 99.99% of all other cases, if the ROEs ever come up (which they almost never do), they are enforced with humor, and everyone goes along. I love it the first time an unmuted phone rings in a retreat and allows the rest of the SPT to tease the ROE #6 offender. I usually tell that person to “tell the President I am busy now and hang up,” which always brings howls of laughter. Thereafter, everyone mutes their phones, and we proceed collegially and respectfully.

There are many different ROEs one can consider; however, I have provided the ROEs I use below. And before you question my sanity any further, I have fun telling everyone on the SPT that as the outside facilitator, I am “the great and powerful and all-knowing OZ.” This always interjects humor into the rule-making process and engenders a lot of good-natured ribbing of me throughout the SP process. While I will not accept compensation for my services, several parishes have given icons of Orthodox Saints or Wizard of OZ gag gifts at the end of the SP process.

### **Stewardship Calling Rules Of Engagement For Strategic Planning.**

1. We will stay on schedule (unless modified by the Facilitator who is “OZ”).
2. Titles, rank, position, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).
3. We will speak and interact confidentially. There can be NO repercussions for anything said. (“What happens in our meetings, stays in our meeting”).

4. Ask questions if you don't understand, because no idea or question is dumb (unless it has already been asked and answered).

5. Tangential/side issues will be parked.

6. No texting, emailing, tweeting, Facebooking, private conversations, phone calls, or other distractions during our retreats. We must all stay focused and be dedicated.

7. All decisions will be made by consensus. We will not be voting (except for occasional straw votes to assess consensus). Majority does not rule. Consensus will prevail.

8. OZ's 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.

9. Everyone MUST participate. ("Get in the game, or stay home")

10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Parish and not just what you want. It's all about Christ's church.

11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. ("Seek first to understand, and then to be understood.")

12. Absolutely NO "Discussion Killers." (e.g., "We tried that once," "It won't work," "You don't know what you're talking about," etc.) Be positive/encouraging.

13. Think strategically, creatively, and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)

15. We are all members of the Body of Christ, our Holy Parish, and are made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

Pick whatever ROEs you want, but it is important to have process procedures established and announced well in advance and agreed to by the entire SPT.

## Majority Does Not Rule.

The concept that a majority gets to rule likely originated in Ancient Greece and remains the prevailing decision-making authority in America today (Heinberg, 1926). The problem with this time-honored tradition in SP is that it can lead to those in the minority feeling their opinions are not welcomed or considered and their perspectives are not embraced. Thus, the team to achieve the Vision in the volunteer-controlled parish can become decimated before the journey begins.

A more inclusive and engaging decision-making model in parish SP is the time-honored “consensus” tradition. This was the model for decisions in the early days of the Christian church. History records multiple Ecumenical Councils where theologians and clergy would gather to debate a theological principle or alternative theory and eventually agree on the final decision through the process of consensus. Consensus decision-making involves a good faith attempt to hear all voices in a full and fair discussion to achieve a decision everyone can support and live with, even if it was not their first choice (Susskind et al., 1999).

When creating a path through a complicated set of decisions to an uncertain future, sometimes the consensus process is a journey rather than a specific decisive moment where the team realizes they have reached a solution they can live with (Mintzberg & Waters, 1990). This is why in parish SP, it is critical to move deliberately but take the time to reach a consensus and not leave parishioners behind with a decision they cannot accept or support.

Moses learned this lesson the hard way. After a time on Mount Sinai, Moses received ten critical commandments directly from God. In a dramatic scene described in Exodus 20:18 that rivals anything modern movies could present, the team saw lightning, heard thunder and trumpets blaring, and witnessed mountains engulfed in smoke. Not surprisingly, they “*trembled and stood far off*” (Exodus 20:21). When Moses descended with the Ten Commandments written in stone, he observed the lack of consensus among his followers as angry human leaders reacted by breaking the stone tablets into the mountain (Exodus 32:19). However, after taking the time to teach and preach and discuss and rebuild a consensus among the followers, Moses returned to rewrite these critical Core Values which the followers eventually embraced so they could continue their journey (Deuteronomy 10:4).

The SP application of consensus is merely seeking the “common mind” through respectful dialogue. Ultimately, you should seek an agreement everyone can “live with” (even if it is not their first choice). Indeed, the question you should repeatedly ask the SPT is if the revised proposal is something they can live with. Consensus is achieved once everyone agrees that the discussion has been full and fair and everyone can accept the modified proposal.

There are times in an SP process when consensus is not achievable after the period allotted to the discussion. This is where great facilitation steps in. If the facilitator (OZ) determines that the group is close, they should extend the time to see if consensus can be reached while the discussion is fresh on everyone’s mind. However, if OZ determines consensus is still far away, the best strategy is to “park” the discussion. This is done by

letting everyone know consensus has not been achieved, and the group will either take a break or move on to the next topic and come back to the open matter later.

In my experience, faithful groups of parishioners in an SPT can usually talk through differences of opinion and reach a consensus if given enough time and facilitation. However, parking an issue and moving on is not to be feared, and it often allows the Holy Spirit an opportunity to move the process forward. In one parish I worked with, even after an extended time, there was one phrase in a Mission Statement that the group could not reconcile. So, I called an audible, parked that issue for resolution later, and moved on to the next task.

About 10 minutes into that following task, an SPT member raised their hand and begged me to return to the previous unresolved issue because they had an epiphany and fresh take. The group looked at me to see what I would do, and leaning into the feeling the Holy Spirit had been at work, I said, "OK, you have one chance before we keep it parked." After stating their revised language, even before they could explain or defend it, several people in the group shouted, "That's it!" And in less than a minute, the entire group enthusiastically celebrated the compromise. I asked everyone to quietly thank the Holy Spirit as I thanked the whole SPT for their dedication to the critical task at hand and willingness to engage in consensus decision-making.

### SP Schedule And Timelines - The Two Phases.

There are two phases to my SP process: Planning and Implementation. The Planning phase (about 7-9 months) is when the SP is developed, and the Implementation Phase (anywhere from 2-5 years) is when all steps defined in the planning phase are fully completed. Some people are good at doing foundational research and considering options to meet needs, thinking strategically for the longer term, and developing strategy and action plans. Other people's Godly gifts are better suited to project management and executing defined action steps rather than conceptualizing grand Visions. This is why there are two separate teams, one to develop strategy and another to implement it.

Of course, every SPT member who created the strategy is encouraged to join an **Implementation Team ("IT")** once the SP is developed. At the same time, parishioners who could not commit to the rigor of the SP process but are interested in implementing it are encouraged to join an IT in a Strategic Goal they are passionate about. Additionally, some Strategic Goals are in areas where parish ministries already exist. All members of any such ministry are encouraged to join the IT in that area to help develop new and better solutions. I also encourage the parish community at large to be recruited into ITs. The bigger the committed army, the more likely the Strategic Goals will be accomplished.

One note of caution, however. When someone who was not part of the SPT is added to the IT team, they will need to be brought up to speed on everything done in the SP process. Particularly, they will need to understand and embrace the parish's WHY and Core Values and review the SWOT to see why these Strategic Areas of Focus were chosen and understand how the Strategic Goal was developed.

If a new IT member has been involved in a ministry in the area of a Strategic Goal in the past, you might find them resistant to change. They may be wed to the way things have always been done and threatened by the need to research best practices, identify measurable goals to achieve, and implement accountability processes. Groupthink and “that’s not the way we’ve always done it” must be addressed.

Change is not easy for most people, especially parishioners who have been doing what they believe was the right thing for a long time, even though the results (as demonstrated by the Weaknesses identified by the parishioners) indicate otherwise. Occasionally, it is time to move past those people refusing to change so they can keep a suboptimal ministry or process rooted in past inadequacies. In those cases, it is OK to have a “succession event,” thank them for their distinguished service, and move forward.

## [The 2 Stewardship Calling SP Process Options.](#)

I have found that, as much as possible, gathering people together in person to conduct an SP process is the most engaging and effective manner to proceed. While quite a few of the activities can be done via Zoom or other virtual processes, there is no better way to form and inspire a team than to have them all together in the same place, going through the two SPT Retreats in my SP process.

However, after the SARS-CoV-2 pandemic, I experimented and was able to migrate the entire Stewardship Calling SP process to be completed virtually. As a result, I will provide two different overall timelines below. One method includes two in-person retreats, and the second process allows SP to be done virtually. Again, either way, you can finish everything properly. However, having everybody together for the three-day first retreat and second one-day retreat just provides better interpersonal dynamics that make for a more positive result.

Regardless of whether the live or virtual program is implemented, those retreats must be action-packed, stay on schedule, and be as entertaining and enjoyable as possible. Accordingly, I routinely include a variety of different activities that can allow for interaction and socialization. I also invite and instigate some good-natured kidding back and forth to build esprit de corps. Indeed, my style is to encourage a fair amount of fun joking with me (and anybody else who can take it). Parish SP is serious work, but the more enjoyable we make it, the more enthusiastically committed your team will be.

I typically look for somebody who is good-hearted, confident in themselves, and a dedicated parishioner who likes joking around to be one of the people I “pick on” in a loving way during the whole process. I encourage them to return the favor of making fun of me. Recently, I identified one of the most well-liked older parishioners who had a good sense of humor, and I always used his name when I described what some wackadoodle might say or do. Every time I did that, immediately the whole SPT came to his defense and reiterated what a great guy he was. Their circling of the wagons around one of their

own was a critical step in their learning to coalesce as a unified team and “fight like Spartans” by always protecting their colleagues.

To bring in happiness, I also like to instigate natural fights. As someone from Atlanta who will insist that Coke products be served, I will routinely criticize anytime I see a non-Coke beverage. Similarly, as a caffeine addict, I insist on having fresh and strong Starbucks coffee present and will “poo-poo” any inferior or non-fresh coffee. (Of course, I'm grateful for any hospitality in the meals and will graciously accept anything that is offered.) However, I have learned that the more fun people can have on insignificant things as they learn to work closely and diligently together over a very intense schedule, the better the experience is for everyone.

### **The Stewardship Calling Live SP Process Timeline.**

I have set out the general timeline and schedule parameters below for both my In-Person approach and the Virtual approach:

#### In Person Summary Overall Timetable<sup>1</sup>

Finalize SPT	≈ 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

<sup>1</sup> Subject to Easter/Pascha/Christmas and major parish events and activities (e.g., parish festivals, Sunday School graduations, etc.)

<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 in-person 3-day 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

### **The Stewardship Calling ZOOM/Virtual SP Process Timeline.**

#### Virtual Summary Overall Timetable<sup>1</sup>

Finalize SPT <sup>2</sup>	≈ 2 months from start
SP Element Determination	≈ 4 months from start
Strategic Goal &	



Action Plans	≈ 5-6 months from start
Second retreat	≈ 7 months from start
Public Rollout	≈ 8 months after start

<sup>1</sup> Subject to Easter/Pascha/Christmas and major parish events and activities (e.g., parish festivals, Sunday School graduations, etc.)

<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 Zoom	2-3 weeks later
Core Values, Mission Statement & Strategic Area of Focus Determination Zoom	2-3 weeks later
Second retreat	7 months after start
Public rollout event	8 months after start

There are substantial similarities between these two respective overall timetables. The biggest difference is that in the in-person approach at the first three-day retreat, the SPT is able to reach consensus on the SWOT analysis, WHY Statement, Core Values, Mission Statement, and the identification of the top two or three Strategic Areas of Focus that will be pursued. In the Virtual version, these activities need to be undertaken at different Zoom/Virtual sessions. I have provided an Example of a 1<sup>st</sup> SP In-Person Retreat handbook (with schedule and actions) in **Exhibit “G”** to this Chapter 7.

### The Three Teams – CT, SPT & IT – Size Matters.

Some prefer doing parish SP with a small planning group that usually consists of leaders or other insiders. I acknowledge it is easier that way; however, I believe it tends to be more of the choir speaking to itself and fails to consider the needs of the broader community as a whole because it does not represent the vast diversity of the parish. While I never advocate diversity for its own sake, if we are truly reimagining a healthier and more effective parish, we must ensure it meets the growing and different needs of the vast array of other people God has entrusted to us.

Thus, I strongly prefer the Strategic Positioning/Planning Team (“**SPT**”) of between 30-50 people, which I find is necessary to reflect more substantial diversity (with smaller parishes at the lower range and larger parishes at the higher end). I have found that by

the time you do the “Noah’s ark” exercise of ensuring you have a couple of all different constituencies, including PIPs, APIPs, FIPs, cradle believers, converts, male, female, older timers, empty nesters, families, young marrieds, young singles, widows/widowers, high-schoolers, catechumens, seekers, and other critical stakeholders, 30 is a bare minimum. Plus, if you cannot excite that many parishioners into creating an SP and Vision for the future, your parish is probably not yet ready.

I have had a few difficult conversations with some clergy and laity who tend to be more control-oriented and do not want a big group. If they insist on doing it with a small group, I know I am not the right person to help them, and I wish them well. I even spoke with one clergyman who said he was unable to inspire even his parish council to undertake SP, so he developed one on his own. I congratulated him on developing his personal SP rather than one for the whole parish since they were neither consulted nor included. I think he got the message, but he did not change his approach. Unsurprisingly, his plan went nowhere, his leadership reputation took a hit, and the parish remains stuck and spiraling.

I hated being right in that case because I did love that priest and his parish. However, as I repeatedly say, Drs. Kouzes and Posner are 100% right: “In the end, leaders don’t decide who leads. Followers do. If you think you’re a leader and you turn around and no one is following you, then you’re simply out for a walk” (Kouzes & Posner, 2010). I think that the priest has finally realized he has been out for a long and lonely walk by himself. Building a team is hard but critical if you want a parish SP to succeed.

Unlike businesses, parishes do not have paid staff to implement their SP. Parishes rely on volunteers who have personal lives, families, and day jobs. One of my repeated humorous legal reminders is “The 13th Amendment to the Constitution freed the slaves and the church volunteers.”

In my second law firm, with over 1,200 lawyers in over 21 global offices, we religiously (pun intended) did SP every three years. Representatives of the vast diversity of our firm participated, and input from all partners was solicited. When we finished the SP, we had a paid staff who helped us stay on top of the implementation of the strategic goals.

No such paid SP implementation staff is present in any parish. For a parish SP to be successfully implemented, you need a veritable army of dedicated volunteers for all the work to achieve the Strategic Goals. You must start building the army in the planning phase by engaging a loyal and committed group of volunteers who do their best work designing a transformational SP that the separate Implementation Team (with lots of overlap) will actually execute.

## Core Team (CT).

When I begin a parish SP exercise, I always like to have a small **Core Team** (“CT”) of about five to seven parish leaders who are most dedicated to a successful SP process that includes the lead priest. This CT tends to be leaders of the community who have a good strategic vision of what is going on and what needs to happen and generally know

most of the people within the parish. At the same time, it needs to be diverse enough to represent or at least know the different major constituencies.

I use this CT to help identify the candidates to serve on the SPT utilizing the process I will describe below. This is why they need to know as many parishioners as possible from different demographics and constituencies within the parish. The CT members will also divide the list of SPT candidates and help solicit their participation in the SP process. In addition, I use the CT to help me do the “heat mapping” of the parish data (described in **Exhibit “F”** to this Chapter 7) we will gather through the SWOT analysis. Having this small group of leaders learn my SP process is also a way I try to perform a knowledge transfer so that in the years following the completion of their first SP, they are more capable of leading the next SP.

### Strategic Planning Team (SPT).

I suggest the Core Team use the following criteria to determine who your best choices for SPT are.

1. Who must be a part of the SPT for it to be successful, and who would we be better off if they were not a part of the SPT? We must have a frank (and very confidential) conversation. We are all acutely aware of psychology and human behavior. Some people, if they are not in the room, will kill whatever is developed. Some people, if they are in the room, will kill whatever is not their idea. Both are dangerous and not helpful.
2. We need to have people from many different perspectives and with many diverse gifts who represent the required constituencies within the parish.
3. All SPT members must be able (as we say in the South) "to play nice in the sandbox" and work well in a team environment.
4. We need intelligent, articulate, engaged, faithful, intellectually honest, well-adjusted team players who genuinely care about doing the right thing and can leave their egos at the door.
5. We do not need 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, or malcontents. I am sorry to be so blunt; however, I have seen many good planning processes get killed because of the wrong people in the room or die due to a thousand paper cuts because someone was not in the room. Thus, care as to the SPT composition is as important to success as is the process and timetable.
6. The SPT must represent all areas within your parish and all different major constituencies (young/old, cradle/convert, ethnic/non-ethnic, urban/rural, professional/blue collar, working/stay-at-home parents, men/women, etc.). It cannot just be the “usual suspects” and the same folks you see on your PC or at your general assemblies.

7. SPT members must be capable of strategic thought and not merely be small thinkers. We are building something big, important, transformational, and long-term.
8. SPT members must be creative and think like visionaries and futurists and not people who are rooted in the past.
9. We need well-adjusted parishioners and not people who are not so sad/mad/angry/hostile that they cannot see beyond their own circumstances.
10. SPT members must be willing to dedicate a fair amount of time over the next 7-9 months and make this SP work a priority. There may be some people you think do not have the time who will surprise you if invited to participate in something this transformational. They have just been waiting to make a difference. There will be some who you would think have plenty of time and who will not want to participate because they do not appreciate this kind of process. You will not always know which is which, so invite the best folks and let them decide if they are willing to devote the time.

Some original SPT members will drop out for different reasons (e.g., a bigger priority may arise in their lives, they may not like the process or amount of work it takes, they may realize they can't add value or have the necessary time, etc.). That should be expected and is OK. This is one reason you will include a larger number of SPT invitees so that when you have departures, you do not harm your critical mass. After the first retreat, you will also have "on-ramping" opportunities to bring in new blood interested in the strategic areas we identify as necessary. The Holy Spirit will guide and work with you if you have faith.

### Strategic Planning Team (SPT) Selection.

I use a somewhat untraditional way to select the SPT invitees that have been validated over time in many situations. I ask all CT members, including the clergy, to send me the maximum list of individuals that they can think of throughout the parish that meet all the criteria I set out previously. I then compile an aggregate list of names from all members of the CT, alphabetize it, and remove any common names.

In a special CT meeting, I read every name alphabetically, and any member of the CT who does not believe that particular SPT candidate is a good fit and meets all the criteria can merely say "B." This signifies that they will not be invited to be a part of the SPT in the first round but will instead be added to the "B-Team," which you may "on-ramp" later. No CT member is required to explain their reason for placing a candidate on the B Team. This is to protect whatever confidential reasons they might know that may make this candidate less than ideal.

Typically, If the CT has done a good job of going through the parish list and identifying SPT candidates, it takes no more than one pass through the names to identify the remainder that you invite to be members of the SPT. My usual experience has been

to invite at least twice as many parishioners as you hope to have on your SPT ultimately. Thus, for a larger parish where you may be seeking an SPT of 50 members, you would try to make sure that you have invited at least 110 parishioners. For smaller parishes that may only need a 30-member SPT, you would look to invite between 70 and 75 individuals. My extensive experience has discovered that a 50% yield rate from invites to acceptances is normal.

After the CT has finalized the list of SPT invitees, a formal letter of invitation is sent out that describes the entire process, what is expected of them, and includes both the ROEs we will follow, the expected timelines and deadlines, and some FAQs to answer their questions in advance. A sample of this letter is attached as **Exhibit “C”** to this Chapter 7.

I have discovered that you will typically get between 25% and 40% of the SPT invitees to respond to the RSVP in the invitation letter within ten days of when it is delivered. For this reason, I recommend that it is delivered both via mail and e-mail (and even via text message if a parish has that capability). I also recommend that the RSVP period be left open for about three weeks at a maximum. About one week before the deadline, all SPT invitees who have not yet responded are allocated among the members of the CT so they can follow up personally to answer any questions and help the SPT invitee decide whether or not they should participate. Deadlines are important if you're to stay on track in this process, which is why I try to rigorously manage this phase of the program so that we can make sure that we have the right team in place.

### Implementation Team (IT).

Once the SP is finalized, the members of the SPT are, as I jokingly say, “fired and thanked for their service.” Immediately thereafter, I start recruiting them to join an IT team of their choice for one of the final Strategic Goals in order to execute all the actions determined in the SP Action Plan. A natural starting point for each IT is the members of the SPT that helped design each of the Strategic Goals and Action Plans. However, I have discovered that some people who are really good strategic thinkers are poor at implementing an SP, and therefore, they elect not to participate in the implementation phase. Similarly, some individuals who may have worked on one Strategic Goal may become more excited about working on the implementation of another Strategic Goal. Therefore, you should facilitate their migration to where they feel the most passion.

In addition to the members of the SPT that carry over onto the IT, anybody who is involved in a ministry that a Strategic Goal directly or indirectly touches must be invited to be a member of that goal's IT. Their insights and past experiences are important as long as they don't become a hindrance to surveying or evaluating new and improved solutions. Finally, at the Open Community Rollout Event, where the SP is presented for enthusiastic acceptance by the parish as a whole, all parishioners should be invited to join an IT and thus become part of the solution of creating the new Vision for the parish. Most won't, but it is always good to ask.

Some individuals worry about having an IT that is too large. However, experience has demonstrated that quite a few people who sign up may not be willing actually to do the work. In addition, once the actual Action Plan is determined for each Strategic Goal, a whole host of different activities need to be undertaken. Thus, a large group can be allocated amongst the various tasks to be performed so that there's no significant overlap, redundancy, or too many people getting in the way of others.

Spending time identifying, recruiting, and developing the best and largest team possible is absolutely critical for your SP to be fully and successfully implemented. Having the largest army fighting the parish battles that need to be fought is the goal. To put the parish in the best position for the future requires “all hands on deck” and participation by as many people as God has called to provide service to this great end.

### The Whole Parish Community.

One critical point that cannot be overstated is the essential importance of ensuring that the entire community is involved in this process as much as possible. Ultimately, any successful SP will require the consensus support of the whole parish community to ensure that all the hard work will be done effectively. Accordingly, extensive and continual communication of every step of the SP process is essential. In addition, I strongly recommend the inclusion of every type of parish communication activity to help inform and include the broadest possible support from the parish at large.

While the information regarding the SWOT analysis will be discussed more below, one of these community-wide opportunities is to have an open community forum SWOT analysis discussion. At this forum, I typically present a 10-to-15-minute PowerPoint regarding the overall strategic planning the parish is undertaking and explain what each element of the SWOT analysis means. We would then open the floor for comments from everyone in attendance to offer their parish strengths, weaknesses, opportunities, and threats.

This is done as an open community forum for a variety of reasons. Some people are verbal auditory communicators and do that much better than writing their SWOT analysis answers. Secondly, if people attend and hear the ideas expressed by others, it will often trigger new ideas that they can offer verbally. Additionally, in some cases, parishioners can reinforce the concepts that other parishioners offer.

Finally, you want to make sure that parishioners all have the maximum number of opportunities to be heard. It is essential that gathering the data from the greatest number and diversity of parishioners occur through multiple opportunities to provide their input so that with integrity, it can be said that every parishioner was able to become part of the process and offer their input and wisdom.

The last engagement action in the planning phase is the invitation to the community-wide celebration of the SP so that every parishioner can embrace the SP and engage with an IT to help ensure that the Strategic Plan is fully and effectively implemented. Throughout the SP process, constant communication regarding the SP and progress is critically important. Furthermore, as the implementation of the SP begins, it is

equally important that the SP efforts be effectively communicated. One way to do this is to establish a page on the parish's website just for the SP with updated information and the relevant scoreboards of accomplishments. Showing the levels of achievement of each of the Strategic Goals, as well as the “low-hanging fruit” (discussed in more detail later), helps convey the seriousness of the SP process and the achievement of the Vision.

## Question 2 – Where Are We Now? - Effective Parish Assessment - EPA.

I always preach the well-worn truth that “you cannot master what you do not measure.” This is a nuanced version of management guru Peter Drucker’s version of “you can’t manage what you don’t measure.” Unfortunately, in church-world most things go unmeasured. And the few things measured tend to be symptoms and not root causes of issues. For example, parishes can tell you about financial collections and how they are paying expenses (both lagging indicators of symptoms) but not how they achieved them or why their results were not better.

Most parishes do not even measure how many people are present for their various services (by different demographic) groups. This means they cannot determine if they are reaching a significant portion of parishioners or if some groups are missing. Moreover, if they were to experiment with some theologically appropriate innovation without having a baseline of attendance, it would be impossible to determine if the innovation is an improvement or not.

Doctors can assess your personal health. Financial planners can determine your financial well-being. Educators can assess your academic proficiency. However, one thing that bothered me was the complete absence of a free, methodical, empirically and experientially validated, and convenient and easy-to-administer tool to assess the operational health and effectiveness of Christian parishes.

Thus, after 30 years of working with over 1,000 parishes and completing strategic plans that covered over 26% of Orthodox Christians in the United States and studying all of the relevant church empirical data I could find, I assembled a treasure trove of useful information. I was then blessed to gather a few colleagues to see if we could develop an empirical parish health and effectiveness assessment. After meetings and ZOOMs over several years, the Effective Parish Assessment (**EPA**) was born.

Based on all the empirical data, we identified 30 “Building Blocks” of operational excellence and parish health that can be grouped into 6 “Pillars.” The diagram on the next page depicts the totality of what a healthy and effective Christian parish must provide.



At the top, under the dome, is the worship experience. In traditional churches like the Orthodox and Roman Catholic denominations, this includes various precise liturgical and sacramental practices handed down from the time of the Apostles and Ecumenical Councils. For other more modern faiths, the worship experience varies. Regardless of the style of worship, a healthy and effective parish must excel at this. However, since that is mostly under the purview of the clergy, this is largely not evaluated in the EPA (with a few exceptions).

Similarly, an effective parish must foster personal faith formation, depicted as the foundational element at the bottom of the “living house of faith.” How one lives one's faith is a critical process. In traditional faiths, this would include a sacramental life (e.g., communion (Eucharist), confession or penance, baptism, chrismation or confirmation, Holy Unction or anointing of the sick, marriage, ordination). It also includes an active prayer life, study of the Holy Scripture, and other elements of living one’s Christian faith. Since this is highly personal and varies widely, it is also not included in the EPA.

However, everything else the parish does falls within the broadly defined rubric of what I call “the operational side of the house of God.” This includes all the ways the faithful can interact with the parish (other than liturgically), including ministries, philanthropy, education, service, social, and the parish’s Vision to bring people closer to Christ and each other. All of that is the subject matter of the comprehensive EPA assessment.

The EPA consists of a free online survey all parishioners complete. The EPA is a reliable, easy, and empirical way to assess the Parish health and operational effectiveness by surveying parishioners and any other relevant stakeholders. The EPA consists of a series of validated statements that parishioners evaluate on a 5-point Likert scale from “strongly disagree,” “disagree,” “neither disagree nor agree,” “agree” to “strongly agree.” In addition, an “I Don’t Know” option is available for each statement, which helps provide valuable feedback for parish leaders regarding activities, programs, and initiatives being implemented for which inadequate or ineffective communications cause their availability not to be known by parishioners.

The EPA results are grouped as: (a) Favorable = Strongly Agree and Agree; (b) Unfavorable = Disagree and Strongly Disagree; (c) Neutral = Neither Agree nor Disagree. “I Don’t Know” answers are tabulated separately to assess the effectiveness of Parish communications. Indeed, as part of the readout of EPA results, we include a slide showing



all 30 building blocks ranked from the most “I Don’t Know” answers to the least, as represented in the example below:




Pillar	Building Block	% I don't know
Stewardship & Generosity	Capital Campaign	56%
Stewardship & Generosity	Planned Giving & Endowments	54%
Operational Effectiveness	Financial Excellence	41%
Stewardship & Generosity	External Philanthropy	36%
Vision & Planning	Strategic Planning	35%
Ministries	Ministry Management	35%
Parishioner Engagement	Outreach	34%
Operational Effectiveness	Staff Management	34%
Stewardship & Generosity	Giving & Tithing	33%
Vision & Planning	Goal Achievement and Accountability	33%
Vision & Planning	Parishioner Involvement	32%
Stewardship & Generosity	Transparency & Accountability	30%
Stewardship & Generosity	Stewardship Campaign	30%
Ministries	Youth & Young Adult	29%
Operational Effectiveness	Safety & Security	28%
Vision & Planning	Operational & Technical Planning	25%
Parishioner Engagement	Evangelism	25%
Ministries	Volunteer Management	25%
Ministries	Ministry Engagement	23%
Ministries	Defines Needs of Parishioners	21%
Operational Effectiveness	Facilities & Technology	19%
Operational Effectiveness	Communications & Digital Strategies	19%
Parishioner Engagement	Spiritual Engagement & Catechism	17%
Parishioner Engagement	Liturgical & Sacramental Participation	17%
Leadership & Teams	Conflict Management	16%
Leadership & Teams	Effective Teams	9%
Leadership & Teams	Parish Council & Boards	8%
Leadership & Teams	Leading & Coaching	8%
Leadership & Teams	Christian Leadership	6%
Parishioner Engagement	Welcoming & Fellowship	5%

*Possible Communication Opportunities*

Over a three-week period, all parishioners are repeatedly asked to complete this EPA survey. Following the completion of a statistically significant sample size of parishioners and the necessary calculations of results, a color-coded analysis is delivered at the Pillar level. As usual, Green indicates things are relatively good in this Pillar, yellow signifies a need for caution and some areas that may need attention, and red indicates a DEFCON One need for attention and remediation. The following hypothetical sample shows the Pillar names at the top and the Building Blocks in the bullets below, as well as an overall color of the summary results for the entire Pillar.

## EFFECTIVE PARISH ASSESSMENT Sample Pillar Report Card



A statistically significant approximately 10% of Greek Orthodox parishes have completed version 1.0 of the EPA, as well as parishes from other Orthodox jurisdictions. As a result of the data from these early adopters and innovators, a Version 2.0 of the EPA is being developed that will make it even easier to implement while still yielding extraordinarily valuable information. The next iteration will hopefully include using artificial intelligence to help facilitate the gathering and analysis of the data. However, my absolute Stewardship Calling commitment is to ensure that I (or another experienced church consultant) will analyze and deliver all data directly to the parish council and other leadership, answer all questions, and help them chart strategies to respond to the results.

Delivery of these EPA results usually takes place over three sessions. In the first parish ZOOM, we review the EPA tools, present the overall Pillar assessment, and then present the detailed Building Block results depicted above. We then go down to the next level to show the detailed percentages of responses that were favorable, unfavorable, neutral, and I Don't Know for each Pillar. See the example below:

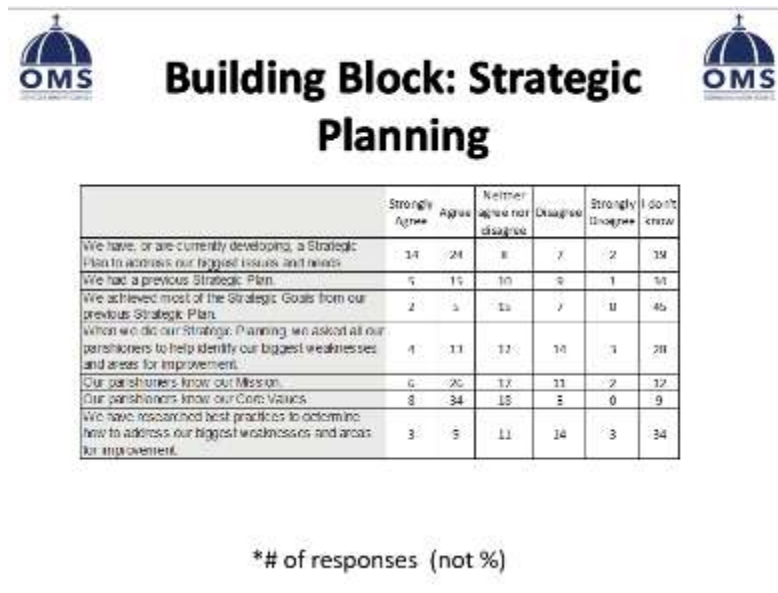
<b>Effective Parish Preliminary Assessment Results</b>				
	<b>% favorable</b>	<b>% unfavorable</b>	<b>% neutral</b>	<b>% I don't know</b>
Vision & Planning	37%	34%	29%	17%
Leadership & Teams	50%	21%	28%	7%
Stewardship & Generosity	28%	45%	26%	30%
Parishioner Engagement	44%	38%	18%	15%
Ministries	33%	40%	27%	15%
Operational Effectiveness	45%	29%	26%	23%

After this Pillar data is presented and understood, we then present the percentage favorable, neutral, unfavorable, and “I don’t know” for each of the thirty building blocks one at a time, focusing on the areas that the data shows provide the need for the greatest attention. See an example to the right.



This analysis is repeated for all of the thirty building blocks. Any preliminary parish council questions are answered in this first presentation of results, and the parish leadership is challenged to start to identify if any of the responses are anomalous and unexpected or easily explainable by a fact unknown to me or my team.

The second EPA Zoom session occurs after the parish leadership has digested the results and provided answers to a questionnaire about the things they would like to be explained in greater detail. In this second session, we can go down to the question-by-question level to review responses and identify the root cause of the issue. Below is an example of parishioners’ responses:



For those parishes undertaking an SP, the level one and two analysis of the EPA is critical data the SPT will use to identify the most vital root cause issues that must be addressed. Those parishes that are not yet ready to undertake SP can use the data from these two EPA sessions to begin to explore the concerns most important to their parishioners and start to consider solutions.

Over decades, leadership scholars Drs. Kouzes and Posner have surveyed over 100,000 people who have consistently identified the critical importance of honesty, integrity, and trustworthiness in all research and organizational improvement efforts (Kouzes & Posner, 2017). The next highest-rated element followers looked for in their leaders was well below these elements of trust. There is no better way to earn the trust of your parishioners than to solicit their input, concerns, and thoughts objectively and then transparently report on and use that data to address the biggest challenges they identify.

While often attributed to President Ronald Regan, the phrase “Trust but verify” has Russian roots. “Doveray, no proveryay” which translates into “a responsible person always verifies everything before trusting” (Shevchenko, 2019). The Apostle Thomas is treated as the poster child for the scriptural imperative of not trusting until you can see for yourself. “*Unless I see in His hands the print of the nails, and put my finger into the print of the nails, and put my hand into his side, I will not believe*” (John 20:25). In this way, he demonstrated humans’ need to see things with their own eyes.

For this and other reasons, every parish is highly advised to use a tool like the EPA (and/or SWOT analysis that is discussed next) to regularly survey the parishioners and let them know their concerns are heard and will be addressed in order of priority. If you are interested in learning more about the free EPA, please get in touch with me at [Bill@stewardhipcalling.com](mailto:Bill@stewardhipcalling.com) or check out the Effective Parish Assessment website: [www.effectiveparish.org](http://www.effectiveparish.org).

### SWOT Data Gathering: “Facts Don’t Care About Your Feelings.”

Before executing transformational SP, one must answer the second of the four critical questions: Where are we now? Finding the answer requires using one (or more) accepted SP assessment techniques. Bensoussan and Fleisher (2008) discussed how thoughtful data analysis, separated into its constituent parts, is often overlooked or underemphasized in processes such as excellent SP.

One of the older and very successful truth discovery processes is what is widely defined as a **SWOT Analysis** (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats), which remains a mainstay in SP despite its efficacy critics (Leigh, 2009). In every SP I have led over many decades, the fact discovery process yielded a clear consensus of the most critical challenges a parish is facing. This was also true when I did SP for business clients, religious schools on whose Board I served, and the countless number of churches and ministries I have been blessed to lead through SP.

I repeatedly say that every element of an SP process is biblical in its foundation, and a SWOT Analysis is no different. St. Paul preaches in II Corinthians 13:5, “*Examine yourselves as to whether you are in the faith. Test yourselves.*” The Orthodox Study Bible (2008) commentary on this powerful passage instructs “that the test of being in Christ is a humble, virtuous life lived in communion with the Church” (p. 1586). This is exactly what a SWOT Analysis is attempting to discern in asking what your parish does well to bring people closer to Christ and each other (your Strengths) and what your parish does not do well or that needs to improve (Weaknesses).

However, the SWOT analysis is not only introspective, looking within the four walls and activities of the parish, but also forces you to look outside. You know that in modernity, there are forces at work outside of your parish that it can use or take advantage of (Opportunities) and headwinds that can cause your parish difficulties (Threats). Understanding both the internal things you do well and that need improvement, as well as the external factors to deploy and avoid, is a critical part of helping a parish determine a bright new future.

Among the SWOT Analysis benefits is the ability to quantify concerns and show the community in order of the number of mentions. These things are top priorities for the majority of parishioners. In this way, planners can help people realize when their opinions are unique and not mainstream concerns of a consensus of other stakeholders. This recognition allows a parish to prioritize the biggest consensus problems they must address in their SP.

Moses modeled this practice many times, perhaps most famously when he sent out the “twelve spies” (Numbers 13:1-33). The Twelve Tribes of Israel descended from Jacob, and each sent a “spy” to factually assess the prospective lands for their suitability to be the “promised land” and to return with empirical evidence of what they found. This is essential to discover the quality of the parish soil into which new seeds are planted through the SP process.

Fascinatingly, the data presented by ten of the twelve spies underscored the difficulty of their journey while simultaneously sharing how rich the land was in the resources they needed (Numbers 13:27-28). However, the remaining two data-gathering spies, Joshua and Caleb, disagreed and concluded they should take the journey and claim the land (Numbers 13:30). The people foolishly followed the majority until God killed the first ten spies (other than Joshua and Caleb) with a plague. Since the people ignored the empirical and factual data and acted on feelings of journey difficulty, they made the wrong decision and required God’s intervention to correct their error.

Gathering this SWOT data from as many parishioners and other stakeholders as possible is critical. This is why in my Stewardship Calling SP process, I have every member of the SPT and CT complete a SWOT as well as having them ask every parishioner to do the same. This is done in as many different communications media and vehicles as possible. Thus, I suggest a parish mail AND email the SWOT request to everyone at least twice, as well as placing it in any parish bulletin, on the parish website, in the area outside the church (narthex), and through every other media vehicle at the parish’s disposal. I have provided a sample of my simple parish-wide SWOT request letter and form in **Exhibit “D”** to this Chapter 7.

I recommend leaving the SWOT deadline open for at least three weeks. The priest should mention it every Sunday and in any other weekday services, as well as in any announcements in church and mailings of bulletins. It is also helpful to talk it up at any Ministry or Small Group meetings, Bible studies, or other activities happening at the parish over those three weeks. I encourage everyone to complete it using the Microsoft Word document to make the transcription easier. Still, some people will inevitably handwrite their responses, so someone will need to transcribe the written work into a Word document.

If you have parishioners for whom English is not their primary language, it is helpful to have translation services available. Also, for senior citizens who may not be computer literate, I have found it helpful to have some computers, notebooks, or iPads in the church hall where people can fill out the forms. It is also a great idea for some of your youth to be available to help the seniors complete the forms as one of their community service stewardship projects. Some parishes have created online Google Docs or used MailChimp, Constant Contact, parish APPs, or other vehicles to get SWOT data from as many parishioners as possible so that their voices can be heard.

Every member of the SPT must complete a SWOT; however, there is additional information they need to submit for the first retreat. I have provided a sample of my simple SPT SWOT and Advanced Assignments request letter and form in **Exhibit “E”** to this Chapter 7. As the forms are submitted, someone needs to move the individual entries onto separate Microsoft Word documents to facilitate the heat mapping process. There will ultimately need to be seven separate Word documents, one for each of Strengths, Weaknesses, Opportunities, Threats, Core Values, Mission Statements, and proposed Strategic Areas of Focus (with the last three items only coming from SPT members and not the entire parish).

In addition, as the SPT Advance Assignments are submitted, someone in the parish office or a volunteer will have to log in the choice of the SPT members for the two different sets of breakout groups, namely either (a) Mission or Vision, and (b) Strengths, Weaknesses, Opportunities Threats, and Core Values. For the first SPT retreat breakouts, there should be relatively even numbers of SPT members allocated to each of the five choices in (b) above and then two or three different groups of Mission Statement teams and two different groups of Strategic Area of Focus Teams.

In addition to the written submissions, as previously mentioned, I strongly recommend having at least one open community forum night where anyone who wants to can come to offer their own SWOT suggestions verbally. A short presentation of the SP process should proceed with the “open mic night” opportunities when people can come forward and state their suggested Strengths, Weaknesses, Opportunities, or Threats. I recommend doing them one at a time, and I ask people to try to come to the microphone only once for each of the four elements with as many ideas as they wish to offer for each item. Of course, someone will offer an idea that triggers a neuron firing in another person who has already contributed so they can come up a second time after everyone who wants to speak has made their first offering.

It is fine if a person submits both a written form and offers some verbal suggestions (as the law of large numbers will not make their doubling input statistically significant). However, parishioners are discouraged from coming to the open forum and merely reading their written form. This event is primarily for the people who are more comfortable verbalizing ideas rather than writing them. However, it is also another opportunity to speak with your parishioners about the SP process and let them know that you want their voices to be heard. A CT member or the facilitator should transcribe all comments offered, which must be integrated with whoever is compiling the seven Word documents with all the submissions for heat mapping.

Once the deadline has passed, all the written SWOT and Advance Assignments are in from parishioners and SPT members, and the open forum comments have been included, it is time to “heat map” and organize the results. The heat mapping process is merely the act of reorganizing every submission (verbatim) by grouping them into like topics. People will articulate their ideas using different words, but they often mean the same categories of things. The heat mapping process is all about taking a lot of data and identifying how frequently a common topic occurs (regardless of the words used). The topics are then listed in the order of the number of times they are mentioned. I typically recruit CT members to help with the heat mapping by each taking one of the SP elements. I have provided my heat mapping instructions and some sample heat-mapped data in **Exhibit “F”** to this Chapter 7.

One note of caution. I have discovered that no matter how many times I explain it, and no matter how I write the instructions, quite a few people always get Opportunities and Threats wrong. These are supposed to be things happening outside the parish. However, the word “Opportunity” conjures up internally focused sentiments such as “I think we have a real opportunity to make our service more accessible.” This is not an external Opportunity and thus cannot be included in the list of Opportunities. I tell my heat mappers to take all those internal comments and put them at the bottom of the document under the heading NOT EXTERNAL OPPORTUNITIES and not include those comments in the count. The same is true of Threats, as many people still look inside the parish to identify something happening internally that they call a threat. That is not a proper SWOT Threat and, again, should be listed at the bottom and not included in the count.

And now for the big reveal that demonstrates another difference between my Stewardship Calling parish SP process and how others do SP. I think the Strengths should be celebrated and their continuation reinforced. But you do not need a SP process to do that. In addition, someone in parish leadership should be assigned to keep the watch tower on external Threats, but they will likely not drive strategy and the future vision. Thus, in my Stewardship Calling SP process, I focus first (and sometimes exclusively) on the identified Weaknesses. I strongly suggest that if the parish tackles the root causes of the top 2 or 3 Weaknesses and develops a strategic solution to fix them over a few years, the health of the parish and its effectiveness will be most positively impacted.

Thus, when the time comes for the first retreat to identify the top two or three Strategic Areas of Focus for which the parish will develop strategic goals, I have them start with the top Weaknesses. Once a consensus is reached about the top several weaknesses, they can scan the Opportunities and see if any of those external phenomena can help address one of the top three Weaknesses. But I truly believe that the greatest results and momentum are achieved when a parish fundamentally addresses and solves its greatest Weaknesses.

I have repeatedly mentioned that only the top two or three Weaknesses should be addressed in any SP. I learned to limit the list both due to research and practical experience. The Covey organization’s Four Disciplines of Execution (“4DX”) provides substantial research confirming our ability to address only a few big things at a time. MIT neuroscientist Earl Miller concluded that “trying to concentrate on two tasks causes an overload of the brain’s processing capacity” (McChesney, 2012). Dr. Miller’s research

confirmed that human beings are genetically hardwired to do a very small number of things at a time with excellence. Thus, focusing on the critical root causes of the major Weaknesses produces a larger scale of positive impacts.

This is even more true in nonprofit organizations like parishes, which depend almost exclusively on volunteers who have families, day jobs and can only give limited time to their parish as opposed to businesses where people can be hired to implement SPs. Thus, it is much more effective to successfully transform the top two or three identified weaknesses with great focus and energy than to try the “peanut butter approach” of spreading your limited people and time resources too thin trying to do many things halfway.

When I first started doing parish, Diocese, and national church SP, I would let them convince me to allow them to tackle as many of the top Weaknesses as they thought they could. Honestly, in retrospect, no parish has successfully handled more than three Strategic Goals with any degree of comprehensive effectiveness. To be sure, they often made progress in many of the other areas, but usually at the expense of completing the really big things properly and fully. The phrase borrowed and modified from Covey’s 4DX process asks what are “the few things that can change everything.”

For example, (spoiler alert) the research unquestionably shows (as will be discussed in Chapter 10 of my Roadmap) that when parishioners are more engaged liturgically and in ministry, they give substantially more money. Thus, if a parish says they have financial problems, that always translates to them having ministry engagement and volunteerism problems. So, if they create one Strategic Area of Focus on stewardship and engagement, they will solve multiple problems with that initiative. This is why Chapters 9, 10, and 11 of my Roadmap fairly exhaustively focus on how a parish addresses its significant Stewardship and Engagement challenges. By prioritizing the biggest Weaknesses and addressing their root causes, you will have the greatest impact from your SP.

One final note. My Stewardship Calling parish SP process always uses all three of a SWOT analysis, EPA, and a Financial Stewardship Analysis (discussed in Chapter 10 of my Roadmap) to answer SP question #2 of “Where are we now?” I find that all three tools add valuable insights into framing and understanding the biggest challenges. Moreover, when they tend to point in the same direction, it provides cross-validation that the most critical Strategic Areas of Focus are “the few things that can change everything!”

## [Why Start With WHY - Part 1.](#)

I believe that asking the why question is perhaps the most critical question that anyone must answer both for themselves and their parishes and ministries. I think this is truly, at its root, the question that the Lord has placed in each of our hearts to ascertain why we exist. Why, out of the trillion to the trillionth power times infinity of things that God created, which is to say everything, He only made one in His image and likeness. And that is you and each of your parishioners. And yet, even amongst that similarity with our



maker, we are all unique. Even genetic twins have different characteristics that will allow them to grow up looking the same but able to act differently.

Because of my focus on WHY, one of the differentiating characteristics of my Stewardship Calling SP process is the critical aspect of helping parishes discover their WHY. Author Fyodor Dostoyevsky once said, “The mystery of human existence lies not in just staying alive but in finding something to live for” (Dostoyevsky, 1880). Another clarion call for discerning one’s why is the great wisdom most often attributed to Mark Twain but probably first uttered in a sermon by Dr. Earnest Campbell that I use in every Stewardship Calling Igniting The Flame programs and my Ancient Faith Radio podcasts: “The two most important days of your life are first the day you were born, and second the day you figure out why” (Campbell, 1970).

This prominent focus on WHY differentiates my Stewardship Calling SP process from most others who do not make the WHY Statement a principal focus. Alternatively, I believe some confuse the WHY and the Vision. Some SP consultants believe the Vision should be aspirational and not achievable. I take a different view since the word Vision naturally implies you can see it. Instead, I maintain the aspiration of what the parish seeks to become should be found in its WHY Statement.

Thus, the WHY Statement of the parish’s fundamental beliefs is the first and most critical question you must answer in any SP process. The WHY Statement should be the articulate, compelling, and inspirational reason why the parish exists and why anyone should want to care or want to join. I believe WHY Statements are the most important foundational aspirations along with your parish’s Core Values. I modified Pastor Andy Stanley’s quote, as I advise that your parish “date your vision, marry your Mission, and die living your WHY and Core Values.”

I say this because your parish Vision Statement will change every three or four years as the prior Vision is achieved and a new Vision is cast for the future. In contrast, your Mission Statement defines the fundamental things your parish does and will not change over time (if it is aligned with Christ’s teachings). This is why you marry your Mission Statement. Ultimately, the foundational truth of everything a parish should do is live its WHY and Core Values.

The WHY Statement is also biblical in its foundation. In Acts 14:15, St. Paul challenged the people by saying, “*Friends, why are you doing these things?*” This was in response to the Jewish people of the time continuing habits out of rote memory rather than out of fundamental belief. That oftentimes defines one of the reasons why your parish is stuck in the past and not moving to the future.

### [Stewardship Calling Parish WHY Discovery Process.](#)

My Stewardship Calling SP process includes a WHY discovery that consists of some WHY education I offer at the beginning, followed by watching Simon Sinek’s inspirational Start With Why TED Talk (Sinek, 2010). In eighteen minutes, he articulates the differentiation between a WHY (the fundamental purpose your parish exists), the

WHAT it does (which is found in your parish's Mission Statement), and the HOW it does its work (which is found in your Strategic Goals and Action Plans).

In emphasizing the WHY, I have slightly edited Simon Sinek's articulation by saying (my additions in parenthesis): "People don't buy (into) what you do; they buy (into) why you do it. But if you don't know why you do what you do, how will you inspire anyone else to follow you?" While he did not articulate it in the context of a parish, I agree with his conclusion: "The goal is not to attract people who need what you have. The goal is to attract people who believe what you believe" (Sinek, 2010).

When you consider the statement of bringing people closer to Christ and each other, you can start to appreciate the reason a WHY Statement is critically important. Your parish WHY Statement should inspire the parishioners and help explain its fundamental purpose to others who may be seeking it. To be most effective, the WHY Statement must be simple, clear, compelling, inspirational, actionable, and focused on the parish's contribution to others. It should be expressed in positive and affirmative language that will resonate with people and inspire them to take action. Thus, the WHY Statement is targeted to one's heart and gut rather than the neocortex part of your brain that processes language.

### The WHY Obsession.

I confess to having been obsessed with the concept of WHY since the late 70s and early 1980s. Indeed, in Joey Asher's book about better communications, Even a Geek Can Speak, he quoted my WHY Statement from 1981 (Asher, 2001). He mentioned the time that he met me and asked what I did. My answer was (and remains today): "I'm a problem solver and dream facilitator." As he gave me a puzzled expression, trying to understand what that meant, I could see that the wheels were turning, and he started to think about me in an entirely different way. I became someone who could hear his problems and seek solutions or facilitate a dream he would like to achieve. He started to think of me as his partner and not just another service provider he could hire to perform a discrete task.

Having been pulled into my WHY, Joey said it was intriguing and wanted to know what and how I accomplished those objectives. This invited me to migrate from the WHY to the What and How. It allowed me to explain that I was a lawyer who worked with businesses and non-profits to resolve their issues and pursue their transactional dreams.

At that moment, he understood that I viewed my responsibility as far more than just the tactical use of the law. I was able to communicate to him that my primary focus was always on understanding the problem the client needed to solve or the dream they were pursuing. In this way, I signaled I was allowing myself to more creatively find solutions using the vehicle of the law in which I was trained, but I wasn't limiting myself just to those tactics that I learned in law school.

Indeed, as my career developed, I was called upon to provide "business judgment" advice well beyond the practice of law because clients realized that I was investing myself in knowing their situation and helping them achieve their desired outcome. When one

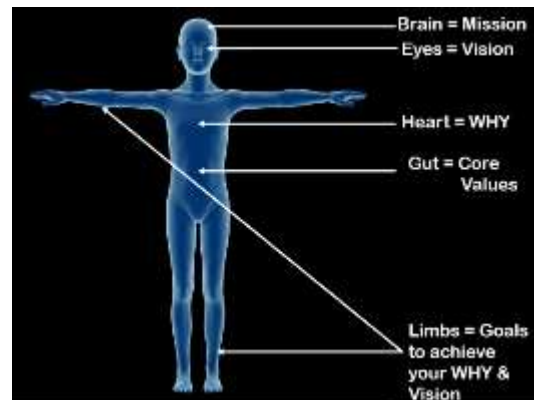
connects with your parish's WHY, the impact of what is possible becomes enlarged and exciting.

In Sinek's Start With WHY TED talk and book, he specifically explains how the WHY appeals to the limbic part of your brain, which actually drives emotions and behavior (Sinek, 2010, 2011). I submit it is one degree more complex than that. In Dr. Michael Gershon's book, The Second Brain, he explains how the enteric nervous system (what he calls the "second brain") in our gut has over 100 million neurons that transmit data and information from our guts to our brains (Gershon, 1998). Indeed, Dr. Gershon concluded, "a big part of our emotions are probably influenced by the nerves in our gut" (Gershon, 1998).

Thirteen years ago, I attended the defense of my older daughter's doctoral dissertation on intestinal stem cells at Johns Hopkins University. In Alexis's PhD thesis, she produced microscopic images of stem cells in our guts. In reviewing one of those images, I asked her what were the things that looked like spaghetti noodles. As she gave me the raised eyebrow look that only a scientist would give to a liberal arts dunce, she politely corrected me and said: "Dad, those aren't spaghetti noodles. That's part of the enteric neuron system that connects the cells in your gut to your brain" (Marianes, 2013). And that is when I truly understood the power of WHY in driving behavior.

When we talk about making "gut decisions," our behaviors and opinions are being shaped by the biological reality of our Lord's great human creation and the way He hard-wired our circuitry to allow our guts (and hearts) to communicate with our brains and influence our thinking and behaviors.

As a result, my simplistic picture to the right depicts how I view my Stewardship Calling SP process integrates with the way God created our organs to work. The WHY speaks to your heart, and the Core Values to your gut. Similarly, your parish's Mission Statement, which defines what your parish does, speaks to your neocortex brain, where language is processed. In contrast, your parish Vision Statement arrow points to your eye so you can see where your parish is going. Finally, your arms and legs are what you use to accomplish your parish's Strategic Goals and Action Plans. In this simplistic diagram, we can see how perfectly aligned our Creator's human design is with my Stewardship Calling SP process.



## How To Get To WHY - Part 2.

After my Strategic Planning Teams (SPT) watch the Start With WHY TED Talk, I discuss the WHY Statement rubric Simon Sinek suggested. This begins with "TO" and defines the contribution, followed by "SO THAT" which explains the desired impact. I then share examples of many powerful parish WHY Statements.

I also share (a) Simon Sinek's WHY: "To inspire people to do the things that inspire them so that together we can change our world." and (b) my Stewardship Calling WHY "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." This way, SPT members can see the "contribution" I am trying to make by helping people and parishes discover their WHY. I define it as your "stewardship calling" to demonstrate that living your WHY is how you use the gifts God has allowed you to be a steward of (i.e., caretaker). Finally, my WHY focuses on the "impact" I'm trying to accomplish, which is tied to your and my II Corinthians 5:10 Moment of a "good account before the awesome judgment seat of Christ."

Similarly, the Orthodox Ministry Services WHY Statement I developed for colleagues was to "Help transform and improve Orthodox Church parishes organizations and ministries in order to strengthen the body of Christ." Notice how the contribution and impact can be articulated without having to use the "to" and "so that" rubric.

A powerful WHY Statement can help your parish (and you personally) make decisions. For example, if I was discussing SP with you and you explained your parish was not interested in discerning its WHY, I know I am not the right person to help you. If you are merely trying to put a Band-Aid on a problem rather than address the root cause consistent with your WHY and Core Values, I can sincerely and lovingly explain why you need someone else for your more limited journey.

However, if you wish to be transformed and improve your parish or life and discover how best to accomplish what God has called you or your parish to do, then I might be the right person to help. Often, merely explaining why I am not the right person leads to a deeper dialogue about what a WHY Discovery and comprehensive SP process entails and what it would accomplish. This further education, more often than not, changes people's perspective.

I have found it helpful for parishioners to see other parish WHY Statements which I have helped develop. I have provided below several WHY Statements from selected parishes, dioceses, or national churches so you can start to get a feel for what a WHY Statement might look like:

- ~ To share love, spread joy, instill hope, and live with purpose.
- ~ To welcome all on a transformational journey to a life of purpose and salvation.
- ~ To seek and share Christ's love so that all will find eternal life in Him.
- ~ To bring people closer to Christ and each other.
- ~ To glorify God by growing in life, faith, and spiritual understanding.
- ~ To welcome all so that we may share Christ's love with one another.
- ~ To be a warm, caring Christian environment so that faith, service, and community thrive.
- ~ To receive and share unconditional love, mercy, healing, and peace so that life has greater meaning and purpose.

Let's briefly unpack the first parish WHY Statement in greater depth. You notice their fundamental purpose is all about "sharing love, spreading joy, instilling hope, and living with purpose." Do these aspirational goals sound uplifting and righteous to you? Might you be interested in learning how to live with a greater purpose or more lovingly and joyfully?

Another way to look at the impact of a good WHY Statement is to reverse the order. This parish would tell you something like: "If you're looking for a place where you can share love, spread joy, instill hope, and live with greater purpose, boy, do I have a church for you." I think just by articulating it that way and actually listening to the words and thinking about them, you can feel how different this is from the way most people describe their parishes. At this point, either your heart and gut want your brain to find out more, or you are not interested and are not a good fit for that parish.

Notice how this WHY does not describe what the parish does or how it achieves its objectives. That is for the Mission Statement, Vision Statement, and Strategic Goals, but only if the WHY interests you. Rather than leading with a laundry list of your parish's activities, location, number of parishioners, or any other facts and figures, why not engage your "**FPIPs**" (**Future Parishioners In Pews**) deeper and more intimately? While what your parish does should be engaging and interesting, it may not always be motivational and drive behavior. But if you were to look at someone and say we really want to give you the opportunity to begin a transformational life of purpose, that kind of inspiration can drive someone to want to learn more about your parish.

After presenting a variety of different WHY Statements and my teaching about WHY Statements, I ask SPT members to take 10 minutes by themselves to draft their proposed parish WHY Statement. I then aggregate all their WHY Statements into one document and present them all to the entire SPT several times. To get a sense of which WHY Statements touch their hearts and guts the most, I conduct a straw poll where everyone is permitted to vote for their top three WHY Statements. We do not make decisions by voting and merely try to get a sense from the SPT if there are any proposed WHY Statements that are most impactful and inspirational.

Following the straw poll, I identify the clear top several finalists and lead the SPT through an exercise of parsing the words to see what elements most drive people's motivations and inspirations. Through a dialogue that includes the entire SPT, I help them mix and match words and, in some cases, replace words or combine them with other phrases to reach a consensus. I continue the dialogue until everybody in the room identifies a WHY Statement that would motivate them to really want to learn how to become an active member of such a parish and to bring others to it.

Interestingly, this is a great place where the Holy Spirit works through individual parishioners to help them discover their parish's fundamental reason. Indeed, it takes time for us to get "out of our heads" and the typical way we think about describing our parish. But almost always, within about 60 minutes or less, SPTs reach a strong consensus and enthusiastically support the WHY Statement they develop. Occasionally, we'll get to a blockage point where we need a short break to allow the Holy Spirit to help, and inevitably, the SPT returns with refreshed vigor and motivation.

Importantly, developing a WHY Statement is not enough by itself. It must be enculturated in every aspect of the parish. Therefore, I strongly encourage every parish to take their WHY Statement and repeat it constantly and plaster it everywhere. Yes, I do mean everywhere.

For example, I ask parishes to place their WHY Statements in every parish bulletin and communications, at the top of every parish council agenda, on placards and signs in their halls, and all over their website. Parishes should also ensure that all WHY messaging shows how it has been actualized and implemented. It is only when a WHY Statement is fully understood and enculturated that its impact can be fully realized. Parish power is achieved by parishioners and parishes fulfilling and living their respective WHYS. Your WHY Statement can honestly be one of the most powerful outcomes of a good and well-run SP process.

I now offer you one additional personal note. I use the SP process to encourage all SPT members to wrestle with and understand their personal WHY. I repeatedly find SPT members who share with me that they used what they learned in the SP process to figure out their WHY. And the results they report are usually transformational as it helps them make decisions in their lives.

I have known people to change what they did with their lives as a result of the journey that they began when they started to focus on their WHY. I respectfully submit that you must remember that your Creator gave you a calling and fundamental purpose for your existence. It is, therefore, your job to figure out what you are called to do and start living the most fulfilled and meaningful life possible.

## Core Values.

Core Values are beliefs shared by the stakeholders that drive decisions. Cambridge University Press (n.d.) defines “values” as how one decides “what is right and wrong” and, thus, what is appropriate behavior. The Greek origin of values is the word “αξίες” which focuses on one’s worth or actions (Axias, 2017).

Church consultant Aubrey Malphurs identified the critical importance of Core Values as a part of the DNA (genetic material) that forms every parish or other faith-based organization (Malphurs, 2004). Core Values are strategic and serve as the foundation for everything built atop them, especially when enculturated in every parish decision (Tocquigny & Butcher, 2012). Core Values also determine the priorities of the parish and its ministries and how parishioners and other stakeholders interact and identify what is critical. They ultimately form the essence of the organization’s culture (Malphurs, 2004, p. 96).

An excellent contemporary example of living Core Values in every aspect is Chick-fil-A, which Schmidt (2022) identified as America’s favorite restaurant for eight consecutive years. Notwithstanding the occasional public relations conflict between modernity’s constantly shifting values and Chick-fil-A’s timeless Core Value to “glorify God,” Singal *et al.* (2016) identified how this enterprise’s commitment to quality, service,

altruism, and honoring the Sabbath (among other values) are lived out every day and in every aspect of what they do.

Like everything else in SP, Core Values are Biblical. For example, in the Ten Commandments, God establishes critical fundamental Core Values that Moses accepted unconditionally and his followers embraced over time. While most Core Values and WHY Statements are not written with such thunderous and dramatic sights and sounds as Moses experienced with God's ten Core Value commandments, taking the time to ensure stakeholders fully embrace and live the organization's Core Values and WHY is among the most important and foundational efforts any parish leader can undertake. Thus, as God spoke to His people with ten critical Core Values, a proper parish SP process must result in adopting and living the organization's consensus-developed Core Values.

### **How Did Biblical Leaders Present Values To The World?**

In Chapter 4 of my Roadmap, I explained fairly extensively how the Holy Scripture is replete with lessons about the importance of defining and living one's Core Values. Please feel free to re-review that section (with the same title as this Section) to refresh your recollection. I merely reinforce the Biblical journey of discovery of Core Values found in Job 1:1 and the Lord's teaching about how He fulfilled the Law and Prophets (Old Testament) focus on Core Values (Exodus 18:13-24; Titus 2:11-15; Matthew 5:17; Luke 10:25-37; John 13:34). Central to the Bible's teachings is the critical importance of adherence to the most righteous few values that are so central to one's existence that they deserve the title Core Values.

### **The Marines Path To Core Values, Ethics, And Culture.**

In my Stewardship Calling SP process, I use a powerful example of an organization that practices clear Core Values, culture, and ethics, which leads to a way of life centered on a solid WHY. In the United States Marine Corps, "... values and virtues acquire a special meaning, and they combine with several other elements to become part of a strong spirituality" (Yaroslaski & Tripodi, 2006, p. 68). While it may seem paradoxical to think of a global premier fighting force as a manifestation of spiritual values, culture, and ethics, the Marine Corps' cultural values extend to honoring the human life of both the civilians they protect and the enemies they fight.

The Marine Corps system of Core Values always focuses on "doing the right thing," which creates a culture that includes a sense of "spirituality" (Yaroslaski & Tripodi, 2006). Indeed, the motto of the Marine Corps is "Semper Fidelis," Latin for "Always Faithful." Values, culture, and ethics combine into one motto and mindset for those who commit to becoming a Marine.

This juxtaposition of the adherence to an ethical value system that constantly seeks to "do the right thing" and remain selflessly faithful to all Marines ("leave no man behind") stands in marked contrast to some corporate value systems where human loyalty is sometimes freely sacrificed for a personal financial incentive. This contrast led business

strategist Simon Sinek to conclude, “In the military, they give medals to people who sacrifice themselves so that others may gain. In business, they give bonuses to people who sacrifice others so that they may gain” (Sinek, 2014b).

As you contemplate your parish Core Values, it is easy to start with God’s ten essential Core Value “commandments” given to Moses (Exodus 20:2-17; Deuteronomy 5:6-21). Jesus expanded these through the “Beatitudes” (Matthew 5:3-10) and added His final new “commandment” that we “*love one another*” as He loved us (John 13:34). In Christ’s time, only God could give a commandment. Thus, Christ’s use of that word informed everyone precisely who He was and the significance of this foundational Core Value He was introducing. Teaching and enculturating righteous Core Values were central to the Lord’s work, and His righteous Core Values have stood the test of time for almost 2,000 years.

In American culture (and, unfortunately, in some churches), we have seen the consequences of dishonoring Core Values. There are many examples of so-called “blue chip” organizations whose failure to adhere to their Core Values resulted in significant calamities of epic proportions (Green, 2004). In contrast, the research shows that a large part of Chick-fil-A’s year-after-year success is attributable to every stakeholder clearly understanding and firmly practicing their critical and righteous Core Values (Uttakalla et al., 2017).

Thus, as a grounding of the true North, a parish should have the five or so most critical Core Values that define it and form the basis for all its decisions. I have found that when parishes include more than five or six Core Values, they become watered down and forgotten. Moreover, parishes also confuse “aspirational values” with Core Values. Patrick Lencioni, in his powerful leadership book, The Advantage, clarifies the difference between these two types of values.

If something is truly an essential Core Value, your parish models it currently and consistently (recognizing we occasionally fall short). However, what if your parish identifies a value it would like to embrace but does not do so consistently? In that case, it should be labeled an “aspirational value” that the parish wishes to eventually fulfill (Lencioni, 2012). However, only when something becomes a non-negotiable commitment can it truly be called a Core Value.

I was able to apply the lessons of immutable Core Values early in my legal career. A partner and I represented a healthcare organization that was growing and a profitable client for the firm. They then decided it would be very profitable to perform abortions. My partner was Roman Catholic, and I am Greek Orthodox, and that practice, while common in the U.S., was inconsistent with his and my Core Values. After extensive conversations with the client, we agreed that we could no longer represent them.

This led to some interesting conversations with our law firm partners, who inquired about why we were “firing” such a profitable client. However, when we explained our moral dilemma and our need to live consistently with our Core Values, the firm’s Core Value of respecting each other kicked in, and everyone agreed we needed to move on. So, when you’re willing to give up something valuable because it is inconsistent with what you believe, you will know you have identified a Core Value.



## Mission Statement.

The topic that seems to create the most confusion when individuals talk about SP is the Mission Statement. Regrettably, over time, people have used Mission Statements as a “verbal diarrhea” expression of every possible thing the individual organization might consider doing or believing in. As a result, they become highly unmemorable and are impossible to memorize. If you can't say it, you probably won't live it.

I believe the Mission Statement should be the most succinct list of the most critical actions the parish performs. In this way, it speaks to people's neocortex and does not describe every activity undertaken by the parish. It remains focused on first things, first principles of importance.

As with every other element of SP, I submit that Mission Statements are biblical in their foundation. For example, perhaps the most well-known Mission Statement ever created was the one our Lord gave to His Apostles: “*Go therefore and make disciples of all nations*” (Matthew 28:18). In that simple expression, he defines for the Apostles what their “job” is. From that moment forward, they are disciple-makers, plain and simple.

To be sure, there are other activities that the Apostles were to undertake, which we will review when I share the biblical foundation of Strategic Goals. However, the clarity and simplicity of understanding that the Apostles' mission was disciple-making is made powerfully apparent as the Lord defines who a “disciple” is in John 13:34-35. The reason I decry paragraph-long mission statements that try to list ad nauseam every activity a parish performs is because no one remembers it, and they most certainly do not live it.

In contrast, let me give you a few sample Mission Statements that were created by parishes I took through SP. I am not saying I would have written them this way, and I sometimes believe they are a bit more verbose than they need to be. However, at the end of the process I take parishes through to developing their Mission Statement, the SPT members embrace the key elements with such clarity and enthusiasm that I become convinced they will be able to articulate and live them. Here are a few examples:

- ~ The Mission of \_\_\_\_ is to: Love God, Love Others, Make Disciples.
- ~ We are a Christ-centered community that welcomes all to worship, to pray, to serve others, and to learn our Orthodox faith.
- ~ We are a worshipping community, living and sharing the Faith given by Christ to the Apostles.
- ~ We are a welcoming Orthodox community supporting each other in spiritual growth and philanthropy in Christ.
- ~ \_\_\_\_ Church welcomes all to experience and share Christ's love and the apostolic faith through worship, education, fellowship, stewardship, and service.

- ~ The Mission of \_\_\_\_ is to proclaim the Holy Gospel by teaching and spreading the Orthodox Christian Faith in a dynamic and welcoming community devoted to serving all people who seek a growing relationship with Jesus Christ.
- ~ The Mission of \_\_\_\_ Church is to worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy, and service to others.
- ~ \_\_\_\_ is a Christ-centered community that loves, guides, engages and serves all people.
- ~ The mission of \_\_\_\_ is to energize, cultivate and guide the faithful by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.
- ~ The Mission of \_\_\_\_ is to be a Christ-centered community welcoming all people to grow spiritually in the fullness of the Orthodox Christian faith through love, worship, and service.
- ~ We will establish and grow a Church community in Christ that embraces and teaches the Orthodox Christian Faith.

Allow me to briefly unpack the first two examples to explain why I think they are effective Mission Statements. In the first one, you know exactly what they do: 1. love God, 2. love others, 3. make disciples. This is extremely clear and concise. Of course, there's more detail that goes into how they go about doing those critical actions. However, its simplicity, focus, and inspiration are its power. The parishioners recognize that all their ministries and other activities must focus on loving God and others and thus making disciples.

In the second example, they begin by clearly stating that they are a Christ-centered community. This phrase has a further depth of meaning but is clear enough on its face to be direct. However, the parish proceeds to add that they will welcome all... to worship, pray, serve others, and learn their faith. In this regard, they are articulating a series of top-level actions that the parish will undertake.

Of course, there may be similarities from time to time between parish Mission Statements or WHY Statements that sometimes cause SPT members to want to make changes. I tell them that these statements do not have to be unique in the entire universe. They merely have to describe your parish accurately. Thus, if there are elements that are similar to other parishes, glory to God, it is great that others are focused on the same things that your parish finds valuable. You are not in competition with other parishes. You merely have to be authentic to your beliefs. Rather than engaging in extensive wordsmithing to be distinctive, it is far more critical to speak the truth in your Mission Statement with clarity and resolve.

There are a variety of ways in which a parish can develop its Mission Statement; however, drafting by committee is one of the most difficult ways to do it. Thus, I ask several subgroups of the SPT to look at all their parish's Strengths (from the SWOT Analysis) and

other parish examples I provide and then draft proposed Mission Statements in the context of their particular parish. By having a couple of different SPT groups develop a version of the Mission Statement, we have a variety of perspectives to share with the entire SPT. We write them on the board for everyone to see, diagram the sentences, and heat map the concepts to identify those elements that are consistent amongst all of them and, therefore, should definitely find their way into the final Mission Statement. The SPT can then pick one and start to wordsmith it with the other common concepts until, again, everybody can agree that the final version depicts the critical activities the parish does. This final Mission Statement is repeated everywhere anyone can look to read about that parish.

While it is theoretically possible that over time, an element of a Mission Statement might change slightly in practice for Christian parishes, it's more typical to say that the Mission remains the same throughout the entire life cycle of the parish. This is why the earlier rule of "Marry your Mission" signifies a long-term commitment.

### **Strategic Areas Of Focus & S.M.A.R.T. Goals And Action Plans.**

My SP process I have defined up to this point has answered the first several critical questions by identifying why the parish exists, what its values are, where it is now, and what it is that it does. The next step in the SP is to answer question #3 of where it wants to be in the future. The good news is that if you have followed my process, you have already gathered an enormous amount of data about what your parishioners think is going well and not so well through your FSA, SWOT Analysis, EPA, etc. However, I believe the greatest place for parish transformational improvement, growth, and health is by focusing on the consensus that determines the greatest weaknesses your parishioners have identified. If the root causes of these "pain-point" strategic challenges can be addressed, the future of the parish is much brighter.

At this time in my SP process, the SPT reviews all the SWOT and EPA data, reorients themselves with their WHY, Core Values, and Mission Statement, and discusses the most critical challenges they must address. To facilitate this process, I typically have a couple of small breakout groups of SPT members who think about all that data and come back with their recommendations for the top two or three strategic areas that need to be addressed.

Once again, all the different break-out teams present their conclusions to the entire SPT. I help them identify those items that are common to each group's lists and thus should make the final list of Strategic Areas of Focus. We then discuss any other alternatives identified. This is where a lot of creativity is brought into the process. So, for example, it's not uncommon for youth and young adult issues to be brought up as one of the top five weaknesses of a parish. If this topic were not to make the list of the final three strategic areas of focus for the parish, the many people who have children or are concerned about the youth would feel that their concerns were not addressed.

Therefore, a creative way we can address this item that would otherwise be too low on the list to make the top three is to insist the parish focus on the youth as well as

adults in their solutions to each of the top three issues. As I previously noted, parishes always have an overwhelming list of strategic areas that they want to focus on based on the data from their parishioners. I confess that in the early days of doing SP with parishes, I let them have longer lists of Strategic Areas of Focus.

However, it is clear that parishes comprised of volunteers are largely unable to deal with more than two or three of the most critical strategic areas that need to be addressed. This information is again validated by the work of the Covey organization and many other church researchers who identified how the brain gets overloaded when trying to focus on too many critical items. Thus, it is essential in parish SP processes that an enormous focus be placed on the most vital challenges that would produce the greatest positive impact for your parish and parishioners.

This is difficult because of the pace of life around us and all the competing challenges we confront. Chris McChesney, in the 4DX book, says, “In the moment, urgency always trumps importance” (McChesney, 2012). The Covey organization calls these competing pressures “the whirlwind,” which always distracts us from the most critical tasks in front of us. I call these the “tyranny of the urgent,” where everyone justifies their interruption of your attention because of perceived urgency.

I believe urgency is doing something now, and strategy involves doing the right thing. They are both essential. However, doing strategy before urgency ensures the greatest impact by executing the most important thing with urgency.

Every one of us experiences the “whirlwind/tyranny of the urgent” regularly. For example, if you are the kind of person who takes time on Sunday night to plan the next week, everything falls apart when you show up in the office on Monday, and the phone starts ringing, emails and text messages pile up, and it seems like Noah’s Ark parked outside your office with every type of animal dropping in two by two to discuss their problems. And in an instant, the big strategic issues you listed that you would address drop lower and lower on your to-do list.

In fact, one of the most critical success disciplines of the best leaders is the ability to say “no” specifically to some logical things that are somewhat relevant so that they can provide the extra time and focus on the most critical issues. Everyone is familiar with the Pareto Principle, often called the 80/20 rule, which applies equally well to time management. Thus, I encourage you to try to dedicate only 80% of your time to the “whirlwind/tyranny of the urgent” and reserve at least 20% of your time for the most important strategic areas on which you should focus.

One of the best articulations of this principle came from Tim Cook, the President and CEO of Apple Computers. Mr. Cook was brought in by legendary founder Steve Jobs to address the many supply chain challenges that Apple was facing. Tim Cook reconfigured and transformed the supply chain with such excellence that he became the logical choice to succeed Steve Jobs when he passed to the Kingdom eternal. Tim Cook clearly articulated the need for focus by saying:

We are the most focused company that I know of or have read of or have any knowledge of. We say no to good ideas every day.

We say no to great ideas in order to keep the amount of things we focus on very small in number so that we can put enormous energy behind the ones we do choose...

It's not just saying yes to the right products, it's saying no to many products that are good ideas, but just not nearly as good as the other ones (Frommer, 2010).

It is impossible in a volunteer-run parish to have such discipline and focus; however, an effective SP process will provide you with a clear sense of direction. I typically tell SPT members that there are two fundamental rules and one critical question that they must keep in mind. First, since change is the only constant, you must constantly change and then anticipate further change. Second, you cannot master what you do not measure. Thus, having the discipline of measuring not only the allocation of your time but also the results and objectives you are trying to achieve is equally important. The big question is how you are measuring the effectiveness in your parish and what the most critical aspects are that need to be measured and managed. This conversation then drives a large discussion about what are the two or three most critical things that can change everything in your parish if appropriate attention is brought to bear on them.

Highly focused attention must be placed on the root cause of your biggest problems and not merely the symptoms you see. The example I offer is a group of doctors that were called to sub-Saharan Africa, where children were repeatedly getting bacterial infections. The doctors followed the usual protocol of diagnosing and treating the symptoms with antibiotics.

However, they discovered that a couple of weeks later, the children were returning reinfected. The doctors did what doctors typically do. They tried to analyze the efficacy of those particular antibiotics based on the genetics of the individual children in this sub-Saharan African environment, as well as other scientific inquiries to try and determine a medical solution. However, it was not until one doctor followed the children home that they realized the children were drinking water from a contaminated stream. Thus, no matter how efficacious the antibiotics were, until they solved the root cause problem of the children drinking contaminated water, the children were continuing to be infected. This is a heightened example of digging deep enough and following the rabbit trail until the root cause is discovered.

Individuals trained in management processes are familiar with "the five Whys" process (sometimes referred to as the "seven whys"). This process approached a problem by asking why the problem arose. Regardless of the answer, they are asked, "Why is that what's happening?" The next answer receives another why question. This "why question" process is repeated until it is clear that the essential foundation of the problem has been identified.

This is the reason why, in Chapters 9 and 10 of my Roadmap, I will prove to you that no parish has a money problem. They may have a Vision problem and almost assuredly have parishioner education and engagement problems.

However, once those root causes are addressed, more than enough financial resources will be abundant.

### Strategic Areas Of Focus.

All of this brings us back to the SP process, where the SPT has a thorough conversation about those critical root cause issues that are manifesting themselves in a variety of different ways in the parish until they can agree on the two or three most critical challenges that must be addressed. I call these the **Strategic Areas of Focus (“SAF”)**. The SAFs identify the general areas in which the most significant challenges exist that demand a Strategic Goal and Action Plan to fix.

Identifying the SAFs is all that is required at the first retreat of the SPT. At the end of the first retreat, the SPT members divide themselves (by their choice) into as many teams (“**SAF Teams**”) as there are SAFs. Having learned from vast prior experience, I limit a parish to no more than three SAFs, given their limited volunteer bandwidth. I will occasionally allow a fourth SAF if it is critical to the future of the parish, and they can convince me they can handle that extra workload with a dedicated team of volunteers.

### Strategic S.M.A.R.T. Goal And Action Plan Development.

In the two months after the first retreat, I schedule three separate ZOOMs with each SAF Team to separately lead them through a process to define a very specific Strategic Goal and Action Plan to address the issue in their SAF. This is achieved by developing a S.M.A.R.T. Goal and comprehensive Action Plan (discussed below). I provide each SAF Team with some prior sample S.M.A.R.T. Goals and Action Plans that other parishes have developed in their SAF so they can start with a frame of reference for some of the key issues that need to be addressed. It is also always easier for a group to edit a starting point draft than to draft from scratch as a group.

Over the decades of doing parish SPs, I have accumulated some good exemplar models that are constantly updated and provided to each SAF to consider as starting drafts. Current examples are on my Stewardship Calling website at this location: <https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/>

In the first SAF Zoom, I lead the SAF Team’s discussion of the very specific areas in their SAF they wanted to address using the exemplar samples to ensure they considered a wide array of relevant alternatives. By the end of that first ZOOM, the SAF Team has agreed upon a draft S.M.A.R.T. Goal with either specific success metrics identified or at least a tight range of success endpoints to be finalized in the second ZOOM.

I then circulate a revised draft of the Action Plan from among the examples I provided that is tailored to the specific S.M.A.R.T. Goal elements the SAF identified. In the second ZOOM, the SAF Team reviews and edits every word and timeline in the draft Action Plan to create a proposed final draft they can live with. They also finalize any of the S.M.A.R.T. Goal metrics left open in the first ZOOM.

Since I started using this method about 7 years ago, the SAF teams rarely need the third scheduled ZOOM. However, if there are any S.M.A.R.T. Goal or Action Plan elements for which they have not developed a consensus, that third ZOOM is where everything is finalized for presentation at the second SPT retreat.

### **S.M.A.R.T. Goal And Comprehensive Action Plan.**

As with everything in my Stewardship Calling SP process, I submit that S.M.A.R.T. Goals are also biblical in their foundation. There are repeated examples within Holy Scripture where the Lord gives his Apostles and disciples specific instructions. But an easy example is found in Matthew 10:1, 5-8. Christ provides a step-by-step Action Plan to his Apostles. If you examine this pericope, you can identify that there are at least six very specific steps in His Action Plan. The Lord calls for his apostles to 1. go to the lost sheep, 2. preach as they go, 3. heal the sick, 4. cleanse the lepers, 5. raise the dead, and 6. cast out demons.

Within my Stewardship Calling SP process, I use the very traditional S.M.A.R.T. Goal concept. The “S” stands for “Specific,” which asks the goal to be very clear and specific enough so that it can be understood by anybody reading it. The “M” stands for “Measurable.” Are there very specific measures and effectiveness metrics that can be evaluated to ensure that the goal has been achieved? The “A” stands for “Attainable” which identifies whether or not this particular parish can actually achieve the very specific goal that they've identified within a reasonable period. The “R” stands for “Relevant,” which ensures that the particular goal is identified and specific to the needs and challenges of the parish. The “R” can also mean “Realistically written” to ensure that the goal has been written in a manner in which parishioners reading it can express their confidence that they understand it. Finally, the “T” means “Time-bound” or “Timetable.” This is perhaps as critical as anything else since it ensures that there is a detailed timeline for each step to be accomplished and an ultimate deadline for the entire goal to be achieved. A S.M.A.R.T. Goal can thus be very narrowly tailored to address the specific challenges and ensure a high level of confidence that the parish can achieve it.

This is also a difficult part of the conversation with SPT members. Parish leaders are generally unaccustomed to having detailed goals, effectiveness metrics, and deadlines. Thus, this process of developing this S.M.A.R.T. Goal begins a more thorough cultural change to ensure that the importance of parish work is at least as high as it is for any other aspect of the parishioners' lives.

The challenge in this phase is that oftentimes, parishes don't know the benchmark beginning points for any of the specific things that they're trying to achieve. If they do not understand the starting point benchmark, then it can be difficult to craft a S.M.A.R.T. Goal in such a manner that a very specific targeted number or level of improvement is identified. In the absence of clear, detailed benchmarking of whatever element you are examining, S.M.A.R.T. Goals can be written in the form of percentage improvement or percentage participation.

For example, in a stewardship and engagement ministry, one might look to have a S.M.A.R.T. Goal that commits to having 90% of the parishioners actively engaged in a ministry within three years. The words "actively engaged in ministry" must be defined by the **Implementation Team** ("IT") for that S.M.A.R.T. Goal so that there is a standard of performance against which success can be measured. However, the idea is to identify a very specific metric of what you are looking for in the form of active engagement and a percentage goal you are trying to achieve within a stated time period.

## Action Plan Phases.

My Stewardship Calling SP Action Plans are as precise as they can be and worded to ensure the highest level of success in its implementation period. Thus, we identify all the specific steps that must be completed to achieve the S.M.A.R.T. Goal. These steps are broken down into separate components and action items.

The Covey organization's 4DX book focuses on "leading indicators" and "lagging indicators" from which a parish identifies very specific goals that can be achieved at each level. I've discovered that what works best for most parishes is an Action Plan that includes five phases.

**Phase 1** is the research phase, where the IT conducts comprehensive research on the definitions, terms, and baselines the parish needs to consider. Thus, when phrases like parishioners are "actively engaged" are used in the S.M.A.R.T. Goal, the Action Plan identified the need to define that term in this research phase. Similarly, suppose no parish baseline data exists for a S.M.A.R.T. Goal objective. In that case, the Action Plan will identify that during this research phase, the parish will benchmark/survey in order to ascertain its starting point.

Also included in the Step 1 research phase is the requirement that the IT look outside of the parish to find best practices in other churches. I also insist that they look outside of their particular religious Denomination because oftentimes, some really great practices may be found in different churches that can be adapted to address any unique theological differences.

The Action Plan should require the IT to identify at least three examples of best practices in each area from which they can draw insights. This is sometimes challenging because the natural tendency is for them to call family or friends at other parishes and ask them what they do without qualifying that parish to ensure it is implementing best practices that are effective.



Since, in my experience, so many parishes lack the discipline to have clearly defined objectives and applicable measurement methodologies, generic surveying of friends tends to be highly unproductive. Thus, I challenge each IT to ensure that they are able to explain with data why that sample program was effective and is worthy of study as a best practice.

**Phase 2** of the Action Plan is the “development phase,” where the IT takes all the research identified in Phase 1 (both from within the parish and outside) and analyzes it to develop a specific program in that Strategic Area of Focus that best suits the demographics and needs of the parish to achieve the S.M.A.R.T. Goal endpoint. Any solution must be based on research into best practices and internal data. During Phase 2, the IT must creatively take other best practices and make the necessary adjustments to apply them to the unique elements of their parish.

**Phase 3** is the recruitment and training phase. For almost every S.M.A.R.T. Goal, it's important to have a team of individuals who are properly grounded in what is to be accomplished and trained to deliver the new program and ensure it is effectively communicated to the parishioners. Thus, for example, if the S.M.A.R.T. Goal is focused on religious education, it is critical to ensure that the best religious educators from within the parish are recruited and properly trained on the new education program developed in Phase 2. Similarly, if the parish rolls out a new stewardship program that touches all parishioners, a sufficient number of “stewardship ambassadors” need to be identified, recruited, and trained to ensure they effectively implement the new program.

**Phase 4** is when the new program to achieve the S.M.A.R.T. Goal is rolled out. This is obviously the longest phase because there has to be the appropriate amount of time and effort to properly execute this new program across the parish while the IT benchmarks interim goals. During Phase 4, it is important to continuously update the information that is gathered throughout the months of the rollout to ensure that any challenges are identified or immediately addressed and that the plan is executed within the established time frame.

For example, if a new Sunday school curriculum is developed, then it is important to ensure that it is used for one complete Sunday school academic cycle to be able to assess its effectiveness properly. Similarly, if your parish is rolling out a new stewardship and engagement program, it is important to ensure that a full-year giving cycle is completed to assess its success. Regardless, this fourth phase is when the SP comes to life and fruition and where the parish starts to see the value of all the planning and research that was done previously.

I always insist on a **Phase 5** that consists of a retrospective assessment of the entire S.M.A.R.T. Goal and Action Plan process to assess if it achieved the objective in the S.M.A.R.T. Goal as well as any interim benchmarks that were identified. This assessment is ideally conducted by someone other than an IT member to ensure the absence of any bias or excuses. During this assessment phase, course corrections and adjustments should be made to the program so that when it is rolled out for the next year (or other relevant period), it will be an

improved program based on the experiences gathered in the first-round implementation period.

Parishes frequently lack the discipline and desire to do this retrospective analysis. However, it is perhaps one of the most valuable parts of a good SP process that helps ensure this new program is improved for succeeding periods.

I have provided in **Exhibit “H”** to this Chapter 7 several recent parish SMART Goals and a sample Action Plan. Additional examples developed in real-time are always posted on the specific parish’s SP page on my [www.stewardshipcalling.com](http://www.stewardshipcalling.com) website under the Strategic Planning Tab.

## Second SPT+ Retreat.

The second and final SP retreat includes every member of the SPT, plus all parishioners “on-ramped” by each SAF Team, which represents parishioners interested in that SAF or involved in a ministry being addressed by that SAF. At this one-day retreat, I begin by reviewing all the previously decided SP elements (SWOT, WHY, Core Values, Mission) to ensure everyone remains 100% aligned and enthusiastically supportive. Each SAF Team then presents their S.M.A.R.T. Goal word for word, followed by their Action Plan. The entire SPT (including new on-ramped members) debates every word and metric in the S.M.A.R.T. Goal, asks any questions, and proposes any alternatives for consideration.

The SAF Team’s objective is not to defensively defend their previous S.M.A.R.T. Goal wording but merely to answer any questions about how they got there. They then facilitate the improvements, edits, additions, or deletions so the entire SPT can reach a consensus. Again, the objective is to ensure that the expanded SPT is fully on board with each S.M.A.R.T. Goal and Action Plan.

This step is critical because other SPT members may have insights and perspectives the SAF Team did not consider, which could make their S.M.A.R.T. Goal or Actin Plan better. Moreover, we want the entire expanded SPT to be able to answer any parishioner questions about all S.M.A.R.T. Goals and strongly advocate for them to the parish at large. This is another part of building the SP implementation army.

At the end of the second retreat, I have a ceremony where I “graduate and fire” all members of the SPT and thank them for their service in developing the parish strategic plan. Applying the rule of never letting a volunteer get away, I then immediately start recruiting them to join one of the ITs for the S.M.A.R.T. Goal that most excites them. I have a sign-up form for them to identify the S.M.A.R.T. Goal they want to work on and to identify if they might be willing to be the Co-Captain leading the implementation.

We then discuss the next steps for finalizing the writing of the SP and hosting the community roll-out event. I also describe what I call the “**Implementation Headquarters**” (IHQ) and **SMART Gap Implementation Plan**

the parish will use (described further below). It is important to leave enough time for the expanded SPT to contemplate and celebrate all they did to create a transformational SP.

### Low-Hanging Fruit.

On several occasions, I have mentioned the concept of “low-hanging fruit.” These are Weaknesses that were identified in the SWOT analysis that did not rise to the level of strategic significance to make it into one of the final S.M.A.R.T. Goals. However, to show that the parish council has been listening to the parishioners and also to address some of the areas that need improvement, I ask the parish council to take on those “low-hanging fruit” Weakness items that can be addressed in a year or less.

By doing this, the parish council shows the parishioners they were heard and that the time they spent on the SWOT and the EPA was meaningful. It allows for celebrating SP successes while S.M.A.R.T. Goal IT is researching best practices and creating new programs. As the parish council fixes these identified low-hanging fruit Weaknesses and reports this accomplishment to the parishioners, they attribute this success to the SP process.

Progress on the low-hanging fruit is especially important to share during what I call the SP “Quiet Period” while IT is doing its research and development. A good SP typically requires extensive preliminary research about best practices, how they will define and measure success, and assessing their current baseline against those measures. All these steps take time and are done quietly without parishioners seeing tangible results from the SP process. No etched tablets are produced from the mountaintop.

So how do the parish leaders keep their parishioners believing transformational change is coming while all the “quiet phase” research and work takes place? The answer is identifying and addressing the low-hanging fruit nonstrategic and tactical actions they can accomplish quickly. When these tangible successes are shared publicly, the WHY and Core Values can again be reinforced and used to show how the parish is being transformed.

In every SP I have facilitated, while the parish took approximately seven to nine months to research, study, and develop best practices programs in mission-critical areas not previously optimized to excellence, it simultaneously tackled less strategic stakeholder-identified “pain points.” Moses understood this several times in his journey. For example, Moses was away for forty days/nights receiving the Ten Commandments and returned to every kind of debauchery and dereliction of Core Values. However, rather than allowing God to kill the sinners, Moses pleaded for the opportunity to collaborate with them one step (or generation) at a time to return them to God’s favor and their journey to the promised land (Exodus 32:1-35). Moses celebrated every low-hanging fruit victory and return to excellence as a step closer to the promised land. In this way, parish SP leaders must constantly look for improvement opportunities to implement during the arduous journey to greatness.

## Vision Statement.

At the very beginning of the SP process, we were reminded of the admonition from Proverbs 29:18: “Where *there is no vision, the people will perish.*” Thus, at one level, the creation of the Vision Statement is the culmination of the summary of the SP process as it provides clear guidance of where the parish will be 2-4 years into the future. There are a variety of ways in which people create Vision Statements, and I will acknowledge that my Stewardship Calling SP process does it differently than many.

As mentioned previously, I believe that SP consultants often confuse a Vision Statement with a WHY Statement. I think the WHY Statement is aspirational and defines the fundamental purpose for which the parish exists. It is harder to achieve quickly and remains the ultimate objective. In contrast, a Vision Statement should be accomplishable in a reasonable period of several years. Accordingly, I believe the Vision Statement must be seen as a completable solution by the parishioners so they can gain the enthusiasm and excitement to proceed forward with the hard work over the next several years.

Another significant way in which my Stewardship Calling SP process differs from others is that I believe the Vision Statement is one of the last items to be created and not the first. I am well aware of, and have participated in, SP processes where much time is spent at the beginning with the group trying to identify a Vision for the future. After debating a Vision Statement with no data to support it, they then go about determining where the organization is now and some of the strategies that they might want to implement. They then try to cram the strategy and goals into the Vision Statement they crafted in the beginning before they had any data or knew their WHY, Core Values, or Mission. This seems backward to me.

Accordingly, I recommend parishes complete all the previous steps of identifying WHY the parish exists, where it is now, what its Core Values and its mission are, and what strategic areas of focus are needed to identify very specific S.M.A.R.T. Goals and Action Plans. After that is all done, they should be able to see a Vision of where the parish will be in several years after all the work is complete and the S.M.A.R.T. Goals are achieved. Thus, only after all the S.M.A.R.T. Goals are finalized do I reverse engineer the Vision Statement to state affirmatively what the parish will achieve and by when. Below is an example of a Vision Statement from a parish SP I recently completed:

We will:

(a) Within 36 months, implement best practices and effective adult and youth Ministries to measurably improve our:

(i) Stewardship & Ministry Engagement, and

(ii) Religious Education;

(b) Within 23 months, implement cultural best practices through effective adult and youth:

- (i) Parish Leadership Ministry,
- (ii) Comprehensive Welcoming Ministry, and
- (iii) Outreach & Inreach Ministry; and

(c) Within 39 months, establish and implement a viable and effective comprehensive Buildings and Facilities Ministry that will finalize a Consensus Facilities Plan.

If you look at this parish's Vision Statement, you can easily see they identified four Strategic Areas of Focus in the areas of: 1. stewardship and ministry engagement, 2. religious education, 3. parish culture, and 4. a new church facility. Thus, it is no surprise to see those specific areas called out using the exact phraseology from the S.M.A.R.T. Goal that was created. In this way, the Vision Statement aligns perfectly with and summarizes all the other SP work. In addition, if someone were only to review the parish Vision Statement, they would immediately understand this parish's S.M.A.R.T. Goals and where the parish will be in the future (depending on each specific goal).

### **Implementation Of S.M.A.R.T. Goals And Action Plans.**

I previously provided data concluding that close to 90% of SPs fail to reach all their endpoints. While some fail because of the wrong People, Process, or Plan, overwhelmingly, they fail in the Performance phase of implementation. This is why I have learned to spend time with the parish, identifying an organizational structure that can stay on top of the implementation and a SMART Gap process to ensure goal achievement.

This is an opportunity to build a high-performing, effective team because what we learned over and over again is repeated in the phenomenal 4DX book by the Covey organization. Our brains are genetically hardwired to only do a very small number of things at one time with excellence, regardless of those of you who, like me, are neurodivergent ADHD people who think we can do many things at once. Indeed, we can do many things, but the data shows we cannot do them all simultaneously with excellence.

Thus, the parish must focus on the critical root causes that produce larger-scale positive impacts with all the energy and resources it can muster. By having all hands on deck to work on the few things that can change everything and stop focusing all their energy on the many little details that are not as significant, the parish can achieve the transformational Vision it seeks.

### **IHQ = Implementation Headquarters**

The management of SP Implementation I recommend has layers aligned to improve accountability. I use a football analogy for titles but encourage parishes to rename positions however they prefer. Ultimately, I recommend two Co-captains to lead each S.M.A.R.T. Goal IT. This is to ensure redundancy and support in case one person

has an issue. The Co-Captains are ultimately responsible for ensuring that every step in their S.M.A.R.T. Goal Action Plan is completed on time.

Supervising the S.M.A.R.T. Goal Co-captains are several “Head Coaches.” These Head Coaches are not to manage the day-to-day implementation of the S.M.A.R.T. Goal, as that is the job of the Co-captains. Instead, the Head Coaches check in with the Co-captains assigned to them to ensure they keep their teams on track and see if they need any support. The 4th column of the draft Action Plans provided in **Exhibit “H”** identified the “completion check” for that step. This column is what the Head Coaches are managing. Thus, when a Co-captain says they are ready to move to the next step, the Head Coach reviews all the work performed and ensures they have met their current action step based on the ‘completion check” requirement.

The Head Coaches ultimately report to the “Team Owner,” who is the priest in the parish. The Team Owner clergy plus the several Head Coaches form what I call the “**IHQ**” (**Implementation Headquarters**). Together, they ensure that the public scoreboard for each S.M.A.R.T. Goal is updated in a timely manner, along with the SP pages on the parish’s website. The IHQ also makes regular reports to the parish council and parish as a whole and is responsible for ensuring that SP communications are fully and timely delivered to all interested stakeholders.

If a parish has 3 S.M.A.R.T. Goals, then one Head Coach will have two S.M.A.R.T. Goal IT Co-Captains reporting to them, and the other Head Coach gets the third S.M.A.R.T. Goal IT Co-Captains reporting to them. If there are four goals, then each Head Coach receives two sets of Co-Captains reports. The picture on the right is a simple organization chart assuming three S.M.A.R.T. Goals.



My Stewardship Calling **S.M.A.R.T. GAP Implementation Process** tries to deploy best practices. Elements of this process include:

- (a) regular and frequent team meetings that solely focus on the Strategic Goals,
- (b) team members who hold each other accountable for their commitments,
- (c) a public Scoreboard that keeps track of progress on all goals and
- (d) constant parish communications updates of Strategic Goals and “low-hanging fruit.”

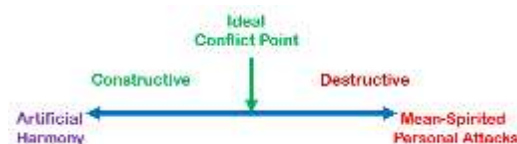
The Covey 4DX process reinforces my process, creating a “cadence of accountability.” This means that ideally, each IT briefly meets weekly with a short check-in on where they are in the current step of the **S.M.A.R.T. Goal Action Plan**. This short weekly check-in would include the Co-captains and those IT members who had responsibilities for the prior week. In that brief call, they would state what they said they were going to do the preceding week, what they actually did, and what, if anything, they

will do in the following week. Also, if they need any help, this is the time to ask. If each person who has responsibilities does this brief check-in report, the call should not take longer than 10-15 minutes. Thus, it can be conveniently added to everyone's calendar first thing on Monday each week.

Of course, there will be **S.M.A.R.T. Goal IT** members who do not have any responsibilities until later in the process. While everyone should be encouraged to attend all the weekly check-ins to be up to date, if their work does not start until step 6 in the process, then their presence is not necessary for every one of the earlier meetings.

In the training I provide for the **S.M.A.R.T. Goal IT** leaders, I focus on the critical principles that derail effective teams, advanced by Patrick Lencioni in his helpful *Five Dysfunctions of a Team* book that I previously discussed in Chapter 4 of my Roadmap. To review, they include:

1. Lack of **TRUST** = vulnerability, being open and able to productively discuss failures, errors, weaknesses, and even fears. (Ego is the #1 team killer.)
2. Fear of **CONFLICT** = productive, ideological conflict - passionate, unfiltered debate around important team issues. A little discomfort is helpful.



3. Lack of **COMMITMENT** = embrace disagreement and temporary indecision to extract every possible idea and perspective to achieve clarity and buy-in. "Disagree then commit" with cascading communications to everyone.
4. Avoiding **ACCOUNTABILITY** = unwillingness to remind one another when they don't live up to the performance standards of the group.
5. Inattention to **RESULTS** = Use a Scoreboard to unambiguously identify how the team is doing to achieve the goal and how much time is left.

One of the lessons I have learned over and over is that the parishes (or any Goal Implementation Team) that do not follow a disciplined implementation process will not likely achieve their **S.M.A.R.T. Goals and Vision**. It is that simple.

The above comprehensive discussion of my Stewardship Calling SP process is an effort to provide as much detail as possible and all the necessary supporting documents so that your parish can undertake SP with or without me. The essence of succession planning is to ensure that the absence of any one person does not prevent overall success.

It is my fervent prayer that you and your parish may find the above helpful should you decide to undertake the transformational work of SP. It really is worth it. Everything in this Chapter 7 is offered with extreme humility and reflects the lessons I learned in my decades of parish SP. However, as I said at the outset, this is "A" Roadmap and not "The"

Roadmap. Thus, you are encouraged to experiment and use what you want, adapt anything, and replace what you think is better.

I sincerely hope you can improve this SP process and will be willing to share it freely with other parishes seeking the most effective roadmap. Ultimately, you must travel your path using a roadmap you earnestly believe will help you improve the health and effectiveness of your parish by bringing people closer to Christ and each other. Godspeed on that journey!



**Exhibit “A” Sample Prototype Strategic Plan Document**

**(insert parish-specific items where indicated by yellow highlighted placeholders below)**

**INSERT FINAL TITLE PAGE**

**PARISH LETTERHEAD**

**Beloved in Christ,**

**INSERT LETTER FROM PARISH PRIEST PROMOTING THE STRATEGIC PLAN  
HERE.**

**With Love in Christ,**

**+Father \_\_\_\_\_**

## **EXECUTIVE SUMMARY**

### **INSERT WHY STATEMENT HERE**

Progress and success require periodically assessing where you are, where you want to be, and how you will get there. Our **FILL IN NAME OF PARISH** Parish 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, approximately  dedicated lay stewards and our clergy, representing the significant diversity within our Parish, have worked joyfully and diligently to analyze available data and issues and develop this Strategic Plan 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 (**S.W.O.T.**) of our Parish and developed the following **MISSION** statement:

### **INSERT MISSION STATEMENT HERE**

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**:

### **INSERT CORE VALUES HERE**

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

### **INSERT VISION STATEMENT HERE**

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

### **LIST THREE STRATEGIC AREAS OF FOCUS TITLES HERE**

These **3** Task Forces then developed by consensus the Strategic Goals and the detailed action plans to achieve them, all of which met the “**S.M.A.R.T.**” goal criteria of being

**Specific, Measurable, Attainable, Relevant** (and **Realistically** written), and with achievable **Timetable**.

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

**Part 1** (pages [ ] through [ ]) includes more detail about the process, the team, our Statement of Why, and our S.W.O.T. Analysis, Core Values, Mission, and Vision.

**Part 2** (pages [ ] through [ ]) lays out the **three** specific S.M.A.R.T. Goals and the very methodical, step-by-step implementation action plan and process to achieve each goal, including precise timelines, areas of responsibility, and how we will measure success.

The length of this Strategic Plan may give some pause. However, 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 achieving 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 **FILL IN NAME OF PARISH** Parish **exists to INSERT WHY STATEMENT HERE**.

## **PART ONE – The Process, Mission, S.W.O.T., Core Values, Vision, 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*" for all eternity?

Visionaries understand the importance of first creating a clear vision of "Why?" 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?"

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?”* Through this Strategic Plan, the **FILL IN NAME OF PARISH** Orthodox Church (the “Parish”) commits to emulate the kingdom of God in the Southeastern United States. We unequivocally state:

**INSERT WHY STATEMENT HERE**

*“Come and see”* 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.”*

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...”* 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.”*

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 at a more rapid pace.

All the data information 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 and, most notably, 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:

Why do we exist?

Where are we now?

Where do we want to be?

3. 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 [REDACTED] diverse lay leaders and clergy 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.*”

To address the needs of the Parish more particularly, we adopted the new Parish Mission Statement: **INSERT MISSION STATEMENT HERE.**

### S.W.O.T. Analysis.

Proper Strategic Planning requires a comprehensive analysis of the current state by examining one’s Strengths, Weaknesses, Opportunities, and Threats (“S.W.O.T.”). A S.W.O.T. 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!*” The entire Parish family and each member of the Strategic Planning Team participated in this S.W.O.T. 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 S.W.O.T. 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 in this Strategic Plan is implementing, periodically reassessing, refreshing, and potentially modifying to 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 S.W.O.T. Analysis as possible. This Strategic Plan does that. A summary of the consensus S.W.O.T. conclusions follows:

1. Strengths

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

***INSERT FINAL STRENGTHS HERE***

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2. Weaknesses

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

***INSERT FINAL WEAKNESSES HERE***

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3. Opportunities

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

***INSERT FINAL OPPORTUNITIES HERE***

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4. Threats

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

***INSERT FINAL THREATS HERE***

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Many interesting and valuable pieces of information and inferences were drawn from this S.W.O.T. Analysis. Significant time must be spent by the various ministries and leaders of the Parish to continue to assess and address the items identified in the S.W.O.T. Analysis. Indeed, we identified several Weaknesses as “low-hanging fruit” that



the Parish Council and ministries can improve while we achieve the more significant Strategic Goals.

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 **INSERT FINAL WHY STATEMENT HERE**.

### 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.

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:

**INSERT CORE VALUES HERE**

### VISION.

Vision defines what the organization hopes to do in the future. Vision is a longer-term, multi-year view focusing on: (1) What do we want to accomplish? (2) Where are we going? (3) What do we want to be in the future?

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

**INSERT VISION STATEMENT HERE**

### 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.” “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.”*

The Strategic Planning Team used the “S.M.A.R.T.” 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 S.M.A.R.T. 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 3 Strategic Areas of Focus to systematically address the most critical issues. The Parish’s 3 Strategic Areas of Focus are:

### **LIST THREE STRATEGIC AREAS OF FOCUS TITLES HERE**

### **3 Strategic Goals.**

In the months between the two strategic planning retreats, the Strategic Planning Team divided itself into these 3 Strategic Task Forces. It began monthly meetings and calls to develop a reasonable number of the most critical S.M.A.R.T. 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 S.M.A.R.T. 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.

In addition, the Strategic Planning Team, together with the Parish Council, has identified a number of items the parishioners identified as weaknesses that could be addressed in a year or less. While the Strategic Plan Implementation Teams are performing comprehensive research and design of the new programs identified in the Strategic Goals identified below, the Parish Council will tackle this Low Hanging Fruit list as part of the strategic planning process and periodically report on the results.

### 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."*

Just as our Lord appointed 70 Disciples to go to "every city and place" 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 3 Strategic Goals and Accountability.

To be successful, any genuine Strategic Plan should follow a 4-P approach: (1) use the proper Process; (2) recruit the right People; (3) develop the best, practical Plan; and (4) Perform 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 3 Strategic Goals, reconstituted “Implementation Task Forces” will be formed - one for each of the Strategic Goals identified by the Strategic Planning Committee. These new Implementation Task Forces will include some initial Strategic Planning Task Forces members. They will also add large numbers of individuals from throughout (and perhaps outside) the Parish who can assist in achieving the 3 Strategic Goals.

We are also implementing an unprecedented level of accountability and transparency. As you can see, every action plan step for all 3 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 ([www.](#) ) 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 where we go from there. 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 3 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. \_\_\_\_\_, 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 [insert website or email address for volunteers to sign up](#).

## Communications and Breadth

The proper and effective communication of this Strategic Plan and the progress made in its achievement will be equally critical. Accordingly, regular communication 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 **3** 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 [REDACTED] dedicated faithful from our Parish, 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:

**INSERT CORE VALUES HERE**

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 or email us at [insert website or email address for volunteers to sign up](#).

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 [www. .net.](#)

There is plenty of room for the active engagement of every person and organization prepared to ensure that our Parish achieves our Vision to **INSERT VISION STATEMENT HERE**.

May God bless the **INSERT PARISH NAME** Parish and its faithful on our journey!

PART TWO – Specific Action Plans for Each of the 3 Strategic Goals

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 1 HERE

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 2 HERE

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 3 HERE

ENDNOTES

**Exhibit “B” Sample Completed Strategic Plan**



FINAL St. Demetrios Warren OH Strategic Plan.pdf

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## Exhibit "C" Sample Strategic Planning Team Invitation Package

[ON CHURCH LETTERHEAD]

Dear Brothers and Sisters in Christ,

Together, we can and must make a real difference for Christ's church and help prepare a "good account before the awesome judgment seat of Christ." We request your help and participation in a historic and monumental undertaking. As we seek to make our Holy and God-protected Parish a place where joy, peace, and love abound, we will undertake something unique and significant in which your assistance would be invaluable.

We ask you to please join a select group of leaders from our community who will together develop a new and comprehensive Strategic Plan that will guide our Parish for years to come as we serve our present and future parishioners.

Strategic planning is well-accepted among the world's most successful Christian, non-profit, and business organizations and was used by Christ with his Apostles. Indeed, we will use a process designed around Christ's example, Holy Scripture, and best practices tailored uniquely for us. We would truly value your participation and wisdom.

We have enclosed several documents that will hopefully give you a greater understanding of the process and what we are asking of you. These enclosed documents include (1) a brief explanation of strategic planning and the six-step comprehensive process we will use; (2) the Rules of Engagement for our entire process to which all participants must commit; and (3) some questions and answers that would be helpful for you to understand.

We ask that you carefully and prayerfully review this letter and all these documents before you decide. We want you to know that your involvement will include participating in 2 invigorating retreats that will take place. The dates of the first retreat are [REDACTED]. The second retreat will be on [REDACTED], 2024. These retreats will be vigorous and enjoyably collaborative sessions with leaders throughout our Parish.

The first retreat will start with dinner [REDACTED], and continue for the rest of the evening. On [REDACTED], we will begin with a continental breakfast and continue the entire day with numerous breaks, including lunch and dinner. And we will have a brief lunch after church on [REDACTED], and finish our retreat before dinner.

The second retreat will occur on [REDACTED], 2024. If you agree to serve on our Strategic Planning Team, you are committing to attending the entirety of both of these amazing and engaging retreats.

At our initial retreat, we will develop by consensus our Parish's Statement of Why, SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats), Core Values, Mission, and Strategic Areas of Focus. You will then select one of the Strategic Areas of Focus and participate with a Team that will have three meetings between the two retreats to develop a specific strategic goal and methodical action plans to achieve those goals.

Once the goals and action plans are developed, we will all gather again in a second retreat to discuss and build a consensus around the final detailed goals, action plans, and Strategic Plan that will be written, communicated, and implemented. Ultimately, our comprehensive Strategic Plan will be publicly presented to our Parish at a special Parish-wide celebration event in [REDACTED].

Your active engagement in every step is essential to ensure our success. Thus, if you cannot commit to full participation in all aspects of this project, we will understand and reluctantly accept that you will not be able to join us on this critical journey at this time. We mean this with complete love in our hearts. Because of the crucial importance of this work, we sincerely hope you will be able to commit to participating.

We wanted to provide you with this high-level outline of expectations of those who will help determine the future and direction of our Parish and to seek your honest assessment of whether or not you are in a position to be a part of our leadership Strategic Planning Team. While we have included answers to some of what we anticipate are your initial questions, if you have any additional concerns or inquiries, you can contact our Strategic Planning Facilitator, Bill Marianes, at: [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com).

This is one of the most significant and strategic activities our Parish has undertaken in quite some time and will help shape our direction and goals for the next several years and beyond. Therefore, the prayerful consideration of your ability to participate and willingness to fully commit if you are able, is what we are seeking at this time.

Please give us your yes or no answer by [REDACTED]. Please contact the church office ([REDACTED]) or email your answer to [REDACTED]@ [REDACTED] to let us know one or the other if you can fully commit to participating in the entire strategic planning process. If you can participate, we ask you to please provide us with your email, preferred telephone number, and address.

Again, thank you for considering this significant commitment and stewardship of your time and talents in acknowledgment of your leadership and wisdom. We urge you to carefully and prayerfully consider whether or not you will be able to complete this critical and noble task effectively. We hope you will enjoy us on this rewarding journey. Looking forward to your answer, we remain yours in Christ,

+ Fr. \_\_\_\_\_, President \_\_\_\_\_ Strategic Planning Leader



STEWARDSHIP CALLING Parish Strategic Planning Action Plan



Our Holy Parish and Churches in the United States face unprecedented critical internal and external challenges. Only by reaching a consensus on how to address these unique issues can we more fully live our Faith and give meaning to Christ’s Great Commission to “make disciples of all nations.”

Strategic Planning is a proven process to do this holy work. It finds its roots in the Holy Gospel, follows the process our Lord and Savior Jesus Christ developed for his Apostles, and embraces current best practices. It is transformational for a Parish!

To do it properly, the 4 Ps must be effectively aligned. The right People must go through the right Process to develop the best Product that is effectively and thoroughly Performed. The Stewardship Calling 6-step Parish Strategic Planning Program follows this Christ-inspired, best-practices process successfully implemented in national churches, Metropolises, Dioceses, and Parishes that cover over 26% of all Orthodox Christians.

#### A. What is Strategic Planning?

Strategic planning effectively defines one’s vision, goals, and strategies to successfully achieve one’s calling and mission. It helps manage the “busyness” of our Parish without turning our Parish into a “business.”

A good and comprehensive Strategic Plan must answer four fundamental questions:

Why do we exist?

Where are we now?

Where do we want to be?

How will we get there?

Why? Why does our Parish exist? We must clearly articulate why anyone should want to be a part of our Parish.

Current state: Where are we now? This requires a “brutal facts” assessment of our existing Strengths, Weaknesses, Opportunities, and Threats (a “SWOT analysis”). This should include an assessment of our current situation, environment, talent, and resources. We must examine our effectiveness from the perspective of all key stakeholders.

Desired future state: Where do we want to be? Following our sense of God’s calling, we need to pick a reasonable time in the future and outline a comprehensive vision of the Parish at that time. Achieving consensus around that future vision is essential.

Action plan: How will we get there? This is the “rubber hits the road” step where specific activities and step-by-step actions for the next several years are outlined in each strategic area of focus to make the Vision a reality.

## B. Stewardship Calling 6-Step Strategic Planning Work Plan

### Strategic Planning Team

A Parish Strategic Planning Team (“SPT”) will be recruited. It is essential that this SPT be as diverse and inclusive as possible and have representatives from as many different constituencies, demographics, ages, experiences, and perspectives as is reasonably practicable. Only by having an SPT that is diverse and inclusive can we (together with the Holy Spirit) hope to discern a strategic plan that will work optimally for the whole Parish.

### First Strategic Planning Retreat Team Homework

A. Before the retreat, each SPT member will be asked to compile a list of what they believe to be the Parish’s Strengths, Weaknesses, Opportunities, and Threats and what Core Values, Mission Statements, and Strategic Areas of Focus they think are most critical. (In addition, the entire Parish will also be asked to complete a SWOT analysis

and/or offer their suggestions at a community-wide open forum so that we gather as much feedback from as many people as possible.)

B. All of their answers will be compiled and heat-mapped before the First Retreat, and the consensus top SWOT analysis, Core Values, Mission Statements, and Strategic Areas of Focus will be organized for presentation and discussion at the First Retreat.

C. At the 3-day First Retreat, the SPT led by our volunteer facilitator (“OZ”) will systematically reach a consensus on a Statement of Why, SWOT analysis, Core Values, and Mission Statement, and identify the top Strategic Areas of Focus for the Parish. We will then divide the SPT into the number of Strategic Areas of Focus you have determined to be most critical.

## STEP TWO – THE TEAM MEETINGS/ZOOMS AND FEEDBACK LOOPS

Each Strategic Area of Focus Team will have several scheduled meetings/ZOOMs to determine the “Strategic S.M.A.R.T. Goals” (Specific, Measurable, Attainable, Relevant, and Realistically written with an implementation Timetable), “Interim Goals/Actions,” “Accountability Scoreboard” and comprehensive “Implementation Action Plan” (all of which will be explained at our retreat and will be facilitated by OZ.). All specific Strategic S.M.A.R.T. Goals will have a detailed Action Plan to achieve them.

New individuals (not a part of the SPT) who add value to a specific Strategic Area of Focus will be solicited and brought onto the Teams (“on-ramped”) during this step. Each Team will have as many meetings as necessary to complete their work (usually 3). During this time, we will also check with other constituencies affected by the Strategic Goals and Action Plans, seek input and advice, and start building the broadest consensus possible.

## STEP THREE – THE COMMUNICATION OF THE STRATEGIC PLAN IN PROGRESS

Community “feedback loop” events and communications will present the proposed key elements of the Strategic Plan to the Parish (e.g., Statement of Why, SWOT Analysis, Core Values, Mission, Strategic Areas of Focus) and proposed strategic goals for feedback and consensus building. The first is the open community forum.

## STEP FOUR – THE STRATEGIC PLANNING CLOSING RETREAT

At the second and final retreat, each of the Strategic Area of Focus Teams will present their work to the entire SPT so that they may (a) hear the proposed Strategic Goals and Action Plans of each Team, (b) ask questions and offer input and other considerations; (c) resolve any issues or challenges; (d) make adjustments to the work product of the

Teams; and (e) start to build an SPT group consensus around a Strategic Plan. It is expected that this retreat will be less than a full day.

#### STEP FIVE – THE FINALIZATION AND COMMUNICATION OF THE STRATEGIC PLAN

With input from the Strategic Area of Focus Teams regarding their final Strategic Goals and Action Plans, we will organize the written product of each Strategic Area of Focus Team, as finalized by the entire SPT, into one cohesive, comprehensive, well-written, and clear Strategic Plan. The Final Strategic Plan will be properly and professionally typeset, printed, and published.

The Final Strategic Plan will be ultimately presented at a significant community-wide celebratory and informative event, hopefully in person. If possible, several community break-out groups will take place to build consensus and enthusiasm and recruit volunteers to work on the Action Plans.

#### STEP SIX – THE IMPLEMENTATION OF THE STRATEGIC PLAN

The overall implementation “Head Coaches” will select “Strategic Goal Co-Captains” who will implement each Action Plan. This leadership group will manage the entire Strategic Planning process, continually assess, communicate progress, and make necessary adjustments to the Strategic Plan. They will report on the progress and results at every Parish forum, in written and electronic communications, and keep every constituency informed and engaged. Transparency, accountability, and enthusiasm will be hallmarks of the communication and implementation process as we help to achieve the unimaginable future of the Parish.



## Rules of Engagement for Strategic Planning

1. We will stay on schedule (unless modified by the Facilitator who is “OZ”).
2. Titles, rank, position, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).
3. We will speak and interact confidentially. There can be NO repercussions for anything said. (“What happens in our meetings, stays in our meeting”).
4. Ask questions if you don’t understand, because no idea or question is dumb (unless it has already been asked and answered).
5. Tangential/side issues will be parked.
6. No texting/emailing/tweeting/Facebooking/ private conversation/phone calls during our retreats. We must all stay focused and be dedicated.
7. All decisions will be made by consensus. We will not be voting (except for occasional straw votes to assess consensus). Majority does not rule. Consensus will prevail.
8. OZ’s 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can’t do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.
9. Everyone MUST participate. (“Get in the game, or stay home.”)
10. Be honest and “no spin.” No party lines. Think about what will really make a difference in the Parish and not just what you want. It’s all about Christ’s church.
11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. (“Seek first to understand, and then to be understood.”)
12. Absolutely NO “Discussion Killers.” (e.g., “we tried that once,” “it won’t work,” “you don’t know what you’re talking about,” etc.) Be positive/encouraging.
13. Think strategically, creatively, and outside the box. Think long (not short) term.
14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)
15. We are all members of the Body of Christ, our Holy Orthodox Parish and made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

## FREQUENTLY ASKED QUESTIONS REGARDING PARISH STRATEGIC PLANNING PROCESS

Q: How was I selected?

A: Our clergy and Strategic Planning Core Team initially identified a diverse group of faithful leaders throughout our Parish representing all constituencies, groups, and positions. We want an efficient team of strategic thinkers representing many of the different perspectives that could build, by consensus, a comprehensive Strategic Plan for our diverse Holy Parish. Your invitation to participate acknowledges your leadership, vision, faith, and ability to work well on teams.

Q: How long will this process take?

A: We will complete this comprehensive work in about 7-9 months! The opening strategic planning retreat in step one will occur on [REDACTED], 20 [REDACTED]. And we will have the work of the Strategic Planning Teams in step two completed in time for our second retreat scheduled for [REDACTED], 20 [REDACTED]. We will finish the Strategic Plan and present it to the community at a Parish-wide celebratory event at the beginning of 2024.

Q: Will we develop a big-picture Mission and Vision, a series of strategic goals, or a combination of the two?

A: To do things properly and maximize our success, we need to reach a consensus on our Parish's: (i) WHY (why we exist); (ii) Mission Statement (what we do); (iii) Vision Statement (where we are going in the future); and (iv) agree-upon our most critical Strategic Goals (how we will achieve our Vision).

Q: How will the Parish communicate, follow up and implement what we decide, and what will be done to ensure our parish and their leaders support our plan?

A: As a part of our Strategic Plan, we will create a detailed implementation plan to achieve our goals. We will diligently and with great vigor pursue the achievement of these consensus-built goals. To maximize our success, we intend to fully communicate our Strategic Plan as mentioned in our 6-step action plan. This will include regular communications about our progress and accomplishments. We will also build a broad-based consensus throughout our Parish that will help us ensure greater buy-in and success.

Step six of our action plan focuses on our implementation team process dedicated to achieving our Strategic Plan. Because we intend to have measurable objectives, and our Strategic Plan and actions will be fully communicated and transparent, we can hold ourselves accountable as we achieve our goals.



Q: What is the “track record” of strategic planning concerning church work?

A: Our methodology has been widely and successfully used in churches, businesses, and non-profit entities to help organizations consistently become more focused and effective. Indeed, the process we will use has been successfully implemented by our Facilitator (a/k/a, “OZ”) to assist many Orthodox jurisdictions, parishes, and organizations in creating dynamic and outstanding Strategic Plans that now cover over 26% of Orthodox Christians in the U.S. We know this process works and can make a real difference.

Q: What is expected of each participant in this project?

A: Each participant must attend two retreats, as outlined in the process summary. In advance of our first retreat, each participant must spend only about 15-30 minutes completing some advance assignments (e.g., identifying our Parish’s strengths, weaknesses, opportunities, threats, Core Values, the reason for existence, and critical strategic areas of focus). Between the 2 retreats, each participant must actively participate in approximately 2 to 3 meetings/ZOOMs with one Strategic Area of Focus Team created at the first retreat. Given the critical importance of our tasks and the significant work to be done, for us to be successful, everyone must be present, attentive, and actively participate in both retreats and all meetings of one Strategic Area of Focus Team. If one cannot commit to doing all that is required of a participant in this comprehensive Strategic Planning process, we will certainly understand, and they should decline to participate in the SPT.

Q: Why do we need a Strategic Plan, and how will it support the Parish’s Ministries

A: Most successful organizations (and individuals) do not achieve their goals by accident. It takes purposeful work preceded by proper planning. As importantly, one must thoughtfully and prayerfully consider what they hope to achieve and their vision for their essential purpose. Strategic Planning is a well-established “best practices” discipline to do everything systematically. We will determine by consensus where we are, where we want to go, and how we will collectively get there as a unified Parish family. Ultimately, our Strategic Plan will provide the roadmap for more effectively focusing on our most critical goals to operate our ministries better and serve our Parish, Parishioners, and community. You are now asked to commit yourself to this noble purpose.

## Exhibit “D” Community SWOT Letter and Request Form

### Community Strategic Planning SWOT Analysis Instructions

Our Parish will complete a “SWOT” analysis as part of our new strategic planning efforts. This strategic planning tool evaluates our Strengths, Weaknesses, Opportunities, and Threats. Any SWOT analysis aims to identify the key internal and external factors critical to achieving our Parish’s goals. A SWOT analysis groups key pieces of information into two main categories:

1. Internal factors – The Strengths and Weaknesses internal to our Parish.

(a) Strengths include characteristics of our Parish that give us advantages.  
This includes things we do well.

(b) Weaknesses include characteristics that place our Parish at a disadvantage. This includes things we do not do well or problems we face that we must overcome.

2. External factors – The Opportunities and Threats presented by the external environment outside our Parish. External factors may include sociocultural changes, economic matters, technological changes, laws, and changes in our environment. They only exclude things EXTERNAL to our Parish.

(a) Opportunities include things happening outside our Parish that we can take advantage of.

(b) Threats include things happening outside our Parish that could cause problems or issues for our Parish.

We will undertake a comprehensive and critical SWOT analysis and challenge ourselves to ask and answer questions that generate meaningful information for each category (Strengths, Opportunities, Weaknesses, and Threats). Eventually, we will take this critical data we face and form some strategies to deal with our most pressing challenges.

BY NO LATER THAN [REDACTED], 20 [REDACTED], please type your answers onto this following two-page Word document and email them to: [REDACTED]@ [REDACTED]; or (b) if you cannot type your answers on this form, print them neatly and bring them to the church office. Again, the final submission deadline is [REDACTED], 20 [REDACTED].

S & W Please type the most important Strengths of our Parish and the most critical Weaknesses we face internally. Please focus on the bigger, more strategic, and longer-term issues.

STRENGTHS

WEAKNESSES

Opportunities & Threats Please type things outside of our Parish and could present OPPORTUNITIES and things outside of our Parish that we need to monitor as potential THREATS. On this page, do NOT mention things our Parish could do better. This page focuses on forces and things outside our Parish. For example, a poor economy could be a threat, and evolving or new technologies could be an Opportunity because they are both outside our Parish and potentially affect us. Please do not include anything related to our Parish specifically.

## OPPORTUNITIES

## THREATS

## Exhibit “E” Strategic Planning Team Advance Assignments Letter and Request Form

Beloved [REDACTED] Strategic Planning Team (SPT) Members,

We greet you in the name of our Lord and Savior, Jesus Christ, as we begin another exciting new chapter in the rich history of our Parish. We are honored you have agreed to serve on the SPT and work toward a transformational Strategic Plan to guide our Parish into the future.

On [REDACTED], we will gather in an invigorating strategic planning retreat where we will determine, among other things, our Parish WHY, Strengths, Weaknesses, Opportunists, Threats, Core Values, Mission Statement, and Strategic Areas of Focus.

To maximize our effectiveness, we need all SPT members to complete some Advance Assignments well before the retreat begins to allow the necessary time to process the information. We have attached a 2-page description (pages 2 and 3) of what we need you to do, followed by four more pages (pages 4-7) upon which you will type your answers to complete these critical Advance Assignments.

You must complete the final four pages by typing your answers directly onto this WORD document and email them to [REDACTED]@ [REDACTED] by NO LATER THAN [REDACTED], 20 [REDACTED]. We need your name only on page 7 to be able to assign you to the retreat breakout groups of your choice.

If you have any questions, please email our facilitator Bill Marianes at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com). This entire document can also be downloaded at: [REDACTED]. This is truly a historic undertaking, and we thank you for your willingness to be a good steward of God’s many gifts to you.

Please complete pages 4, 5, 6, and 7 and email them to [REDACTED]@ [REDACTED] by NO LATER THAN [REDACTED], 20 [REDACTED].

By the grace of God, with the guidance of the Holy Spirit, and with a lot of hard work from all of you, we will accomplish this transformational work together.

We remain yours in Christ,

+ Fr. \_\_\_\_\_, President \_\_\_\_\_ Strategic Planning Chair

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## Strategic Planning Team Advance Tasks

### SWOT INSTRUCTIONS

We will complete a “SWOT” analysis that evaluates our Strengths, Weaknesses, Opportunities, and Threats. Any SWOT analysis aims to identify the key internal and external factors critical to achieving our Parish’s goals. A SWOT analysis groups key pieces of information into four main categories:

1. Internal factors – The Strengths and Weaknesses internal to our Parish.

(a) Strengths include characteristics of our Parish that give us advantages.

This includes things we do well.

(b) Weaknesses include characteristics that place our Parish at a disadvantage. This includes things we do not do well or problems we face that we must overcome.

2. External factors – The Opportunities and Threats presented by the external environment outside our Parish. External factors may include sociocultural changes, economic matters, technological changes, laws, and changes in our environment. They only exclude things **EXTERNAL** to our Parish, so do not include anything involving it.

(a) Opportunities include things happening outside our Parish that we can take advantage of.

(b) Threats include things happening outside our Parish that could cause problems or issues for our Parish.

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### CORE VALUES INSTRUCTIONS

Core Values are beliefs shared among the stakeholders. Core Values drive an organization’s culture and priorities and provide a framework for decision-making. We ask you to briefly identify up to six Core Values you believe are most critical for our Parish in single words or concise phrases.

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### MISSION STATEMENT INSTRUCTIONS

Mission answers the question: “What do we do?” A Mission Statement concisely describes the fundamental purpose for which an organization exists and what it does to achieve its Vision. Below are some examples from other Parishes to provide some food for thought.

Sample Mission Statements (taken from various churches)

- ~ The Mission of \_\_\_\_\_ Church is to: Love God, Love Others, Make Disciples.
- ~ We are a Christ-centered community that welcomes all to worship, to pray, to serve others, and to learn our Orthodox faith.
- ~ We are a worshipping community, living and sharing the Faith given by Christ to the Apostles.
- ~ We are a welcoming Orthodox community supporting each other in spiritual growth and philanthropy in Christ.
- ~ \_\_\_\_\_ Church welcomes all to experience and share Christ's love and the apostolic faith through worship, education, fellowship, stewardship, and service.
- ~ The Mission of \_\_\_\_\_ is to proclaim the Holy Gospel by teaching and spreading the Orthodox Christian Faith in a dynamic and welcoming community devoted to serving all people who seek a growing relationship with Jesus Christ.
- ~ The Mission of \_\_\_\_\_ Church is to worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy, and service to others.
- ~ \_\_\_\_\_ is a Christ-centered community that loves, guides, engages and serves all people.
- ~ The mission of \_\_\_\_\_ is to energize, cultivate and guide the faithful by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.
- ~ The Mission of \_\_\_\_\_ is to be a Christ-centered community welcoming all people to grow spiritually in the fullness of the Orthodox Christian faith through love, worship, and service.
- ~ We will establish and grow a Church community in Christ that embraces and teaches the Orthodox Christian Faith.

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Strategic Areas of Focus Instructions

Strategic Areas of Focus are the most essential and critical strategic areas that require our attention to make the most significant difference for our Parish. Once we know the topics and areas in which we must focus to make the most important differences for our Parish and parishioners, we will develop specific strategic goals to address the needs in these areas. They are the “few things that will change everything” and help address our issues and their root causes. To get us started, we are asking you to please



suggest the most critical 1 or 2 (no more than 3) strategic areas on which we must initially concentrate.

Strengths & Weaknesses Please type the most important Strengths of our Parish and the most critical Weaknesses we face internally. Please focus on the bigger, more strategic, and longer-term issues.

STRENGTHS

WEAKNESSES

BY NO LATER THAN \_\_\_\_\_, 20\_\_\_\_, please type your answers onto pages 4-7 of the Word document and email them to: \_\_\_\_\_@\_\_\_\_\_



O & T Please type things outside of our Parish and could present OPPORTUNITIES and things outside of our Parish that we need to monitor as potential THREATS. On this page, do NOT mention things our Parish could do better. This page focuses on forces and things outside our Parish. For example, a poor economy could be a threat, and evolving or new technologies could be an Opportunity because they are both outside our Parish and potentially affect us. Please do not include anything related to our Parish.

## OPPORTUNITIES

## THREATS

**BY NO LATER THAN \_\_\_\_\_, 20\_\_\_\_, please type your answers onto pages 4-7 of the Word document and email them to: \_\_\_\_\_@\_\_\_\_\_**

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Core Values Please LEGIBLY TYPE no more than 6 of the most critical Core Values (single words or very short phrases) you believe our Parish should embrace to define our culture, and that should help us decide what we do and how to prioritize our efforts.

- |          |          |
|----------|----------|
| 1. _____ | 3. _____ |
| 2. _____ | 4. _____ |
| 5. _____ | 6. _____ |

Mission Statement Please LEGIBLY TYPE a clear, concise, compelling, inspiring, and easy-to-understand and share a Mission Statement that outlines what our Parish should do. (See examples on pages 2 and 3 for ideas.)

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Strategic Areas of Focus Please LEGIBLY TYPE the top 1 or 2 (no more than 3) most critical and important strategic areas you believe our Parish must prioritize in its strategic plan with specific strategic goals to have the most significant impact and help create the healthiest Parish that helps bring people closer to Christ and helps us achieve our mission. What are the few things that can change everything?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_



Various times during our strategic planning retreat on November 10-12, the SPT will break up into smaller groups to work on discrete tasks. We need to know your

preferences. Please give us your name on this page so that we can try and match you to the smaller groups of your choice.

**PRINT YOUR NAME:** \_\_\_\_\_

SWOT/Core Values Team During the retreat, everyone will work with a subgroup in one of five categories (Strengths, Weaknesses, Opportunities, Threats, Core Values) to reach consensus conclusions in each of these areas. Please tell us which group you would prefer to be assigned by ranking all five items from 1 (my first choice) to 5 (my last choice). Put a number, 1 through 5, on each line based on your preference for the team on which you want to work. You must fill in all lines with a number from 1 to 5 based on your choices.

\_\_\_ Strengths \_\_\_ Weaknesses \_\_\_ Opportunities \_\_\_ Threats \_\_\_ Core Values

Mission/SAF Teams During the retreat, everyone will work either on a team to (a) develop the Mission Statement of the Parish (a clear description of what we do as a church) or (b) identify the most critical Strategic Areas of Focus that the Parish must prioritize in our strategic plan to have the most significant impact and help create the healthiest Parish that brings people closer to Christ and help us achieve our mission. Rank these choices from 1 to 2 (with 1 being your first choice and 2 being your second choice). You must fill in all lines with a number 1 or 2 based on your preference.

\_\_\_ Mission \_\_\_ Strategic Areas of Focus



## **Exhibit “F” SWOT Heat Mapping Instructions**

### Stewardship Calling Heat Mapping Process Summary

The heat mapping process is all about taking a lot of data, identifying how often a common comment occurs, and then listing the comments in the order of the number of times they are mentioned. This process requires judgment as many people will describe the same root cause item using different words. It will also take quite a few passes through the raw data to get everything properly categorized. So, take your time and find an environment where you can concentrate and discern the key concept being expressed.

#### Step 1. TRANSCRIPTION PHASE

We will begin by literally transcribing all of the raw data identified by EVERYONE who submitted advanced assignments into separate Microsoft Word documents (one for each of Strengths, Weaknesses, Opportunities, Threats, Core Values, and Strategic Areas of Focus). Every item submitted will be typed into the appropriate document verbatim. No editing will be done in the Transcription Phase, and we will not need to keep track of who said what. Just the exact wording will be carried over. After this phase, we will have 6 Word documents.

#### Step 2 FAMILIARIZATION PHASE

The work can be divided between several people (preferably 5-6), by allocating the 5-6 separate items among the team working on this. Each person should read through whichever item(s) is assigned to them several times to familiarize themselves with all the comments. The more times you merely read through all the submissions, the more you will start to see patterns of common thoughts being expressed. It will help with the next step.

#### Step 3 HEAT MAP FIRST, SECOND, THIRD, ETC. PASSES

The final step is identifying the number of times and item is named. The easiest way to do this is to read each item in the order in which it was transcribed. As you find one that is similar to a previous one, copy and paste and then edit down the redundant wording after the first time that concept was identified and put the number 2 in front of the item the first time it was identified. As additional mentions of a similar item are included, you will change the number in front to 3 and then 4, etc., as the same concept is mentioned. This allows us to see the number of times a particular item is mentioned.

You can do the heat mapping however you find works best for you. But one of the easiest ways most people have found to do the work is to place two WORD documents on the same screen next to each other. One has the raw data, and the other starts out blank. You will cut and paste each item from the raw data document over to the heat-

mapped one, making sure to paste like ones after each other, and then change the number in front of the summary phrase to reflect the addition of another similar comment.

Regardless of how you do it, as additional mentions of an item occur, you can continue to edit down the wording to get to the essence of the item if need be. Many people write “essays” and you need to distill what they wrote to the specific key concept they are trying to express. This often occurs by eliminating as many extra words as you can to get to the core concept in as few words as possible.

It usually takes many passes to keep refining it down to the smallest number of repeated concepts. There will also be several items that are just “one-offs” with no more than one mention. In the heat mapping, those will naturally fall to the bottom of the list, and the more times a concept is mentioned, it will rise to the top of the list.

#### SPECIAL NOTE

This Special Note applies to just the Opportunities and Threats. By definition, Opportunities and Threats need to be external to the organization and not internal to it. Most people get this wrong and include both external and internal Opportunities and Threats. So, any internal Opportunity or Threat should be eliminated and NOT included on the heat map.

We will only work with the external Opportunities and Threats. For example, “A poor economy” is an external threat (not just affecting our organization) that could make the list, whereas “Poor Financial Contributions/stewardship” is an internal Weakness (not Threat) that affects just our organization and will not be included. Again, delete internal items improperly listed as opportunities and threats. This may be difficult to discern at times, so please feel free to reach out to OZ at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com).

#### Step 4 FINAL HEAT MAPPING

After you’re done, OZ will take the best final version of the heat-mapped item documents, review them carefully, and make consolidating and consistency changes to produce the final heat mapping for use at the retreat.

A redacted example of 3 of these items from a Parish process is attached as an example.

## WEAKNESSES

25 – LACK OF ENGAGEMENT - Low participation in ministries/activities because lack of commitment -too many ministries and people spread too thin- Complacency and lack of commitment in our community- Too few volunteers for work needed to be done, Volunteers usually the same group

21 – GREEK- CULTURAL ISSUES - Greek language/cultural issues - creates communication barrier and exclusionary issues- lack of balance between Greek cultural activities and Orthodox faith - Chanter's Greek is a turn off to newcomers and young members- Highest energy levels and volunteer participation from church members on Greek cultural events (which presumably is not the mission of the church.....or maybe it is...not sure yet)- People looking for a new church who are not Greek or have not heard of Orthodoxy may not be likely to consider our parish - cultural influences can prevent our Parish community unity and undermine the true mission

21- FACILITIES - Limited facilities: in general, not enough downstairs seating, space for choir, church seating, for Sunday School/Youth - no intercommunication between buildings - Inadequate parking - Inadequate recreational areas - Poor location of Church (unsecure location)- Facility to brand our Greek Festival and other church programs. (Development of our church property is crucial to begin that brand identification)

20 – CHURCH SERVICES - Liturgy is too long and repetitive and does not fully engage participants, Too much standing- Mired in old and ancient traditions that have developed over 2,000 years that do not bolster one's spirituality- Single service option with no earlier time option (vs. Catholic & others)- Lack of childcare and nursery during services.- People struggling to find a place to fit in may not assume such a traditional form of Christianity is accepting to them- Church attendance dominated by older demographic

15 – UNDERSTANDING ORTHODOXY - Lack of education and knowledge about the Orthodox Faith & Liturgy & Bible- Lack of excitement about the faith- Diverse Orthodox community where superstitions, cultural "beliefs," and ignorance of our true faith often infiltrates a kind of "peasant" religion results in lack of a true understanding of Orthodoxy- Assimilation into the "modern" American morality and culture- People want to change the Orthodox Church to fit their views and way of life

13 – YOUNG ADULT ENGAGEMENT - Lack of active young adults in the community.

12 – WELCOMING- NEWCOMER EXPERIENCE - Newcomer experience needs to be improved - Lack of inclusiveness and cliques – lack of inclusiveness- need better welcome information/packet with brief explanations of the elements of the service - Develop some talking points to share with others, when asked or given the opportunity to talk about our Orthodoxy and our church in order to ensure a consistent and impactful message to instill curiosity to learn more)

11 –MINISTRY - TRANSPARENCY, ACCOUNTABILITY and EFFECTIVENESS - Lack proper measurements on effectiveness and execution of ministries- Need for better organization and scheduling in ministries

11 – STAFFING - Inadequate staffing- Need a 2nd priest - high demands and responsibilities of the clergy/Priest stretched thin - Most administrative functions are performed by volunteers hence lack of consistency- Low number of those who pursued full time church ministry or missions. Is current clergy the only one?

8 – STEWARDSHIP – FINANCIAL SUPPORT - Parishioners do not have a culture of tithing- limited Stewardship/financial Resources (not a wealthy community) - Church minimally named in members' estate planning / wills- Fund raising activities have become excessive- 80/20 rule applies to financial support Stewardship and Capital Campaign - we have less families and this makes it difficult to raise the money for our new church.

6- YOUTH ISSUES - lack of mentoring of our young people in project oriented arts and crafts related to our Orthodox Greek culture- Teenage/youth activities- GOYANS should have more responsibilities and opportunity to lead and contribute to church and community. Vision for GOYA/JOY- Add sports program (soccer, flag football, basketball, baseball, softball) - Youth protection policies could be strengthened

5 – MEMBERSHIP DECLINES - Membership declining due to aging community, divorce and members relocating or growing minimally Lack of Transparency and accountability in decision making/Not open to suggestions

5- SUNDAY SCHOOL ISSUES - No SS curriculum- No teacher review & development - poor SS arrival & dismissal procedures - Use of Non-Orthodox religious materials in Bible Study and Sunday School- Poor commitment and engagement of parents in the Sunday School

5 – OUTREACH - Minimal external community outreach. One example, how to better engage business leaders in our parish onto City/State Boards/commissions Philanthropy vision & mission is segregated to Philoptochos & AHEPA vs. engaging the entire parish - Minimal community involvement with other Orthodox or community Churches

4 – FAMILIES ISSUES - Need to better address real problems families are having in our parish- Strengthen programs for mothers/children (Mommy and Me, Babysitter program comprised of young members of our church) - Lack of fun family activities- Compared to other churches in our community,

4 – RESISTANCE TO CHANGE - Parishioners resistance to change

4- NOT GREEK ENOUGH - Increased “distancing” from Greek culture.

3- CHOIR Issues - Spotty choir practice- Aging organists- few people worshipping singing- there is no inviting way to join in on church hymns

3 – LEADERSHIP DEVELOPMENT - Need more leaders- and ways to get new people to take on leadership roles

3- SENIORS - Elder care issues – not enough care programs for our own poor and old parishioners; lack of senior living facilities - lack of church transportation for those unable to drive or without a means of getting to church

3 – COMMUNICATIONS - Insufficient communication to parishioners.

3- TECHNOLOGY - Technology Limitations - limited technology content creators fewer number of people currently creating content and limited number of users publishing content - Website not mobile friendly

2 – EMAIL - Too much reliance on email.

Lack of broad based understanding and agreement of our why we exist, and what we envision for our future church

#### ONE-OFFS

- Identify ways to expose people in our city to Orthodoxy, and the sense of family our church offers.

- Inreach - We should look to help and improve our community before (or at least at the same time) we reach out to the larger community. Many in our community in need.

- Social media presence

- Sense of entitlement by descendants of the founders

- Unaudited Technologically Published Content - Our current content needs to be audited and updated to reflect the current state of the parish

- Membership spread out geographically throughout Jacksonville

Sport/Recreation programs interfere with church attendance/activities

- Vacation Bible School enrollment down

- Church luncheons are too frequent losing appeal to membership. Attendance is dropping

- We must revisit the ancient Greek adage “Everything in moderation”

- Lack of meaningful support when members are in crisis (e.g., death, divorce, addiction, etc.)

- Metropolis

-Tutoring unavailability to our young people in their academic subjects

-Philoptochos Charter clarification – many programs beyond just working on matters for the poor

- Distrust between laity and various positions held in our Hierarchical organization.

#### CORE VALUES

36 – CHRIST-CENTERED (FAITHFUL / SPIRITUAL)– guides us and is the basis for all our decisions; Orthodoxy – a commitment to the fundamentals of Orthodox teachings; Holy Tradition; The Gospel of Jesus Christ; The One, Holy, Catholic and Apostolic Church of Jesus Christ; attend service, pray to get closer to God; worship; Church is a Hospital for the sick in which we are all in

need of a physician Beliefs as outlined in the Nicene Creed; Biblical and spiritual doctrines and guidelines as a central thought and guide; Practices the lessons that Christ gave us; Historical presence; Evangelism; Everything we do is for the Glory of God; Maintain a high standard of excellence in all ministries and activities; Strengthening relationship with God; The opportunity to increase the knowledge of Orthodoxy and church history is being lost; All are working towards salvation; To help all on our shared journey toward salvation.

33 - LOVING and WELCOMING COMMUNITY - a healthy community based on strong family relationships, Greek culture and positive outreach – We are bound to each other and our community; Warm Fellowship; All feel included, engaged and part of community; forgiving community; Reach out to each other to work with love and harmony; Love everyone in spite of our sinful nature; Love all those who enter the Cathedral friendly/inviting/hospitable; Newcomers/visitors.

14 - COMMUNITY SERVICE – We are bound to each other and our community; servant leadership; volunteer; charity and helpfulness; committed to philanthropy; be a good example in the greater Atlanta community through our good works; We are here to help others; Support all kinds of Families; Embrace helping those in need; To be Good Samaritans.

13 - GOOD STEWARDS - contribute money, time and talents with purpose, passion and integrity; generous contributors; Excellent Planning and Fiscal Management.

11 - EDUCATION – a commitment to programs that support lifelong learning; educate non-orthodox as well as orthodox as to why things are done a certain way during the liturgy; educate our parish about Christianity; train and equip clergy, leaders, parish, and youth to develop into Christian individuals, families and parish; Educating our youth and all people about the Holy Trinity through Orthodoxy is crucial; Keep our youth engaged in our community; Youth education; Youth retention to foster Orthodoxy for life.

8 – INCLUSIVE / COLLABORATIVE –Create more opportunities to make our Cathedral “home to all”, a place you want to come and be with family and friends. Non-judgmental – loving and accepting of everyone; Be more inclusive and not exclusive - We respect all backgrounds and potential contributions, no matter age, gender or income; Ecumenism; Working in a harmonious way to be a loving example to all people; Synergy.

6 - HONEST – To be good honest and respectful stewards of the faith and church; Truthful; Transparent; accountable.

5 - ENGAGING - Retaining our Parishioners and keeping them engaged; Increase participation to services, ministries, etc. Engaging our young adults (groups, activities, sports).

4 - FLEXIBLE - Change is good; and adaptable; Shift from generations of Greek immigrants, and children and grandchildren of immigrants with cradle commitments to Orthodoxy, to later and current, and future generations with much weaker ties to ethnic heritage and the Orthodox Faith.

2 - HELLENISM – should be used to enhance Orthodoxy and not supersede it; appreciate its relevance to our Orthodoxy.

2 - COMPASSIONATE – a commitment to help those less fortunate; service to others.

2 - FORGIVING

2 - HUMILITY

2 - FAMILY

ONE-OFFS

Passionate

Simplicity

Impact

Hopeful

Cultural and religious identity

We know all stages of life deserve equal consideration when determining where to put our time, effort and support.



## THREATS

24 – DEMOGRAPHIC SHIFTING TRENDS – CHURCHES LOSING YOUTH AND AGING POPULATION - Adults-35 and younger not wanting to be a part of the church after getting married or the birth of their child; Dwindling newcomers and or growth in Orthodox faith; Dilution of traditions from generation to generation; The community is on the older side; and many of the children and grandchildren of the elder congregants do not participate in the community to the same extent as the elders; Youth leaving our church community; Millennials are less likely to attend church in general; similar to in the past; but likely more pervasive now. How do we capture and/or retain those people in our church; Young adult migration away from Orthodoxy; Weakening cultural ties; Losing young people after they go to college; Losing the age bracket 35+; Once people become empty nester they pull away from the church; The major threat is the demographic shift from generations of Greek immigrants; and children and grandchildren of immigrants with cradle commitments to Orthodoxy; to later and current; and future generations; with much weaker ties to ethnic heritage and the Orthodox Faith. How we at our Cathedral (and even the Church nationally) manage this demographic shifting will determine how; and even whether; we survive and flourish in the future; Parishioners' age and health plus dedication vs. millennium youth and disinterest; We are losing our youth. We need to find ways to get young adults involved; We are losing older population – can we have something to learn from them about our faith and ancestry?; We are losing people. The youth are not coming. So we are fading out. This includes our religion and our culture; Church members declining; Church membership declining – seniors passing; GOYANs going to college (losing people; not gaining); Greek culture (as a whole) is dwindling; not enough representation exists within the Metropolis to share our ideas and culture/heritage with our parishioners to express our love for them (dance; language; food; clothing; etc.); festivals and competitions across the US are losing customers and participation to assist in creating/maintain these events; College; especially teaches our children relativism (that there is no real truth).

21 - LIVING IN A SECULAR COUNTRY / WORLD - Societal continuation and emphasis on secularism; Religion itself is not important to more people now than before; Young church members exposed to and influenced by non-Orthodox norms; The growing secularization and anti-Christian attitudes in American society. Secularization of society; organized religion not relevant; parents working or not working; competition with other school/outside activities; Secularism gaining strength. Secular distractions; The world around us; People are looking for validation and do not want to be in a place that they feel guilt or shame; College and Outside influences on our youth; if they are not properly prepared and ready for challenges to their beliefs; they could be swayed or distracted (need to be prepared to deal with educated and persuasive arguments; Growing secularism; especially among the young; Friends that are not good role models; and don't attend church themselves; Overcoming Bias: With the current political climate there is a huge divide in the way folks react to things. Although this divide is mainly outside the walls of the church; it certainly effects the church as a whole. For some it has become acceptable to be less tolerant of people who are not like us. The idea that you can be a moderate has evaporated and both sides of the political spectrum seem to be embracing their extremes. Polarization has become the norm; it is not healthy; and if unchecked it will eventually creep into the way we pray; Political climate around immigration; Discord within our country over political and social issues; Xenophobia; Nationalism/tribalism; Consumerism; Homophobia; Fundamentalism; Complacency – Not moving further towards God with faith and/or losing sight of the big picture and focusing on minutia.

19 – PEOPLE ARE TOO BUSY WITH OTHER PRIORITIES - Too many Outside activities vying for available time and attention; Younger adults do not have orthodoxy on their priority; Youth “travel” sports taking a priority over church on Sundays and Holy days; “Others” occupying our time and finances; Time and emotional demands upon our youth; Time constraints/over commitments; Husband/wife both working; Children involvement in school/other athletic activities; Diverse needs; time commitments; competing activities; Time Challenges (external youth activities; constraints of working families - both parents; single parent); Competition for peoples' time and attention (for getting involved with our parish activities.); 365/24/7 world – all days are the same morning; noon; and night; Youth sports (time factor); Dual working families; Unconventional working days and times; busy family activities; i.e. sports; clubs; and education; Too many choices of things to do in Atlanta; life is busy; people who don't have much hope in this crazy world; Both parents in family work.

17 - CHANGING MORAL VALUES / CULTURE - Changing moral values; Me culture/society; Change in family values; The envy and jealousy that is growing in the world; Religious Apathy; Disinterest; Lack of Faith; and alternative sexual lifestyles conflict with our beliefs; The glamour and image that the world portrays ad says you must be that!; The role models that the world shows – rich; famous; foul mouthed; immoral; instead of humble; God loving saints; Erosion of Christian faith in society; Changing family values; Parents not setting example of importance of attending church; participating in church-related activities; Contemporary Moral Issues – might be losing people due to the face that we do not deal with today's issues; Younger generation – mixed marriages/life styles pulling our young people away from the church; Decline of the family unit and parent involvement. Societal shifts – self-image; instant satisfaction; etc.; “What's in it for me?” mentality; Family values/priorities have changed or shifted; Desire to conform - join forces of the mass.

16 - OTHER CHURCHES/RELIGIONS - There may be a potential threat from “Mega” churches & their youth programs that seem to be more engaging with its parishioners Look at what IHM and Oak Grove Methodist are doing to capture the attention of the members. If we are not able to meet the needs of our parish; including spiritually; they will find alternatives...new parish; religion or other coping mechanisms; Arianism with Jehovah's Witnesses (very fast-growing Christian sect. They are well organized – methodical); Islam (The lies and practical threats it presents to the Truth and life for other religions); A growing trend of anti-

established religion; Other Christian and none Christian churches; Larger churches have more life-stage ministries and better "production" (A/V; communication; marketing assets); Outside religions/non-believers and other Christians. Do not know what we believe in; when I say I am Greek Orthodox; the most two common questions/comments I get are: "Are you Jewish?" and "Do you believe in the Greek Gods/Mythology as your deities?"; Other religions are more easily understood and taking away our youth from the church; Competition for Orthodox members from other Orthodox churches; Competing religious concepts (products) that may pull Orthodox Christians away from GOC; Other faiths or non-denominational appeal to mixed marriages or younger ages; Rise of mega churches; Competition from other churches; People are leaving the Church for other churches or nothing at all; Other churches are more easily accessible – satellite churches; bible studies; Are other Parishes in the metro area considered to be more attractive to families due to their programs and "Community?"; When people visit from out of town; a non-orthodox person would not attend an orthodox church; yet there are many churches for a non-orthodox Christian to attend; Modern theme churches appealing to younger generations.

11- POOR BRAND AWARENESS / LACK OF KNOWLEDGE OF ORTHODOXY Very few people still know about or understand the Orthodox faith; – people not aware Orthodox church exists; Community misunderstanding/ignorance about what Christian Orthodoxy is; BRAND AWARENESS people in this city; state and country need to know that the Eastern Orthodox Church is a Christian Church whose parishioners are disciples of Jesus Christ with the same fever as the original apostles. This is threatened everyday by our not showing gratitude to God for his unconditional love toward us. When we do not proclaim this message in some way we weaken the validity of the claims of the Eastern Orthodox Church to being the one true apostolic church. We become just another business whose employees are scrambling to make a buck and trying to get ahead in the world; The lack of Brand Awareness that we are a Church dedicated to the basic message of Jesus Christ that "God unconditionally loves everyone". I believe this is the greatest threat to the Eastern Orthodox Church in America; Lack of knowledge about the Orthodox faith; Limited access to positive media and news coverage of Christianity; Language and lack of knowledge of church history; traditions and mission; Christianity is *now associated* with rigid dogma that is counter to contemporary cultural norms; Political – correctness of new ideas and laws prevents people from saying what the church believes in and/or church against these peoples.

11- SOCIAL MEDIA - Threat to religious freedom from social media; the content not necessarily the form. Expose to the world can be a good thing but like the old saying goes. Too much of a good thing can be bad; influence toward children today; Outside world is a threat to the beliefs of our youth. Our youth is exposed to so much due to social media; Evil social media influences/preoccupation; The world and social media occupies everyone; but especially our youth; Media and drugs are a threat to our children.

6 – LOSS OF INTEGRITY - GOA FINANCIAL AND RELIGIOUS SCANDALS - Scandals and perceived ill-will in the Greek community and Archdiocese; Although this item isn't within our control; the lack of transparency with financial issues at both the Archdiocesan and Metropolis levels is eroding faith in our church in the big picture---we need to express our concerns as a community; Additional proof of financial mismanagement within official Diocese departments occurs and further destroys trust in leadership; Stewardship in jeopardy being part of the GOA and its problems; Financial exposure at Archdiocese may ultimately require increase in fair share contribution; squeezing limited resources.

5 – PERCEIVED GREEK ETHNICITY REQUIREMENT / CHALLENGES - Too much emphasis on Greek makes it more difficult for potential converts; disconnect between being Greek vs Greek Orthodox; Use of Greek language use in liturgy; Complacency; bias; exclusive attitude; prejudice; perceptions by and of others. Being seen as a 'Greek' church; Cultural Preservation – need to focus more on Orthodoxy instead not just for Greeks; outside perception that you need to be Greek to come to this church.

5 - GOVERNMENTAL LAWS - Governmental laws and regulations dealing with human rights and equal treatment under the law can conflict with our dogma and beliefs; Recent Supreme Court case did not resolve collision of business vs. religious freedom and practice; Threat to religious freedom from government. Zoning; construction laws; permits if need to add on to existing structures/build vertical building structures/do renovations; New tax laws regarding tax deductibility (should be explained; maybe); Potential tax law change affecting churches.

4 - VIOLENCE AGAINST CHRISTIANS - Safety; Overt hostility toward Christianity; Religion (publicized religion) is dangerous in today's society; Beliefs are being threatened all the time; We might experience an act of terrorism at the church; Need to consider pumping up our security systems on Sunday and when we have events on our property. Do we need an armed guard on duty?; Lack of night time security.

4 - COMMUNICATION - Changing Communication: I believe that communication problems are just beginning. There are no clear forms of communication available to any organization that would let them contact everyone throughout many generations; The systems in place are also constantly changing and communication in general is harder instead of easier; Changing communication habits between generations; Upper Management Clergy (Archbishop and Clergy at the Archdiocese) and Middle Management Clergy (Bishop and Clergy at the Diocese) who do not on a consistent basis proclaim the message in a straight forward assertive manner that "GOD unconditionally loves everyone."

3 - ATHEISM - Casual Atheism (i.e. Orthodox or others going through the motions; but not really believing). People leaving churches; in general; due to not believing in God etc.

## Exhibit "G" First Strategic Planning Retreat Handbook

INSERT PARISH LOGO OR PICTURE HERE

\_\_\_\_\_ Parish

Strategic Planning

Retreat #1 Handbook

\_\_\_\_\_, \_\_\_\_ & \_\_\_, 20\_\_

*"Where there is no vision, the people will perish."* Proverbs 29:18

Bill Marianes

[Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com)



## Rules of Engagement for Strategic Planning Retreats

1. We will stay on schedule (unless modified by the Facilitator, who is OZ).
2. Titles, ranks, positions, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).
3. We will speak and interact confidentially. There can be NO repercussions for - anything said. ("What happens in our meetings, stays in our meeting").
4. Ask questions if you don't understand because no idea or question is dumb (unless it has already been asked and answered).
5. Tangential/side issues will be parked.
6. No texting/emailing/tweeting/Facebooking/ private conversation/phone calls until after our retreats. We must all stay focused and be dedicated.
7. All decisions will be made by consensus. We will not be voting (except for consensus straw polls). Majority does not rule. Consensus will prevail.
8. OZ 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.
9. Everyone MUST participate. ("Get in the game, or stay home")
10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Church and not just what you want. It's all about Christ's Church.
11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. ("Seek first to understand, and then to be understood.")
12. Absolutely NO "Discussion Killers." (e.g., "we tried that once," "it won't work," "you don't know what you're talking about," etc.) Be positive/encouraging.
13. Think strategically, creatively, and outside the box. Think long (not short) term.
14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)
15. We are all members of the Body of Christ, our Holy Orthodox Church, and made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

Strategic Planning Retreat Schedule \_\_\_\_\_, \_\_\_, & \_\_\_, 20\_\_

1. First Day 5:15 p.m. – 11:00 p.m.<sup>1</sup>

#	Time	Presenter	Activity
			A. The Opening
1	5:00 - 5:15	Fr. _____	Opening Prayer Service.
2	5:15 - 6:15	Full SPT	Dinner.
3	6:15 - 6:20	Fr.	Fr. _____'s opening remarks and welcome.
4	6:20 - 7:50	OZ	Review strategic planning process, goals, agenda, rules of engagement, facts and statistics, and Strategic Planning Team ("SPT") exercises.
			B. SWOT
5a	7:50 - 9:00	OZ then 4 SWOT Teams	SWOT explanation followed by each separate SWOT Team develops a consensus list of the parish's Strengths, Weaknesses, Opportunities, and Threats based on the results from the heat-mapped SWOT submissions depending on to which SWOT Team they have been assigned. <i>(See Team assignments on pages 7-8. SWOT instructions are on page 6. Your specific SWOT heat-mapped results will be given to you in your room. Summaries of heat-mapped suggested SWOT conclusions are on pages 14-15.)</i>
5b	7:50 - 9:00	OZ then Core Values Team	The Core Values Team develops a consensus list of the proposed Parish Core Values. <i>(See Team assignments on pages 7-8. Core Values instructions are on page 6. Summaries of heat-mapped SPT suggested Core Values are on page 15.)</i>
6	9:00 - 10:55	Full SPT	Each SWOT Team presents their specific consensus proposed Parish's Strengths, Weaknesses, Opportunities, or Threats. The full SPT will then discuss

<sup>1</sup> Subject to change by OZ – See Rules of Engagement #1

			and reach a consensus agreement on the final Strengths, Weaknesses, Opportunities, and Threats.
7	10:55 - 11:00	Fr. _____	Closing comments, prayer, and dismissal.

2. Second Day 8:30 a.m. - 8:30 p.m.<sup>2</sup>

#	Time	Presenter	Activity
			<b>C. Statement of WHY &amp; Core Values</b>
8	8:30 - 9:00	Full SPT	Opening Prayer and continental breakfast.
9	9:00 - 9:05	Fr. _____	Fr. _____'s opening remarks.
10	9:05 - 10:30	Full SPT	WHY Discovery.
11	10:30 - 11:15	Full SPT	Core Values Team presents their proposed list of parish Core Values, and the full SPT will discuss and reach a consensus on the final parish Core Values. <i>(Summaries of heat-mapped SPT suggested Core Values are on page 15.)</i>
12	11:15 - 11:30	Full SPT	Break.
13	11:30 - 12:30	OZ	Explanation of parish Mission Statement and Strategic Area of Focus and S.M.A.R.T. Goal development process.
14	12:30 - 1:10	Full SPT	Lunch.
			<b>D. Mission Statement &amp; Strategic Area of Focus (SAFs)</b>
15a	1:10 - 2:15	Mission Teams 1 & 2	Mission Statement Teams 1 & 2 discuss and develop a Proposed Mission Statement by consensus. <i>(See instructions on pages 10-11. Your specific heat-mapped Mission Statement results will be given to you in your room. Summaries of heat-mapped Mission topics are on page 16.)</i>
15b	1:10 - 2:15	SAF Teams 3, 4 & 5	SAF Teams 3, 4 & 5 discuss and determine the proposed SAF by consensus. <i>(See instructions on pages 10-11. Your specific heat-mapped SAF results will be given to you in your room. Summaries of heat-mapped SPT suggested SAFs are on page 16.)</i>
16	2:15 - 3:30	Full SPT	Mission Teams 1 & 2 have up to 10 minutes each to present their proposed Mission Statement, followed by

<sup>2</sup> Subject to change by OZ – See Rules of Engagement #1



			SPT discussion, development, and agreement on a consensus final parish Mission Statement.
17	3:30 – 3:45	Full SPT	Break.
			E. Strategic Areas of Focus (SAF)
18	3:45 – 4:55	Full SPT	SAF Teams 3, 4 & 5 have up to 5 minutes each to present their proposed consensus parish SAFs, followed by SPT discussion, development, and agreement on consensus parish final Strategic Areas of Focus. Each SPT member selects which Strategic Area of Focus Team on which they would like to work.
19	4:55 – 7:00	Full SPT	Prayer Service and dinner (5:00 - 7:00).
20	7:00 - 8:30	Full SPT	Discuss and explain the process for determining S.M.A.R.T. Goals, Interim Goals and Interim Actions, Accountability Scoreboard, and creating a comprehensive Action Plan.
21	8:30 - 8:35	OZ	Sunday Services homework assignment.
22	8:25 - 8:30	Fr. _____	Closing comments, prayer, and dismissal.

3. Third Day 10:00 p.m. - 3:30 p.m.<sup>3</sup>

#	Time	Presenter	Activity
23	10:00 - 11:45	Full SPT	Divine Liturgy
24	12:30 - 1:30	Full SPT	Opening Prayer and working lunch and discussion of Sunday Services homework assignment.
25	1:30 - 2:00	OZ and full SPT	Review and recommit to parish final SWOT, Statement of Why, Core Values, Mission, Vision, and Strategic Areas

<sup>3</sup> Subject to change by OZ – See Rules of Engagement #1

			of Focus. Discussion of S.M.A.R.T. Goal development and next steps.
			<b>F. SAF Teams</b>
26	2:00 - 3:00	SAF Teams	SAF Teams are formed and: (i) select their Co-Chairs; (ii) identify the dates and times of their three meetings (subject to OZ availability); (iii) brainstorm any people who add value in their area of focus who can be on-ramped; and (iv) start brainstorming possible S.M.A.R.T. Goals in their Strategic Area of Focus ( <i>See instructions on page 11.</i> )
27	3:00 - 3:55	OZ	Discuss the next steps, timetable, and final retreat on <u>20</u> . ( <i>See post-retreat instructions on pages 12-13.</i> )
28	3:55 - 4:00	Fr. _____	Fr. _____'s final comments, closing prayer, and dismissal.

**SWOT and CORE VALUES Guidelines**

1. You have until 9:00 p.m. to reach a consensus.
2. Use the Heat Mapped SWOT Document in your assigned room. The Heat Mapped SWOT Document lists verbatim submissions from everyone in the SPT and parish in the area in which your group is focusing.
3. The bold number in front of each group of comments represents the number of times that item was mentioned. Start with the items mentioned most frequently.

4. The bold word(s) after the number and before the listing of all verbatim comments is the short, suggested SUMMARY DESCRIPTION of those comments. You must decide if those short descriptive words need any editing to be clear, concise, and accurate.
5. Only the most important items can make the final list in your assigned area. You are deciding how far down the list you will "draw the line" of the most mentioned and most critical items. The most popular answers must make your final SWOT list.
6. Make your decisions by consensus based on the actual data in the Heat Mapped Document, and NOT your personal opinion. Thus, something you think is important may not make the final list.
7. Select a secretary (with good handwriting) who fills out a flip chart listing ONLY your final SUMMARY DESCRIPTION of the most important items in your area.
8. Don't take anything personally (especially if something you care about is mentioned, not mentioned, or criticized).
9. Opportunities and/or Threats must be external to the parish.
10. Core Values are beliefs shared among an organization's stakeholders that drive its culture and priorities. They should be simple SINGLE words or very short several-word phrases. There should not be too many.

LAST NAME	FIRST NAME	FRIDAY	SATURDAY
		Core Values	SAF 3
		Strengths	Mission 1
		Strengths	Mission 2
		Strengths	Mission 1
		Opportunities	SAF 4
		Strengths	SAF 5
		Strengths	SAF 3
		Opportunities	SAF 4
		Strengths	SAF 5
		Weaknesses	Mission 2

		Weaknesses	SAF 3
		Weaknesses	SAF 4
		Weaknesses	SAF 5
		Weaknesses	SAF 3
		Opportunities	SAF 4
		Weaknesses	SAF 5
		Core Values	SAF 3
		Core Values	SAF 4
		Threats	SAF 5
		Core Values	Mission 1
		Core Values	SAF 4
		Strengths	SAF 5
		Threats	SAF 3
		Strengths	Mission 2
		Weaknesses	SAF 4
		Weaknesses	SAF 5
		Threats	Mission 1
		Threats	Mission 2
		Core Values	SAF 3
		Threats	Mission 1
		Opportunities	SAF 4
		Threats	Mission 2
		Strengths	Mission 1
		Core Values	SAF 5
		Core Values	Mission 1
		Core Values	Mission 2

All SPT activities place in

<u>TEAM</u>	<u>ROOM</u>
Strengths	_____ Room
Weaknesses	_____ Room
Opportunities	_____ Room
Threats	_____ Room
Core Values	_____ Room

full-group will take

<u>TEAM</u>	<u>ROOM</u>
Mission 1	_____ Room
Mission 2	_____ Room
Strategic Area of Focus 3	_____ Room
Strategic Area of Focus 4	_____ Room
Strategic Area of Focus 5	_____ Room

\_\_\_\_\_”

## WHY STATEMENT SESSION

1. The WHY Statement is a compelling and inspirational reason the parish exists and why anyone should care or want to join us.
2. Our "Why" is the purpose, cause, or belief that inspires us to do what we do. When we think, act, and communicate, starting with Why we inspire others to join us.
3. A WHY Statement typically has two parts: (a) the "TO" part that identifies the Contribution and (b) the "SO THAT" part that identifies the Impact. You are not required to use this format.
4. You have ONLY 10 minutes to draft your proposed parish WHY Statement (either alone or with a partner).
5. Here are some modified partial Parish and ministry WHY Statement examples:
  - ~ *To share love, spread joy, instill hope, and live with purpose.*
  - ~ *To seek and share Christ's love so that all will find eternal life in Him.*
  - ~ *To embrace all in Christ's church to share in the light, life, and love of God.*
  - ~ *To receive and share unconditional love, mercy, healing, and peace so that life has greater meaning and purpose.*
  - ~ *To bring people closer to Christ and each other.*
  - ~ *To practice Christ's love through faith and service in a welcoming community so that we may reflect the image and likeness of God.*
  - ~ *To welcome those seeking holiness and salvation through a loving and nurturing spiritual family so that we may manifest the presence of Christ on earth.*
  - ~ *To provide an authentic experience of transformational love, healing, and peace so that we may find the fullness of truth and salvation through Jesus Christ.*
  - ~ *To welcome all people seeking Love, Peace, Salvation, and Truth, so that we may bring ourselves and others closer to Christ.*
  - *To practice Christ's love through faith and service in a welcoming community so that we may reflect the image and likeness of God.*
  - *To be a welcoming and inspiring community of God so that we experience Christ's love with all seeking eternal life.*

- ~ To glorify God by growing in life, faith, and spiritual understanding.
  - ~ To be transformed in Christ's joy, peace, and sacrificial love, so that all may become one with God and others.
  - ~ To welcome all so that we may share Christ's love with one another.
  - ~ To bring together all who want to serve and inspire others so that we can all be ready to enter a life with Christ.
  - ~ To inspire everyone to discover their true purpose in life through the life and teachings of Jesus Christ so that we may lead everyone to salvation.
  - ~ To spread God's living word to all so that souls are saved.
  - ~ To be a beacon of Christ's love so that we may make disciples of all nations.
  - ~ To create engaged disciples of Christ so that we may reflect the image and likeness of God in the world.
  - ~ To guide all people to the love of Christ so that we may live eternally in heaven with God.
  - ~ To be a warm, caring Christian environment so that faith, service, and community thrive.
- 

## **MISSION & SAF SESSIONS**

### **INSTRUCTIONS FOR BOTH MISSION AND SAF TEAMS**

1. You have ONLY about 65 minutes (subject to OZ's audible change) to reach a consensus.
2. Each team selects a secretary (with good handwriting) who fills out a flip chart and reports your team's consensus to the whole SPT.

### **INSTRUCTIONS FOR JUST MISSION STATEMENT TEAMS 1 & 2**

1. Mission Statement Teams 1 & 2 will each develop one suggested parish Mission Statement.

2. Look at the Mission Statement examples in your assigned room, especially the heat-mapped key themes that should inform your final draft.
3. Draft by consensus ONE brief Mission Statement.
4. Remember that the Mission Statement explicitly says WHAT the parish's most critical activities are (not everything it does, or why or how it does them).
5. A good Mission Statement is the shortest description incorporating key themes. Ultimately, it should be easy to memorize.

### **INSTRUCTIONS FOR SAF TEAMS 3, 4, & 5**

1. SAF Teams 3, 4 & 5 will each separately decide the fewest strategic areas on which the parish should focus to determine its fewest number of most critical S.M.A.R.T. Goals that can have the greatest Impact.
2. Use the Heat Mapped SAF Document in your assigned room. The bold number in front of each group of comments represents the number of times that item was mentioned.
3. The bold word(s) after the number and before the listing of all verbatim comments is the short, suggested SUMMARY DESCRIPTION of those comments. (*The Summary Description list is repeated on page 15*).
4. Ultimately, SAF Teams 3, 4 & 5 must each reach a consensus on the fewest number of SAFs (no more than 3) upon which the parish will focus with disproportionate energy to make the greatest transformation and difference.
5. In determining these most critical Strategic Areas of Focus, start by first considering how to address the consensus biggest parish Weaknesses. The SAF MUST ADDRESS the biggest final Weaknesses of the parish. It is also great if they address any of the biggest Opportunities.
6. Three (or fewer) SAFs are the ideal target.
7. The SAFs should be concise phrases or single words (just like the Summary Description words). They should summarize the area where a separate team will develop the specific S.M.A.R.T. Goal.
8. You do NOT need to identify the specific S.M.A.R.T. Goals. Identify merely the strategic areas from which the specific Strategic S.M.A.R.T. Goals will eventually be developed.



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**(Sunday) STRATEGIC AREA OF FOCUS FIRST SAF TEAM MEETING**

1. SAF Teams in each Strategic Area of Focus will initially meet to identify their work plan and brainstorm possible Strategic S.M.A.R.T. Goals in their specific SAF.
2. Each SAF Team:
  - (a) select 2 Co-Chairs (who will coordinate the meetings and work);
  - (b) identify their meeting schedule and location (e.g., where in person and via ZOOM);
  - (c) brainstorm people who add value to their SAF who can be on-ramped and added to their SAF Team, and
  - (d) start brainstorming possible specific S.M.A.R.T. Goals topics in their SAF.

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**PART TWO – (AFTER RETREAT #1)**

1. Each SAF Team must develop 1 (and only 1) SMART (Specific, Measurable, Attainable, Relevant with a Time deadline) Goals, Interim Goals, Interim Actions, comprehensive implementation Action Plan, and Compelling Scoreboard.
2. Each SAF Team will have 2-3 meetings/ZOOM calls to finalize the S.M.A.R.T. Goal and Action Plan. (OZ will facilitate all meetings for continuity and to help keep the entire process on track.)
3. Each SAF Team should recruit and include any new key individuals who can add value to their Strategic Area of Focus.
4. Your SAF Team is NOT responsible for researching or determining the specific solution or way to achieve the SAF at this time. You are not to solve the problem. Your Action Plans will outline the steps a separate Implementation Team will use to determine the solution. DO NOT RESEARCH OR DISCUSS SPECIFIC SOLUTIONS. Simply provide the to-be-formed Implementation Team with the step-by-step roadmap they need to follow to research, develop, implement, and evaluate the new solution.

5. The Action Plan you will develop will NOT start now. The separate Implementation Team will choose a start date for implementation that is selected after the strategic plan is finalized.

6. Each Action Plan will list the Interim Goals and Interim Actions that will lead to its achievement. It will lay out the detailed work plan in 4 columns:

~ Column 1 = the specific action to be undertaken

~ Column 2 = who must do that action

~ Column 3 = the deadline (IN MONTHS) for completing that action

~ Column 4 = describes how someone will know when that action is completed

7. Each SAF Team should check with other parish constituencies/ministries affected by the topic they are focusing on and recruit the involvement of those people.

8. You MUST use the official S.M.A.R.T. Goal and Action Plan Template to develop your SAFS and Action Plans (<https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/>). OZ will help build this for you, so include OZ in your meetings.

9. Each SAF Team must COMPLETE all of their work by:

NO LATER THAN [REDACTED], 20 [REDACTED].

10. OZ will participate in your SAF Team meetings/calls to ensure you are on the right track, answer your questions, and help you finalize the specific wording. OZ will work with all the Task Forces and thus can help avoid overlaps or conflicts among the Task Forces

11. Examples of the correct format for SAFs, S.M.A.R.T. Goals, Interim Goals, Interim Actions, Action Plans, and Accountability Scoreboards can be found here:

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

12. If you have ANY questions, please don't guess; email OZ at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com).

13. Positively talk up this strategic planning process every chance you get among your friends, at the parish, and other events and activities. This is a critical part of the consensus-building and communications process.

14. This Handbook, the entire Retreat #1 PowerPoint presentation, the final consensus SWOT, Statement of Why, Core Values, Mission Statement, Strategic Areas of Focus, and SAF Teams (together with regular updates and information) will be available on the: Stewardship Calling website under the Church Strategic Planning Tab in the

\_\_\_\_\_ parish page located at:

<https://stewardshipcalling.com/>

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## **SECOND RETREAT**

1. Please reserve \_\_\_\_\_, 20\_\_\_\_\_ on your calendar for our second and final retreat.
  2. We will finalize the schedule once the SAF Teams finalize their work between retreats, but it will likely start at 9 a.m. and be finished before 4 p.m.
  3. The entire SPT (PLUS any "on-ramped" new SAF Team members you recruit) will attend the 2<sup>nd</sup> retreat.
  4. Each SAF Team will present their proposed S.M.A.R.T. Goal and Action Plan. The entire SPT will debate, revise, and reach a consensus on the exact wording of everything.
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If you have any questions, please email OZ at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com)

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## **HEAT MAP APPENDIX**

(# of mentions at the beginning)

### **SUMMARY HEAT MAPPED TOP STRENGTHS**

- 34 - Strong Clergy Leadership
  - 34 - Well-Rounded Close Community
  - 25 - Strong History And Traditions
  - 19 - Valuable Real Estate And Facilities
  - 17 - Orthodox Faith
  - 16 - Local Community
  - 16 - Fundraisers
  - 15 - Youth Ministries
  - 12 - Endowment Fund
  - 11 - Church Ministries
  - 9 - Volunteerism
  - 8 - Large Parish Size
  - 7 - Family Oriented
  - 6 - Greek Pride
  - 4 - Use Of Technology
  - 4 - Open To Potential Growth
  - 4 - New Members / Converts
  - 3 - Psalti
  - 2 - Office Staff
  - 2 - Bookstore
- 

### **SUMMARY HEAT MAPPED TOP WEAKNESSES**

- 44 - Stewardship & Engagement
- 42 - Unwelcoming & Divisive
- 35 - Apathy & Resistance To Change
- 32 - Facilities / Location/ Community Center/ Inadequate Youth Facilities
- 22 - Church Services & Engagement
- 14 - Leadership
- 12 - Youth & Young Adult Ministries
- 11 - Religious Understanding/Education
- 11 - Technology & Communications
- 8 - Endowment
- 6 - Lack Of Outreach & Philanthropy
- 6 - Too Ethnic – Lack Of Diversity
- 6 - Declining / Aging Community
- 5 - No Choir
- 4 - Changing Family Dynamics
- 3 - Moving Away
- 3 - Orthodox Religion Issues
- 2 - Post Covid Attendance Declines

### **SUMMARY HEAT MAPPED TOP OPPORTUNITIES**

- 30 - Community/ Outreach
  - 22 - Location
  - 15 - Technology/Social Media
  - 15 - Seekers /Non-Greek Converts
  - 2 - Funding/Local Economy
  - 2 - Youth
-

### **SUMMARY HEAT MAPPED TOP THREATS**

- 38 - Antagonism Toward Religion / Decreasing Importance Of Church
- 25 - Economy
- 26 - Crime / Violence / Safety
- 14 - Social Media And Influence From Culture
- 13 - Other Religions
- 8 - People Leaving Area
- 7 - Changing Family Dynamics
- 5 - Mental Health Issues
- 3 - Covid

### **SUMMARY HEAT MAPPED TOP CORE VALUES**

- 30 - Faith
- 19 - Worship
- 18 - Welcoming
- 16 - Love
- 15 - Tradition
- 14 - Outreach
- 14 - Integrity
- 12 - Generosity
- 8 - Education
- 9 - Service
- 8 - Youth
- 4 - Growing
- 4 - Family
- 3 - Team Oriented
- 2 - Forgiving
- 3 - Respect
- 3 - Leadership
- 3 - Unity
- 2 - Humble
- 2 - Communication
- 2 - Innovative

## **SUMMARY HEAT MAPPED MISSION STATEMENT TOP THEMES**

- 31 - Welcoming/Accepting/Fellowship
  - 28 - Spiritual Growth/Faith
  - 22 - Orthodox Christianity
  - 21 - Christ/God-Centered/Like
  - 18 - Love
  - 16 - Service/Philanthropy
  - 14 - Educating/Learning
  - 12 - Worship
  - 7 - Greek/Ethic Culture/Heritage
  - 6 - Evangelizing
  - 6 - Stewardship
  - 5 - Grow
  - 3 - Acceptance / Tolerance
  - 3 - Prayer
  - 3 - Outreach
- 

## **SUMMARY HEAT MAPPED TOP STRATEGIC AREAS OF FOCUS**

*(pre-retreat suggestions before consensus determination of SWOT, Why, Core Values, and Mission)*

- 21 - Trust, Unity & Welcoming Community Open To Change
- 16 - Youth
- 15 - Liturgical/Religious Engagement & Education
- 12 - Stewardship & Engagement
- 8 - Community Outreach & Philanthropy
- 4 - Buildings & Facilities
- 4 - Technology & Communications
- 4 - Growth
- 3 - Future Vision
- 3 - Address Weaknesses

## **Exhibit H SMART Goals and Action Plan Samples**

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

We will research, develop, and implement a best practices and effective adult and youth Stewardship & Engagement Ministry (the “Stewardship & Engagement Ministry”) with a comprehensive communications plan that will achieve the following “Stewardship & Engagement Targets” within 36 months:

- (a) Transition the adult and youth parishioners to becoming percentage givers on their way to becoming tithers and filling out stewardship cards;
- (b) The median annual stewardship contribution from adult parishioners increases by at least 50% within 2 years;
- (c) Net increase of at least 15% adult stewards each year;
- (d) Implement a youth stewardship and engagement program that includes 100% of our youth within 2 years;
- (e) Increase the adult and youth ministry engagement so that at least 50% of parishioners within two years are actively engaged in ministry through implementing pathways for parishioners to use their time and talents on our way to becoming a full participation parish;
- (f) Consistently cover at least 100% of parish operating expenses solely through financial stewardship contributions plus at least an additional 10% of operating expenses to be given to parish-chosen external charities without negatively impacting any capital campaign; and
- (g) Implement a planned giving campaign in which at least 10% of parishioners participate within two years.

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

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



<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 4: Implement the Stewardship &amp; Engagement Ministry to achieve the Stewardship &amp; Engagement Targets within 24 months</b>			
<b>9. Fully implement the SMEPG Ministry to achieve the Stewardship &amp; Engagement Targets.</b>	Ambassadors	24 months after step 8	SMEPG Ministry is fully launched
<b>10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship &amp; Engagement Targets are achieved</b>	Ambassadors	Contemporaneous with step 9	Established monthly Stewardship & Engagement Targets are achieved
<b>Interim Goal 5: Compile and assess the results of the Stewardship &amp; Engagement Ministry and make necessary improvements within 2 months</b>			
<b>11. Obtain and compile qualitative and quantitative data from SMEPG Ministry and determine effectiveness and success (based on criteria established in step 2, and identify areas for improvement.</b>	Ambassadors and S&EMT	1 month after step 10	SMEPG Ministry assessments are completed
<b>12. Finalize and deliver SMEPG Ministry assessment analysis report and make all refinements necessary to make the SMEPG Ministry more effective.</b>	Ambassadors and S&EMT	1 month after step 11	Analysis is completed, and SMEPG Ministry is refined accordingly

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

### **SAMPLE WELCOMING & CULTURE S.M.A.R.T. GOAL**

We will research, develop, and implement best practices and effective adult and youth “Welcoming & Church Culture Ministry” programs that will achieve the following “Welcoming & Culture Targets ” within 23 months.

- (a) Welcoming and Newcomer Ministry that ensures that 100% of adult and youth visitors, newcomers, and former parishioners in the area are fully welcomed by completing a comprehensive welcoming process;
- (b) New or Enhanced Interpersonal Engagement Activity Semi-Annual Programs or Community Service Events in which a minimum of 20% of parishioners actively participate;
- (c) Small Group Education and Engagement Ministry that will include at least 30 people within 12 months;
- (d) 70% of parishioners after year one and 90% of parishioners after year two report in an evaluation that they feel the parish is a loving and welcoming community;
- (e) Increase our OCF actively engaged students to at least 25 students within 18 months.

### **SAMPLE RELIGIOUS EDUCATION S.M.A.R.T. GOAL**

Within 36 months, we will research, develop, and implement best practices and effective adult and youth “Religious Education Ministries” in each of the following six areas with a comprehensive communications plan where:

1. We will achieve the following “Religious Education Targets” for the Religious Education Ministries:
  - (a) At least 50% of parish youth in year 1, and at least 75% of parish youth in year 2, will complete a revamped full academic year “Youth Sunday School Ministry” and achieve measurable outcomes identified in step 2 of the Action Plan;
  - (b) At least an average of 15% of parishioners in year one, and at least 25% of parishioners in year 2, will participate in at least two new quarterly “Parish Life Education Ministry” dinner series with dynamic presenters and discussion groups (the “Parish Life Ministry”);
  - (c) A new “Small Group Ministry” will actively engage at least 3 small groups of parishioners meeting at least monthly in year 1, and at least 10 small groups of parishioners meeting at least monthly in year 2, where they will discuss spiritual growth, religious education, and personal growth topics;

(d) A bi-weekly adult “Bible Study Ministry” will be offered each year over four distinct modules of sessions live, via Zoom, and recorded with at least 15% of parishioners completing at least half of the four modules in year one, and at least 25% of parishioners completing at least three of the four modules in year two;

(e) A parish “Religious Education Media Center” will be created that engages at least 50% of parishioners at least weekly by providing on the parish website, email, text messaging and social media and other platforms at least 90 items of religious education and spiritual growth content over the course of each year with specific metrics of delivery, opening, viewing, reading, and engaging to be determined in step 2 of the Action Plan; and

(f) Within 12 months, the parish will implement a “Congregational Singing Ministry” to more fully engage parishioners in liturgical life by singing during the Divine Liturgy.

2. In addition to the above Religious Education Ministries, within 26 months, we will research and begin to implement some form of “Parochial School Ministry,” which can include either creating a more engaging interactive partnership with the Holy Trinity Academy in Warren, Ohio, St. Constantine School in Houston, TX, some other Orthodox parochial school, or developing a separate parish plan for its own parochial school.

### **SAMPLE PARISH FACILITIES/BUILDING S.M.A.R.T. GOAL**

Within 54 months, we will research, develop, and implement best practices and effective Parish Facilities Ministry with a comprehensive communications plan that will achieve the following “Parish Facilities Targets”:

A new and comprehensive “Parish and Facilities Ministry” will:

- (A) Within 6 months, finalize developing a detailed plan “Consensus Parish Facilities Plan” that addresses all present and future building and facilities needs and desires of the parish in one campus location, including
1. facilities improvements and additions priorities list,
  2. plans for sales or repurposing of existing property and purchase of alternative building or property, and
  3. creation of development budget for the Consensus Parish Facilities Plan;

(B) within 6 months after (A),

1. obtain all necessary parish approvals for the Consensus Parish Facilities Plan;

2. obtain Archdiocese and other governmental approvals for the Consensus Parish Facilities Plan approved by the parish;

(C) within 6 months after (B),

1. identify and contract with architects, general contractors, and other service providers necessary to execute the Consensus Parish Facilities Plan;

2. develop and begin executing a “Capital Campaign” process plan and methodology that includes using the parish Endowment (to the extent approved by the parish) plus three-year pledges to cover at least 80% of the aggregate budget for the Consensus Parish Facilities Plan (“Contributed Portion”);

3. obtain funding commitments for a construction loan and, if necessary, mortgage loan and repayment plan (the “Borrowed Portion”) for the Consensus Facilities Plan; and

(D) within 36 months after (C) completes the Consensus Parish Facilities Plan, including completion of the Capital Campaign by raising at least the Contributed Portion.

# CHAPTER 8. Additional Leadership Tools To Consider Using.

## Myers-Briggs Type Indicator – “MBTI.”

Among the biggest challenges I discovered in working with over a thousand parishes is effective communication among volunteers, parish leaders, and parishioners. There are often valid differences that are difficult to transcend. However, in many cases, merely understanding each other better and how we each receive and process information and communications would solve many issues. So, what tools and processes can we use to enhance our parish and interpersonal communications?

One such tool I have used extensively is the **Myers–Briggs Type Indicator (“MBTI”)**, which is a preeminent and well-established personality profile assessment. Everyone experiences sensations, intuitions, feelings, and thoughts; however, generally, one of these tends to be dominant in your personality. Based on Carl Jung’s work in the 1920s, Katherine Briggs and her daughter Isabel Briggs Myers examined how seemingly random variation in behavior is actually orderly and consistent due to differences in perceptions, communication styles, and judgments.

Perception involves all the ways of becoming aware of things, people, happenings, ideas, etc. This research led to the development of the MBTI, first published in 1962. MBTI is now the world’s most widely used personality tool, with over two million people completing it yearly.

The MBTI can build self-awareness and effective teams through the following:

- a. understanding similarities and differences,
- b. presenting common ways to understand and describe differences,
- c. understanding the positive aspects of all personalities, and
- d. safely exploring overcoming behavioral and communications challenges.

People’s personalities fall on a range between two extremes in four dimensions. Whichever end of the range one’s personality falls on determines the letter that describes one’s personality in that dimension. These results give each person a four-letter personality designation. There is no right or wrong personality style. MBTI is merely an assessment tool to help bring greater self-awareness and improvement into how you process information and communicate.

People fall on a range between being Extroverted or Introverted, a Sensor or an intuitive, a Thinker or a Feeler, a Judger, or a Perceiver, as described in the box to the right.

Source of Energy	Processing of Information	Approach to Decision Making	Need for Structure
<b>E</b> EXTROVERTS Extroverts are energized by interacting with other people, participating in events, and are known to act quickly.	<b>S</b> SENSORS Sensors are pragmatic realists who focus on facts and their own real-world experiences.	<b>T</b> THINKERS When making decisions, Thinkers are logical, highly analytical and evaluate the facts.	<b>J</b> JUDGERS Judgers like to make plans and lists, follow schedules, and are highly organized.
<b>I</b> INTROVERTS Introverts are energized by alone time, reflection and working alone. They tend to analyze and reflect before taking action.	<b>N</b> INTUITIVES Intuitives focus on patterns, future possibilities and enjoy abstract thinking.	<b>F</b> FEELERS When making decisions, Feelers are careful to consider people, feelings, and various points of view.	<b>P</b> PERCEIVERS Perceivers are spontaneous, flexible, and highly adaptable to their outside environment.

Given the four-by-four matrix of the range between extrovert and introvert, sensor and intuitive, thinker and feeler, and judger and perceiver, your four dominant personality characteristics will produce a 4-letter personality description. This MBTI chart below briefly describes the 16 personality type attributes (Beech, 2014).

## What's Your Personality Type?

Use the questions on the outside of the chart to determine the four letters of your Myers-Briggs type. For each pair of letters, choose the side that seems most natural to you, even if you don't agree with every description.

**1. Are you outwardly or inwardly focused? If you:**

- Could be described as talkative, outgoing
- Like to be in a fast-paced environment
- Tend to work and talk with others, think out loud
- Enjoy being the center of attention

then you prefer **E** Extraversion

- Could be described as reserved, private
- Prefer a slower pace with time for contemplation
- Tend to think things through inside your head
- Would rather observe than be the center of attention

then you prefer **I** Introversion

**3. How do you prefer to make decisions? If you:**

- Make decisions in an impersonal way, using logical reasoning
- Value justice, fairness
- Enjoy finding the flaws in an argument
- Could be described as reasonable, level-headed

then you prefer **T** Thinking

- Base your decisions on personal values and how some actions affect others
- Value fairness, harmony
- Like to please others and point out the best in people
- Could be described as warm, empathetic

then you prefer **F** Feeling

**2. How do you prefer to take in information? If you:**

- Focus on the reality of how things are
- Pay attention to concrete facts and details
- Prefer ideas that have practical applications
- Like to describe things in a specific, literal way

then you prefer **S** Sensing

- Imagine the possibilities of how things could be
- Notice the big picture, see how everything connects
- Enjoy ideas and concepts for their own sake
- Like to describe things in a figurative, poetic way

then you prefer **N** Intuition

**4. How do you prefer to live your outer life? If you:**

- Prefer to have matters settled
- Think rules and deadlines should be respected
- Prefer to have detailed, step-by-step instructions
- Make plans, want to know what you're getting into

then you prefer **J** Judging

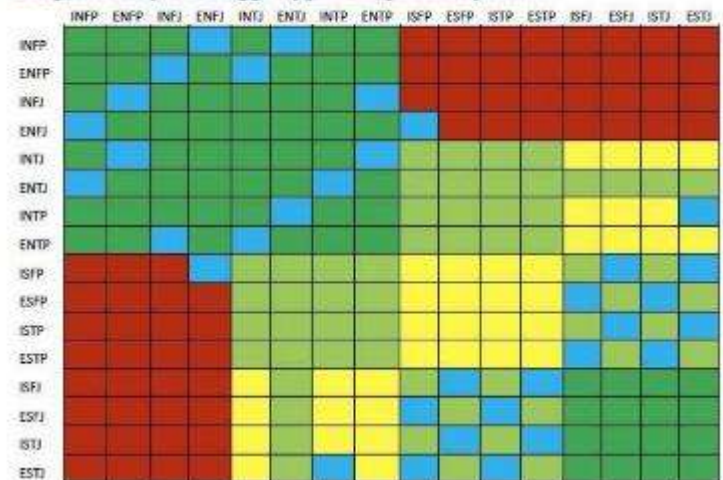
- Prefer to have matters open
- See rules and deadlines as flexible
- Like to improvise and make things up as you go
- Are spontaneous, enjoy surprises and new situations

then you prefer **P** Perceiving

I find the extensive MBTI longitudinal research is very useful in identifying which personality styles work better together and which ones need to work harder or differently to communicate effectively. This does not necessarily mean that any two people are completely incompatible or unable to communicate successfully. Rather, it means they must understand how they and their intended recipient communicate and make adjustments to increase their effectiveness. The chart to the right suggests how various MBTI profiles work together:

For example, I scheduled a ZOOM interaction with someone in a ministry whose MBTI profile I knew. By comparing his and my MBTI profiles, I determined that I would likely be too domineering in our interaction. However, because of this early self-awareness, I

Simplified Myers Briggs Type Compatibility Chart



**Chart Legend**

- Uh-Oh, Think This One Through
- It Could Work, But Not Ideal
- One Sided Match
- It's Got a Good Chance
- Often Listed as an Ideal Match

completely changed the way I interacted with him and was able to have a substantially more productive conversation.

Similarly, after using MBTI in a parish council leadership retreat I led, several members understood how they were dominating the dialogue and drowning out the voices of valuable contributors. Several hours after this enlightened MBTI self-assessment, the parish council discussed a critical issue, and the ENTJs started their usual domination of the discussion. One of them remembered the realization from a few hours earlier. He interrupted himself and insisted the two introverts on the parish council speak first. Interestingly, the insight one of the introverts quietly offered at that moment was one of the most powerful ideas shared.

Immediately, every parish council member acknowledged the value of this contribution. MBTI helped them have this epiphany. A parish council that a few months earlier was often at odds and not communicating effectively was able to improve their interpersonal interactions substantially. I strongly recommend that every parish council (or other team) use MBTI (or similar tools) to learn about each other and figure out how they can work together more effectively.

## Culture Matters - The Organizational Culture Assessment Instrument And The Competing Values Framework.

The **Organizational Culture Assessment Instrument (“OCAI”)** uses the well-researched “Competing Values Framework” relating to the four diverse Types of Culture in organizations (Cameron & Quinn, 2011). Organizational culture can either be internally or externally focused, and it can either be oriented toward creative flexibility or organizational stability.

Just like personalities, there is not a singular universally “correct” organizational culture. Moreover, there is no perpetually stagnant optimal culture. Instead, an organization’s environment, team, market, capabilities, competitors, client needs, resources, and other factors will cause an organization’s culture to focus at various times, either more externally or internally, and either seek greater agility or stability.

How an organization defines its cultural orientation determines how it prioritizes its resources, teams, activities, and strategies. At its core, the “Competing Values Framework” acknowledges that organizations cannot be at opposite ends of two sets of cultural extremes at the same time (Cameron & Quinn, 2011). Instead, they must find an optimal blend somewhere in the range between the internal/external poles and the stability/entrepreneurial poles.

The Competing Values Framework developers examined the cultures of tens of thousands of entities and discovered that the more flexible and responsive the organization, the more effective it can be. The consequence of this realization is that best-in-class parishes assess and prioritize the four different Competing Values as appropriate for their current circumstance. This prioritization does not migrate wildly in the extremes. Instead, the research shows the parishes and other organizations with the

best operational results are those most closely aligned with their shared values. For this reason, I recommend any such analysis begins with a focus on the organization's WHY and Core Values as they explore their current culture and desired future culture.

## **Organizational Culture Assessment Instrument Elements.**

OCAI is one of the most frequently used tools to assess the culture of an organization (Cameron & Quinn, 2011). OCAI assesses six key "Dimensions of Culture," namely the organization's: 1. dominant cultural characteristics, 2. leadership, 3. team management, 4. elements that bind it together, 5. areas of strategic emphasis, and 6. criteria of success. OCAI parish respondents allocate 100 points among four statements, with the highest numbers assigned to the statement about their organization's culture they believe is most accurate. When one maps a two-by-two matrix (internal vs external and flexible vs. controlling), they arrive at four distinct cultural alternatives. OCAI creators have ascribed the following terms and summary descriptions to the 4 Types of Culture that will be used in this analysis (Cameron & Quinn, 2011).

### **1. "The Clan Culture."** ("Collaborative") (high Internal - high Flexibility)

"Clan Culture" organizations are very "people-oriented," highly collegial, and family-like. Mentoring is common, and loyalty, tradition, and consensus-driven teamwork are hallmarks. These cultures try to avoid conflict as they build and empower teams and collaborative partnerships. This culture is common in parishes, non-profits, and educational institutions.

### **2. "The Adhocracy Culture."** ("Creative") (high External - high Flexibility)

"Adhocracy Culture" organizations are the most "dynamic and entrepreneurial." They take risks and are viewed as highly innovative and creative. New ideas, products, and offerings are valued, as are personal creativity and freedom. Organizations with these cultures are transformational change agents who are often viewed as visionaries and for whom uncertainty and "failing fast forward" are comfortable. This culture is most common with technology start-ups and disruptive innovators like Uber, Airbnb, and Pixar.

### **3. "The Hierarchy Culture."** ("Control") (high Internal - high Control)

"Hierarchy Culture" organizations are far more "process-oriented and structured." They are more formalistic with established procedures and structures. High values include stability, smooth operations, efficiency, reliability, and predictability. Progress that is incremental, cautious, and conservative is preferred. This culture is more common in banking, insurance, medicine, the military, governmental employers, and some extremely hierarchical churches.

### **4. "The Market Culture."** ("Competitive") (high External - high Control)

"Market Culture," as the name suggests, is "competitive and results-oriented." Emphasis is placed on winning, achieving goals, and business victories. Objectives focus on being a market leader based on their established metrics and the desire for high customer satisfaction and problem-solving. This culture is frequently found in consulting firms and sales and marketing-driven organizations.



Figure 1 represents the Cameron and Quinn (2011) OCAI Matrix with 4 Culture Types based on the 4 Competing Values.

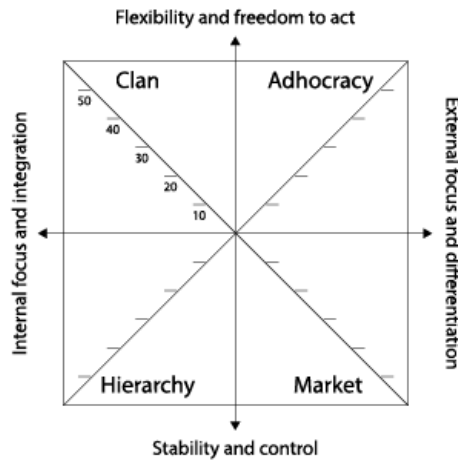
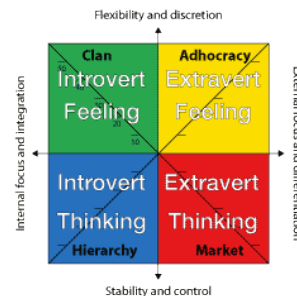


Figure 1. OCAI Matrix with 4 cultural alternatives: “Collaborative Clan Culture” “Creative Adhocracy Culture,” “Control Hierarchy Culture,” “Competitive Market Culture.” These cultural alternatives vary depending on their alignment with the opposite values of external vs. internal focus, and flexibility vs. stability.

OCAI is an ipsative questionnaire in which the sum of each survey respondent’s scores in a category adds to a constant value of 100. This “forced choice” scale differs from the popular Likert scale, where respondents score the degree to which they agree or disagree with a statement. This ipsative method is often used to compare performance over time, as with the OCAI, where the respondents compare the current culture of their parish/ministry/organization against the preferred culture. One consequence of an ipsative response scale is the inability to compute statistically significant differences in scores.

Parish councils, ministries, and some churches or charitable organizations can benefit from using tools like OCAI that allow the members to identify their current culture and their desired future cultural state and start to map the road to a better culture. Interestingly, research on the integration of the Competing Values framework used in the OCAI tool with the personality traits in MBTI is ongoing. For example, a University of Indonesia study made the following correlations and connections between culture type and psychological type between the MBTI and OCAI tools (Bremer, 2011):

- Clan Culture = introvert + feeling
- Adhocracy Culture = extravert + feeling
- Market Culture = extravert + thinking
- Hierarchy Culture = introvert + thinking



## S.T.E.E.P.L.E. Analysis.

In three decades of working with parishes, Dioceses, and national churches, I often encountered them dealing with what seemed like insurmountable issues. It most frequently involves facilities (moving, building, buying new land/buildings) and other large strategic matters and expenditures. In most cases, there were high emotional stakes articulated between those who wanted a change and those who preferred the status quo. In such cases, logic often took a back seat to emotional appeals, and other alternatives remained unexplored and unconsidered.

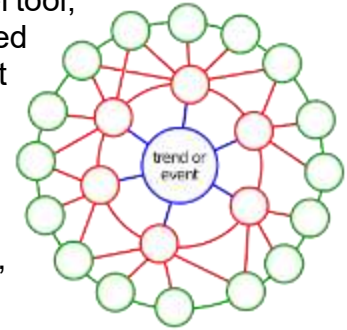
For example, I was working with a parish that had been unable to move on its long overdue need for a larger sanctuary. They had explored some (but not all) options, but both leadership and the parishioners were unable to reach a consensus on their available options. In part, because I was an outside facilitator who was able to be more impartial and comfortable with researching and considering options for change, I used an effective process to challenge that status quo that kept them immobile in a suboptimal position.

A variety of future smart templates and tools exist with which you might be familiar. While the acronyms vary slightly, the concepts are similar. The focus is to identify the future issues and consequences in discrete areas that require thoughtful analysis. Three examples of these types of models include P.E.S.T., P.E.S.T.L.E., and the version I ultimately used with this stuck parish called S.T.E.E.P.L.E. (Stephens, 2021). For those of you more familiar with P.E.S.T.L.E., S.T.E.E.P.L.E. merely adds a look at “Ethical” considerations (Richardson, 2020a.; Richardson, 2020b.; Richardson, 2020c.).

In unpacking the S.T.E.E.P.L.E. model, each letter of the acronym asks us to explore different issues and elements in greater depth (Stephens, 2021).

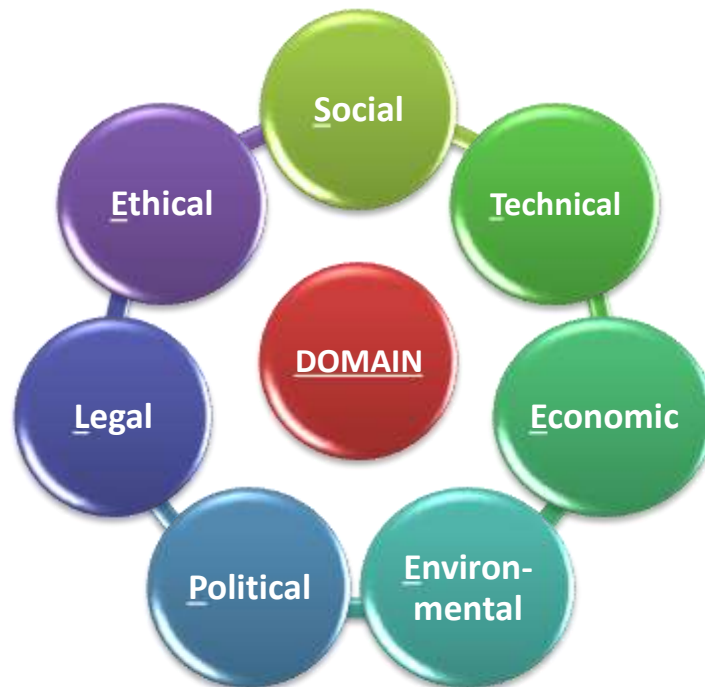
1. **Social** (cultural, demographic, population growth, lifestyle...)
2. **Technological** (innovations, automation, skilled resources...)
3. **Economical** (economy, inflation, interest rates, credit access...)
4. **Environmental** (use consumption, weather, waste, resources...)
5. **Political** (governmental policy, political stability, economy, tax policy...)
6. **Legal** (zoning, courts, health & safety, discrimination, equal opportunity...)
7. **Ethical** (trust, reputation, business ethics, morals, confidentiality...)

In this S.T.E.E.P.L.E. process combined with a Futures Wheel tool, the parish council opens a discussion about a specific topic, called the Domain (e.g., building a new church) and then considers the first and second-order impacts in each of the above seven areas that would result from implementing the future event being considered. When using a Futures Wheel (see picture to the right), the central or decision (**Domain**) is featured in the center, followed by 1st Order and 2<sup>nd</sup> Order impacts and consequences (Richardson, 2020a; Richardson, 2020b; Richardson 2023c).



The **Domain** trend, event, or decision that drives change in the center (blue circle) lights the fuse to the future. The initial “1<sup>st</sup> Order Impacts” resulting from the Domain event (red circles) are identified and discussed. The group then considers the “2<sup>nd</sup> Order Impacts” (green circles) resulting or arising from the 1<sup>st</sup> Order Impacts. The process proceeds by organizing the parish council’s or other group’s thoughts about the future Domain event/trend through brainstorming the first and second order impacts. In typical brainstorming, the participants offer their respective thoughts, which are then transcribed in either a first or second-order circle for each of the S.T.E.E.P.L.E. elements.

This process provides a method to dispassionately consider future implications of current issues and how they are related to primary impacts (1<sup>st</sup> Order), secondary impacts arising from the 1st order impacts (2<sup>nd</sup> Order), and perhaps even tertiary impacts (3<sup>rd</sup> Order) arising from the 2nd Order. Below is a graphic representation of how a S.T.E.E.P.L.E analysis template can fit around a Domain in a Futures Wheel analysis.



After I took the previously described unaligned parish council through the S.T.E.E.P.L.E Analysis using a Futures Wheel, they brainstormed all the 1st and 2nd Order impacts from the controversial Domain I posed (selling the current church and property and moving to a new location). They began to see there were quite a few additional options, that all had different pluses and minuses. Sensing a breakthrough, I challenged them to look at the building plans they had previously drawn up to solve their space problems and explore every possible alternative solution, including ideas they had never conceived of before.

Once the creative juices started flowing and the traditional Groupthink or Smallthink prior idea limitations were lifted, a new proposal emerged that was previously never considered. I pushed them to explore that new option using the same analytical process. I even helped them model the financial alternatives for that option, given their current situation and foreseeable future finances. As we progressed, it was as if the cloud of confusion and division was lifted, and a new light showed through to an optimal solution they could all enthusiastically support. There was no doubt in my and the parish leaders' minds that the Holy Spirit was present and helped them see what they had previously refused or been unable to visualize.

A parish leader opined that perhaps all the discussions, disputes, and disagreements they had experienced previously were because it was not the right time. But now that the Holy Spirit had opened their eyes, the leadership processes and tools I exposed them to allowed them to see past their divisions and limitations. With a fresh and creative vision, they could better see what they perceived was the will of God.

Indeed, within a short time thereafter, they finalized the new plan and received a positive vote of 100% from the parishioners to proceed with the new vision that was materially better than what they had been stuck on for so long. The enthusiasm after the leadership retreat where I pushed them through the process was so palpable that the priest changed his homily for the next day and delivered one of the most powerful and encouraging homily about getting "Unstuck" that he has authorized me to share with you (Powell, 2024): <https://www.youtube.com/watch?v=-nl2r0LfZpc&t=628s>.

Let me be clear that I believe all the leadership and other tools and my pushing might have helped. Still, it was all in the hands of the Holy Spirit and Lord to move through these faithful servants in the right season to do what will help this parish fulfill its parish WHY, which is: *"To welcome all on a transformational journey to a life of purpose and salvation."*

I believe watching Fr. Barnabas preach the above homily from his heart will inspire you to see what is possible when dedicated clergy and laity put aside their differences and lack of future vision and use facilitated processes like S.T.E.E.P.L.E., a Futures Wheel and other leadership tools to finally see clearly what was previously thought impossible. And all of this is for the glory of God and so that this parish can bring people closer to Christ and each other.

## Scenario Planning And Strategic Foresight.

Related leadership tools parishes can use to access any strategic plan or similar long-range Vision they create are called scenario planning and strategic foresight. In scenario planning, one looks at potential future conditions of both high and low extremes and certainty to investigate current strategies' unexamined and unexplored impacts or futures (Chermack, 2020). Since future prediction is impossible, the objective is to stress-test current strategies against possible relevant future outcomes across a matrix of uncertainties (Chermack, 2011, 2020).

Strategic foresight allows organizations to consider future alternatives in a coordinated way to make better present decisions (OECD, 2020, p. 14). A specific tool to consider alternative futures is the exploration of professionally developed "scenarios" based on current trends to safely explore and test the consequences of future alternative states (OECD, 2020, p. 16). These possible futures allow one to examine and improve their current and future strategies. While these professionally developed scenarios can stretch out into a 20-year future horizon, to be meaningful, they should also be relevant to a parish's uncertainties and Strategic Goals (Chermack, 2011, pp. 214-215). By specifically evaluating the parish's key Strategic Goals in the context of four alternative future states, a form of stress-testing of outcomes allows for the examination of potential future results that might suggest specific present changes in strategy.

For example, I applied scenario planning to a parish strategic plan I facilitated, and we discovered that when their six Strategic Goals were assessed against a two-by-two matrix of alternative future scenarios (see Figure 1 below), most Strategic Goals were expected to perform well or be acceptable in all but one scenario. This final scenario resulted in poor performance for all six parish Strategic Goals. The following color-coded assessment using the typical red-yellow-green rubric evaluates how each of the six parish Strategic Goals will likely perform in the four future OECD (2020) scenarios.

SCENARIOS		Schooling Extended	Education Outsourced	Schools Learning Hubs	as Learn As You Go
STRATEGIES	1 Tithing	Green	Yellow	Green	Red
	2 Ministry Engagement	Green	Yellow	Green	Red
	3 Planned Giving	Green	Green	Green	Red
	4 Youth Religious Education	Green	Yellow	Yellow	Red
	5 Adult Religious Education	Green	Yellow	Yellow	Red

	6	New Church Building				
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**Rubric:**  Strategy performs well under this scenario.

Strategy performs marginally under this scenario.

Strategy performs poorly under this scenario.

**Figure 1. Strategic Plan | OECD Scenario Matrix Analysis for Saints Raphael, Nicholas & Irene Greek Orthodox Church. (Marianes, 2024).**

Overall, the juxtaposition of the six Strategic Goals into the future of a proven scenario plan’s four education scenarios showed primarily positive results with a few neutral future possibilities. However, this scenario stress test showed an apparent problem with all six Strategic Goals if the “laissez-faire Learn As You Go” educational future scenario that was modeled became a reality. Knowing this in advance allows for the Strategic Plan to be possibly reconfigured to prevent a completely suboptimal outcome if that one scenario becomes reality. There is obviously a lot more that can be said about how scenario planning is implemented; however, this tool is a valuable check and balance to any parish strategic plan and can result in positive alterations to strategies.

### [Future Smart Strategic Foresight - “Never be afraid to trust an unknown future to a known God” \(Boom, 2013\).](#)

Can we be smarter about the unknown? In its simplest form, Canton (2015) identified **Future Smart** (“FS”) as a process of anticipating, mapping, and harnessing the unimagined by examining and extrapolating trends to predict the future. Indeed, leadership guru Peter Drucker (2004) famously suggested that “The best way to predict the future was to create it.” Humans have the inherent capacity to imagine the future through helpful processes and tools motivated by curiosity, fear, or need (Slaughter, 1993). Six FS steps move from “framing” objectives through “scanning” information to “forecast” alternatives and determining a “vision,” “plan,” and “actions” to implement the desired future state (Hines, 2006, p. 18).

One relevant technique is called Horizon Scanning. Scanning the horizon involves intentional and systematic research of relevant trends and the threats/opportunities on the horizon that could impact an organization’s ability to achieve its objectives (Cheah, 2020). Horizon scanning can begin a process of looking to the future to identify events and results that could occur to serve as an early step in creating strategies (Cuhls, 2020).

For example, The Pew Research Center calculates that in 40 years, if current religious attrition rates continue, 52% of the U.S. population may identify as “NONEs” (with no religious affiliation) while only 35% might identify as Christians (Pew Research Center, 2022). Horizon scanning is described in a straightforward video as a “systematic process of gathering information to identify future risks, opportunities, and developments” (Big Bang Partnership, 2023).

Another example is the research of Streitz’s (2015) data, which concluded that by 2050, 70% of the estimated 9.5 billion earthly inhabitants will live in cities, making these venues the hub of humanity (p. 17). This concentration will require different infrastructure, city design, power and food delivery ecosystems, transportation, and logistics (Streitz, 2015). Other Future Smart analyses suggested this urbanization would facilitate greater cultural differentiation (Cornish, 2004, p.28). What will this Future Smart (**FS**) glimpse of our potentially inevitable path mean for how parishes are planted, organized, and grow to meet the changing human needs?

Drucker (2004) criticized forecasters who focused more on prediction accuracy while ignoring unanticipated future occurrences that ultimately made a profound difference. Thus, a parish or ministry FS process should not merely focus on adaptability and innovation for its own sake. Instead, you should explore how this FS analysis can help you provide better solutions and a higher quality of life due to the availability of greater options, processes, innovations, and results that could benefit all parishioners (Lee and Trimi, 2018, p. 2). This is a unique opportunity for parish leaders to facilitate processes that imagine a better future for the entire parish and its present and future parishioners (Kouzes & Posner, 2017).

One perspective defined future literacy as: “the capacity to explore the potential of the present to give rise to the future, focusing on greater awareness of situations and the impacts of change over time” (Miller, 2007, p. 347). Becoming FS (Future Smart) is challenging for parishes because of the various approaches to achieving it juxtaposed against the divergent cultural backgrounds and desires of diverse parishioners and other stakeholders. This leads to the need for a “futures literacy framework” that focuses on parish leaders being cognizant and conscious about the future and examining different parish assumptions and paths that vary depending on present desires and intentions (Benavides-Rincón & Díaz-Domínguez, 2022, p. 3). Honestly, most parishes find it difficult to do this work alone and frequently need outside assistance from FS-oriented facilitators.

**Strategic Foresight** is about anticipating, mapping, and creating desired futures. Framing objectives by scanning information to forecast alternative future visions with plans to achieve them is critical. While the future cannot be perfectly predicted accurately, the discipline of FS studies focuses parish leadership on providing examination, exploration, and mapping to partake in creating a more desirable parish future (Slaughter, 1993, p. 372). Thus, focusing on the present is predicated on seeking possible futures by “developing and interpreting stories about possible, probable and desirable futures” (Miller, 2007, p. 347).

While only God knows the future for you or your parish, He has given you tools and processes to begin to identify the foreseeable challenges, issues, and opportunities

you must address. By using Future Smart Strategic Foresight processes, parish leaders can better predict and prepare for the future. Data analysis of trends presents an early warning system, which is why parish leaders must constantly scan the horizon and assess how current trends will alter their future realities.

Not every leader is blessed with inherent gifts of strategic foresight. This is why the FS six-step process calls for someone to begin by “framing” objectives through “scanning” information to “forecast” alternatives and ultimately determine an optimal “vision,” “plan,” and “actions” to implement the desired future state. The Section on Strategic Planning/Positioning in Chapter 7 of my Roadmap helps provide a parish process to execute these essential steps. To demonstrate how this can be applied, in Chapter 13 of my Roadmap, I actually perform a Strategic Foresight analysis of Orthodox Theological Seminaries, which helps describe why they are currently challenged and thinking too small. If you are not gifted with the ability to apply Strategic Foresight and examine and analyze trends, then please, for the sake of your parish, recruit those who are. The future of your parish might hang in the balance.

## Annual Leadership Retreats.

Throughout my Roadmap, I underscore the necessity of annual leadership retreats for parishes and all ministries. Each year, there may be new parish council members, ministry leaders, or clergy who need to be grounded in the basics of the parish (e.g., its WHY, Core Values, Mission, Vision, Strategic Goals, financial situation, etc.). In addition, there are at least seven critical benefits of an annual parish leadership retreat:

**1. Spiritual Renewal.** Remembering that a parish is not like any other business or even non-profit, the annual retreat must begin as a journey toward spiritual formation, growth, and advancement for the parish leaders. This can include understanding their roles as Christian Servant Leaders and the more tactically important aspects of enhancing their prayer life, liturgical and sacramental commitment, time learning Holy Scripture, and prayerfully applying everything in pursuit of God’s desires for the parish. The (preferably offsite) annual retreat provides this time to step away from the whirlwind of daily life and pressures and recommit to a personal spiritual journey of theosis.

**2. Team Building & Relationship Strengthening.** Every team needs time to bond better and learn how to improve interpersonal communications. This is especially critical for parish council members who are not full-time and have only sporadic interactions. Finding the time and using techniques to increase the Servant Leadership foundational attributes of love, trust, and humility are critical for a high-performing team. Learning to interact, communicate, and even disagree more effectively is especially important for part-time parish council and ministry teams.

**3. Vision Assessment Casting & Alignment.** If a parish has a Strategic Plan, the annual retreat is a perfect time to review the WHY and Core Values and assess whether parish leadership has always been acting consistently with those true North principles. Progress toward the achievement of the Strategic Goals in the Plan is also a perfect topic for review and discussion. If anything is behind schedule, then a remediation



plan is beneficial. If the parish or ministry does not have a Strategic Plan, then the annual retreat must be the time to assess a Vision for at least the year to come and identify specific goals to achieve and a plan to accomplish them. Alignment (or recommitment) toward a common purpose and Vision is an essential leadership function at least annually.

**4. Strategic Problem-Solving.** Inevitably, there are several critical issues the parish is facing or will face in the foreseeable future. This is a time to present the data and Strategic Foresight analysis of these issues and engage in a discussion about alternatives to ameliorate any problems. This allows the parish council team to learn how to work better together to address challenges. If they can use the Futures Wheel or S.T.E.E.P.L.E. Analysis or some other tool to tackle the big issues cooperatively and collegially, they will be better prepared to handle the inevitable “tyranny of the urgent” issues they will face throughout the year. Learning how to brainstorm and reach a consensus is a valuable skill high-performing teams need to use with excellence.

**5. Personal Development & Training.** If Socrates was correct in saying that all he knew was that he knew nothing, then the annual parish leadership retreat is a perfect time for professional development, as well as Servant Leadership and ministry management training. I strongly recommend that time be devoted (with an appropriate presenter) to educating the team on the most effective leadership techniques, processes, and strategies. This is also the time to introduce other personal development training such as how to (a) disagree agreeably and productively, (b) keep first thing first and prioritize what’s critical, (c) how to live a better Christian life while executing your parish responsibilities and living life, (d) needed relevant parish tactical skills (e.g., reading financial statements, welcoming newcomers, participating in ministries, etc.). The opportunities for leadership training, workshops, and learning to enhance skills are endless and add value to an annual retreat.

**6. Encouragement & Motivation.** Serving in parish leadership is time-consuming, challenging, and often tedious. In addition, it can include receiving criticism and judgment. Yet, it is an excellent opportunity to use the skills, talents, and gifts God has given you to improve the parish’s health and effectiveness as it brings people closer to Christ and each other. Thus, adequate time must be spent to ensure that parish leaders are rejuvenated and re-focused on the critical life-changing good they are accomplishing as they also prepare themselves for their II Corinthians 5:10 Moment and a hopeful “good account before the awesome judgment seat of Christ.” I call my retreat “Igniting The Flame” because that is what I hope to do with parishes and parish leaders to whom I minister. Once we remember that we were called to be “the light of the world,” then all the light-dimming efforts of the serial arsonists and “nattering nabobs of negativism” can be ignored as we refocus on bringing forth the light of Christ.

**7. Dreaming.** An annual retreat is a time for future vision and creative visioning. Dreaming about the things the parish could do and starting to brainstorm how it can achieve those dreams and change lives is a productive way to reorient the leaders to the future and out of the muck of the “tyranny of the urgent.” It is highly motivational and valuable to invest time in letting the Holy Spirit motivate the team with new and creative ideas and ways to serve the parishioners and community at large. Making sure this time

is spent outside the box of the traditional prison of old thoughts and low expectations can be uplifting and reinvigorating.

There are many other advantages to an annual parish council or leadership retreat. There is no limit to creativity when creating an agenda. However, the habit of gathering at least annually to revisit the past year and envision a brighter future briefly is a powerful reminder that we serve a much higher calling and a big God who can overcome every obstacle and lead us on a path of glory and righteousness.

Regrettably, most seminaries provide insufficient leadership training for their clergy graduates. Moreover, volunteer parish council members have widely varying leadership skills and rarely have formal non-profit or servant leadership training. Drs. Kouzes's and Posner's decades of research (Kouzes & Posner, 2017) concluded that a (church) leader's job is to be constantly focused on the future and inspire the necessary change of culture, operations, and actions required to achieve the consensus shared WHY, Mission, and Vision with a plan to drive transformation. Best-in-class leadership is a foundational element that must be strengthened to address the other root cause challenges.

Data and research show the invigorating and empowering results of synergies between parish council team numbers and competent true Servant Leaders. Thus, Servant Leadership training and deployment are always central to reversing the previously noted negative trends for Christian parishes in America (Hunter et al., 2013). Servant leaders inspire servant followers. This interrelationship is an essential interdependent antecedent and outcome for stakeholders and their organizations.

Ultimately, the perhaps inconvenient facts undeniably confirm that followers do not serve leaders they do not respect or trust and will not pursue a Vision they cannot see. Collaboration, service, and symbiosis are all relationship characteristics that require parishioners and parish leaders to work together toward their consensus WHY, Core Values, Mission, and Vision (Chaleff, 2009).

My Stewardship Calling trifacta of "**S<sup>3</sup>**" (**S**ervant leadership, **S**tewardship & engagement, and **S**piritual formation and religious education) solutions and WHY Discovery process discussed in my Roadmap focus on enhancing the Servant Leadership understanding and relationship to help build a consensus around a shared transformational Vision and plan supported by the requisite engagement, generosity, and stewardship to fuel success.

For the parish leadership retreats, I typically include sessions devoted to all the following elements, which I have explained throughout Chapters 5-8 of my Roadmap:

1. the Four Pillars of High-Performing Cultures,
2. the Five Habits of High Performing Teams,
3. the Five Dysfunctions of Teams,
4. the Four Universal Promises of Leadership,
5. the Six Elements of Servant Leadership,

6. the Five Practices of Exemplary Leaders,
7. the Top Four Qualities People Want In Their Leaders,
8. Effective communication through Understanding of Myers Briggs Personality Types,
- 9 vital team building and interactive exercises, and
10. Helping team members find their optimal stewardship calling as servant leaders learning to embrace the excellent leadership wisdom of St. John Chrysostom, who wanted leaders to discern the gifts of others and help them use them fully to benefit mankind. Having regular leadership development training and retreats facilitates this critical objective. Regardless of what you choose to prioritize and address at your leadership retreats, their value is only limited by your creativity and dedication.

From this extensive discussion of the many and diverse sets of tools in Chapters 5-8 of my Roadmap, I hope you understand you are not alone in your parish Servant Leadership journey. Proven successful approaches and tools exist to assist you in every step of the way. However, the most critical understanding is that your parish leadership work is Godly work to which you have been called. This should be among the most vital work you do as it will help you on your journey to theosis and help prepare you for your II Corinthians 5:10 Moment. Besides, can you think of anything more wonderful than bringing people closer to Christ and each other?

## CHAPTER 9. The Why And What Of Stewardship & Engagement.

One day, we will have the privilege to stand before Christ and account for what we have done with all the gifts we have been given in our II Corinthians 5:10 Moment. Take a few minutes and think about what you would say to the Lord as of this date. Do a mental inventory of all the gifts, experiences, people, and resources you have at your disposal and all the needs of Christ's church at which you pray for salvation. Ask yourself if there is anything more you or your parishioners can offer. If there is not, and you have given everything, then glory to God! If there is more you can do, then please read on.

Without qualification, the empirical data shows that **Stewardship & Engagement** (“**S&E**”) are at the top of the list of most critical challenges every parish faces. In 100% of the strategic plans I have completed (now covering over 26% of parishioners in the American Orthosphere), S&E is either the number one or two biggest weakness identified in the SWOT Analysis or the EPA (Effective Parish Assessment).

Every parish I have ever worked with verifies the Pareto Principle (80/20 rule) that 20% of the people do 80% of the work and 20% of the people contribute 80% of the funds. The need for more engagement in ministry and financial stewardship by parishioners is at an epidemic level in most American Christian Churches. And in most parishes, most other problems pale by comparison. If yours is the exception, glory to God! For everyone else, the second of the S<sup>3</sup> biggest challenges will be addressed here as we explore some best practices to Ignite the Flame of Stewardship & Engagement.

### Stewardship's Bad Rap.

I believe the term stewardship has gotten a bad rap in church-world. It is usually associated with asking for money. Thus, a stewardship chair is often treated like a leper. As you will understand by reading what comes next, any financial issue your parish is experiencing is merely the symptom of a much bigger and deeper root cause problem. Financial issues are the tail and not the dog, although the financial tail often wags the parish dog in most places.

As stated in my first cardinal rule, every parish problem is a leadership problem. This is true of any stewardship issue. However, I follow up on that first rule with the corollary, which is that no Christian parish in the United States has a financial problem, even if they think they do. They merely have an engagement challenge. This leads to the oldest joke in church fundraising and stewardship, where the priest announces, “I have good news and bad news. The good news is we have all the money we need. The bad news is it's still in your pockets.”

However, I want to be clear from the outset that three of the four distinct types of financial generosity all parishioners should donate (described in greater detail below), (**Emergency Appeals, Capital Campaigns, and Planned Giving**) are focused primarily

on giving money (or marketable securities or other assets). However, while the other type of giving, “**Annual Stewardship Tithes**,” has a monetary component, the broad full definition of “stewardship” primarily must be focused on creating greater engagement of parishioners with their parish. This includes liturgical engagement in church services, engagement in whatever sacraments your church offers, and, critically importantly, engagement in ministries. Since S&E are flip sides of the same coin, by increasing overall engagement, a parish will also get increased financial stewardship along with increased time and talent stewardship.

Please understand this point. My definition is that “**stewardship is what you do with ALL the gifts God gave you.**” Those things you possess (temporarily while on this earth) are what you are a steward of during your life. Those gifts include your very time, skills, and abilities (i.e., your time and talents), as well as your financial resources and other assets (i.e., treasures). Extensive empirical research proves that once people engage with their time and talents, they automatically give more treasure. Thus, if you merely focus on financial stewardship, you are emphasizing the wrong issue and not changing the right behavior. Once you learn to focus on increasing time and talent stewardship engagement (liturgically, sacramentally, and in ministries), your financial stewardship will significantly improve.

## [Why Do Parishes Think They Have A Financial Stewardship Problem?](#)

This question is easy for me to answer but hard for you to correct. All the data and experience show that the two primary reasons any parish has a financial stewardship challenge are “education” and “consumerism.” Let me explain. In a section below and also the more extensive discussion of the Holy Scripture foundation of stewardship in Chapter 10 of my Roadmap, you will learn that S&E is a Biblical and Christ-centered imperative.

There is no doubt that our Lord taught extensively about stewardship. Yet because it has gotten a bad rap as being only about money, and since most people detest asking for money, clergy avoids it like the plague, and most parishes cannot recruit someone to lead their stewardship ministry. The problem is we have not taught stewardship correctly. (Any parishioners or converts from other traditions may have been better educated about stewardship and tithing; however, some of the teachings may stray from the understanding of stewardship provided herein.)

Moreover, for those church Denominations that are older, hierarchical, or have a more extensive history and tradition, like my Orthodox Jurisdictions, the parishioner’s education problem includes a failure to teach the proper theological understanding of stewardship based on Holy Scripture. This includes covering the stewardship teachings of the Saints, early church fathers, the Ecumenical Councils, and other historical and relevant teachers of true stewardship. Thus, unless your parish undertakes to undo decades (and perhaps centuries) of improper or inadequate understanding of stewardship, your financial challenges will continue.

However, a systematic, continual, multimodal, and year-round education about good, practical, effective, and Christ-centered stewardship can turn the tide. This does not include complaining about insufficient funding or financial resources. That approach never works sustainably and is actually counterproductive. All it shows is how much of an education (and leadership) problem your parish is facing. Teach the truth about S&E, and over time, you will have no financial or engagement in ministry challenges.

### Consumerist “Burger King® Mentality.”

The second reason for the financial problem is what I call the pervasive “Burger King® consumerist mentality” in parishes today. I do not mean to disparage the fine quick-service restaurant by that name. I merely refer to their highly successful advertising campaign, “have it your way.” Americans have enculturated that mentality in everything we do. It is one thing (and not offensive) to politely return a food item not ordered or improperly cooked. It is another thing to apply that self-centered philosophy to the Lord’s house. Let me be clear: God’s house is the King of King’s house and not just a burger king house.

God gives you everything - Your life, your intellect, your genetic composition, all your talents, abilities, and life experiences. Who are you to treat His house like a restaurant? And yet I repeatedly hear parishioners say: “If I don’t get what I want, I will withhold my money.” This is fallacious for several reasons. First, it is not “your” money. You may have earned it, but everything you used to earn it was a gift to you from your Creator. Get your pronouns and attribution right, my friend. It is all God’s, and you are merely a temporary caretaker (steward) of everything you possess. And you won’t take it with you when you leave for the Kingdom Eternal! So, who are you to condition giving back to God’s house and ministries what came from Him in the first place?

If you gave me a dollar, and I gave you back ten cents, I am not a generous benefactor or philanthropist. I merely returned 10% of what you gave me. And yet I hear parishioners all the time object to tithing from the whole of what God gave them because of some earthly complaint they have. “I didn’t like the priest’s sermon.” “The church is always too cold/hot/crowded/empty.” “The music/choir/chanter is horrible/too loud/too soft.” “The church does not do what I want it to do when I want it done.” I have heard all the above giving excuses, and so many more your head would spin in my more than three decades of ministry work.

All of this is indicative of the consumerist society in which we, in modernity in America, live. I am constantly reminded of this when I complain about something to my daughter, who lives in the jungles of Trinidad, who patiently responds, “First world problems, dad, first world problems.” She is correct. The church is there for our salvation, not to service our convenience needs. It is the other way around. We should be in service to God’s house/parish, its parishioners, and the communities and world in which we reside. We call them church “services” because WE have the opportunity to serve the Lord as we pray and offer our sacrifices and give thanks to God, who gave us everything, including his sacred Son. It is we who have the luxury of offering service based on what we have been given.

Again, God's house is not a burger joint. It is a place where those who enter in humility can grow and transform themselves on a sacred journey to theosis (oneness with God). Leave your worldly peccadillos and complaints out in the world that caused them. Your parish house is a sacred space, regardless of what it looks like. Please stop thinking you are righteous if you withhold what God gave you rather than cause it to multiply by returning it to His house, His ministries, and in service to Him.

When you display a Burger King® mentality in your parish, you are not righteous. You become a petulant child who insists on taking your marbles home rather than asking how you can contribute them to help others. After trying to reason with a Burger King® mentality parishioner who kept talking to me about HIS church, I asked him to go out front and tell me if his name was on the church sign. Yes, I understand the previous sentences are direct and harsh. I apologize if the words were not the best I could have used; however, if you have ever expressed a Burger King® mentality vis-à-vis your parish I do not apologize if you were offended by my point. Indeed, I ask you to lean into that "offense" and ask if your feelings are righteousness and from God or some other place.

I can say all the above because I was the worst of the worst sinners who failed to understand the Godly gift of stewardship. I am the horrible penitent thief on the cross begging for forgiveness for the error of my previous ways. I am like the spoiled man in hell begging Abraham to send Lazarus to warn his family to be generous and loving and, well, Christian! I am like John the Baptist crying out to the world to repent. I speak with authority because I failed to understand and practice true Christian stewardship for too long in my blessed life. Perhaps I still do!

But boy, my legal training served me well in demanding that the church conform to what I wanted. Many decades ago, I was the King of the Burger King® mentality. But brother or sister, there is nothing worse than a penitent convert. That is me regarding stewardship. This is why I daily beg for forgiveness for my past failings and misunderstandings about Christian stewardship. This is why I left a lucrative law practice early to run toward what God has called me to do, namely work every day of the rest of my life for free, trying to help parishioners and parishes discover and live their stewardship calling and better appreciate what true S&E is and what it means to be a follower of Jesus Christ.

Let me be clear. I do this work not because I am righteous or generous but because, as I said at the outset of my Roadmap, I truly believe Jesus Christ is who He says He is. And I want to follow and be more like Him. I want a good story to tell Him when I tell Him my story in my II Corinthians 5:10 Moment before his awesome judgment seat. How about you? Please learn from my many and repeated horrible mistakes and let me help you.

Don't take my word for it. Let me quote from highly respected St. John Chrysostom, who delivered his homily On Living Simply in the 4<sup>th</sup> Century. He used the Socratic method to ask questions in order to discern what stewardship really means:

Do I possess the house in which I live? No, it is only on loan to me from God while I remain in that place.

Do I possess the clothes I wear? No, they are on loan to me until they wear out, or until I give them away to someone in greater need.

Do I possess this body that you see before you? No, it was lent to me by God when I was born, and he will take it back when I die.

Do I possess the mind that is composing the words that I speak? No, that too was lent by God at my birth and will go when I die.”

So, do I possess anything?

Yes, I possess the virtues which during my life have grown and flourished within my soul.

Inasmuch as I have grown in faith, I possess faith. Inasmuch as I have grown in gentleness, I possess gentleness.

These things are immortal; they are divine gifts which God will not take away, because He wants heaven itself to be filled with virtue.

And, of course, I possess my soul, in which these virtues have their roots (Chrysostom, 1997).

Dear brother or sister, it may be too late for me, but I pray it is not too late for you to discover and live your stewardship calling so you may have a “good account before the awesome judgment seat of Christ.” Let us begin that journey.

## So Sayeth The Lord, So Sayeth I.

To set the stage, let us begin to explore one phrase and instruction our Lord gives repeatedly. He always finds a way to instruct his Apostles, disciples (and us) to “GO” and “Do” something. At the end of the parable of the Good Samaritan, Christ says: “**Go** and do likewise” and help those in need. (Luke 10:37) In this way, the Lord reminds us always to serve and be stewards of whatever gifts we possess.

In the “Great Commission,” Christ instructs: “**Go** therefore and make disciples of all nations...” (Matthew 28:19). The first word in His sentence is Go. In other words, take action and do something. And the second action word is “Make” disciples. So, everything in Christ’s messaging is all about active engagement. Engaging your life, engaging your purpose, and it translates itself into the church, so that’s really what we’re going to be focusing on in a very systemic way to understand how we do it.

Christ could have said, “Be a disciple,” and that would’ve been a good answer. But he did not say that. Being a disciple is a given. He focused on the going and doing. He also did not tell the Apostles only to make disciples and help those from their home village. His instructions were to transform the world. As the heirs to the Apostles, He speaks to us and challenges us to globally “go and make disciples” everywhere and to the ends of the earth by reaching “all nations.”



In addition to the Great Commission, Christ provided many examples and messages of engagement. However, another message from our Lord I love to focus on is what we refer to as the Great Commandment, which says that you love everyone as Christ loved us (John 13:34-35). Love is an active verb in this case and not a noun. It requires action on your part, and to make the point clear, he said, “*as I have loved you.*” So, we are called to action and to engage in the interactive objective of loving everyone. To give love.

Even as far back as in Genesis 8:15-16, God spoke to Noah: “**Go** out to the ark, you and your wife, and your sons and their wives with you...” God was saving their lives while simultaneously urging them to start the new world He had ordained. The figure, often called the “Father of India,” also called his people to action by saying:

We but mirror the world... If we could change ourselves, the tendencies in the world would also change. As a man changes his own nature, so does the attitude of the world change towards him. This is the divine mystery supreme (Gandhi, 1913).

Every Biblical directive has the action of engagement and stewardship over gifts embedded in it. So, how do you transform the S&E trajectory of your parishioners and parish? Chapter 10 of my Roadmap will explore in great depth the spiritual foundation and background of S&E. However, the empirical data points us in a critical direction by beginning our focus on the word “engagement.” An essential starting point for all parishes that wish to address their S&E problems is reading Al Winseman’s extraordinary book Growing and Engaged Church: How to Stop “Doing Church” and Start Being the Church Again, where he aggregates Gallup organizations over 70 years of research in the field.

While I submit Al Winseman’s book is required reading for every parish leader and S&E ministry leader, please allow me to share a few of the most critical quotes to set the stage (Winseman, 2007):

1. “Perhaps the key characteristic of engaged members is that their church is top of mind for them.”
2. “...congregations with engaged members) are spiritually healthier and better able to (a) carry out their missions, (b) attract more new people, (c) fund new ventures, and (d) have a higher percentage of spiritually committed individuals.”
3. “Spiritual commitment is the result of one big, overlooked factor: parishioner engagement.”
4. “Focus on improving engagement, and increased commitment will follow.”

5. How much members give...How many hours they volunteer... How often they invite others...is more dependent on engagement than on any other factor.”

6. Those who are engaged give more to their congregations than anyone else does...”Each year, engaged members give a median of 5% of their annual income...”

7. “Your job as a leader is not to placate the actively disengaged. It is to create and grow disciples.”

8. “One reason United States congregations are in trouble is that they have a low percentage of engaged members.”

9. “So the very first thing you, as a leader, must do to ensure congregation effectiveness is to clarify ‘membership expectations.’ ”

What Gallup’s 70 years of data confirmed by my 30+ years of work with over 1,000 parishes throughout the American Orthosphere is that the comprehensive solution to most significant parish challenges is enhancing S&E. It includes engagement in every way, including (a) living as a disciple of Jesus Christ, (b) in the liturgical services and sacramental practices of a parish, (c) in the parish’s life-changing ministries, (d) as a financial contributor gladly sharing your “first fruits” for the salvific work of your parish and so that you prepare a “good account before the awesome judgment seat of Christ” in your II Corinthians 5:10 Moment.

## **The Four Types Of Parish Giving.**

We must begin by understanding that there are four distinct types of stewardship giving to which every parishioner should commit themselves.

1. Annual stewardship tithes,
2. Emergency appeals,
3. Capital campaigns,
4. Planned giving.

Each has a different purpose and arises at different times; however, your parishioners must be educated to understand the importance of committing to all four.

### **1. Annual Stewardship Tithes**

This is the annual giving stewardship tithes contribution that parishioners offer to their parish, which is hopefully a tithes of 10% of their income and usually contributed on a weekly basis. This annual stewardship tithes is designed to cover 100% of the operating expenses of the parish as well as support the various ministries and philanthropies it undertakes.

## 2. Emergency Appeals

Occasionally, emergencies and exigencies arise, and a parish will do a one-time fundraiser to help provide the necessary resources to help individuals in need. These emergency appeals should be only occasional and specifically targeted at an unusual and specific identified need that arises. Repeatedly having emergency appeals creates the “boy who cried wolf” phenomenon that desensitizes generosity.

## 3. Capital Campaigns

From time to time, a parish will undertake a major capital improvement activity, whether building a new church, fixing major infrastructure, expanding its operating footprint, or materially improving its interiors (e.g., iconography, pews, painting, carpeting, etc.). These are significant one-time expenditures that require a special separate capital campaign for parishioners to provide much-needed added support to complete these non-recurring activities. If it is a large-scale project, like building a new church, capital campaign contributions are usually spread over a three to five-year period.

## 4. Planned Giving

Finally, as discussed in greater detail in Chapter 10 of my Roadmap, every parishioner should be asked to include their parish in their wills and estate plans. This legacy gift goes into the endowment that is established by the parish for specific enumerated causes, as will be discussed in Chapter 10 of my Roadmap.

The critical takeaway is that parishioners must be educated and trained repeatedly on the four types of parish giving to which they are called to provide their gifts. While capital campaigns and emergency appeals are episodic and sporadic, and a planned gift is usually only done when one revises their will, the annual stewardship tithes are the critical lifeblood that must be donated repeatedly. Nevertheless, the more the parish does to educate its parishioners about the requirement for all four types of giving, the better they will respond when the appropriate need arises.

## Ending The Scourge Of Nickel And Diming.

I offer one critical caveat at the beginning. Parishes are increasingly “nickel and diming” their parishioners. These requests take many different forms. They include passing trays (that only generate nominal contributions), constant emergency parish expense appeals, selling candles/flowers/books, asking for donations for special church services, philanthropies, or youth programs, and an endless array of social fundraising activities such as golf outings, holiday parties, bake sales, etc. When I discussed the Financial Stewardship Analysis (“**FSA**”) in Chapter 10 of my Roadmap, you will better understand this challenge.

However, the critical takeaway is that since all these “nickel and diming” appeals are for donations from parishioners, they actually result in a reduction in the amount

contributed to the annual stewardship tithe campaign. Because parishioners are smart and know they will be “nickel and dimed,” there is a natural and understandable tendency to hold back some financial “dry powder” from their annual stewardship tithe pledge to have money available for the “nickel and diming.”

It is for this reason that I most strongly recommend that parishes cease all such practices. Recognizing that they have existed for a long time in some parishes (and are growing in number), it is not easy to eliminate the addiction to what I pejoratively call the “crack cocaine of church fundraising.” Thus, I recommend that a year in advance, the clergy, parish leadership, and parish **Stewardship & Engagement Ministry (“S&EM”)** repeatedly indicate that beginning the following year, there will be NO nickel and diming, and that every item to be funded by the parish must come from the annual stewardship tithes the parishioners offer.

It is necessary to repeat this message and inform parishioners they will be asked to step up their annual stewardship tithe (hopefully to at least a 10% tithe) and will no longer be asked to make these individualized contributions. The one exception is a very occasional parish council-approved emergency appeal to help a group in need after a natural disaster, etc.

You must often repeat that you will cease all nickel and diming until the parishioners believe it will be true. Then, in the following year, that practice must immediately be stopped cold turkey and be enforced. Thus, any time an organization or group comes and asks for permission to conduct a separate fundraiser, parish leadership must have the discipline to say no. Every funding request that is required by ministries should be included in the ministry budget and rolled up into the parish’s budget. In this way, ALL special fundraising activities can be ceased.

One challenge will be the separate parish-affiliated organizations and charitable ministries that are not directly under the control or jurisdiction of the parish council. For example, many parishes have ladies’ organizations that raise money for a variety of philanthropic purposes. I know what I say next will get me in trouble with some. What these groups do is wonderful and good. However, the consequence of their separate fundraising reduces the contributions that people make in their annual stewardship tithes to the parish. After all, the funds are coming from the same pockets. Sorry, but as I repeatedly say, “facts don’t care about our opinions.” Thus, to the greatest extent possible, parishes should cease all “nickel and diming” activities and focus individual stewards on the four critical types of giving that the parish will request of them.

Ultimately, parish leadership should embrace what I call the 4Cs of S&E messaging.

1. **C**ulture where the parish becomes a tithing/percentage-giving church.
2. **C**ommitment that parish leadership models the tithing/percentage givers culture and ceases all nickel and diming activities by a certain date.
3. **C**ommunications that are constant, creative, and consistent to provide S&E education on what it means to be a good steward of God’s gifts.

4. Celebration of the impact of the life-changing ministries and activities that the parish is performing resulting from the parishioners' stewardship generosity.

All the above help bring people closer to Christ and each other, and it must be celebrated as people fulfill Christ's call to be a steward of God's gifts to us. The promised reward from such commitment is for us to hear "*well done, good and faithful servant*" (Matthew 25:23) as we work toward our "*good account before the awesome judgment seat of Christ*" (II Corinthians 5:10).

# CHAPTER 10. Stewardship & Engagement (S&E) Best Practices.

## Introduction.

As introduced in Chapter 9 of my Roadmap, without qualification, the empirical data show that Stewardship and Engagement (“**S&E**”) are at the top of the list of most critical challenges every parish faces. Rather than wasting time debating definitional nuances, let me generically define “**Engagement**” as the act of giving one’s time and talents to serve others liturgically, sacramentally, and in ministry. The broader term “**Stewardship**” incorporates all levels of giving of time, talents, treasures, and tithes, all of which we have received from our Creator. Because these terms overlap and are both focused on giving back, I will merely combine them into the shortcut “**S&E**” and the ministries that encourage this work as “**S&E Ministries.**”

“Now, brother or sister, please fasten your seat belt and return your seat back and tray table to the locked and upright positions because we are fix’in to go on a wild ride.” What I present next is the “mother of all stewardship roadmaps.” If you are looking to fast forward your parish strategic planning and solving your S&E challenges, Chapter 10 of my Roadmap lays out everything I know and can prove that will work. I am not saying there aren’t other things to do or try. Indeed, I am sure there are. But I intend to “leave it all on the field” in what comes next. So, as Michael Buffer is fond of saying, “Let’s get ready to rumble.”

## Summary Of My 10 “Commandments” Of Stewardship.

In this section, and all the pages that follow, I will present in great detail my Stewardship Calling ten commandments (lowercase “t” and “c”) of church S&E excellence (not to be confused with the real Ten Commandments from God):

1. **Understanding Scriptural Stewardship** - This entails understanding what Holy Scripture and Christ say about S&E as well as more modern useful definitions.
2. **PPS** - The alignment of the **P**riest, **P**arish Council, and **S**tewardship & Engagement Ministry (“**S&EM**”) on a stewardship process is essential for its success.
3. **W<sup>2</sup>** - This means “own the **W**atch, and you will own the **W**allet” and underscores the most critical importance of engagement of **T**ime and **T**alents as the vehicles that drive commitment of **T**reasures (the “**Three Ts**”).

4. **The Mob was wrong!** - In movies, mobsters frequently excused their behavior by saying, "It's not personal, it's just business." In church-world, the rule is the exact opposite and must intentionally and always be personal.
5. **The 4<sup>th</sup> T** - Tithing is the critical secret sauce to setting the minimum standard of generosity excellence for each parishioner.
6. **Essential CITA** - Effective **C**ommunications and consistent Integrity, Transparency, and **A**ccountability are essential for any successful parish stewardship program.
7. **Youth Matter** - "*Train up a child in the way he should go, and when he is old, he will not depart from it*" (Proverbs 22:6). If we adults had been better trained on stewardship, we would be better practitioners of it. We cannot similarly fail the next generations.
8. **W&T Always** - A parish must always excel at **W**elcoming & **T**hanking everyone at all times.
9. **The 4 Types of Parish Giving** - Understand the difference between, and how best to execute, the annual stewardship tithe, emergency appeals, planned giving, and capital campaign contributions.
10. **Teams, Tactics, and Technologies - Not Everything Is A Nail** - The old saying that if you are a hammer, then everything is a nail does not apply to parish S&E. One cannot always use the same old techniques and solutions. The use of the newest, best, and most effective and varied tools is essential.

All the above, as well as the various sub-elements of each, will be explored in greater detail in the following sections.

## **STEWARDSHIP CALLING COMMANDMENT #1.**

### **Understanding Scriptural Stewardship - Definition Of Stewardship and Data.**

### **Financial Stewardship Is The Tail That Should Not Wag The Dog.**

Perhaps one of the biggest challenges in church S&E is the misunderstanding that parishes have financial problems. If their finances are inadequate, they have a much deeper issue that must be addressed. Giving financially is a byproduct of a mindset and understanding that, once positively transformed, changes the financial trajectory of parishes' contributions.

Money often becomes the tail that wags the dog because we fail to understand the real root cause. People give their time and finances to causes they believe in, visions they wish to achieve, and people they find worthy. If your parish or ministry is struggling financially, additional fundraising gimmicks or fundraisers that are not connected to the parish/ministry Why, aligned with its theology and Core Values, and focused on achieving its Mission and Vision are not sustainable and often become counterproductive. Thus, the solution to a lack of financial support is “education, not extortion” and “generosity, not gimmicks.”

I frequently make this last point to the poor souls who attack me at my live Igniting The Flame retreats when I urge them to stop nickel and diming parishioners. The usual flashpoint is when I tell them to stop passing trays because it reduces what people would provide in their annual stewardship tithe because they know they will be nickel and dimed.

To make my point, I like asking tray advocates (what I call “**Trayvocates**”), “How many trays should you pass?” They always respond with whatever number they pass. They get defensive when I say they are wrong but laugh vigorously when I suggest that, under their line of thinking, they should keep passing trays until the last one comes back empty. Everyone sees the absurdity of that solution but do not have faith in their parishioners. I will provide further examples shortly. Except for those parishes where the tray is used to collect that week’s portion of the annual stewardship tithe, the trayvocates fail to appreciate that this gimmick (like ethnic festivals, golf outings, hall rentals, etc.) was invented when the effectiveness of their S&EM failed.

## **The Earthshattering Lifechanging Understanding of “INYIG.”**

**INYIG** is the most foundational truth that all parishioners must understand before their generosity behavior changes. INYIG stands for “**It’s Not Yours, It’s God’s**.” None of the “stuff” we possess (including our money) is truly ours except for the short period we might remain earthbound and possess it. You never see a hearse followed by a U-Haul trailer. Everything we own will be left behind and either used, sold, given away, or trashed. Indeed, the classic definition of a steward is a temporary caretaker for another.

Think of all the clothes you once owned that are no longer yours. Or how about all the houses, cars, boats, or other assets you once owned that are no longer titled in your name? They belong to someone else now, and your temporary caretaker-ship time has expired.

Upon reflection, you will realize that everything you have is a gift from God. You did not choose your parents, genetics, or all the things that happened to you. You have chosen how to deal with those gifts, but the gift was given to you by your Creator. While you may have used your education to work hard to produce tangible finances or other results, the very brain, abilities, and experiences you used were all gifts to you from your Creator.



In Matthew 10:8, we learn, “*You received without paying, give without pay.*” Merely sharing the gifts given to you does not make you a great benefactor. It honors the giver and blesses both the recipient and you because of the positive earthly feeling you will receive from giving (See “**DOSE**” discussion below). More importantly, you’re sharing what you have been given, which likely helps you better achieve what should be your earthly life goal of working toward a “*good account before the awesome judgment seat of Christ*” in your II Corinthians 5:10 Moment.

Thus, my definition of stewardship is simply “**what you do with ALL the gifts God gave you.** The sooner we stop using the first person to describe “our” money/abilities/resources/time/stuff/etc., the sooner we can become the blessed vessels of generosity and impact our creator created us to be. This is not a totalitarian taking, but rather a voluntary decision to be better stewards of the gifts we have received to care for our families, parishes, and all others God places on our and our parish’s path. This is the most repetitive and consistent teaching of Christ and was the exemplary model He offered and instructed us to live.

My **INYIG (It’s Not Yours, It’s God’s)** message was more eloquently articulated by Christian Church Father, St. John Chrysostom, in his homily *On Living Simply* (Chrysostom, 1997), where he confirmed everything we have been given to us by God.

Thus, a Christian steward:

1. is a temporary caretaker for another,
2. joyfully gives with a heart of gratitude and expects no recognition or benefit for their gift,
3. never talks about “their” things or money and only regrets not giving more,
4. gives of their “*first fruits*” before anything else and in proportion to their blessings received (Genesis 4:4-5; Deuteronomy 26:1-11; Exodus 23:19; Nehemiah 10:37; 1 Corinthians 15:20), and
5. views giving as a walk of discipleship with Christ.

Please do not miss that last point. Generosity is discipleship. What kind of disciple you wish to be is the kind of steward and how generous you must be.

### **The “DOSE” Effect That Reinforces Generosity.**

Consider how great you feel whenever you help someone else. Whether it is teaching a family member or stranger to do something better or helping someone in need by sharing food, money, clothing, or even a kind word. These emotions that reinforce

generosity are not accidental. They are hardwired in your DNA and bodies by your Creator (Orthodox Study Bible, 2008; Sinek, 2017). I call it the “**DOSE**” effect. These are hormones and chemicals our bodies naturally and automatically produce when we are generous, giving, loving, sharing, and philanthropic.

**Dopamine** helps you feel pleasure, satisfaction, and motivation. Your brain gets a surge of dopamine when you feel good that you achieved something.

**Oxytocin** (not OxyContin) is a hormone that makes you feel love and trust. It’s sometimes known as the “love hormone.”

**Serotonin** is a natural mood stabilizer chemical that controls well-being and happiness. Too little serotonin contributes to depression.

**Endorphins** are directly related to happiness or meaning and help reduce physical pain or symptoms from injuries.

Notice how this understanding of generosity and stewardship provides a perfect alignment of science, psychology, and theology. We are genetically hardwired and experientially reinforced to release the chemicals our Creator gave us when we do what He asked us to do.

## **Dues and Fees Are The Opposite Of Christian Stewardship.**

Churches have too often relied on the antithesis of Christian stewardship and generosity and incorporated secular financial practices instead. The most common enemy of stewardship is dues, which are either overt or disguised. Dues are generally defined as charges or fees for membership in a club or organization. An obvious manifestation in parishes is the set amount of “fees” parishioners are told they must pay to be a “member in good standing” or similar language. These minimum dollar amounts denigrate Christian church participation to a sum certain in complete contrast with the teachings of Christ and the Holy Scripture.

The equally evil “disguised dues” take many different forms, such as:

1. “recommended donation amounts,”
2. set amounts to be paid based on some demographic characteristics (e.g., over age 65, under age 18, family plans, etc.),
3. perks that are given to parishioners who contribute at a certain level (e.g., discounts for use of the church hall, free participation in church activities that otherwise have a cost),

4. contribution amounts based on the parish budget divided by the number of stewards/members (as if all stewards are equally financially blessed),
5. “pay a day” amounts that take the parish budget and divide by 365 and ask parishioners to contribute a certain number of days of expenses, and
6. anything other than the tithe of proportional giving.

All these dues and disguised dues approaches are antithetical to the Christian stewardship teachings of Christ, the Holy Scripture, the Apostles, and the early Fathers of the Church. They are easy but ineffective and tend to relegate one’s parish to a status no different than any other social or other club to which people may belong rather than to the holy house and ministries of our Creator and Savior. An example might be illustrative.

“How much do I owe?” asked the parishioner. “For what?” I asked. “You know, for my church dues.” I truly did not know what to say next, so I asked a simple question: “How much have you been blessed?” “A lot,” they said, “but what does that have to do with anything? I just want to know how much of my money I have to give to the church as dues to be a member?”

And that was when I finally realized that, among other things, they got the wrong pronoun. They weren’t really dealing with “their” assets. They are all “His” (i.e., God’s). They failed to understand that Christ’s church does not sell “memberships” or charge “dues” and that everything “they” had was really a gift from God, their Father. Everything! Their life, their talents, their genetic composition, their life experiences, the people who loved them, the opportunities presented to them for greatness, the chances to make a difference in the world, their stuff, and even their money. None of that was really theirs. They were merely a temporary steward (caretaker) of God’s gifts. They didn’t get it and just wanted me to give them a magic number as if it were written in stone on some golden tablets delivered from on high.

So, I replied with what Christ taught us on the subject: “Give it all, I said.” In Matthew 19:16-21 we are presented with a Parable of the Rich Young Man who asked Christ: “*What good deed must I do to have eternal life?*” The young man was focused on the right thing, namely eternal life, and not some temporary success, job promotion, or nice lifestyle. Christ responded by essentially first reviewing the 10 Commandments and then giving the following clear guidance: “*If you would be perfect, go sell what you possess and give it to the poor, and you will have treasure in heaven; and come follow me.*”

Notice what Christ said. “*If you would be perfect...*” Perfect, he said, not average or in the 2<sup>nd</sup> quartile. The roadmap to perfection is to give back everything we have been given. How many of us are ready to go “all in” and take the journey down that path toward an ultimate goal that is richer and more fulfilling than anything we could imagine? The young man was not ready, and “...*he went away sad.*” So, too, did the parishioner who

asked me how much he owed. I realized that this soul was not a bad person. They merely had not been properly taught Christian stewardship. Hence, the need for my Roadmap.

Recognized church consultant Thom Rainer identified many problems with dues, including:

1. Christ never taught dues, and instead, Christ explained our “all in” stewardship obligation in various parables (Rich Young Man - Matthew 19:16-22; Zacchaeus - Luke 19:1-10, etc.),
2. Funds are given from what’s left rather than “first fruits,” and
3. Membership dues create entitlement benefits and are given with expectations because “it’s my money.” With a dues system, the donor gives for recognition and not out of gratitude and humility and uses their contribution to receive some benefit or provide them a “right” to determine all church spending (Rainer, 2018).

The most common problem is that in a consumer transaction model that dues promote, the steward feels vindicated if they withhold funds when they don’t get what they want. Worse yet, these unhappy “consumers” become metastasizing cancer cells and try to convince other parishioners to withhold their contributions until their desires are placated. When I am dispatched to deal with those church consumer troublemakers, I ask them if it would be fair for God to do the same with them. Thus, if they failed to follow a commandment, should God be able to withhold oxygen, food, or their kidneys from them until they complied?

Indeed, our Creator modeled the exact opposite behavior. At the height of our evil actions, he not only continued to give us life, resources, and infinite other blessings, but He provided the ultimate loving continued gift by sacrificing His Son to teach us properly. The message of John 3:16 teaches us to be generous with what is most important to us for the benefit of others and the salvation of their and our souls into eternity: “*For God so loved the world that he gave His only begotten Son that whoever believes in Him should not perish but have everlasting life.*” The next time you are angry at something that happens at your parish, resist the human tendency and do not withhold the generosity and blessings God gave you.

As mentioned in Chapter 9 of my Roadmap, I call this behavior the “Burger King® mentality” (with no disrespect to the burger chain by that name). This “have it your way” approach caused them to hand out crowns to signify the customers' right to be a king. While a fine approach for some businesses, it is the diametrically opposed teachings of our real King and Lord, who taught servant leadership and love by acting in humility and service to others. I belabor this point on dues and disguised dues because many parishes (particularly in the Orthodox tradition) continue these un-Christian habits and fail to undertake the proper education of their faithful. Then, they wonder why they are suffering financially.

A critical point of distinction is required here. In a subsequent section, I will elaborate at length on what I believe to be the only proper understanding of stewardship obligations by focusing on the tithing of first fruits. Focusing on the minimum 10% tithe can start to sound like dues. However, shifting the focus from a set dollar amount to a percentage makes all the difference in the world. It recognizes that while God blesses all, we are not all blessed with the same gifts and in the same proportions. Thus, by calling us to provide a percentage of our first fruits (read that, gross earnings for those in modernity), we acknowledge that each is not called to give the same finite amount but rather in relative proportion to their resources and blessings. And that amount will likely change for us over time.

Management guru Stephen Covey argued that ownership and stewardship are different. He posited that the stewardship of leaders and followers focuses on their interdependence and is more about the “we” relationship. Interestingly, once there is a common organizational value system, the overall organizational attitude of stewardship is enhanced and returned with a focus on the common good (Covey, 1997). Thus, once everyone is held accountable to a common set of values and rules, global organizations can become less dependent on the strengths of any one individual. This spirit of responsible stewardship should be the education imperative our parishes promote.

### [The Scriptural Foundation Of Stewardship - Teaching Proper Christian Stewardship.](#)

By knowing which of our practices are not true Christian stewardship, we can reset our understanding by exploring the wisdom from the Holy Scripture and wise Fathers of the Christian church. St. Paul was among the most effective stewardship teachers after the Lord’s resurrection, such as when he told the people of Corinth (and us): *“But this I say, he who sows sparingly will also reap sparingly; and he who sows bountifully will also reap bountifully”* (II Corinthians 9: 6-8).

The call for generosity is so commonly repeated within the Christian Scriptures and teachings that it is impossible to ignore. Are you generous in your giving? St. Peter reminds us of the importance of being a good and generous steward of God’s blessings. And while not a “get rich quick prosperity gospel” message, St. Peter reminds us of the glorious bounty we receive through the stewardship of giving.

St. Luke shares one of the many direct teachings of our Lord to give proportionally and generously when He promised: *“For everyone to whom much is given, from him much will be required; and to whom much has been committed, of him they will ask the more”* (Luke 12:48). I am always struck by the word “required” in response to what we should do with all our many blessings. I also refer to the second part as the “lawyer loophole exception,” reminding us that as we continue to receive additional blessings, our generosity should increase in proportion. This once again reinforces the proportional tithe of first fruits message we see throughout Holy Scripture.

None of this proportionate giving messaging was foreign to the faithful of Christ's time. As Moses reached the end of his long and blessed life in the territory of Moab, he wrote his Book of Deuteronomy (which means "second law giving") (Orthodox Study Bible, p. 210) and said, *"Every man shall give as he is able, according to the blessings the Lord your God gave you"* (Deuteronomy 16:17). This law-giving message from Moses of generous proportional giving could not have been any clearer.

Thus, it is no surprise that St. Paul reinforced the proportional giving message while making it clear to the early faithful that their first fruits must be given weekly for the work of Christ's church by admonishing: *"On the first day of the week (i.e., Sunday) let each one of you lay something aside, storing up as he may prosper ....I will send... your gift to Jerusalem"* (i.e., the Church center at that time) (1 Corinthians 16:2-3). This foundational message must be taught and reinforced to the faithful of modernity. The financial and ministry needs facing each parish require the disciplined weekly percentage-giving of first fruits, tithes, and offerings.

However, I urge all Christians, particularly those of us incredibly blessed to live in abundance in the United States, to focus on St. Paul's strong admonition: *"Command those who are rich... not to be haughty, nor to trust in uncertain riches... Let them do good, that they be rich in good works, ready to give, willing to share, storing up for themselves a good foundation for the time to come, that they may lay hold on eternal life"* (1 Timothy 6:17-19).

This passage from 1<sup>st</sup> Timothy directly connects the dots of the **"Three Ss,"** Steewardship, Spiritual growth, and ultimately Salvation. Notice how those who are "rich" are reminded not to be so reliant on accumulating their wealth that they lose the greater opportunity to become even richer by willingly and generously sharing the gifts they received. Through their acts of stewardship, they grow personally and spiritually as they can achieve the salvation that comes when we can seek our *"good account before the awesome judgment seat of Christ"* (II Corinthians 5:10). Our stewardship giving in the "here and now" is expected of us and helps prepares us to receive the gift of eternal life in the "hereafter."

### **Selected Stewardship Teachings of Christ.**

The oft-repeated conclusion is that Christ talked about money more than anything else (allegedly (but not verified by me) in 11 of His 39 parables and 2,300 verses). As someone who is not a theologian, I can neither confirm nor deny those allegations. However, I can say they may have missed the point. Rather than merely talk about money (something all Christians of the day would understand), I suggest Christ taught about personal responsibility and generosity.

For example, my favorite stewardship parable involving Christ (although we are not supposed to have favorites) is what I call the Parable of Generosity. Search though you may, and listen to all the clergy homilies you want, you probably will not hear anything called the Parable of Generosity. That is because I believe it is mislabeled the

Parable of the Feeding of the 5,000. While the title is accurate, we often miss the key stewardship message, which I think is a critical takeaway for us to embrace. This parable is one of the few reported in all four Gospels (Matthew 14:13, Mark 6:31, Luke 9:12, John 6:1-14).

As the story goes, after learning of the beheading of St. John the Baptist, the Lord landed on shore and began preaching long and hard to a large assemblage. In my active imagination, I envision St. Peter leaning over and whispering to the Lord that it was dinner time, the people were hungry, and the Apostles had insufficient resources to feed everyone. I creatively picture St. Peter asking the Lord to let the people go home and eat, after which he can resume His preaching when they return.

What the Lord says next, however, is amazing. It is mission-critical for each of us who call ourselves Christians. The Lord says, “**YOU** give them something to eat” (Matthew 14:16) (emphasis added). The message that all who follow Jesus have an obligation to act (including feeding the hungry) should not be missed in this critical moment. However, it is what comes next that explains why I call this story the “Parable of Generosity.” Again, in my imagination, I hear the Apostles making every kind of excuse as to why they cannot feed the faithful as they scurry around to see that they can scrounge up.

At this point, most clergy homilies fast forward to the Lord, taking five “loaves” and two fishes” and causing them to multiply to feed 5,000 men and a likely equal number of women and children with twelve (a fascinating number) of basketfuls left. We are told that we are called to give what we have so and trust the Lord to cause it to multiply. This is a worthy message worth repeating and acting upon. But inquiring minds dig deeper and are rewarded with one of the greatest exemplars of generosity we find in the Holy Gospel.

It requires deciphering St. John’s Gospel, where we read that St. Andrew brings a child to the Lord and says, “*There is a lad here who has five barley loaves and two small fish, but what are they among so many*” (John 6:9). We never know his name, but from an understanding of the context, we know much about this young lad. I always tell homilists and teachers of Scripture that if you do not explain the context of Holy Scripture, so much is lost.

The poor of those times ate barley and could not afford wheat for their bread. Thus, we know this young lad steward was of a low socioeconomic stratum. Moreover, we hear “loaves” and think big loaves of Wonder Bread we see on our grocery shelves. Instead, they were more like five pieces of pita they would call a loaf. Finally, the two small fish were likely what we would think of as two small sardines.

So, picture a young, poor child with this meager amount of food in his possession. It was most probably his dinner that his mother had prepared for him. This was the only thing this young lad would have to eat. And what does he do? Without hesitation, this generous steward gives everything he has to the Lord, who in turn causes it to multiply.

This is the perfect example of stewardship because the “young lad,” who is only identified in John 6:9, willingly gave the Lord his entire small dinner. He sacrificed everything he had so that the Lord could take this act of stewardship and feed many thousands. This young lad was the quintessential steward who fed a whole community.

This is why the big stewardship story in the Parable of Generosity is of a poor child who believes so fully in the Lord that, without hesitation, he gives everything he has so that others can be fed. What would you have done in that situation? More to the point, what are you doing now?

Contrast our poor young lad with his counterpart in the Parable of the Rich Young Man I discussed previously (Matthew 19:16-26). This wealthy person asked our Lord the right question, focused on his II Corinthians 5:10 Moment and “good account,” but was unwilling to be perfect and give everything he had. I always underscore the word “perfect” that our Lord defined as giving 100%. In other words, 100% giving is what we would call “best practices.” Later, when I discuss the tithe, you will understand why I say 10% is the minimum since 100% is “perfection.”

The poor young lad in the Parable of Generosity willingly did what the Rich Young Man would not. He gave everything he had to the Lord and allowed it to be multiplied to serve others. Which one are you? Are you prepared to go ALL IN? What have you taught your family? What have you taught your fellow parishioners? What has your parish done to fulfill the example of the poor young lad?

The well-known and often-preached Parable of the Talents (Matthew 25:14-30) underscores the criticality of each of us who have been given different blessings and are nonetheless called to take what we have and put it out into the world to cause it to multiply and bless others. Notice that nowhere does the Parable of the Talents say that the person given five talents was five times better or more important than the person given one talent. It is not how many talents we have but rather what we do with whatever we have. (I always find it fascinating that contextually, “talents” in those times was a unit of economic measure, and today, it means something different, although the message is the same.)

This critical message our Lord taught about stewardship ends with those who take whatever they have been given without comparison or envy and cause their gifts to multiply by being told, “*Well done good and faithful servant; you have been faithful over a few things, I will make you ruler over many things. Enter into the joy of your Lord’*” (Matthew 25:22). These are the words we should all want to hear in our II Corinthians 5:10 Moment when we stand before the awesome judgment seat of Christ.

St. Luke underscores this last point in a harsh story about an unjust steward that ends with a critical admonition that if we are untrustworthy with worldly wealth, we do not deserve to be trusted with the “true riches” available in Heaven (Luke 16:11). Indeed, a commentary about this passage explains:



The test as to whether God will bestow heavenly blessings (i.e., true riches) on a person is directly related to how that person spends his money. The money we consider our own is actually another man's that belongs to God, or at least to the poor. The Fathers universally see a person's failure to give money to God's work as stealing: 'nothing less than embezzlement of money belonging to someone else' (St. Theophylact of Ohrid, Bulgaria; Orthodox Study Bible, p. 1398).

While God provided the most powerful stewardship message through the gift of His Son for our salvation, He also provided the initial stewardship message at the beginning of Genesis. God blessed His human creations, the only creatures made in His image and likeness, by giving them control over "*all living things*." In this way, God identifies Himself not only as our Creator but also as the first steward and environmentalist. He reminds us of our duties as stewards of His gifts as we care for His creation and creatures (Genesis 1:26; Orthodox Study Bible, p. 5).

### **A Possible Stewardship Question from our Lord and A Personal Accountability Challenge.**

As we close out this all too brief focus on what stewardship and generosity are and what the Holy Gospel and our Lord taught us about it, I leave you with a powerful question to contemplate. What would you answer if the Lord were to ask you directly today: "What did you do with the money over which I allowed you to be a steward?"

Think about what you spent this last day, week, month, or even year, and ask yourself how you would feel if you had to review these expenditures with your Creator, who gave you all of it and your very life. Indeed, I recommend everyone undertake an exercise. Each week, fill out an "accounting to God" of what you did with His money this past week. Then, conduct an imaginary discussion session with Him about how you invested the "talents" he gave you and what return you produced.

### **The Stewardship Calling "Good And Faithful Servant Stewardship Challenge."**

I urge every parish to try my "**Good and Faithful Servant Stewardship Challenge**" to model the living of the Parable of the Talents. In this program, your parish gives all parishioners some money and challenges them to find creative ways of putting it out into the world and causing it to multiply. Every parishioner then shares what they did with the money, how it made them feel, and the response from the recipient(s). In so doing, we teach proper Christian stewardship and generosity, and we change our parish culture and the communities in which we live and serve. In Exhibit "A" at the end of this Chapter 10, I provide a more detailed explanation and step-by-step roadmap of how to conduct my Good and Faithful Servant Stewardship Challenge.

After over a decade of challenging hundreds of Orthodox parishes I worked with to undertake this Good and Faithful Servant Stewardship Challenge, a courageous leader, Fr. Luke Veronis, and his brave and faithful parish of Saint's Constantine and Helen Greek Orthodox Church in Webster, MA., did so. They gave away \$30,000 to their parishioners, and the results were transformative and exceeded everyone's expectations.

This challenge continued to foster increased stewardship and generosity among the parishioners and even non-parishioners in the community who heard about the amazing things being accomplished. While it had to be suspended once the SARS-CoV-2 pandemic closed everything down, you can read some of their success stories here: <https://www.schwebster.org/about/good-and-faithful-servant/>. Furthermore, I interviewed Fr. Luke on my Stewardship Calling podcast, where he shared the preliminary incredible results from the Good and Faithful Servant Challenge that can be heard here: [https://www.ancientfaith.com/podcasts/stewardshipcalling/who\\_gives\\_away/](https://www.ancientfaith.com/podcasts/stewardshipcalling/who_gives_away/)

## The Science Of Generosity Studies.

Sir Winston Churchill is attributed to have said: "We make a living by what we get, but we make a life by what we give." While the Winston Churchill Society refutes attribution, the sentiment is nonetheless powerful and is the foundation of what the empirical data says about the consequence of fostering generosity in parishes.

The Science of Generosity project at Notre Dame University (<https://generosityresearch.nd.edu/>) has been running one of the largest longitudinal empirical studies of giving and generosity. It seeks to integrate knowledge about philanthropy, volunteerism, and altruism through the lens of personal choice. Every parish, clergy, stewardship committee, and leader should review their powerful findings that provide a roadmap for increasing parish generosity. **They define generosity as "giving good things to others freely and abundantly."**

As the definition identifies, key elements of true generosity are giving by choice and "freely" and not out of compulsion or guilt. Does your parish stewardship process encourage generosity or guilt/obligation? Giving "good things" focuses on the Biblical principle of "first fruits" and of your best, and not what is left over. Does your parish stewardship process encourage generosity of the best one can offer, or does it beg for leftovers? Finally, the definition focuses on giving out of the "abundance" we have and not from a mindset of scarcity. Does your parish stewardship process encourage parishioners to consider how truly blessed they are and promote an abundance mindset, or is the focus always on the nagging expenses and meeting a budget?

## Six Critical Findings Of The Science Of Generosity Studies And Questions About Your Parish That Follow.

While the excellent data and resources from the Science of Generosity Studies should be reviewed in detail, I will attempt to provide a summary of key elements to consider.

1. Each person usually decides whether or not they will be generous and a giver at a fairly early age. This decision is typically influenced by their parents or other important adults in their lives. What does your parish do to discuss and teach generosity to its youth and encourage parents to be generous and share that mindset with their offspring?
2. After they form a personal generosity opinion, people look for easy and routine ways to be generous. The ability to make a generosity decision once and then have it easily implemented is valuable. What has your parish done to make giving easy and systematically routine?
3. Reinforced by years of generosity, it becomes a habit, and being a good steward is cemented in their adult behaviors and DNA and what they teach their children/ grandchildren. Habits require reinforcement and re-education so that they continue as permanent lifestyle choices and not episodic reactions to a particular need. What does your parish do to reinforce and continue to educate on the need to build the muscle of generosity to its fullest potential?
4. Parishes must create and communicate a culture of generosity and social networks that support generosity so that all parishioners (including youth) can see themselves as a part of that generous culture. With appropriate humility and gratitude to God, celebrating the impact of a parish's generosity is critical to creating and reinforcing the desired culture. This should occur regularly (no less frequently than monthly and preferably weekly) and in very visible ways. What does your parish do to regularly celebrate generosity and philanthropy and create ministry and social networks to expand its impact further?
5. Parishes need to cultivate an attitude of abundance and gratitude, not scarcity, since most of us are blessed. Attitudes of abundance have been shown psychologically and biologically to cause people to reframe their reality and become more generous. I see most parishes making mistakes by not heeding this last finding. No sane person gets excited about paying bills. It is a necessary evil. So why would a parish think it to be motivational to constantly discuss how

far behind collections are in comparison to the budget or how desperate the parish is to raise the needed funds? It is uninspiring and actually counterproductive. Stop it! Instead, what does your parish do to avoid the devilish negativity spiral from a perspective of scarcity and instead focus on the Godly abundance that can be willingly and freely shared?

## **Six Action Items From The Science Of Generosity Studies Critical Conclusions.**

### **Conclusion #1 (Cognitive Decision):**

Since people at an early age form an existential opinion about themselves and their generosity, what can your parish do to help people confront the key question: “What kind of person do I want to be?” What are we doing to ask parishioners to consider if they are generous (“giving good things to others freely and abundantly”), and what is the parish doing to teach generosity (to both youth and adults) formally?

### **Conclusion #2 (Routinization of Giving):**

Since after they form a personal generosity opinion, people look for easy and routine ways to be generous, how many easy electronic and other routine giving options have your parish implemented? Does your parish have a standard donor-giving timetable (stewardship campaign) and process (including a separate stewardship campaign for your youth)? Have you implemented the newest forms of secure online giving to make things easy and routine (and since young people increasingly do not carry cash)?

### **Conclusion #3 (Culture of Generosity):**

Since people model the behavior of their peers and those around them, how is your parish creating and communicating a culture of generosity and social networks that support giving? It makes a difference in individual attitudes and behaviors when people see themselves as a part of a generous culture. It is often said that there are no “lone givers” because people’s giving is affected by who they know and how generous those people in their network are.

Given the propensity of young people to form generosity mindsets by observing the behaviors of their parents, it is critical to encourage creative ways for your youth to decide to become generous and see the results of their increased philanthropy. Testimonials are an effective vehicle for creating a culture of generosity as ministries and generous givers talk constructively (without bragging) about the joy their giving brings them and the difference it makes in God’s kingdom. Does your parish encourage people to be generous in a variety of creative ways without trying to shame or guilt them into this Godly behavior?

#### **Conclusion #4 (Church Giving Facilitation):**

The data is clear that regular churchgoers generally give more money more often and are more generous overall. However, the research also shows that generosity is improved when a church makes a religious call to give. While people are reluctant to ask others for money, it is often easier to ask people to change lives and have an impact on the world (the consequence of giving). Does your parish ask and remind, not constantly, but consistently? When doing so, does your parish ineffectively talk about needs, paying bills, or meeting budgets that are not motivational and do not create true and sustainable generous stewardship behaviors? People give to experience the impact of the mission and vision, and not the words. So, has your parish created regular processes to share its vision and life-changing ministries and solicit generosity?

#### **Conclusion #5 (Parents Teaching):**

Perhaps surprising to some, the Science of Generosity Studies undeniably shows that the greatest influencers of youth are their parents and other adults close to them. (While this fact explains some of the different social issues our culture is facing, further discussion on such other impacts is outside the scope of my Roadmap.) Because children watch and mimic adults' visible behavior, what is your parish doing to ensure parents understand the need to proactively and explicitly teach their children about giving generously? Research shows that parental generosity is usually invisible to children. Thus, parents and adults need to make it more visible and talk about it in humility to show them how you live and how they should live. What does your parish do to create a social network of generosity, including your youth?

PERSONAL NOTE: It has long been our family's tradition that we always give money or whatever else we have to anyone we see begging/asking for help, whether on the side of the road or walking around. I say this in all humility, not for self-aggrandizement but to validate from personal experience the validity of the Science of Generosity Studies. One time recently, due to a green light (and traffic), I was unable to stop to share some money with someone standing on the corner with a sign asking for help. However, I was not surprised to look in my rearview mirror and see my younger daughter (in a separate car that had to stop at the light) immediately roll down her window to share some money. Being much younger, her resources are substantially less than my wife's and mine. Nevertheless, the giving response has, by the grace of God, been ingrained in the culture and Core Values of our family. When asked why we give money to people on the street without conditions, our answer is always, "That's what we do because we can."

Each beneficiary of generosity is accountable to God for what you do with what you are given. Who are we to sit in judgment of someone else's lifestyle and how they spend what is given to them? Would we want God (or others) to do the same for us? Being generous and "giving good things to others freely and abundantly" is a choice, regardless of one's circumstances, as you prepare for your II Corinthians 5:10 "good account Moment."

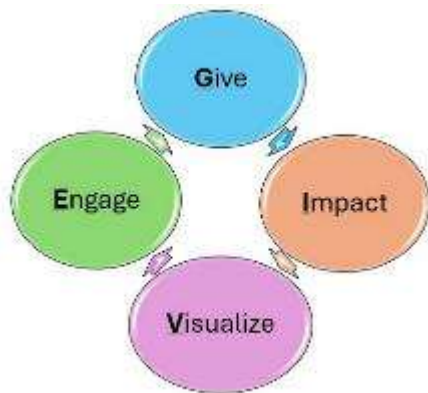
## **Conclusion #6 (Attitude of Abundance):**

The empirical data repeatedly shows that parishes need to cultivate an attitude of abundance and gratitude, not scarcity. In the U.S., most of us have “plenty” in our households and the opportunity to work to increase our “harvest” of good things. Attitudes of abundance have been shown psychologically and, equally importantly, biologically to cause people to reframe their reality and facilitate people’s generosity. When you reflect on the abundance of what you have or is available, you will focus less on what you do not have and more on how you can share your blessings with others.

So, what is your parish doing to constantly and consistently communicate an attitude of abundance and not one of scarcity and crisis? This is the Lord’s repeated message of trust and faith in God that he will provide what is needed (even when sometimes we do not appreciate it.)

## **The Stewardship Calling “GIVE Circle Model.”**

After decades of reading the research and working with over a thousand parishes in my Stewardship Calling Ministry, I developed the very simple and easy-to-understand Stewardship Calling “**G.I.V.E. Circle Model.**” Each letter represents a specific action a person and parish should undertake.



**G = Give:** encourage your PIPs (Parishioners In Pews) to be generous

**I = Impact:** use their generosity to make a positive impact

**V = Visualize:** help PIPs see the positive consequences of their generosity

**E = Engage:** motivate PIPs to greater service, engagement, and generosity

My GIVE Circle Model becomes a self-perpetuating and constantly accelerating cycle as each preceding step positively reinforces greater results in subsequent ones. It is a positively addictive model for generosity. The more one gives that creates a positive impact they can visualize, the more willing they are to continue to engage further and give more. Greater willingness generates more enhanced feelings of significance that drive even greater generosity and service. However, all four elements are necessary to create this constantly growing perpetual motion machine. You should consider this in your life, and your parish must ensure it focuses on each component of the GIVE Circle Model to achieve the greatest results.

## Financial Stewardship Data.

Empirical data show Americans have experienced increasing disposable income for the last decade and generally increased charitable donations of all types. Americans overall remain very generous. As the charts below from the Giving USA Report indicate, (a) in 2022, Americans gave \$499.33 billion to all charities, with 27% or \$143.57 billion to all forms of religion, and (b) \$557.16 billion to all charities in 2023 with only 24% or \$145.81 billion going to all forms of religion.



Different research organizations show slightly different numbers in the church giving area (depending on who they include or exclude); however, the chart below is informative.

Year	Disposable Income (Trillions USD)	Total Charitable Donations (Billion USD)	Total Religious Donations (Billion USD)	Christian Church Donations (Billion USD)
2013	12.5	414	118	118
2014	13.1	426	119	119
2015	13.4	439	120	115
2016	13.8	410	120	116
2017	14.4	410	118	118
2018	14.9	427	121	120
2019	15.1	449	123	120
2020	16	471	131	131
2021	16.5	485	128	128

2022	17	499	143.6	125
2023	17.5	557.2	145.8	120-125 (est.)

Sources:

Disposable Income = Bureau of Economic Analysis  
 Charitable, Religious and Church Giving = [\\_\\_Giving USA 2023 Report](https://givingusa.org/)  
<https://givingusa.org/>  
 National Philanthropic Trust <https://www.nptrust.org/>  
 Barna Group <https://www.barna.com/topic/church/>

Generally, American disposable income and total charitable giving have been growing for the last decade to a much greater degree than the variable and sometimes stagnating giving to churches. However, when adjusted for inflation, in 2023, giving to all charities declined by 1%, and church giving declined by 2.1%, according to the Indiana University Lilly Family School of Philanthropy. Indeed, of all the beneficiaries of charitable giving, including arts, human services, education, health, environment, and animals, religion is the only area that saw a decline in inflation-adjusted giving (Indiana University Lilly Family School of Philanthropy, 2023).

Clearly, monetary giving to churches has not kept up with inflation or the growth in disposable income and is less favored than other charitable recipients. This trend is not unique to the last few years. Parishes and all religious institutions have some serious soul-searching to do to ascertain why they are losing ground in the charitable giving arena to other philanthropic causes.

Nevertheless, the respected Lilly Foundation concluded from their extensive data that: “Nonprofit entities are more trusted than government and business. Religious charitable organizations and community foundations are the most trusted charitable entities” (Indiana University Lilly Family School of Philanthropy, 2023). Thus, there is no question that the opportunity for greater success with generosity and contributions is possible for Christian parishes.

However, this analysis also concluded:

1. that donors lack knowledge of the functioning and effectiveness of many non-profit sector entities (including churches), and
2. Building and maintaining trust through perceived integrity, transparency, and accountability (ITA) is a critical gateway to greater generosity (Indiana University Lilly Family School of Philanthropy, 2023).

Thus, every parish must be completely transparent with all financial and other nonconfidential data and earn the trust of the parishioners. This should be supplemented with the missing generosity and spiritual education and communications to develop



parishioners into the kinds of stewards that the Lord called them to be in the Parable of the Talents (Matthew 25:14-30; Luke 19:11-27).

Troubling data from other sources showed that people gave a lower % of income to churches in the 2000s than they did either during the Great Depression or the 1920s, and as many as 37% of churchgoers give \$0 to their church (Ronsvalle & Ronsvalle, (2002). Indeed, according to one survey, 17% of American families have reduced the amount given to their church, and 7% of churchgoers dropped regular giving by 20% or more (Firsch, n.d.).

When looking at giving to church compared to the Biblical standard of a 10% tithe, the respected empirical sources of Giving USA, Barna Group, and National Philanthropic Trust determined that the percentage of income Americans donate to churches has been **steadily declining over the last several decades, from around 3-4% in the 1950s to about 1.5-2% today**. This percentage varies significantly based on many factors, including age, church attendance, and religious Denomination. Nevertheless, the trend reflects broader societal shifts that likely include secularization, concerns regarding transparency and efficacy, and competitive factors of other nonprofits with more sophisticated, consistent, and effective fundraising processes (Firsch, n.d.).

More problematically, in a proxy tithe analysis of the financial statements from over 275 Orthodox parishes in the United States, I calculated that Orthodox Christians in the American Orthosphere only donate between 0.5% to 0.8% of their income to their churches (not 10%). This challenge (and corresponding opportunity) will be addressed in more detail in the Stewardship Calling Commandment #5 Tithing discussion below.

## **STEWARDSHIP CALLING COMMANDMENT #2.**

### **“PPS” – Priest, Parish Council And Stewardship Ministry.**

One of my favorite Greek expressions I heard nonstop growing up was “**Τα ψάρια μυρίζουν από την κεφαλή.**” The technical translation is that “the fish smells from the head down.” I prefer my positive leadership version, which is a nonliteral translation that says, “The direction of the head determines the direction of the fish.” Either way, leadership alignment in stewardship and generosity strategy and implementation is critical. This truth led to my 2nd commandment of church stewardship excellence.

**PPS** means that the **P**riest, **P**arish Council, & **S**tewardship ministry leader and team must all enthusiastically support the parish Stewardship strategy. Everyone in leadership must completely buy-in, actively participate fully, and own the process and decisions. Leadership always leads by example. Or, as another of my favorite sayings concludes: “Your actions speak so loudly I can’t hear what you’re saying.”

Thus, if the parish is to become a percentage-giving church on the journey to tithing, then ALL leaders must agree on how they will conduct their stewardship. Similarly,

if the focus is on positive messaging and encouraging engagement (two critical success factors), then the leaders cannot privately be “nattering nabobs of negativism” or raise objections when testimonials are offered to help create a culture of generosity.

By leading through their example, **PPS** can help ensure the approval and buy-in of the Parish as a whole. All parish leaders should be hand-picked community “servant leaders” (e.g., be among the first stewards actively engaged in ministry work and giving sacrificially). To facilitate this, a parish should use strategic planning, discussed in Chapter 8 of my Roadmap, and undergo periodic Servant Leadership training, as discussed in Chapter 7 of my Roadmap.

### **STEWARDSHIP CALLING COMMANDMENT #3.**

#### **“W<sup>2</sup>” – Own The Watch, And You Will Own The Wallet.**

My 3<sup>rd</sup> commandment of church stewardship excellence is the formula **W<sup>2</sup>** to help you remember it mnemonically. (Cute mnemonics help with memory. I always chuckle when someone tells me they remember the W<sup>2</sup> thing I talked about at their parish 15 years ago.) **W<sup>2</sup>** stands for “own the **W**atch, and you will own the **W**allet.” What in the world does owning the watch have to do with owning a wallet?

What is your most valuable asset or commodity? It’s your time, not your money. If I asked you for \$100, you could eventually earn it back. But the time you spend reading my Roadmap, you will never get back. So, if time is your most valuable asset, why do you waste so much of it obsessing about soliciting money?

The principle of this 3<sup>rd</sup> commandment is to focus on owning the watch and harvesting the most valuable commodity of people’s time and engagement. In church-world, this means engagement liturgically (in church services), sacramentally (by engaging in all the sacraments your faith tradition presents), and in ministry (which allows for service to others).

The empirical data tells us that the byproduct of higher levels of personal engagement of time liturgically, sacramentally, and in ministry will produce disproportionately higher contributions of money. Stewardship and generosity are among the top church challenges identified in Stewardship Calling’s consulting work with over 1,000 parishes and the extensive numbers of strategic plans and Financial Stewardship Analyses completed. These results are confirmed by the 70 years of data acquired by the Gallup Organization as summarized by Al Winesman in the seminal work Growing an Engaged Church (Winseman, 2007).

Gallup’s multi-decade research concluded, “...congregations with engaged members are 1. spiritually healthier, 2. better able to (a) carry out their missions, (b) attract more new people, (c) fund new ministries and programs, and 3. have a higher percentage of spiritually committed individuals” (Winseman, 2007). Every one of these

findings is corroborated by my empirical data and the data produced by other researchers.

Indeed, since churches should first focus on the spiritual commitment of parishioners, it is comforting that Al Winesman concluded that: “Spiritual commitment is usually a result of one big – and often overlooked – factor: congregational engagement” (Winseman, 2007). Thus, by focusing on engagement, a parish can act consistently with its Why, Core Values, and Mission to achieve its Vision (discussed in greater detail in Chapter 8 of my Roadmap).

By focusing on improving engagement, increased commitment to the parish and its ministries almost inevitably follows. Winesman proved the W<sup>2</sup> commandment by concluding: “How much members give...how many hours they volunteer... how often they invite others... is more dependent on engagement than on any other factor” (Winseman, 2007).

Additional empirical studies underscore the importance of engagement as the most critical driver of stewardship success, including the following conclusions quoted from various research studies:

1. “People who are asked to give of their time before they are asked to donate money ultimately give (49%) more money to the charity” (Liu & Aaker, 2008).
2. “...the likelihood of giving money to an organization is affected by an individual’s involvement with the organization as a volunteer... The amount of time spent volunteering is positively correlated with the amount of money that is given by individuals” (Low et al., 2007).
- 3, “...church involvement is the strongest single predictor of giving” (Hoge & Knoll, 2000).

Notwithstanding the above data, most parishes focus on asking for money even though the data shows that financial problems are merely the symptom of a deeper root cause. This leads us to the perhaps surprising realization that the root cause of the absence of financial stewardship is not the lack of capacity of our **PIPS** (Parishioners In Pews) but rather a poor understanding of what the Christian faith teaches about generosity and how we respond by becoming engaged in living our faith through our parishes and daily lives. In other words, our parishes have failed to teach the spiritual foundation of stewardship and provide meaningful engagement in services and serving that would result in substantially higher contributions. Accordingly, the primary focus of your parish stewardship process **MUST** be on all the elements and ways necessary to enhance the engagement of your parishioners with your services and how you serve others.

Think about some of the data presented. If church involvement is the strongest single predictor of giving, then you know what you need to do. You don't need another clever money solicitation campaign or cute giving thermometer in the parish hall. Instead, focus on teaching what God, Christ, and the Apostles said about generosity and providing the way to meaningfully embrace your parishioners in all aspects of your church work. In other words, you need to figure out how to convert your church from only a 90-minute time investment on Sundays to a more holistic investment throughout the week.

It is telling that the studies found that people who give their time to anything always give more money than people who just give money, even if they were not asked to give money. I am reminded of when I told the father of a daughter who wanted to play on my church basketball team that rather than merely paying the registration fee, he had to be involved as my assistant coach. Soon thereafter, without any prompting from me, he donated new basketballs once he saw the poor condition of the old ones. While basketball is certainly not one of the most critical ministries of a parish, it underscores the reality that once a volunteer sees a need with their own eyes, they are changed and want to address it.

Thousands of years ago, Greek philosopher Heraclitus said: "No man ever steps in the same river twice, for it is not the same river, and he is not the same man." Accordingly, your engagement inevitably changes the environment around you and could change how you and other PIPs act. There is nothing more potent than seeing a need to cause you to want to fulfill it. This is one reason I suggest that every child (and adult) should go on at least one mission trip to see the impact they can have on those in greater need.

When both my daughters came back from their mission trips sponsored by their Christian High School, they were forever changed, awakened, and much more willing to get engaged in the causes that make a difference to them. I believe that is one reason my Johns Hopkins PhD daughter lives in the jungles of Trinidad, trying to save God's creatures and creation, and my professional actress daughter got so much from her mission trip experience performing a faith play in the third world.

You can achieve the same awakening result in your parish. All it takes is consistent education in Christian stewardship and providing endless opportunities to get engaged and make a difference. Remember the DOSE hormones that your Creator has your body release when you serve others, all of which make you feel better and more fulfilled? By shifting the stewardship focus to engagement liturgically, sacramentally, and in ministries, you help your parishioners better invest their most valuable asset of time, which will produce exponential results for them and your parish. This is what it means to be a disciple of Christ. Or, as I like to say, **"Writing a check doesn't make you a church steward any more than standing in your garage doesn't make you a car."**

## STEWARDSHIP CALLING COMMANDMENT #4.

### **The Mob Was Wrong.**

Confession time. I love mob movies and shows. It's a genre that I find horribly conflicting for a Christian but entertaining when the bad guys get "whacked" (that's killed for those of you not familiar with this genre). So, what does such an un-Christian topic and heading have to do in a Roadmap about helping increase church stewardship? I use it to point out that the opposite is true in your parish.

In every mob movie or show, there is eventually a scene where the person getting "whacked" is always told the same thing to excuse the upcoming crime. "It's not personal, it's just business." I am not sure that it makes it any easier for the soon-to-be corpse; however, perhaps it makes the perpetrator feel a little better.

That said, the opposite is true in church stewardship. It must always be personal! Very personal. As personal and individual as possible. Do you want proof? Let us explore the modern-day fascination with examining "best practices" in solicitation by studying an important stewardship Biblical story about the best stewardship solicitor in history (Luke 19:1-10).

### **The Conversion of Zman.**

Zacchaeus (or "**Zman**" for purposes of our mob metaphor) was an evil, wicked, and thieving tax collector. At this point, let me definitively state that if you or a family member work for the IRS, I want to be very clear, I am sure they are wonderful, good, and honest people. I am not looking to pick a fight with the IRS because who wants to get audited as a result of something they say in a church stewardship book?

But as I repeatedly tell clergy and teachers of Scripture, if you do not teach the context of Scripture, we in modernity will likely miss the message. Back in Christ's days, tax collectors were crooks who would extort whatever they could from the people, pay the portion Rome demanded, and then keep the rest for themselves. The better they were at threats, intimidation, and extortion, the wealthier they became. (Is the mob metaphor becoming clearer?)

Then, one day, Jesus came to town, and the crowds gathered in such great numbers that Zman, our short Jewish tax collector, could not see Christ. (Again, understand I am not making an ethnic joke, as they were pretty much all Jews back then.) While we are told his size was an impediment, in my vivid imagination, I can also easily suspect that the "faithful" coming to see the Lord would likely have wanted to use their sharp elbows to "box out" this evil Zman.

The rest of the story is captivating, and Christians are no doubt familiar with it. However, I do not want you to miss the critical stewardship story. Christ went to Zman's

house. He made a personal visitation and solicitation. He cared enough to make it personal and not treat it as some other peripheral “business” interaction.

Picture the scene when Christ gets underneath the sycamore tree that Zman climbed to get a better vantage point, only to hear his name called as the Lord invited Himself to Zman’s house for dinner. (I wonder what that conversation was like with Zman’s wife?). However, what we do not have to wonder about is how all the other “faithful” felt.

Of all the “righteous” people there, it was the evil Zman who won the Lord’s dinner lottery. I love that in St. Luke’s dedication to detail, he felt the need to add that the rest of the crowd “complained” or “murmured” (depending on the translation). Instead of celebrating that the Lord picked the worst non-steward to solicit and convert, they selfishly wanted it to be them.

We can all understand that sentiment. However, I believe the Lord is telling us something critical about how we must solicit engagement with our parishioners through personal interactions. Of course, the powerful part of the parable ends with Zman immediately giving half of his belongings to the poor and refunding everyone he defrauded fourfold (that would consume the remainder of his wealth). In other words, Zman actually did what the Rich Young Man we discussed in the previous parable would not; namely, he went “all in.” (My final homage to the mob metaphor). In that II Corinthians 5:10 Moment, Zman converted the trajectory of his life and could be born again as Zacchaeus, a man of God and follower of Jesus Christ.

Thus, the Lord reinforces what the empirical studies show: personal solicitation is the most effective form of asking for anything, including parish engagement. It is also the only thing that will move the needle of stewardship generosity education and behavioral modification.

### **“wHoly Engaged” Personal And Small Group S&E Processes - Three Plans To Personally Engage With All Parishioners.**

Understanding the scriptural foundation and theory of personal engagement is made achievable with a plan. My Igniting The Flame Retreat offers Plans A, B, and C, all of which are better than what most parishes do currently. In order of impact, they are:

1. PLAN A: Each parishioner is visited in person in their home by a stewardship Ambassador from the parish,
2. PLAN B: All parishioners are invited to small group gatherings of about 10 parishioners at an Ambassador’s house,
3. PLAN C: Each parishioner is called on the phone by an Ambassador.

Plan A is better than Plans B or C, which is why it is Plan A. And Plan B is better than C. However, to do stewardship engagement properly and most effectively, a parish should not do anything less than Plan C. Gone are the days of just letters and emails, which all the research proves are ineffective and rarely move the stewardship needle. Let me define terms and explain the process to allay the fears of speaking about money, which is not necessary.

## 1. Who are Parish Ambassadors?

The data and research all show that personal, in-home visitations are absolutely and unequivocally the most effective, and no other strategy is even close. If you remember nothing else from this S&E Chapter, please remember that **to have the most successful stewardship and engagement ministry, you MUST visit with EVERY parishioner in a HOME** just as the Lord did with Zacchaeus and so many others. This is done by what I call “**Ambassadors**” (but you can call them “ooga boogas” or anything else you like).

The primary purpose of Ambassadors is NOT to solicit money. The absence of money is not the root cause of any problems the parish faces. The Ambassadors are like the Apostles and other evangelists sharing the Why, Vision, and exciting and transformational ministries of the parish. The Ambassadors merely seek to share while encouraging parishioners to become more engaged liturgically, sacramentally, and in ministries. Imagine the consequences of sharing in the joy of life-changing ministries and the impact of the parish as it brings people closer to Christ and each other.

Ambassadors generally include the existing leaders of the parish and its ministries. This included the Parish Council members, stewardship ministry, and other ministry leaders. The objective should be to recruit the number of Ambassadors equal to a little over 10% of your number of steward units. This is because the Ambassador will take care of their family and only nine others. If the number of Ambassadors is at least equal to 10% of the parish, and they take care of themselves and nine others, then 100% of all parishioners are personally reached. What the Ambassadors need to cover with the parishioners is outlined below to assuage anyone’s fears and ensure that they will not need to ask for money.

When I explain this process at my Igniting The Flame live programs, I ask how many people are comfortable going up to strangers to speak with them about something they believe in. Almost always, about 10-15% of the people raise their hands. For the remaining 85% of people, I ask if they have at least nine other parishioners/families who are their friends or relatives. Everyone acknowledges they do. So, we start with this larger group of 85% of Ambassadors picking the nine parishioners/families they know or are related to.

The remaining parishioners are what I call in the Orthodox Church the “**CEOs.**” This stands for **Christmas & Easter Orthodox**, who appear in church infrequently and generally only during those two holidays. (I am also familiar with the terms “C.A.P.E. Catholics” (who attend church only on Christmas, Ash Wednesday, Palm Sunday, and

Easter) and “PTPs” (Part Time Protestants). The other 10-15% of Ambassadors who are comfortable talking with (relative) strangers select nine people from among the CEOs to ensure that no steward is left unvisited. Now that we know who the Ambassadors are, we can explore how they are deployed.

## **2. Personal Engagement Plan A.**

In Plan A, EVERY parishioner is visited in their home by an Ambassador. Since most Ambassadors already know (or are related to the parishioners they chose to visit), getting 15 minutes in their homes is not a problem. **This is no steward left behind time.** You must visit them at home because if you visit them at their business, they are likely distracted and are focused on things other than the life-changing ministries of your parish. In their homes, they are also more comfortable and relaxed. Plus, they can't leave once you get there. They are highly unlikely to flip you the keys after you arrive and tell you to lock up after you're done talking to yourself.

Remember, if you want a truly successful S&EM, you must visit everybody at home. The mob was wrong, and S&E (like salvation) is intensely personal. Every study I have ever seen has shown that what I call “pen pal campaigns” using snail mail or email to ask for S&E pledges are less effective and rarely get new or better results. They do not “move the needle” on a sustainable basis. If insanity is doing the same thing over and over again and expecting a different result, don't you think it's time that you stop being insane?

Yes, you will still use snail mail or email for some communications, and in the Communications section below I will help you communicate far more effectively. However, nothing will change the trajectory of your parish more than making it personal and meeting face to face, just as the Lord did repeatedly with great success. The question of what you will discuss in the brief in-person visitations will be discussed in detail below on what I cutely call the “wHoly Engaged” Personal Stewardship & Engagement Process. (Do you get the double entendre in the “wHoly” reference? OK, I am trying hard here!)

## **3. Personal Engagement Plan B.**

The data is clear that, without any doubt, one-on-one visitations are the most effective. However, if your parish is so large or time is limited, I offer a Plan B of small group gatherings. In this approach, the Ambassador invites up to 10 people to their house for a small group gathering. While still more intimate than an email, it loses the personal touch of Plan A. That is why it is Plan B. I will also present the process of what to discuss in small group Plan B visitations below in the “wHoly Engaged Small Group Stewardship & Engagement Process.”

## **4. Personal Engagement Plan C.**

A parish should never use Plan C. It is far inferior to Plans A and B. However, if all you are going to do is your usual and ineffective “pen pal campaign” by writing to



parishioners, then at least consider getting the Ambassadors to call each steward on the phone at their home (i.e., Plan C). The parishioners will not be as attentive as if you are looking them in the eye. It will also be impossible to as effectively execute the wHoly engaged presentations that I will discuss next. However, this form of personal telephone contact will still be marginally more productive than any email or snail mail “pen pal campaign” you will ever execute.

By now, you must agree with what Christ taught, and all empirical research has confirmed that the mob was wrong in parish S&EM. If you want to maximize the result, It is highly personal and cannot be performed as if it were just business. Getting in front of someone is the first critical step. What comes next to make the personal connection in the form of the wHoly Engaged Process is critical.

As presented above, the key to parishioners who are more spiritually connected, willing to serve, and contributing financially is to maximize engagement liturgically, sacramentally, and in ministry. So, how do we actually go about engaging people and reaching out to them in this personal solicitation of their time with the ask? My Stewardship Calling S&E wHoly Engaged Process is a proven method for incorporating all the Christ-centered methodology, empirical research, and practical psychological approaches to increase engagement most effectively and efficiently.

The image below represents the six steps in my Stewardship Calling wHoly Engaged Process that I will summarize. Each step is built on the previous ones, and thus, skipping steps will present problems for the next step. The first three steps are foundational and should take place before any parishioner is visited. The second three steps are the interpersonal steps that will inspire higher levels of engagement and contributions of time, talent, treasures, and tithes as a result of being built on a solid foundation.



A participant in one of my live Igniting The Flame programs humorously suggested I should not present my wHoly Engaged Process in a pyramid as it might conjure up incorrect notions of a pyramid scheme. However, the reason for this structure is to underscore the critical importance of building a strong footing in the first three foundational steps that provide the content to be used in the three interpersonal steps. So, let's explore the steps in my Stewardship Calling wHoly Engaged Personal Stewardship & Engagement Process.

## wHoly Engaged Personal Stewardship & Engagement Process.

Let us first discuss the Personal S&E Process of Plan A because it is far and away the most effective and interpersonal. Here is a brief description of those six steps:

**STEP 1 – PPS Alignment.** It is essential that, as the first step, your Priest, your Parish council, Stewardship and ministry leaders reach a consensus on your S&EM strategy. They must agree on the objectives, processes, metrics for success, themes, and implementation strategies so there is unity of efforts. If you do not do this, “stop, do not pass go, do not collect \$200.” Thus, for example, if the PPS leadership decides that your parish will be a percentage-giving parish on the journey toward tithing (something I highly recommend and will be covered in a later section of this Chapter), then all communications strategies and Ambassador training must be aligned with this transformational result.

**STEP 2 – WHY and Vision Determination.** As discussed more fully in Chapter 8 of my Roadmap, your parish must reach a consensus as to WHY it exists and where it is going (its Vision). While a strategic planning process that involves the entire parish is the most effective way to arrive at these critical elements, if that is not possible, at a minimum, it is essential that the entire PPS leadership and all ministries of the parish are in lockstep and able to articulate the WHY of the parish and the three or so key strategic objectives it will accomplish that define its Vision for the foreseeable future. This is critical not only for the cohesion and unity of the parish but also because the presentation of the WHY and Vision are essential elements the Ambassadors will share with the parishioners (as will be discussed in the sample Ambassador personal visitation agenda presented below). Please remember that the empirical research shows that people will give to an inspiring Why and Vision.

**STEP 3 – Council of Ministries and Materials.** In addition to the WHY and Vision of the parish, the other critical topics of conversation during personal Ambassador visits are the ministries and ways in which parishioners can become more engaged with the parish. In that regard, it is important to have effective S&E materials prepared to be left with the parishioners, some of which they will complete and return. These deliverables include: (a) the Parish Ministry Handbook (“PMH”) that describes all your parish’s ministries (discussed later in this Chapter), and (b) the “S&E Commitment,” which is your/their written commitment of the time, talents, and treasures given to you/them by

God you/they will return to your/their parish for His work (also discussed later in this Chapter). This last foundational step is critical to providing the Ambassadors with the necessary materials for the most impactful personal visitations.

The highly recommended process for developing these materials is through a **Council of Ministries** (discussed in more detail in Chapter 11 of my Roadmap). Simply, this is the organizational body of the leaders of all ministries of the parish, along with its clergy and parish council. Together, this Council of Ministries is best suited to create the most impactful materials that describe the various ways the parishioners can become more engaged liturgically, sacramentally, and in parish ministries. However, even if a Council of Ministries does not yet exist at your parish, the development of powerful materials that tell the story of engagement is a critical foundational step.

**STEP 4 - Ambassador Development.** In this first interpersonal step, the Ambassadors who will meet with all parishioners are recruited and trained to deliver the wHoly Engaged Personal S&E Process. As mentioned before, the Ambassadors naturally include the entire parish council and representatives from all ministries since the primary purpose of the visitation is to encourage parishioners to engage more fully with the ministries that they feel God is calling them to serve. Thus, since the Ambassadors are essential ministry recruiters, it stands to reason the ministries should be major contributors to providing Ambassadors.

After the Ambassadors commit to serve and are trained, they must select the parishioners they will visit. As mentioned previously, likely, about 85% of your Ambassadors will only want to meet with people who are their friends or extended family. So, they should go first to select the nine parishioners they will visit. An effortless way to do this is to gather all Ambassadors and then read off the parishioners in alphabetical order, with Ambassadors claiming the people with whom they have the closest relationship. As the data show, people will be far more responsive to people with whom they already have a relationship. This way, the commonality shared between the Ambassador and parishioner visited makes the discussion more personal, intimate, less threatening, and collegial.

After the 80% of Ambassadors who are only comfortable approaching people they know select their nine parishioners, then the 15% of extroverts who are comfortable discussing the Why, Vision, and ministries of the parish with relative strangers split up the rest of the list of CEOs.

**STEP 5 - Parishioner Visitation.** In the wHoly Engaged Personal S&E Process, the Ambassadors will arrange the time they can spend about 15-30 minutes with their chosen parishioners and actually make the visit. In the wHoly Engaged Small Group S&E Process, the Ambassadors will find the time when all their chosen parishioners can come to a small group gathering at the Ambassador's house. The agenda of what will be covered at either the personal or small group events is described below.

**STEP 6 - Follow-Up.** This is the last critical step that will help ensure 100% participation and that no steward is left out. As mentioned previously, the Ambassador will present the PMH and S&E Commitments to the parishioners; however, the Ambassador is not to collect the completed S&E Commitments because it will include a financial contribution that is confidential. Thus, the Ambassador will end their presentation by explaining that the parishioners are to prayerfully consider their blessings and what God has called and prepared them to do, complete the S&E Commitment, and send it to the parish office where it can be processed confidentially.

However, the key is that every two weeks after the visitation, the parish will inform each Ambassador which of their nine parishioners have not yet completed their S&E Commitments. The Ambassador will then follow up with those parishioners to see if they have any remaining questions and encourage them to complete their S&E Commitment. At this point in the visitation, the Ambassador lets their parishioner know that they will follow up with them every two weeks until the parishioner's S&E Commitment is submitted, thus informing them how critical their S&E Commitment is. Once again, this is NO steward left behind!

## **wHoly Engaged Personal Stewardship & Engagement Process Discussion Agenda.**

When you meet with your parishioners, what should you do? I will share a tried-and-true discussion outline and system that works. However, as with everything offered in my Roadmap, you should feel free to supplement or modify this agenda with other proven (or experimental) approaches to achieve the same end. We will first explore the Plan A personal approach and then look at the slightly nuanced differences in the agenda of the Plan B small group approach.

### **PLAN A: wHoly Engaged Personal Stewardship & Engagement Process Agenda.**

1. An opening prayer of thanksgiving
2. Discuss parish items of common interest (e.g., the top 3 things they like about the parish)
3. Share the WHY/Vision/ministries of the parish
4. Ask and address any comments/concerns
5. Review PMH and S&E Commitment forms
6. Explain you will follow up every 2 weeks until the church receives their completed S&E Commitment
7. Thank them and end with a prayer

**Step 1.** You should begin with a simple opening prayer of thanksgiving that focuses on the connection that you have with the person with whom you are visiting, the things that you have in common, and about which you should be very grateful to God. Feel free to substitute the prayer of your choice, but please do NOT merely recite a common prayer.

A rapid-fire recitation of memorized content is performative and not communicative or transformative. Any prayer is a sacred communication with your Creator and should be delivered as if you were directly addressing Him! Make it personal!

**Step 2.** Now, you can open a dialogue about the various items that you may have in common with the parishioner. For example, if you both have children engaged in a ministry, then you can talk about some of the activities associated with that ministry. Similarly, if you both have aging parents, you might share some of the activities that the parish has focused on in connection with its senior citizens' ministry.

However, what is critically important in Step 2 is what I call the “**secret question.**” Anyone who has ever been involved in sales or marketing at any time will immediately know why you will ask this question. Ask your parishioner, “**What are the top three things they like about the parish.**” There is no limitation on what they can talk about or what they can share. Still, you want them to open up by beginning a dialogue focused on the positive things that they appreciate about the parish, its ministries, and how it helps this parishioner. This secret question will provide you with some critical information that you will use a couple of steps from now. So, stay tuned.

**Step 3.** This is a critical part that allows you to share the WHY of the parish, the Vision of where it is going, and the ministries that are in place and being planned to enable it to fulfill its Vision better and achieve its WHY. This step is the reason why it is so critically important for parishes to have a strategic plan or some other process in which it has reached clarity and consensus about its WHY and its Vision for the future and a robust set of ministries that allows for greater engagement in the church other than just on Sunday.

Sharing the Vision of the parish and where it will be in two, three, or four years can be one of the most powerful ways to allow the individual parishioner to see a future and how they can partake in shaping that future. This is why it is so critical for a parish to have a WHY Statement that points to the heart-felt reason why the parish exists and why they should belong, as well as the tactical Vision of what it hopes to accomplish and where it hopes to be in the next several years.

**Step 4.** Now, it is time to ask the parishioner to share any comments or concerns they have. Oftentimes, this will be a positive conversation, but sometimes, you will hear them articulate some challenges or issues they have faced or are facing that are causing them to be less engaged with the parish. They may also have questions. It is critically important to listen attentively and aggressively to what they're saying and ask follow-up questions to make sure you understand. Please do not get defensive and argue with them. Merely listen attentively and understand they are speaking their feelings and truth. Politely ask whatever is necessary to ensure that you (and they) understand the actual “root cause” of whatever challenge or problem they or their family are experiencing.

At this point, if you know the answers to their questions or solutions to their problems, then this is a great opportunity to provide those answers and solutions. By so

doing, you are creating a further, closer relationship with the parishioner by being the source of a solution to a problem or an answer to a question that they've been dealing with. If you don't know the answer to the question or problem, then this is another opportunity for you to say, "I will get back to you with that answer."

It is critically important to understand that it is far worse to promise to get back to somebody with an answer and not do so than never to promise to get back to them at all. But if you want to increase the level of engagement of your parishioners and your connection with them, the best way is for you to identify any questions or problems that you don't know the answer to, diligently find the answer, and ensure that you (or the person with the answer) gets back to that parishioners as soon as you possibly can. Once again, when you are the vehicle through which their problems are solved or their questions are answered, you are not only furthering a higher level of engagement between you and that parishioner but also underscoring the fact that the parish loves and cares about them. The importance of this step, while sometimes uncomfortable, cannot be overstated.

**Step 5.** Now, it is time to pull out the PMH and the S&E Commitment. It is in this step that you use the critically important answer to the "secret question" that you gained in Step 2. In answering the top three things they liked about the parish, they are telling you what they are already interested in and what they appreciate. Chances are, this is the greater opportunity for you to engage them further in the ministries that are supporting those activities they understand and desire.

Thus, for example, if they shared with you that they liked the parish youth ministries, this is not the time to show them in the PMH, the denture replacement ministry. Instead, you should fast forward to the pages in the PMH that talk about the various youth ministries. At this point, the parishioner is likely to look at some of the names of the leaders of those ministries, or even some of the titles and descriptions of the ministries, and identify those that they may not have known existed or see the names of people that they enjoy working with. This plants the seed for where they may see ways in which they can get engaged in the parish. Just through the vehicle of the secret question, you identify the kind of "shopping list" that you can use to talk to them about how they can get further engaged in the ministries of the parish.

This may also be a time when additional questions are raised when they indicate that they didn't fully understand what was going on with this particular ministry and wanted further information. At this point, either you as the Ambassador can find the answer and get back to them, or perhaps better yet, get the ministry leader to get back to them. In this way, the ministry leader starts to form a personal relationship with the individual parishioner such that they may be able to encourage them to engage in service in that ministry and thus fulfill the things they feel that they are called to do by God.

Also, in Step 5, the Ambassador would present the S&E Commitment that has already completed with the individual parishioner's name, address, email, cell, and names of family members or their demographic information. You can ask them to update

any demographic information that has changed. The Ambassador would also point out the blank line on that S&E Commitment where they will enter their annual stewardship tithe, along with the encouragement for weekly giving of that annual tithe.

Critically, the S&E Commitment lists all the parish ministries, and you ask the parishioner to check off the ministry(ies) in which they would like to engage. Be sure to follow the process for both spouses to enter their ministry selection, typically by using their initials next to the ministry of their choice. (Although I prefer to have each spouse fill out their own S&E Commitment to underscore the personal responsibility of stewardship.) Remember that the greater levels of engagement that one has with the parish, the more they will give financially. Thus, I tell parishes all the time that the critical aspect of that S&E Commitment is getting parishioners to sign up to work in a ministry.

**Step 6.** It is this step that introduces the accountability of your “no steward left behind” approach. At this point, the Ambassador would share that they are not going to collect the T&S Commitment as it will potentially contain confidential information like the level of their financial contribution, which is only to be reviewed by the few people in the parish office who have access to such information. Instead, the Ambassador will let the person know that their S&E Commitment is to be delivered to the parish (by mail or email if in written form, or electronically if possible).

The Ambassador also shares with the parishioner that they will be notified by the church office every two weeks of any of their parishioners who have yet to turn in their S&E Commitment, and you will reach back to this parishioner to find out if there is any information they need. This two-week follow-up cycle will continue until the church office notifies the Ambassador that this parishioner has provided their S&E Commitment. In this way, the stewards will know that they are accountable and that they are also being ensured that every opportunity is offered to answer their questions and participate in the ministries of the parish.

**Step 7.** A closing prayer and a thank you are in order after everything has been accomplished. Obviously, the Ambassador should be very enthusiastic in thanking the parishioners for their time. In addition, I usually like to ask the parishioner being visited to offer the closing prayer to try to get them in the mindset of the prayerful acknowledgment of the gifts that they have been given and their opportunity to serve others. In that way, we are joining together in this communion of a common prayer.

Allow me to offer a few additional notes regarding the Stewardship Calling wHoly Engaged Personal Stewardship & Engagement Process. If the home being visited includes a husband and wife, it's great if the Ambassador brings their spouse with them. Similarly, if the home being visited is a family, and there's overlap between the Ambassador's children and the steward's children, bringing your children along is an additional great idea. In this way, the children have an opportunity to engage more individually and directly and witness that their parents are stewards and engaged in the parish.

While it has taken quite a few words to describe the wHoly Engaged Personal Stewardship & Engagement Process, it generally takes no more than between 15 and 30 minutes for the entire visit. This is not an extensive intrusion on the time of either the parishioner or the Ambassadors, who, for the most part, already know and like each other. However, something very magical can happen as the individual parishioner and Ambassador begin to forge an even deeper relationship and an opportunity to engage in working together for Christ's Church.

## **PLAN B: wHoly Engaged Small Group Stewardship & Engagement Process.**

Here is a sample agenda for my Stewardship Calling small group wHoly Engaged S&E process:

1. Opening prayer, welcome/icebreaker
2. Dinner and/or fellowship
3. Program
  - A. the WHY, Vision, and ministries of the parish
  - B. 2 or 3 testimonials
  - C. present PMH and S&E Commitment
  - D. explain next steps (including 2-week follow-ups),
  - E. answer any questions
  - F. thank them, and closing prayer

**Step 1.** It is wonderful to begin with an opening prayer of thanksgiving offered by the Ambassador host(s). Remember that in the small group gathering, there can be up to 10-12 individuals, which can represent five to six couples, not all of whom may know each other as well. As a result, some form of an “icebreaker introduction” may be helpful to allow the individuals to get to know each other better.

**Step 2.** It is often helpful to have some form of refreshments or a light dinner. In fact, many times this is done in the form of a potluck dinner in which all the guests bring some dish to feed the group. But it is fine even if only light beverages or snacks are offered. Indeed, some research shows that when food or drink is involved in any form of solicitation, the results are often 3 to 4 times better than if food or beverage is not involved. (It is for this reason that I excuse the weight I have gained in all the decades I have been doing stewardship visitations and solicitations.)

**Step 3A.** This is the formal program that you will note tends to generally follow the agenda of the wHoly Engaged Personal Stewardship & Engagement Process program. Thus, part A will begin again with a clarion call to the WHY of the parish, a sharing of the Vision of the parish, and a highlighting of how some of the ministries are going to advance that Vision. More details will be provided for them in the PMH. At this point, you will note that because there is a group gathering, it is not as easy to ask the “secret question” about what they most like about their parish in order to interact with them on a one-on-one basis. Nevertheless, you can continue to ask the “secret question” to the group and



have an open conversation about the various ministries and other activities at the parish the parishioners appreciate. This dialogue, in turn, will help set a very positive tone for what follows.

### **Testimonials.**

**Step 3B** is one of the most critical, valuable differentiators between the Personal and the Small Group S&E process. This is where you get two or three testimonial presenters to share their stories about the incredible impact that the parish ministries had on their lives. A good mix is to have one person who is a beneficiary of a ministry share the positive benefits they received and a second presentation from someone engaged in providing some ministry services (not necessarily the same as the beneficiary).

They will share how such ministry service made them feel and how glorious it was to be able to offer their gifts and help others. Those testimonials tend to sound like: "I was busy in my life and very successful in blah, blah, blah, and then I volunteered with this ministry project, and the feeling of joy I had was unlike any other in my life." When people tell their personal testimonials, they speak to other people in a way that all the preaching in the world can't possibly replicate. That is the power of personal testimonials.

Please allow me a little digression to offer a testimonial about testimonials. I was involved in soliciting engagement and contributions for a Christian retreat center. I could give an inspiring presentation with the right PowerPoint and facts and figures. However, I found the most effective part of my presentation was when I had several high school students from that community who had gone to the summer camp at this retreat center share their experiences.

They were high schoolers, so, of course, they would fumble and stumble with a lot of "uhms" "ahs" and "rights?" even though I helped them rehearse their presentations. But when these young beneficiaries spoke, they captivated everybody's attention. They told personal stories about how they were brought closer to Christ or some other kids. Some talked about the closeness they felt with their spiritual father and a meaningful confession experience that changed their life and helped them make a transformational decision. When I looked into the eyes of the donors and asked for their reactions, I realized they were thinking: "This is the kind of ministry I want for my kids/grandchildren/Godchildren to experience. This is what I want to invest in." Donors feel better about investing in life-changing experiences.

I could see the synapses connecting in the eyes of the donors as they witnessed how Christ was meeting these children at the summer camp and changing their lives forever. Without a doubt, the level of generosity that followed once the donor could actually see the impact of their supporting transformational ministries was unbelievable. It is for this reason that I always tell every parish that you should have a regular habit of providing testimonials in the church both from the beneficiaries and the ministry volunteers because of the powerful impact that it has and on allowing the dots to get connected between a dollar and an effect on someone's life.

The generosity was not limited to financial contributions at my Diakonia Retreat Center (**DRC**) presentations. Some people asked me what else we needed for the DRC. Two of them were doctors and volunteered to serve as the “doctor on call” at the camp. Others volunteered to lead arts and crafts, sporting activities, or even nature walks. These professionals were very busy; however, they felt called to make a difference by using their gifts to help the youth. And as they got personally engaged in this DRC ministry, they increased their financial contributions. It’s all personal; it’s not just business.

Here is the brutal truth. We are the only impediment keeping us from serving Christ and His people more intensely and effectively. It’s not your “day job” or other “busyness” of your life. It’s a personal choice of how you spend your 24 hours each day rather than all the other excuses in the world. I understand and have used excuses myself all the time before I realized my calling. But once I understood my II Corinthians 5:10 Moment was coming and one day I would stand before the “awesome judgment seat of Christ” to account for what I did with all the gifts I had received, I discovered the priority of serving, loving, and helping others was the best use of my gifts and limited time here on earth.

Pastor Rick Warren once said in a commencement speech that as he prayed with people on their deathbeds, they never asked to see their trophies again or wished they had worked more. It is all about loving and serving others that brings the greatest fulfillment. The enormous value of serving and loving others was confirmed in my podcast interview with a good friend (and former client), Jim Huling, who co-authored the Covey organization’s Four Disciplines of Execution. Testimonials make these values clear, and serving in parish ministries provides the opportunity for all parishioners to experience the joy of service. Never feel like you are imposing when you invite parishioners to engage in their parish and ministries more deeply. You are helping them do that which will make them feel better about themselves and have a better account when they stand before Christ.

Allow me a second testimonial for testimonials. I helped a large Episcopal parish with about 1,200 families reimagine their S&EM. They realized they could not do a personal visitation program given the number of parishioners, so they opted for my Plan B wHoly Engaged Small Group Gathering process. They set an aggressive agenda of trying to reach all 1,200 families within three months by having multiple small group gatherings every Friday, Saturday, and Sunday night for every week of those three months, with multiple people attending at any given point in time. After about three weeks, I checked in with the president of their parish council (i.e., Senior Warden of the Vestry), who was my law partner. He told me that he had gotten a complaint call from a parishioner that previous Sunday night. I told him I had heard every possible complaint, so I couldn’t wait to listen to this one and help him respond. However, I was shocked to find an entirely new complaint I had never heard before.

To understand the complaint, you need to understand what happened at these small group gatherings. In every small group gathering for those first three weeks, after

the planned two testimonials were provided from a ministry beneficiary and volunteer, inevitably, one of the other parishioners raised their hand and said, “Can I share my experience with the ministries of the parish?” Then, at 100% of the small group gatherings, a second parishioner raised their hand and asked to share their experiences with ministries of the parish. Finally, at 100% of small group gatherings, a third person raised their hand and suggested they go around the room so that everyone could share their various transformational ministry and parish experiences. These small group gatherings became actual “love fests” where people felt so good about the opportunity to be able to work together in service to other individuals and in service to their Lord and Savior Jesus Christ that they didn’t care how long the evenings lasted. They had an uplifting experience.

So now we get back to the Sunday night complaint from my law partner’s parishioner. This parishioner called to complain that they had been hearing from all their friends about these incredible small group gatherings, and they had not yet been invited to one. They wanted to know why they were being excluded from the “love fests!” Can you imagine a steward calling you to complain because they had not been solicited? This is the power that the Holy Spirit brings when we enter into dialogue and join together in service with Christ and each other.

**Step 3C.** After the testimonials, the parishioners are asked to pull out their PMH and their S&E Commitments provided to them, and the Ambassador explains them. This is also the time to ask the parishioners to review and update their demographic information. The Ambassador will also inform them that they will fill out their annual stewardship tithe amount and then, most importantly, identify which of the ministries they will join and return the S&E Commitments to the parish office.

Again, because we don’t have a one-on-one session, it’s harder for the Ambassador to identify what a particular person or said was a ministry that they got value out of and focus their attention on the ministry handbook in a very personal manner. Nevertheless, if, in the open conversation, some of the individuals identified some ministries they appreciated, the Ambassador can point to those pages of the PMH that focus on that ministry so that the connection can be made.

**Step 3D.** Here, the parishioners are informed about the two-week follow-up process if they don’t submit their S&E Commitments forms, again reinforcing the accountability of our “no steward left behind” policy.

**Step 3E.** Now is the time to answer any questions parishioners have about the process and what’s happening about S&E. Oftentimes, at this point, a discussion might ensue regarding the Vision of the parish and some of its direction or ministries.

**Step 3F.** The evening ends with a parishioner offering a closing prayer of Thanksgiving.

## What's Missing?

Now, here's something you might have noticed. At no place on either agenda did you see the Ambassador talk about money other than pointing to the place in the S&E Commitment where their annual stewardship tithe would be filled in. The reason for this is because it's not the money that you are going after primarily. You want their engagement because the data empirically and unequivocally shows that the more people are engaged with their parish sacramentally, liturgically, and in ministry, the greater the amount they will give.

That's not to say that no discussion about the future financial needs of the parish can occur. If you are comfortable discussing that topic, by all means briefly do so. However, focusing on the parish budget is not the objective because people do not give to budgets. They give to Vision and WHY. So, if a discussion is to take place, it is merely to reinforce that the parish is a percentage-giving church on its way to being a tithing parish. You can direct people to identify the fact that by providing their annual stewardship tithes on a weekly basis, the parish is better able to achieve its Vision. So, for any Ambassadors who were worried about asking for money, as Holy Scripture says, "fear not."

## The Ten Things To Do To Ask For Engagement.

There are a variety of reasons why people are uncomfortable asking for money, but when they are working on something and need help, they are more comfortable asking for assistance. Thus, if the WHY and Vision of where the parish is going is viewed as a journey that needs help, the ask becomes closer to one's comfort level. Another impediment is that most people are generally not trained in how to ask for money. I can recommend quite a few books to help in that process, but in the interest of time, allow me to offer my summary version of the top 10 things you need to consider.

**1. Be Like Christ.** Teach what Christ said about giving. Because most people don't know what He said, you can stick close to the examples He provided once you apply them to current times. It is exemplary to start with the teachings of our Lord. Still, you can't just tell a history lesson without applying it to their lives today if you hope to make a connection (e.g., teaching about giving "first fruits" is not a solicitation for parishioners to bring produce to the church).

**2. Have Credibility.** You must model the generous behavior you teach and ask others to emulate. You cannot preach what you do not practice. Do not tell people the parish is a percentage-giving church on the way to becoming tithers unless you are on that same journey. Indeed, if comfortable, you can share the struggles and joys you realized on your journey to make yourselves more relatable and credible. If you ask people to become more engaged liturgically and in ministry, then you must lead by example and do the same.

**3. Focus On What Matters and Drives Behavior.** Always talk about the parish's WHY and Vision. Use examples of the life-changing impact the parish is having. Paint the picture of where the parish is going to be in three years with the full S&E support of the parishioners. Let people know that whatever they contribute, whether time or treasure, is making people's lives better and bringing everyone closer to Christ and each other. **People give to causes, not crying.** Stop talking about meeting a budget or paying bills or the crisis de jure (e.g., the leaky dome, the broken air conditioner, the parking lot potholes) as those never inspire anyone and merely allow listeners to doubt the effectiveness of the leadership. The goal is always the inspiration of the impact both now and in the future. Stop crying and start exalting!

**4. It's Personal.** I have talked extensively about this absolute truth that can never be overstated. Parishes must build relationships with their parishioners. People will give more of their time and resources to people they trust and when asked in person. This is why pairing Ambassadors with friends and family relationships is extremely helpful.

**5. Practice Makes Perfect and Mistakes Make You Better.** Asking people for anything requires practice. Clearly, mistakes will be made, and lessons will be learned from each successive interaction. However, a parish can provide training for their Ambassadors on how to genuinely engage with the parishioners on the WHY, Vision, ministries, and life-changing impact the parish is having. Let Ambassadors know mistakes are fine as long as they learn from them. There is an old apocryphal story about Thomas Edison, who a reporter interviewed after his 1,000th experiment, in which he failed to produce electric light. He was asked, "How does it feel to have failed 1,000 times?" Edison supposedly responded, "I did not fail 1,000 times. I discovered 1,000 things that will not produce light."

Please allow me a personal testimonial of failure. For example, once, when I was turned down for a major gift for the United Way by a good-sized accounting firm, out of frustration, I ended the interaction by telling the managing partner who refused to contribute or even let me make a presentation at his firm, "No worries, regardless of your decision the member agencies of the United Way will be there for your employees when you need them." The minute I hung up, I realized how horrible my passive-aggressive response was, regardless of how positive my tone was.

After a moment of reflection, I reached for the phone to call and humbly apologize when the switchboard operator hollered out to the bullpen where all the solicitors were working, "Who just hung up on XYZ firm? Because the managing partner is calling." After sheepishly popping my head up over the cubicle tops to take my turn in the game of "whack a mole," I accepted the call.

I tried to preempt what I was sure would be legitimate criticism by trying to offer a full confession, apology, and contrition. Instead, I got interrupted by the managing partner, who said he had a moment to reflect on what I said and realized all the charities were there 24x7x365 for his employees and all those in need, and I was right to point

that out to him. As I uttered a silent prayer to the Lord, the managing partner said he wanted to make a very generous contribution and asked if I accept his apology.

I thanked him profusely and said I would accept his apology, but I first needed to completely apologize for my inappropriate behavior and comments, which he graciously accepted. He laughed, and we “hugged it out” over the phone, particularly after he learned I was a lawyer at one of the biggest firms in town. I learned a lesson, as did he.

The Holy Spirit worked in both of our hearts. When I later ran into him in my professional capacity as a lawyer for a client, he remembered I had taught him a valuable lesson about taking time to serve others. God truly works in mysterious ways and chooses sinful and unworthy servants like me to do His work. And by God’s grace, with the lessons I learned that year, I was able to raise substantially more money for the United Way agencies.

**6. Make it easy to give.** The data show that people making tithes and offering online give 32% more. Folks, why is Amazon so successful? One reason is that they made finding and receiving everything so much easier. You can order anything, and they will deliver it to your door. If you don't like it, you can easily send it back and get a full refund with just a few clicks. They have created a quality experience and made everything easier. Two great lessons every parish can learn.

My wife and I are blessed to be stewards of four different parishes, and I decided to assess their online giving systems. In one, I had to go through seven screens of providing tedious information they already had about me and my family. When I finally got to the screen to transfer funds, it said: “I am sorry, we cannot process your contribution at this time. Please call the church office.” If I were a peripheral donor, I probably would never have followed up. But I was doing an Igniting The Flame presentation to their parish council, and when I told my story, the parish leaders lowered their heads in shame. I assured them this was easy to fix with the proliferating technology, and they took my advice and now take my money much more quickly.

One of our other churches had my money after the second screen and in less than 3 minutes. Imagine how that made me feel about the professionalism and integrity of that parish. Technology eases matters, so make it easy to give. And remember that millennials and younger parishioners rarely carry cash. They use their mobile devices and occasionally an ATM card. So why doesn't your parish have an iPad kiosk that accepts contributions from touch, tap, swipe, Zelle, Stripe, Apple Pay, PayPal, Square, and countless other online payment vehicles?

I want to make our annual stewardship tithes for each of the four parishes by transferring shares of mutual funds we own that have appreciated. This way, the parish gets the full fair market value of those transferred securities, I get a full deduction equal to the fair market value, and I do not have to realize any tax for the amount by which the value exceeds my basis. (I'm not cheating the IRS. I am following their rules.)

However, I had to help each parish set up a brokerage account to receive the transfer of shares (which they immediately sold and used the cash). Once I explained how American Baby Boomers owned \$68 trillion they would transfer on their death over the next several decades (most of which is held in appreciated stock, which they would gladly contribute to avoid the tax hit), the light bulb went on in the parish leadership. And now, these parishes are receiving more and more of such contributions of securities. Your parish must have a brokerage account to accept gifts of readily marketable securities and advertise those facts and the benefit to your donors.

**7. Make the Ask.** Yes, I know and believe God will provide. But God and Christ encouraged prayer and asking. Indeed, the Lord's prayer is both a request ("give us this day our daily bread and forgive us our trespasses") as much as it is a description of what we will do ("*forgive our trespassers.*") Before several miracles He performed, Christ asked, "what do you want me to do?" I am not suggesting the evils of what I pejoratively refer to as "ATM God," where parishioners figuratively drive up to God's ATM window, swipe their stewardship card, make their request, get what they came for, and then drive off all the richer.

I am merely reminding you of what:

(a) the Holy Gospel and Christ teach, "*Ask and it shall be given to you...*" (Matthew 7:7),

(b) every sales training program in history has emphasized the importance of making the ask for what you want,

(c) modern self-help books all stress the importance of asking for what you need,

(d) professional hockey legend Wayne Gretzky said: "You miss 100% of the shots you don't take."

Share the parish's WHY, Vision, life-changing ministries, and the impact the parishioners' generosity will have, and then ask for them to experience the joy of giving as receiving the God-given "DOSE" (of Dopamine, Oxytocin, Serotonin, and Endorphins) and the knowledge that they are making progress on their II Corinthians 5:10 Moment when they tell their story before the awesome judgment seat of Christ.

**8. Stop Talking After The Ask.** I cannot tell you how many times people have lost the "sale" by talking past it. You must let the Holy Spirit do the heavy lifting and give the information recipient the time to investigate their heart and gut and examine the alignment of their WHY and Core Values with the opportunity you have presented. After you have shared the parish WHY, Vision, Mission, and life-altering impact of their generosity, and you've gotten them excited, be quiet! The Holy Spirit will take it from there. And it will be okay even if they need more time to process prayerfully. And by the way, empirical research shows that those who ask more questions are better liked than

those who keep talking and offering advice (Huang et al., 2017). So, keep asking, and you will learn more about others and the world and be able to grow, be trusted, and like it more.

**9. No Means Maybe, and Maybe Means Yes.** Anybody who has ever been in sales knows the saying, “No means maybe, and maybe means yes.” Do not take rejection personally or believe it is forever. This is an old sales axiom that applies, and I am not trying to demean pursuing S&E for parishes to sales techniques. However, sales techniques were developed through psychological research and experiments. One thing that has been demonstrated over time is that sometimes their “no” means “no,” and it is final. Again, it is not personal because it probably is not about you (unless you did something to make it personal). Sometimes, there is a good reason for the no. When it is clear it is final, after you have politely seen if there is any more information they need, sincerely thank them for their time and move on.

However, more often than not, if your cause is righteous and your integrity is proven, it may take some people more time to get to the point of being ready to participate or donate. They may need to review their situation (without you hovering over their calendars or bank statements). They may have unresolved questions, which you can slowly unearth and then find answers to. They may need more education about the scriptural understanding of S&E. They may be slow learners, and you are a fast talker (the latter being a relevant self-indictment). Or perhaps that day, your message just was not the most effective.

I love the experiment leadership guru Simon Sinek did with a homeless woman who always had a sign saying “I’m homeless and hungry” or a similar iteration. She told Simon she made between \$20-\$30 in eight to ten hours of begging. He asked her permission to experiment with her message and promised to make her whole for any losses if it failed. She agreed.

He changed her sign, and she made \$40 in 2 hours. While she left prematurely, she could have made \$150 in a similar full day. What was the difference? The new sign said, “If you only give once a month, please think of me next time.” The message shifted 180 degrees from it being all about her and what she needed. Instead, it started by focusing on the donor’s situation and recognized the many “asks” they inevitably received. It was no longer about the recipient and all about the donor. In that simple change of message, with Simon Sinek’s, help her sign overcame the two big objections donors have by acknowledging: 1. I know you can’t give to everybody who asks, and 2. my cause is legitimate because I will still be here next month or whenever you’re ready and able. Sometimes, you just need to refine and reorient your message and request.

Regardless, remember the WHY of your parish and your own personal WHY. Some people may need more time to understand what it means and how, regardless of their exigent circumstances, they remain blessed and able to bless others. Our problems are “first world” problems and not as severe as many others in the world. Our worst day in America is generally far better than the best day for those struggling in third-world



countries or adverse circumstances. However, your parishioner's problem is still an issue for them, and we must understand and extend grace, love, care, and concern.

**10. Thank always, repeatedly, sincerely, and publicly if possible.** Later in this Chapter 10, I will share the extensive empirical data and research that underscores how critical it is to thank constantly in your parish, and especially in your S&EM. The data shows you cannot thank too much. I like to say, "Thanking is like voting in Chicago. You must do it 'early and often,' and even after they die." I can use that old joke because I grew up on the Southside of Chicago, where the "vote early and vote often" rule got its beginning. (Indeed, I have reason to believe someone is still voting using my name in the United Steelworkers Local 1010 elections after my last of four summers working in the mills during college.)

Dear brother or sister, we do a poor job of thanking people. And I am not just talking about plaques on walls. I am talking about sincerely thanking and showing gratitude. So, these are the 10 things that, if you can do, will help you succeed.

## The Eight Reasons People Hate To Ask.

However, looking at the top ten things to do when asking people to give is only helping you halfway. So why do clergy and laity have so much trouble asking people to contribute time, talent, treasures, and tithes for their parish/ministries? If our WHY is inspirational, our Vision worthwhile, and the impact we have on people's lives transformational, why is it hard to ask others to join us on this salvific journey? Of course, the reasons are variable and sometimes uniquely particular. However, allow me to offer eight reasons people don't like to solicit, even for causes they believe in.

**1. Fear of Rejection.** From the first time you were rejected by that boy, girl, parent, or friend, you learned how bad it felt. Very few people enjoy rejection. And those that do are often institutionalized. However, the fear of rejection usually comes from the misguided notion that it is a rejection of you rather than what you said or how you said it. It is rarely personal, and so you must not take it that way.

Instead, as with every successful athlete, businessperson, theologian, or Saint of the Church, it is not the rejection that defines them but what they do after it happens. It is the ability to stand up, dust off the dirt, take the rejection in stride, and move forward. Football quarterbacks are often told, like pitchers in baseball games, that their memories should be no more than 5 seconds. What happened in the previous play cannot influence what is going to happen in the next play. If you stay focused on your WHY, Vision, and the righteous impact that you can have on people's lives, then the rejection is only temporary until the individual that you are soliciting realizes what you already know.

**2. Fear of Uncertainty** (how/what to ask). Fearing the unknown is often the case because we frequently don't understand how to ask for what we need. This is why I talk

about the importance of having some form of education or training program for your Ambassadors or anyone involved in any ministry that's asking for any support or services. Just as in Simon Sinek's beggar example above, it helps to consider the needs of the donor first and help them fulfill those needs instead of focusing on our parish or individual needs. This way, we change the paradigm of what they see. However, this requires some opportunity to practice and learn the most effective techniques.

**3. Fear of Money Talk.** I think we all understand how oftentimes it's difficult to speak about money, particularly when we're talking about "**OPM**" (**Other People's Money**). We certainly don't want to be seen as sitting in judgment of them or telling them what to do with the results of their hard work and resources. This is the reason why if you are uncomfortable bringing up the subject of money, I highly encourage you never to do that. The data is absolutely clear that people who are engaged liturgically, sacramentally, and in ministries of the parish will give of their financial resources and will give more than if you just ask for money. Thus, just like Christ taught his Apostles to be harvesters of souls rather than dollars, I urge you and every Ambassador and parish leader to focus on what St. John Chrysostom said about helping individuals "discern the spiritual gifts that God gave them and to cause those gifts to be used to the full and for the benefit of all."

**4. Fear of Reciprocity.** The concept of reciprocity focuses on the fact that if I ask you for a favor, it means that I must grant you a favor when you ask in return. Of course, reciprocity is hardwired into our human characteristics, which is why our default personality is to be giving, caring, and loving of others. Thus, it is understandable that you should expect reciprocity to apply if you ask a parishioner to give you something.

But now, let's shift the paradigm. When you're asking for S&E for a parish to achieve its WHY, Vision and make the life-changing impact that it has on individuals, the beneficiary is not you, but rather the donor who is actually seeing the impact of what their contribution can do. In short, the reciprocity of S&E in a Christian parish is automatically granted by the feelings that the donor will receive once they realize the impact that they produced. That doesn't mean that they won't ask you to contribute to some cause or belief that they share, but it does mean that the act of parish giving is the simultaneous act of receiving. Thus, reciprocity becomes full circle for a Christian donor.

**5. Fear of Resentment.** Most people want to be liked, and they translate rejection as dislike. It's a laudable objective to want to be appreciated and valued and not resented. After all, you don't want to be that person who, when others see you approaching, they start running away because they know you're going to ask them for something. But once again, you have to transform the understanding of what S&E generosity is all about.

It is not for your benefit as the requester, but rather for the benefit of the donor: 1. in terms of the DOSE hormones they will receive from the gratitude and joy in fulfilling the needs of others, and 2. their preparation for their II Corinthians 5:10 Moment when they stand before the awesome judgment seat of Christ. When you help people feel good

by being generous, they not only don't resent you, but they also actually appreciate you even more.

**6. Fear of Burdening.** This fear of adding burdens upon others is certainly a valid and justifiable Christian sentiment. After all, we should be mindful of the fact that not everybody is as blessed as we are. Or perhaps their circumstances are significantly worse than ours. Thus, if you meet with a parishioner in the S&EM and discover they are experiencing a significant challenge or burden, you should immediately shift from asking them to give and engage and instead ask them what they could use as a recipient of a parish ministry or service.

Indeed, in solicitations that I make, I always reverse roles and ask the donor what I/we can do for them. In that moment, there is a personal connection and an experience of love where they realize that they are part of a family that is concerned about them. So do not fear that you are burdening because you are either helping them righteously give of their treasures or helping them receive the treasures of others that they can use. What a joy it is to be the source of lifting a parishioner's burden by offering them some love, attention, concern, and possibly a beneficial service or resource.

**7. Fear of Questions You Can't Answer.** I used to say that nobody likes to look like an idiot. However, increasingly, as I watch politicians and pundits, I begin to challenge my hypothesis. All kidding aside, certainly, receiving a question to which you do not know the answer can sometimes be challenging. But rather than looking at that as a weakness of yours, it is a most gracious opportunity for you to learn something new. Indeed, if you can research the answer to the parishioner's question, you will both understand and grow together as your relationship becomes closer through the journey of discovery. I have always been moved by the previously mentioned great wisdom of Socrates, which states that you cannot teach adults new things. You can merely create an environment in which they discover the truth for themselves. In this way, the answering of questions is the seeking of knowledge, and the journey of seeking knowledge with others is a powerful way to learn the truth for yourself.

**8. Fear of Being Disliked.** Again, I used to believe that the fear of being disliked was a universal phenomenon until I reached old age and became increasingly less concerned about what others thought of me. Perhaps that is more of a confession of my curmudgeonly attitude than it is a righteous Christian behavior. Or maybe it is what I said in the Preface to my Roadmap from the wisdom of Vusi Thembekwayo, who said he genuinely gets worried when people like him because he is almost sure that he is doing something God doesn't want him to do.

Nevertheless, it is natural to want to be liked or certainly to avoid being disliked. However, if indeed the WHY and Vision your parish is pursuing is righteous and transformational, then how can anyone rightfully dislike you for pursuing such a noble cause? Indeed, I found that the opposite is generally the case. Even if the donor is unable to participate at this moment in time, they hold you in higher regard because you are

devoting your life in service to others through the promotion of S&EM and what your parish is seeking to accomplish.

In fact, many relationships I formed that have stood the test of time are those that started with me asking for some service, activity, or donation on behalf of a righteous cause. And the joy the donor realized through their gift caused our relationship to become stronger. By being truly blessed to be at the stage of my life where I can devote every waking hour to helping Christ's Church and people and not require any compensation, I realize the incredible gift that has been given to me.

The phrase I often use when people want to compensate me is, "I'm not doing this for the praise, the practice, or the pay. I am working on my salvation." When you can adopt a servant's heart and mindset to what you do for Christ's Church, fear of dislike, disapproval, or any of the psychological shortcomings disappear because you are working for and answering to a much higher authority than some human beings' emotional feelings toward you. And I submit that service to the Lord is perhaps the greatest and most gratifying service you will ever experience.

## **STEWARDSHIP CALLING COMMANDMENT #5.**

### **A. The 4<sup>th</sup> T = Tithing.**

Percentage giving and tithing (10% giving) of Time, Talents AND Treasures is what the Holy Scripture requires and will make the most positive difference in your parish. Indeed, when parishes ask me which of my ten commandments of church S&E excellence is most critical, I unabashedly tell everyone tithing is number one on my list. All ten elements are crucial, but if there was one silver bullet, or you could only do one thing, tithing is the one thing I think is absolutely essential. The Orthodox Study Bible defines the tithe as a tenth of one's income and adds that offerings are in addition. This supports my statement that four types of parish S&E generosity begin with the annual stewardship tithes and extends to occasional emergency appeals, episodic capital campaigns, and one-time planned giving.

### **The Scriptural Foundation of Tithing.**

To make the case for the essential element of tithing, I start with the indisputable foundation provided in the Holy Gospel. As early as Genesis 14:20, Abraham offered his tithe to Melchizedek. This is repeated in Genesis 28:22 with Jacob's vow to continue tithing. The Orthodox Study Bible commentary specifically notes that Jacob gave his tithe to his church in continuation of the ancient tradition. This Old Testament commentary notes that after Aaron's death, while the Lord separated the tribe of Levi, the priests continued to serve and bless the people and accept the tithes and offerings from the faithful.

A powerful statement is contained in Leviticus 27:30: “*Now all the tithe of the land, whether seed of the land or fruit of the tree, is the Lord’s. It is holy to the Lord.*” Numbers 18:20 goes on to identify the Lord speaking to Aaron, informing him of the tithes in Israel being entrusted to the children of Levi, with verse 24 proceeding to discuss the tithe of the children of Israel being offered as “*a choice portion to the Lord.*” Numbers 18:25-28 discuss the Levite’s tithe.

Deuteronomy 14:22 clearly admonished the faithful to “*tithe all the increase of your grain the field produces year by year.*” The repetitive direction to tithe the first fruits one receives is clearly a common theme throughout the Old Testament. Indeed, in those days, there would be multiple tithes and not just one (e.g., I Maccabees 10:31 introduction of both tithes and taxes).

In Nehemiah 12:41, a description is offered about the appointment of stewards to care for the storehouse where all the first fruit tithes were offered. This is present in modernity, which current parish S&EM “steward” leaders undertake as they gather the tithes and offerings of first fruits from parishioners and aggregate them for the ministry and uses of the parishes. Indeed, Nehemiah 13:12 again discussed the tithes being offered by the faithful. Importantly, in the Wisdom of Sirach 35:8, the faithful are instructed to be cheerful in offering their tithes and to be generous with “*gladness*” reminding us of the joy of giving.

Specifically expanding on the joy of generosity is underscored by II Corinthians 9:7, which reminds us how much God loves a “*cheerful giver.*” Orthodox tradition discusses this notion by adding that St. Irenaeus, in the second century, made the added point that while the Old Testament Jews consecrated the tithe of their goods to the Lord, the early Christians followed the parable of the Rich Young Man (Matthew 19:16-22) and actually committed everything (100%) they had to the Lord for His purposes.

The critical point being made in this high-level and brief Old Testament theological commentary is my original point that giving ten percent is the minimum. This teaching is so foreign to some Christian traditions, which is why I began by saying that **Spiritual Formation And Religious Education (SFARE)** are essential components of any effective S&EM. Put another way, until you show people what the Lord teaches throughout the Gospel through the New Testament and into today, you will not be fulfilling your duty to educate the faithful about what they are called to do.

Of course, the “Mac-Daddy” tithing passage of all times is found in Malachi 3:8-12 and specifically Malachi 3:10, where we learn:

*Bring the whole TITHE into the storehouse...Test Me in this says the Lord Almighty and see if I will not throw open the floodgates of Heaven and pour out so much that you will not have enough room for it.*

The Orthodox Study Bible commentary again makes the point that the tithe duty made clear the obligation for people to give their money to the Lord PLUS additional

freewill offerings (p. 1056). From time to time, I believe this passage is sometimes misused by “prosperity gospel preachers” who try to make this into “if you tithe to my church, you’re going to get a lot of money in return.” This is not my point or good theology.

At the same time, every tither I have ever interviewed or spoken with repeatedly says that the more they donated, the more blessings they continued to receive. And as they responded with greater generosity of first fruits, their blessings continued to expand into what can become an endless loop. I have concluded that **you can never outgive God**, and every tither will confirm this reality.

Now, when I review this Holy Scripture with some parishes and parishioners, I am told: “That is all well and good, but that is all the Old Testament theology and ancient history and not applicable to us.” They usually stop short when I ask them if that means the Ten Commandments are also not applicable anymore since it is in the Old Testament (Exodus 20:2-17; Deuteronomy 5:6-21).

While the countless Old Testament teachings underscore the necessity of tithing, I call your attention to two additional passages from the New Testament. In Matthew 5:17, we are reminded by Christ, “*Do not think that I’ve come to abolish the Law and the Prophets. I did not come to destroy but to fulfill.*” Of course, it is essential to understand that the phrase “Law and the Prophets” is the ancient Jewish law and the teachings of their Prophets. Thus, the phrase “the Law and the Prophets” is basically a synonym for what we call the Old Testament. This powerful admonition of Christ reminds the faithful of his time and that he was not abrogating all the traditions of the Old Testament (e.g., Ten Commandments) but rather validating them through His arrival, ministry, and teachings.

Providing further clarity of the Lord’s instructions to we who follow Him is Matthew 23:23, where the Lord fusses at the church leaders of the time by admonishing them:

Woe to you scribes and Pharisees, hypocrites! For you pay tithe of mint and anise and cummin and have neglected the weightier matters of the law: justice and mercy and faith. These you ought to have done without leaving the others undone (Matthew 23:23).

I am not sure how the Lord could have been clearer that His followers are obliged to follow the tithing, Ten Commandments, etc., as we add justice, mercy, and faith to our repertoire of what it means to be a follower of Christ.

By now, it should be clear that the Old Testament tells us to tithe. Our Lord and Savior reiterated that this practice continued in His church. To underscore this obligation, we find tithing prominently featured in the *Didascalia Apostolorum*, which means Teaching of the Apostles (Stewart-Sykes, 2009). This document was a Christian legal treatise belonging to the genre of the Church Orders. It presents itself as being written by the Twelve Apostles at the time of the Council of Jerusalem; however, scholars agree that it was more likely a composition of the 3rd century in Syria, perhaps around 230 AD.

Regardless, the unambiguous instructions to the faithful state: “**Set aside part-offerings and tithes and first fruits to Christ, the true High Priest**, and to His ministers, even tithes of salvation to Him...” These early church instructions reinforced this undisturbed teaching of the tithe and the generosity imperative of all believers.

Again, about one hundred years later, St. John Chrysostom in the 4th century unambiguously said, “If there was a danger then (referring to the Old Testament) in omitting the tithes, think how great it must be now” (Chrysostom, [ca. 395]). This teaching is confirmed in the teaching commentaries of the Orthodox Study Bible and similar Roman Catholic treatises and commentaries (Society of St. Pius X, 2023).

Dear brother or sister, from the beginning of humanity on earth through the time our Lord was with us and continuing into the centuries after Christ’s resurrection, we children of God were called by our Creator and Savior to tithe. It is that simple, no matter how inconvenient that may be to some. Many Christian denominations have continued to teach the tithe directly, and even my Greek Orthodox jurisdiction (which does not adequately teach tithing) has incorporated the tithe in Article 18, Section 1 of its Regulations as the suggested giving level for our faithful (Greek Orthodox Archdiocese of America, 2019). Nevertheless, the empirical data demonstrates that the tithe received less emphasis and was not being taught as many faith traditions approached modernity. I urge you to return to what is the Holy Gospel truth of what we are called to do, namely tithe!

## **B. The Tithe Minimum.**

Now, let me unpack this a little more since I repeatedly say the tithe is “a minimum of 10%.” If we remember Christ’s parable of the Rich Young Man (Matthew 19:16-22), the questioner seeking the path to eternal life was told that to be “**perfect**,” he had to sell everything and give it to the poor. This could not be clearer. I have added the emphasis on the word “perfect” to underscore our Lord, letting us know that perfection equals a 100% commitment.

With that clarity, you can certainly never say the tithe of 10% was perfect. Thus, the repeated reminder to tithe in Holy Scripture can be read as merely the minimum, starting point, or floor of one’s generosity. In my live Igniting The Flame retreats, I jokingly say that as a mergers and acquisitions lawyer for 44 years, the 10% tithe I am offering is “my best and final lowest offer.” That is because the Lord told us what perfection is and to which we should strive.

If you are not yet a tither, please start the journey and proceed as rapidly as you can. If you are already tithing, please continue on the path Christ laid out. And every step of the way, you help do so much for others. And if you are currently practicing the tithe, let me encourage you to join the journey to being a “double tither.” Continue the “round-up” addition of 1% of your income more each year until you reach 20%. Do this not because I asked you to but because your Lord gave you the roadmap to perfection and

heaven. I read that pastor Rick Warren, author of The Purpose Driven Life, is a “reverse tither” where he and his wife live on 10% of their income, and they give away 90% of what they make to the church.

### C. Don't Just “Show Me The Money” (Crowe, 1996).

I call John 3:16 the “football gospel” because, at any football game, you can always find one intrepid soul holding up a sign with that passage. This so-called football gospel is critical to teach so many important things; however, one message that should not be missed is the continuation of God’s stewardship contribution. Not only did He give us our lives, world, and everything we have, but He made the undoubtedly ultimate sacrifice of generosity. God gave us His Son so that we can be taught and saved. And God did this with the realization of the inevitable horrible sacrifice of His Son’s life for us.

As a father, I cannot imagine making such a sacrifice. And yet, our Creator did that for us. This leads to the second tithing realization I ask you to make. Tithing your money is not enough. It is needed, welcome, and righteously contributed. But I submit your call to Tithe is also an invitation for you to freely give at least 10% of your time and talents. Holy Gospel repeatedly teaches us that we are to bring our “first fruits” to the church. This was from a time when the first fruits were what farmers and shepherds had as the result of their labor of time and talents. They spent their days growing crops and other foods. Thus, the gift of first fruits to the temple simultaneously represented the time they spent cultivating those crops/food as well as the money they could have earned had they sold or traded them.

Thus, Holy Scripture and the example of our Lord also teach us the tithe of our time and talents. This is the portion of the engagement in ministry and service to which I have been referring nonstop. This is why this is called **S&E (Stewardship AND Engagement)**, which teaches the importance of a simultaneous gift of your time and financial resources.

Indeed, your time is your most valuable commodity. As I mentioned before, you could eventually earn money back, but your time investment is permanent. However, as you focus on your II Corinthians 5:10 Moment, the good you do and the generosity you exhibit are all relevant when you seek your “*good account before the awesome judgment seat of Christ.*” Going back to the parable of the Rich Young Man, notice that Christ did not end His instructions after everything was given to the poor. His instructions ended, “*Come, follow me.*” The Lord asked for the commitment of the stewards’ entire life. For most of us, that seems impossible if we are to care for our families. However, the only thing preventing you from tithing your time and talents is you.

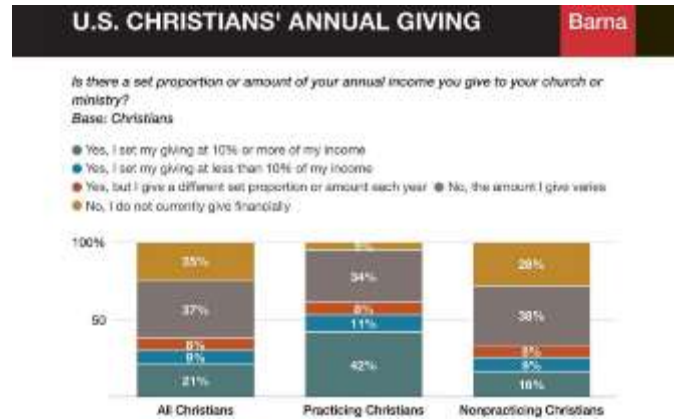
For 36 years, I was blessed to practice law in two global law firms with thousands of lawyers in each firm. In those firms, we charged our clients by the hour and kept track of our time in tenths of an hour. Thus, I had to record how I spent my day in six-minute increments. That was clearly one of the biggest pains of the practice until I realized that



I could also use that same timekeeping system to keep track of the time I spent working for Christ's church or in ministry. Thus, at the end of each week, I could look back and see if I had spent at least 10% of my time satisfying my tithe of time and talents. If I did not, I knew my tithe for that week was incomplete, and I would be inspired to make up the difference the following week.

You can easily keep track of your financial donations. However, how are you tracking your time? I am hopefully inspiring you to fulfill what the Lord asked as a commitment by trying to give at least 10% of your time and talent, along with the 10% of treasures.

As the chart on the right indicates, in 2022, Barna Group reported about 21% of "All Christians" (people who claimed to be Christians regardless of church engagement) tithed at least 10% of their income. A materially higher 42% of those Christians who actively practiced their faith reported being tithers (Barna Group, 2022). And Barna's definition of "actively practicing" only required them to attend church at least once a month, which is a pretty low bar, in my opinion.



Interestingly, 77% of those who tithed said they gave more than 10% (Barna Group, 2022). However, shockingly, that same study reported that 25% of all Christians gave no money to their church. Talk about a group that needs spiritual and stewardship education!

Regrettably, from the extensive **FSA** (Financial Stewardship Analysis) I have done of hundreds of Orthodox parishes in the U.S., the proxy tithe analysis suggests the typical Orthodox parishioner is giving between 0.5 and 0.8% of their income, rather than the 10% called for in the Uniform Parish Regulations. Is there any wonder most Orthodox parishes operate at subsistence financial levels and do not make a sufficient difference in their communities or the kingdom? Regrettably, and I say this with shame, these results are a poor reflection of what the regional and national churches (Archdiocese, Diocese, Metropolis, etc.) provide in the form of training, materials, and support, and how poorly most parishes S&EM operate.

I remember speaking to a former Baptist gentleman at his wedding to an Orthodox woman in an Orthodox church. After I told him what I did in my Stewardship Calling ministry, he told me:

Yeah, becoming Orthodox was the best financial decision I ever made. I mean, I came from a church that taught and required the tithe to one that says, hey, if you give 100 bucks, man, that's great because we're just happy you're here."

After sharing this experience, allow me to chase one rabbit hole about converts adjusting their behavior. I have anecdotally observed data suggesting that some converts from a tithing church who join a church that does not stress the tithe may reduce their rigorous adherence to tithing. Churches that have crossed the Rubicon and become “more convert than cradle” within the Orthodox tradition allow me to conduct such experiments. The Proxy Tithe Analysis (PTA) I completed recently for such a parish with about 70% converts showed only approximately 1.6% of income as the typical stewardship contribution using the U.S. median income.

This result was very surprising to the parish council, convert clergy, and me since most of their parishioners came from tithing traditions. The discussion I led caused parish leadership to wonder out loud if many of the former tithing tradition parishioners had been “dumbed down to the norm” in Orthodox churches and thus slacking off from their traditional adherence to tithing. Obviously, statistically significant empirical research is needed to analyze this properly; however, I have noticed the trend repeating itself in other Orthodox parishes I work with where the demographic shifts from cradle to convert, which raises concerns for ALL parishes embracing the Biblical “first fruit” message of percentage-giving leading to at least tithing.

This is one reason my hair is on fire to Ignite The Flame of stewardship, engagement, and generosity in the hearts and minds of your faithful. If you are reading these words and are not yet tithing your time, talents, and treasures, would you please commit to start the journey toward your II Corinthians 5:10 Moment so you too can hear “*well done, good and faithful servant*” (Mathew 25:23)?

#### **D. “Which Is It, Gross Or Net, And Is It Just For My Church Or All Charities?”**

Whenever I present tithing in my live Igniting The Flame retreat, at parishes, on my podcast internet radio live programs, or in homilies, I ALWAYS get the two dreaded questions. Question number 1: “Is it 10% of my gross income or net income.” Question number 2: “Does all 10% have to go to my parish, or can some of it also go to other charities?” This question shows me the person has never been taught tithing and is not from a tithing tradition.

So, my short and humorous answer to both questions is “yes.” Truth be known, they are probably so far away from a tithe that I can accept them starting to tithe off of their net and sharing it between their parish and other charities. Nevertheless, I think the correct Scriptural answer is it should be 10% of your gross income and to your church, with the understanding that you will also contribute to other charities and people in need. I explained the Biblical foundation of this answer previously, but it focuses on giving “first fruits,” not what’s left over after paying taxes or your bills. Moreover, the theologians I cited earlier from the Orthodox Study Bible explained how the tithe was to the temple and was in addition to whatever taxes there were and other expected generosity. Indeed, historically, in Old Testament times, there were often two, and in some cases more, tithes. But for those not yet embracing tithing, please start now.

And if you are one of my Orthodox or other non-tithing tradition brothers and sisters, please think of the math for a second. My Orthosphere data shows typical parishioners donating between 0.5 and 0.8% of their income to the church. Thus, if every parishioner merely “rounded up” to the next highest whole number percent of income (which I will explain in the “**Round Up**” section below), the parish financial stewardship collections could, in some cases, double or at least increase by 20% in just the first year!

In many cases, this increase would be enough to fully fund the parish operations from stewardship alone (or at least come closer). Then, as a parish started to budget, as I suggest below by asking each ministry what they needed and then adding the operating costs, the next 1% “round up” increase in stewardship in the second year would cause the parish stewardship income to double from 1% to 2%. This would be amazing, and as each year another 1% is added, the future can become very bright financially for your parish.

Tithing should be your goal. A minimum of 10% of your Time, Talent, and Treasures. There is a cartoon I love that shows a child eating at a diner with his dad, whom he asks, “How come the waitress gets 15% and God only gets 10%?” Now, the reality is that most of us in non-tithing churches (particularly my ethnic Orthodox churches) are much better tippers and significantly worse donors to our parishes. This reality changes the cartoon to the child asking why the waitress gets 20%, and God doesn't even get 1%.

## **E. Implementing Tithing.**

So, now you might ask, how do I get a tithing program started? Here is a quick summary of the first four steps.

**#1 Leadership Leads.** The parish leadership must decide whether it will become a percentage-giving church on the journey to being a tithing church. Leaders who do not lead by example are not leading. Thus, the clergy parish council and ministry leaders must prayerfully commit they will start or continue their tithing journey.

**#2 Teach.** Since, for many, tithing is either undertaught or has never been explained and introduced, it is essential that implementing a journey of “being a percentage giver on the way to tithing” be preceded by education. The Biblical foundation of tithing and its elucidation by Christ and the early Fathers of His Church must be taught to adults and youth. Tithing and stewardship must be understood as a spiritual journey with Christ and not just a fundraising activity.

If tithing is introduced as a way to raise more money and pay bills, it will likely fail. It must be patiently explained as not only a historical teaching of the forefathers and our Lord himself but also a spiritual journey of giving thanks to the Lord for the blessings we have received and preparing us for the journey to theosis.

**#3. Actions Speak Louder Than Words.** All parishioners must hear and know their leaders are on the same journey, and their parish will practice tithing in their generosity. This means that to start, at least 10% of the expenses should go to charity, philanthropy, and ministry work to help others and not just to pay utility companies, operating expenses, and payroll. As previously cited, as the percentage of the generosity of the parish to external causes increases, so too will the generosity of the parishioners to the parish. They will begin to see your parish as a righteous recipient of their donations, given the good the parish does and the impact it has on people's lives.

**#4. Over Communicate.** Until tithing becomes enculturated in the ethos of the parish, you cannot communicate about it too much. This means continued examples in homilies, bi-weekly testimonials of the impact of the parish's generosity, articles in bulletins and parish communications, and places on the website featuring the life-changing impact the parish and its stewards are having. Every message the parish communicates about S&E, ministries, and finances must be viewed through the tithing lens to ensure that nothing is inconsistent with the message. All communications must be positive and uplifting, and neither dripped in guilt nor apologetic. In the communications phase, the objective is not to convince people to tithe but to show them the impact of what happens when they do.

I heard of a priest and his parish council who decided to become percentage givers on the journey to tithing. The priest's homily next Sunday supposedly consisted of him saying to the entire congregation: "You approve my salary, and we tithe, which means you know my financial stewardship contribution to the parish. I urge you to join me and your parish council on the spiritual and salvific tithing journey." He ended with a mic-drop moment and left the PIPs (and those watching the livestream) to reflect on the simplicity and importance of what he had just committed his family to do.

At the end of every Igniting the Flame retreat, FSA, or parish council presentation where I discuss tithing and the "**Roundup**," I ALWAYS challenge everyone there to do the roundup that night. I ask them to calculate what they gave to their church last year as a percentage of their income to one decimal point. I then ask them to round up to see what amount of financial contributions would get them to the next highest whole number percentage of income and commit to giving at least that much to their parish in the current year. And since you just read this, I challenge you to do the same and then imagine the life-changing ministries your parish will be able to deliver! (CUE the sound of a microphone dropping.)

F. Proxy Tithe Analysis. Part of my FSA tries to determine how close a parish is to being a tithing parish. This is tricky because the cradle Orthodox whose parents and grandparents grew up in traditionally Orthodox countries never discussed or practiced tithing (or even regular church stewardship) because the government paid for all church expenses. Thus, empirical research confirms that U.S. immigrants generally are less likely to donate to charities like churches and give less (Osili & Du, 2005). Additionally,

U.S. citizens give more to religion than immigrants because of these historical understandings of generosity (Brown & Ferris, 2007).

To overcome these historical limitations, parishes must embrace a significant stewardship and engagement culture change that includes:

1. substantial PIPs education and encouragement related to the imperative of Biblical tithing,
2. consistent communications about the impact that such generosity has,
3. visualizing the effect of generosity in terms of changing lives, and
4. constantly reinforcing the engagement of the PIPs in ministry and further acts of generosity and philanthropy (Panas, 2005; Senoga, 2023; Warwick, 2019; Winseman, 2012).

In addition to the historical challenges of ethnic immigrant stewardship education, parishioners in the Orthodox Christian tradition do not share their tax returns. Thus, an accurate tithing assessment is impossible. Accordingly, the FSA uses a **Proxy Tithe Analysis** (“**PTA**”) process that compares where the parish is in relation to where it could be if all parishioners tithed.

I will describe the PTA process I use for Orthosphere churches that focuses on both the cradle Orthodox and convert populations. Other faith traditions can use this second part, which focuses on all Americans for their PTA approximation. The Orthosphere PTA starts by reviewing the median annual income reported by the U.S. Census for Americans who claim any ancestry from traditionally Orthodox countries. The latest U.S. Census data is as of February 8, 2023, with the following median annual income of Americans claiming any ancestry from these countries.

<b>Lebanese</b>	\$92,997	<b>Macedonian</b>	\$91,852
<b>Russian</b>	\$90,296	<b>Greek</b>	\$87,428
<b>Albanian</b>	\$85,092	<b>Serbian</b>	\$84,607
<b>Armenian</b>	\$83,756	<b>Ukrainian</b>	\$83,723
<b>Romanian</b>	\$81,768	<b>Yugoslavian</b>	\$78,560

The comparable U.S. median average income is \$74,580, which, if included in addressing the converts, would bring an average of all these income levels to \$84,969, which we can round up to \$85,000 for simplicity. Thus, the PTA postulates that if everyone made a \$85,000 median target and gave a 10% tithe, the parishioners would provide \$8,500 a year to their church (or other non-profits if they split their tithes among multiple charities). If a parish is predominantly of one ethnic origin, the median US income from that ethnicity or the U.S. median could be substituted or prorated.

By multiplying this projected Orthosphere median tithe (\$8,500) times the number of parishioners in the parish provides an approximate stewardship income alone the parish could receive if everyone made the median and they all tithed. Of course, half make more, and half make less than this proxy median, so your actual parish potential could be different. However, since we are merely trying to get a proxy analysis for informational purposes, this approach is useful. According to the 2020 Faith Communities Today (FACT) Study (Hartford Institute for Religion Research, 2021), approximately 68% of American parishes have 100 or fewer parishioners. Thus, I will share the PTA results from an anonymous parish I recently completed that had 109 stewards that contributed an aggregate of \$285,605 in annual stewardship (which also had a significant donor concentration problem discussed later in this Chapter).



### Here's What Is Possible?

- Median U.S. Orthodox income = **\$85,000**
- Median U.S. income = **\$74,500**
- (a) **\$8,500** = a U.S. Orthodox median income tithe
- (b) **\$7,450** = a U.S. median income tithe
- If all 109 stewards earned U.S. Orthodox median or U.S. median and tithed, stewardship income =
  - (a) **\$926,500** instead of \$285,605 or 3.24 more
  - (b) **\$812,922** instead of \$285,605 or 2.84 more
- What could you do with (a) **\$640,895** to (b) **527,317** more?

Notice the staggeringly high difference between a potential \$926,500 (or even the lower estimate of \$812,922) in stewardship contributions this parish could receive if everyone earned the median and tithed versus the actual realized results of merely \$285,605. Indeed, with the extra \$640,895 each year, the parish could more than cover all operating expenses and also fund countless new or expanded transformational ministries and charities in its community.

## Estimated Median Percentage of Income Being Tithed

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**0.9%** = Estimated tithe % based on current parishioner  
\$740 median donation compared to median U.S.  
Orthodox income tithe of \$8,500

**1%** = Estimated tithe % based on current parishioner  
\$740 median donation compared to U.S median  
income tithe of \$7,458

To help a parish understand where they are on the journey to becoming a tithing parish, the PTA provided this benchmark from their median giving data that shows the estimated typical parishioner only contributing between 0.9% to 1% of their income.

At this point, I explained to this parish that if they all just practiced the “round-up” (I will explain shortly) and increased their giving by 1% (to get from 1% to 2%), in one year, they would double their stewardship donations. There is much more to comprehend and discuss with the PTA and the full FSA discussed below; however, the hopefully positive and mind-blowing transformational concept to consider is the possibility of a parish generating approximately 3.24 times more stewardship income alone (potentially an additional \$926,500 each year) if they fully embrace tithing. If the parish is growing, then these numbers can become significantly higher, provided that the tithing teaching becomes enculturated.

In presenting this PTA data, I acknowledge it is merely a proxy calculation and that using U.S. averages can ignore regional differences. Thus, where relevant, my PTA considers the local economic differences by using a local median income benchmark. Additionally, if the cradle and convert mix is understood, the comparative median benchmarks can also be proportionally adjusted.

Let me provide some hopefully aspirational news of what is possible when tithing is a parish norm. The chart to the right uses U.S. median income from the 2023 Census Report (which is higher today) to show what your total parish stewardship income could be at different parish sizes. Find the size of your parish in the first column and then compare the potential tithing stewardship income in the second column to your actual parish stewardship numbers.

Number of Stewards in Parish	Stewardship Total Income Based on 10% Tithe of 2023 U.S. Median Income of \$74,580
100	\$ 745,800
150	\$ 1,118,700
200	\$ 1,491,600
250	\$ 1,864,500
300	\$ 2,237,400
350	\$ 2,610,300
400	\$ 2,983,200
450	\$ 3,356,100
500	\$ 3,729,000
600	\$ 4,474,800

Now, imagine what your parish could do with the incremental stewardship income to help bring people closer to Christ and each other and better serve your community. This should hopefully inspire your parish council to embrace a percentage-giving to tithing journey and use the “Roundup” approach (discussed below) as a gradual process to achieve these potentially transformational results.

### G. The “Roundup.”

I have alluded to my “**Roundup**,” which asks you to calculate what you gave your parish last year as a percentage of your income calculated to one decimal point. Then, for the current year, you would “round up” your gift to the dollar amount that would equal the next highest whole number percentage of your income in the current year. For example, if you donated 0.6% of last year’s income to the parish, you would round up to donate 1% of this year’s income (the next highest whole number percentage this year). Similarly, a 1.4% giving level last year would round up to 2% this year. Then, if this increased percentage-giving this year did not create a financial hardship, you would increase your donations to the parish by another 1% of income each successive year until you reach at least the 10% tithe.

There is the old joke about two men talking. One said, “I cannot afford to tithe and pay my bills.” The other said, “If I told you that I would pay your bills for you if you cannot handle it, would you then tithe?” The first guy enthusiastically said: “Yes, I sure would.” His friend responded, “You mean you would trust me, and you won’t trust God?”

I do not ascribe to a prosperity gospel approach. But I have seen in my own life and the lives of everyone with whom I have spoken that the Lord is always there to help the faithful who are in need. Indeed, I have heard a story about a regular tither who fell on tough times and was immediately bailed out by his parish. His faith in his years of tithing was reinforced once he realized that he, too, could become someone in need for whom his parish would provide. His witness served to convince others of the righteousness of tithing.

In February of 2009, I interviewed my friend Nick Kasemeotes on my Stewardship Calling Ancient Faith Radio podcast and live internet program about the tithe



([https://www.ancientfaith.com/podcasts/stewardshipcalling/the\\_joy\\_of\\_the\\_tithe/](https://www.ancientfaith.com/podcasts/stewardshipcalling/the_joy_of_the_tithe/)). Nick served the church and those in need his entire life and was one of those who helped educate me on the tithe many decades ago. In that interview, I asked him out of the blue if there was anything he had heard from everybody who became a tither. He immediately responded, "Yes."

What he said next was exactly my experience. Everybody who became a tither always told him that no matter how much more they gave, one way or another, they always got more in return. This is not a guarantee you will receive more money. Rather, it is the reality that the blessings you receive will reinforce the more generosity you can share. As I always tell people, **you can't out-give God.**

Once generosity becomes the default ethos and is enculturated, it is just as predicted in Malachi 3:10 that God will open the floodgates of blessings. God does not ask us to give more because He needs it. He's doing just fine. He asks us to learn the spiritual value of service and generosity so that we will receive even more in return. God also does not ask you to give more than what you have available for you to give. That is why the message is always given in proportion to the blessings that you have received.

If there was ever a time to do what our Lord taught us, it is now. Indeed, in the history of man for the last 2000 years, the periods in which the Christian church grew faster than any other time was right during and after major devastating events like pandemics or other crises. Because it was the Christians that came forward and served and helped other people in need. The communities of faith led the way in helping and serving others, and when other people saw that act of love and righteous generosity, they wanted to become part of that movement.

To be sure, man has done many evil things allegedly in the name of religion. We must atone for our sins. However, in this time of need, you and your parish can overcome darkness. As I say every chance I get, **darkness is not a thing. Darkness is merely the absence of light.** And as Christ called us to be "*the light of the world*" (Matthew 5:14), your practice of unconditional love and generosity is your opportunity to be that light through your parish. The tithe and a full commitment to S&E are part of your Roadmap journey to being the light of the world and a "good account before the awesome judgment seat of Christ." Please think about this as I again challenge you to embrace the tithe in your life and S&E generosity practices as a parish objective.

I am confident you have forgotten that I was reviewing the Stewardship Calling Stewardship and Engagement Ten Commandments because of all the time I just spent on Commandment #5 (the 4th T of tithing) because of its enormous impact on your parish and life. We now return to our "regularly scheduled programming" and move on to Stewardship Calling Stewardship and Engagement Commandment #6.

## STEWARDSHIP CALLING COMMANDMENT #6.

### **A. Essential CITA - Campaigns/Communications Integrity, Transparency & Accountability.**

For those who prefer to listen than read, several years ago I recorded a long podcast and live internet radio program discussing Effective Stewardship Campaigns and Percentage Giving. You can find that Stewardship Calling Ancient Faith Radio program here: <https://www.youtube.com/watch?v=8rNVSmqzs14>.

A book I believe is essential reading for anyone in parish communications (not just stewardship or fundraising) is Jerold Panas's book Mega Gifts (Panas, 2005). The second edition is an improvement of his first edition in 1984. My cute short acronym summary of Panas's book is to focus on **C.P.I.** (not consumer price index). I articulate his key message as people give (time, talents, or treasures) to **C**auses and **P**eople with **I**ntegrity. Let us briefly explore the great wisdom you should apply in your parish and life.

### **B. People Give To Causes, Not Crying.**

Without a doubt, effective communication is as essential to an outstanding S&EM as anything else. In short, people will only invest their time or resources in Causes with Integrity or People with Integrity. But the absence of Integrity will kill any effective strategy for any activity, including S&E. This is why I repeatedly bludgeon you by insisting on the essential aspects of "ITA" ("**I**ntegrity, **T**ransparency, and **A**ccountability"). To provide another pneumatic device to help you remember this methodology's key elements, I will talk about 1. selling the **D**ream (Cause), selling the **T**eam (People), and selling the **S**cheme (Integrity).

**1. Sell The Dream.** This principle is reflected in the heading for this section, "people give to causes, not to crying." The more an individual can understand the cause, Vision, WHY, and Mission (the fundamental purpose for which a donation is requested), the more likely they can connect with it at a mental and emotional level. Thus, it is always important to be able to articulate the parish's or ministry's WHY and the Vision of what it's hoping to accomplish. Doing this also means relating the cause to what is important to the individual donor.

One key reminder I always offer is that one-size-fits-all communications fit no one. I say this because almost every parish uses the same form of S&E communications with every individual parishioner as if they were all the same. For example, do you think that the concerns facing young adults are the same as those that apply to the octogenarians in your parish? Of course not! So, then, why do you think that one form of communication would be relevant to all of them?

If you look at organizations that are very effective in their donation requests, such as Universities, you see an entirely different strategy. For example, a million years ago, I received my M.B.A. from the Goizueta School of Graduate Business Administration at Emory University, and I earned my law degree from Emory Law School. About fifteen years ago, my younger daughter received her undergraduate theatre degree from Emory University. We laughed that within one month of her graduation, we received three separate solicitations from Emory University asking for money.

What was very important to understand was that none of these solicitations were the same. After all, what is important to a new starving actor is not the same thing relevant to an older lawyer. Colleges and universities, as well as hospitals and other highly effective fundraising organizations, are experts at crafting separate messages that are more closely aligned to the situations, concerns, and values of the individual recipient.

Of course, your parish is unlikely to be able to tailor a specific letter to everyone. However, you can take your parish and divide it into different demographics and then write a specific communication that is designed to meet the needs of that constituency best. So, for example, you could have one S&E message targeting your younger adults, a second version targeting your newly marrieds, a third alternative targeting your families, a fourth version targeting your empty nesters, and a sixth version for your senior citizens. Each of these would be written about the parish solutions for the needs of that demographic group and thus more likely to be effective. Of course, all versions can include common stories about the transformational impact of the parish ministries on others.

One other technique that is very helpful in these kinds of communications is personalization. For efficiency purposes, most parishes will write a relatively similar form letter and send it to everybody, even though the address may be personalized for the individual based on the technology platform that's being used. But if the individual whose signature has been printed on that letter will take an extra couple of seconds to write a short personal note to the recipient that identifies that they're speaking to them more intimately, it goes a long way to making a stronger impact.

Also, you must convey your message about the WHY, cause, or Vision in an uplifting and exciting manner. Communication where you complain about financial shortages, challenges, or problems is highly ineffective at creating the positive, repetitive commitment you want to communicate. No one is ever excited about going to pay their bills. So, if your communications sounds like another dunning letter from a collection agency, you can expect an equally unimpressive response. On the other hand, positive excitement occurs when the communication paints a picture of the great benefit that has been provided for some life-changing ministry that is helping someone in need or bringing someone closer to Christ.

**2. Sell The Team.** People enjoy working with others whom they respect, admire, or wish to spend more time with. In addition, people are motivated by others who prove

themselves to be good servant leaders worthy of following. Thus, in the solicitation of engagement in ministries, it is critical to identify who the leadership team is and who some of the other team members are to make that interpersonal connection. After all, people will give time (and treasures) to people who mean something to them.

Thus, if you have a personal relationship with the donor, meeting them face-to-face has a greater impact on any solicitation, appeal, or personal interaction. In all communications, it is important to try to build a connection between the donor and others involved in delivering that ministry with integrity. Another effective vehicle to encourage engagement is connecting the donor with any beneficiaries of that ministry. Regardless of the “who,” integrity must be maintained at all times. People will no longer affiliate with those whom they believe lack integrity.

**3. Sell The Scheme.** In this context, by scheme, I do not mean something less than legitimate. Instead, I mean the various methods by which your ministry and parish are completely engaged in full **ITA** (Integrity, Transparency, and Accountability). It is well established that donors will stop donating time or treasures to organizations that have been irresponsible or poorly led. As a result, it is critically important for you to continually remind your donors of the parish’s complete devotion to ITA in everything you do. This is why regular reporting of all strategic plans, ministry, financial, and other information is invaluable. At the same time, it is helpful to define and share the metrics and successes that have occurred as a result of either capital campaign, emergency appeal, or even the annual tithes and stewardship campaign.

It is also helpful to remind people of the financial safeguards and financial integrity practices that your parish has implemented. This is why a parish must ensure it is complying with the best practices for financial integrity and that training occurs at regular intervals. Similarly, nothing communicates ITA better to your parishioners than independently audited financial statements. This adds expense; however, the discipline and ITA benefits generally produce substantially greater generosity. I also advise parishes to publish their financial statements, even if they’re not audited, on their website. While some are concerned about some security or confidentiality issues (which, frankly, I have never understood), the overwhelming parishioners’ response when parishes do this is the perception of much higher levels of integrity since everything is transparent.

To summarize, here are some of my top 15 Dos and top 5 Don’ts in S&E communications

#### DO

1. Focus on your parish’s WHY, Mission, Vision, and life-changing ministries
2. Share success stories from your ministries
3. Ask parishioners for their involvement/participation/time
4. Explain how their contributions materially improve lives
5. Keep communications positive, encouraging, uplifting, and empowering
6. Discuss the abundance in your community
7. Share stories of generosity

8. Communicate regularly and consistently
9. Describe the easy ways people can give
10. Discuss your culture of generosity
11. Create social networks sharing your community's abundance
12. Make a religious call to give
13. Thank and celebrate
14. Add personal notes to form communications
15. Always give glory to God!

### DO NOT

1. Focus on financial difficulties or problems
2. Use negative messages
3. Use the same message for every demographic of steward
4. Merely talk about money
5. Just use mail and email

### **C. Overcoming Donor Fatigue.**

Many years ago, I had the good fortune of helping Fr. Aaron Warwick conduct a strategic plan for his parish in Wichita. During our interactions, I discovered how much of a passion he had for the kind of ethical development work that parishes need, and he went on to receive a master's degree. His thesis focused on overcoming donor fatigue and provided an enormous wealth of data, information, and strategies all parish leaders, communications teams, and S&E ministries should practice.

I was fortunate enough to interview Fr. Aaron on my Stewardship Calling Ancient Faith Radio podcast, where he eloquently summarized his key findings. Here is the link: [https://www.ancientfaith.com/podcasts/stewardshipcalling/donor\\_fatigue](https://www.ancientfaith.com/podcasts/stewardshipcalling/donor_fatigue).

Additionally, I received his permission also to share his fascinating master's thesis on overcoming donor fatigue, which you can download here:

<https://stewardshipcalling.com/wp-content/uploads/2015/03/Masters-Degree-Research-Paper-Donor-Fatigue-Fr.-Aaron-Warwick.pdf>

In the meantime, I would like to offer six critical insights I took from Fr. Aaron's work and other empirical research in this area.

**1. Strategy.** It is critically important to develop and communicate key stewardship strategies. This includes the strategy of the parish and any of its ministries. The more articulate and clear the Vision that is being cast, the more likely it is that an individual donor will resonate with it.

**2. Solutions.** Communication should focus on solutions to problems rather than on emphasizing the issues themselves. Most parish communications tend to identify the specific challenge that the parish is trying to overcome without necessarily creating the

inspiration that the parish leadership has a solution for that problem. However, if a communication has to identify a recognized challenge, also identifying the solution will resonate with the donor better.

**3. Percentages Not Numbers.** Interestingly, the research shows it is better to frame solutions in light of the percentage or proportion of beneficiaries being helped rather than the number of individuals. For example, saying you will meet 90% of the needs of this constituency is more impactful than providing the number of beneficiaries that equals that 90% threshold. Of course, the higher the percentage of impact, the better the results will likely be from a donation perspective. So, the idea is to identify a higher proportion of people or problems that will be solved with the donor's generosity.

**4. Connection Matters.** Another extremely helpful technique is to stress the similarities and interconnectedness between the individual donor and those receiving the generosity requested. The more individuals can see either similarities or the possibility that someday it might be them or someone they love being in that situation, the more the need resonates.

**5. Naming Individuals Helps.** Another interesting result from the research is the finding that generosity is improved if you can identify a specific beneficiary. I seem to recall an experiment involving raising money to save seals that generated a certain degree of giving. However, once the communication shifted to saving "Bobo the seal" (or whatever name they used), the levels of contributions increased. Thus, the more personalization and connection that can be made between the recipient and the donor, the stronger the donor's response is likely to be. Experiments show that people are much more responsive to charitable pleas that feature a single, identifiable beneficiary than they are to statistical information about the scale of the problem being faced. As it turns out, our hearts drive our behavior more than our heads.

Many communication and generosity best practices have been demonstrated repeatedly to be effective. Your parish leaders, communications, and S&EM team members must study and implement these successful techniques. Investing the time to research and implement best practices ensures that all parish communications are most effective and aligned with your WHY, Core Values, and Vision.

#### **D. The Schedule Matters.**

A key point I have made repeatedly is that an S&EM process is not a one-weekend event or one-month activity. It requires an annual schedule of regular activities that take place every month/week throughout the year. The key message and communication strategy must be integrated in such a way that the messages are reinforced continuously, but without being overbearing and not just asking for money. This is the reason why using a variety of different communication delivery modalities (including all online and social media outlets), as well as human presenters, is critically important in developing an effective and comprehensive S&EM communication strategy. Please remember that the more often and aligned the communications are, and the more consistent the message

is focused on the WHY, Vision, and impact of any donations, the more effective they will be.

One simple example of what an annual schedule might look like is set forth below for your consideration.

### **Monthly S&EM Schedule**

- January - Recruit the S&EM Team and offer 1<sup>st</sup> S&E homily and article
- February - First Adult lay testimonial and scriptural education article about tithing
- March - Life-changing ministry presentation
- April - Second Stewardship & Engagement homily and follow-up article
- May - Youth testimonial and scriptural S&E education article
- June - Stewardship materials preparation and encouragement for summer engagement
- July - Third Stewardship homily (focused on percentage-giving and tithe)
- August - Young adult testimonial and parish Ministry Fair
- September - Adult & Youth wHoly Engaged Personal Visitations
- October - Homily regarding tithing and engagement and Ambassador follow-up Visits/Calls To Get To 100% participation – (also Planned Giving Giving recognition and solicitation event takes place)
- November - Fourth Stewardship Homily about blessings and giving thanks
- December - The Year-end giving campaign is promoted weekly, and the Parish Annual Report is released with public reporting of S&E results and parish-wide S&E celebration and thank you event

### **E. “Strategic Dialogue Initiative.” (“SDI”)**

If your parish undertakes strategic planning as I recommended in Chapter 8 of my Roadmap, it will have begun an ongoing discussion with your parishioners. Using a SWOT Analysis and/or Effective Parish Assessment opens up that discourse and allows your parishioners to be connected with their parish because leadership is listening to them. These are examples of “SDI” (**Strategic Dialogue Initiatives**).

Keeping that SDI going is an incredibly positive opportunity as part of the S&EM. Another more aggressive schedule that could produce positive results includes providing the “**Parish Data Dashboard**” (discussed later in this Chapter) and:

- a. monthly messaging of the generosity impact,
- b. regular tithing and stewardship homilies,
- c. personal visitations by stewardship ministry members with each PIP,
- d. bi-weekly church testimonials sharing the impact of the increased generosity,
- e. consistent PIP messaging and personal interactions seeking greater,
- f. engagement.

Regardless of what communications schedule is chosen, it is critical for the S&EM to include:

1. both clergy and laity,
2. focus on life-changing ministries,
3. emphasize time and talents and ministry engagement,
4. always explain easy online and other giving options,
5. consistently emphasize percentage-giving and tithing in each message,
6. cast a Vision of the future ministries and philanthropies that could be funded if everyone tithed, and
7. use the wHoly Engaged Personal or Small Group Process (Plans A or B) to ensure that every parishioner is touched and engaged to the greatest degree possible.

## **F. Homily Impacts.**

As we sometimes say down South, “Now I’m gonna go to meddling.” The importance of a powerful, impactful, practical homily that is focused on S&E cannot be overstated. And yet, all too often, clergy are less comfortable speaking about that because it seems more like you are asking something from the parishioners rather than giving them something. So, to encourage our clergy to dig in and realize that the Lord frequently asked those around him for something, I hope that I can offer a few suggestions that I have found to be very successful in the stewardship homilies I’ve been blessed to deliver at parishes throughout the United States.



## G. The Parables Of Generosity.

Earlier in this Chapter 10, I shared with you what I call the Parable of Generosity (more frequently called the Feeding of the 5,000) that is featured in all four gospels (Matthew 14:13, Mark 6:31, Luke 9:12, John 6:1-14). I provided a practical example of how to preach this critical story in such a way as to challenge your parishioners to emulate the poor “young lad” who willingly gave everything he had to the Lord. The point of that generosity parable to me is that this young lad did not hesitate to sacrifice everything he had because he believed in the Lord.

You can challenge your parishioners to model the same degree of faith. Other Holy Gospel stories and parables are equally as powerful and could be adapted to challenge your parishioners to live up to the Biblical standard of generosity. A variation on that theme that I also previously outlined in this Chapter is to describe in some detail the visit of our Lord to Zacchaeus, the tax collector, but making it applicable to modern parishioners.

Another of my favorite S&E homilies is the Parable of the Talents (Matthew 25:14-30). I quickly tell the story, which everyone is familiar with, and identify that talents were a form of economic measure. But the application key is when I randomly choose three PIPs and tell them I'm going to give them 5X multiple what the servants received in this parable. I then hand one PIP \$25 of what I call “my money.” Another received \$10 of “my money,” and the third one received \$5 of “my money.” (These values represent five times the five, two, and one talents from the parable.). It is always fascinating to see the expressions on the faces of the PIPs when I hand them money.

I let them know that if they need the money, they should keep it and use it for whatever they need, and they do not owe me any accounting. Then, I correct my pronouns by explaining that it really wasn't my money, even though I worked to earn it. I explain my gratitude to God, who gave me the skills I needed to earn it. I let them know it is now their money to do with as they please.

But I challenge them to take these small sums and creatively figure out how to “put them out into the world” and cause them to multiply. I again explain that they do not need to tell me what they did with the money and that someday they will stand before the awesome judgment seat of Christ and can explain it to Him. Nevertheless, from time to time, clergymen will contact me and let me know what some of their parishioners have done.

For example, one of the parishioners to whom I gave \$25 used the money to buy ingredients, make cookies, and sell them at a parish bake sale. She then took the \$127 bake sale proceeds (her first 5x multiple), bought food ingredients (another multiplication), and made a lot of soup she took to a homeless shelter that fed quite a few people (yet another multiplication). She lived the action necessary to prove she understood the parable. I asked the clergy to share that follow-up story with the congregation to underscore the teaching of generosity.

Another time, a mother subsequently let me know that the \$10 I gave her daughter was used to buy thread from which she hand-wove Orthodox prayer ropes, which parishioners wanted to buy. She used the proceeds from those sales to buy more rope and made more prayer ropes and even got some of her Sunday School teenage friends to join her in this ministry. Over and over again, the paltry \$10 was multiplied until all the parishioners were wearing prayer ropes to remind them to pray. (For those unfamiliar with Orthodox prayer ropes, a small bracelet of rope is woven into 33 knots (one representing each of Christ's 33 years on earth). These prayer ropes are used to pray the "Jesus Prayer" ("Lord, Jesus Christ, Son of God, have mercy on me, a sinner") or other prayers.)

Finally, a gentleman in another parish to whom I gave the \$5 used it to buy a hammer and volunteered to build Habitat for Humanity houses. I encourage clergy to share these stories both to acknowledge the service accomplishments of his parishioners and also to reinforce how we can all live a Gospel parable. This is a way to connect our Lord's powerful messages to your daily life and model ways they can do the same thing. All they need to do is take whatever gifts and resources they have been given and cause them to be put into the Kingdom.

One more critical part of the parable I would like to remind you again to emphasize is that nowhere do we read that the person who received five talents is five times more important or valuable than the person who received one talent. The point is to remind everyone that it is not about how many talents you have or receive. Instead, it is all about what you do in service to others with whatever you have been given.

No matter what Biblical story you use to share a critical S&E message, the key is in taking powerful Biblical stories and translating them into something actionable today in your parishioners' daily lives. Don't merely recite history lessons. When the faithful can see a vision of what they can do to live their faith and the Lord's teachings, they experience a calling from God to live their WHY. And the more ways you can integrate that call to action into parish ministries, the more impactful your S&EM will become. God has called all people to a ministry. Sometimes, we just need to help remind them of that fact.

#### **H. December Year-End Campaign.**

All successful relay teams generally save their fastest and best runner for the last lap, which requires a strong finish. As a result, in parish S&EM, special emphasis should be placed on a December year-end campaign. Please do NOT interpret this as so often happens with furtive messages from the parish about the crisis of how short they are from reaching their budget. Instead, this should be an every-year December campaign.

Why is this critical? The data show that nearly 1/3 (30%) of annual giving occurs in the month of December. Interestingly, the data also shows that 10-12% of all giving happens in the last three days of the year (Vanguard Charitable, n.d.). Indeed, charities

in the U.S. receive up to 5% of their total contribution on December 31<sup>st</sup> (Huntsberger, 2023). As a result, you are not the only charity to know this fact. The rest of the great ones have focused and effective December campaigns and generate fantastic returns. And if your parish S&EM is “taking December off,” especially at the end of the month, you are losing precious donations to other more organized and astute charities. It is time your parish did the work to excel at the end of the race.

Thus, please undertake a very specific ask of your parishioners in December and allow them the opportunity to celebrate and join in the amazing and life-changing ministry work your parish accomplishes. If possible, try not to combine all the December contributions with operating expenses and try to earmark some for generosity in the kingdom or community and for changing or improving lives. When you tell those stories (as you should), you will further reinforce the message of generosity that your parish makes a difference.

The above data should not surprise you because approximately 60% of all nonprofits will make between 1 and 3 “touches” with all their donors in December as part of their year-end campaign (Haddad, 2020). No doubt, you have been the “beneficiary” of such constant solicitations from different charities you support during the year. The point is not to make your parish a pest but to remind donors who have already invested in your parish and the ministries that they have another opportunity to change lives.

Interestingly, the data shows that nonprofits (who don't have the benefit of weekly parishioners attending services) will typically raise at least 26% of their entire annual funds in their year-end ask (Huntsberger, 2023). Some non-profits report receiving up to 50% of their funds in December. So, it's no surprise that year-end asking has become as common and popular as we now see with “Giving Tuesday” (the Tuesday following Thanksgiving weekend). Finally, I am NOT offering tax advice and won't engage in a long conversation about tax benefits and capital gains. Nevertheless, it is important to share the tax benefits of year-end giving with your parishioners. Moreover, it gives them the option to contribute appreciated stock and increase their deduction.

## **I. ITA - Integrity Transparency Accountability, Audits, Parish Data Dashboard.**

Supreme Court Justice Louis Brandeis once opined that: “Sunlight is said to be the best of disinfectants; electric light the most efficient policeman” (Brandeis, 1913, p. 10). As I have reiterated often in my Roadmap, among the most critical responsibilities for parish leaders: “It is essential for the efficient operation of all church activities that financial resources be effectively managed and reported” (Senoga, 2023, p. 1388). Equally clearly, Kalapurackal (2020) emphasized the duty of public officials and religious leaders to act with great visibility, predictability, and clarity.

Perhaps the clearest statement is the conclusion: “Parishioners want more say in how their parishes are run.... In parish financial matters, they expect accountability and transparency” (Zech, 2006, pp. 128-129). Ultimately, ITA is Biblical:

In everything, set them an example by doing what is good. In your teaching, show integrity, seriousness, and soundness of speech that cannot be condemned so that those who oppose you may be ashamed because they have nothing bad to say about us (Titus 2:7–8).

In America today, ITA has become an absolute expectation, and the absence of it raises presumptions of improprieties. Moreover, conversations in churches about ITA allow leaders to productively discuss money in a way that sets the stage for a financial stewardship conversation. As a result, a parish should:

- (a) regularly provide all financial information to all stewards,
- (b) annually audit ALL Parish financial records,
- (c) place your financial statements and audit on your website,
- (d) All Parish Council, stewardship, and finance ministry members should complete “financial best practices” training,

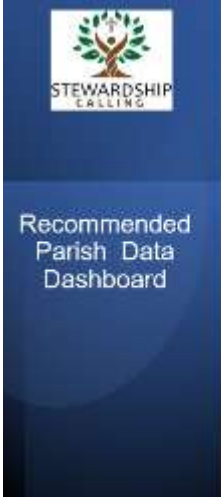
I realized early on in working with parishes that they were overwhelmed by the depth and breadth of the financial and other numerical data of the typical P&L, except for those few individuals with accounting and finance backgrounds. The financial information was more confusing and less enlightening for many parish councils, priests, and parishioners when they looked at the detailed financial statements. Because trust and ITA are mission-critical for any parish, the full audited financial statements must always be made available and provided even if the parishioners do not fully scrutinize them.

### **”PDD” - Parish Data Dashboard.**

At the same time, it is critical to understand the **Key Performance Indicators** (“**KPIs**”) that are the most relevant metrics that define success and must be assessed and compared with prior periods to show trends. While all parish financial information must be shared with all parishioners, providing them with an easy way to view and understand the most critical data is helpful.

I also discovered that parish leaders often obsess on less relevant or totally meaningless metrics (e.g., average pledges) and may not have a good handle on more accurate metrics of what is most important from a financial stewardship perspective. For example, as discussed previously, most Christian parishes (and virtually all American Orthosphere parishes) have significant donor concentration problems because a few generous donors contribute at a substantially higher level than the vast majority of others. Thus, looking at average pledges is misleading, and an analysis of the median pledge is more enlightening.

I recommend that your parish use my Stewardship Calling **Parish Data Dashboard (PDD)** displayed on the right (or another similar KPI tool) to provide the key information to parishioners and stakeholders and convince them of the parish's absolute greatest commitment to the highest levels of ITA. This PDD should be updated monthly and provided directly to all parishioners, reproduced in the church bulletin, and posted on the parish website.



Stewardship Calling Recommended Parish Financial Dashboard

ITEM	THIS YEAR	LAST YEAR	PRIOY 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 <sup>2</sup>			
<small>(add any other critical line items that you need to watch here)</small>			
The following are noted in the report each quarter			
Total Expenses invested in parish chosen charities and ministries			
% of Total Expenses invested in parish chosen charities and ministries			
Proxy Title % Analysis <sup>3</sup>			
% of Stewardship Income from top 10 Stewards			
% of Stewardship Income from top 20% of Stewards			
% of Stewardship Income from top 20 Stewards			
% of Stewardship Income from top 20% of Stewards			

<sup>1</sup> All columns include only "active donors" numbers as of the end of the reporting period.  
<sup>2</sup> Use median value average to more easily compare parish managers.  
<sup>3</sup> Use the proxy title analysis provided by the Stewardship Calling software.

In addition, the full parish financial statements should be uploaded onto the parish's website. While the PDD may be the only document reviewed at each PC meeting and each **General Assembly ("GA")**, any other important financial item should also be presented to the PC and at GAs. I also strongly recommend that the parish retain a professional bookkeeper to properly track and record all financial transactions in a timely manner.



Recommended Data Financial Dashboard

Item	2023	2022	2021
Total Income	\$ 464,641	\$ 463,296	\$ 381,828
Total Stewardship Income	\$ 341,497	\$ 386,588	\$ 282,989
Total Expenses	\$ 434,719	\$ 516,361	\$ 315,234
Net Income or Loss	\$ 9,923	\$ (62,085)	\$ 66,402
% of Expenses Covered by Stewardship	73%	64%	74%
Number of Stewards	136	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 Title Analysis	1.40%	1.06%	1.43%
% of Stewardship Income from top 10 Stewards	48%	35%	42%
% of Stewardship Income from top 20 Stewards	60%	58%	59%

To the left is a sample filled out of PDD. You will notice that the farthest year out is the baseline. Then, each succeeding year's data is color-coded such that if it is increasing, it appears in green, and decreases are noted in red. Accordingly, one's eyes are immediately drawn to the most current column numbers in red, which should be the focus of parish council discussions.

Finally, as soon as possible, an independent auditor should complete a full audit (or at least a review) of the parish financials. A full independent audit is the best practice for higher levels of ITA. Since they are not cheap, parishes that cannot afford an annual audit could consider completing them every two (or three) years, with accountant “reviews” done in the interim. It is also critical for the parish to adopt and implement a proper, consistent, and comprehensive Chart of Accounts (COA) for itemized reporting of all expense categories. An accountant who works with non-profits can provide such a COA.

## **STEWARDSHIP CALLING COMMANDMENT # 7.**

### **Youth Matter.**

As we return to the next of the Stewardship Calling S&E Commandments, my entire Igniting The Flame S&E focus is based on the principle of “no steward left behind.” Why should anyone whom God has blessed with talents, abilities, and resources not be included in the ministry to use those gifts for God’s greater glory and their own “good account” II Corinthians 5:10 Moment?

And yet, the one group ALWAYS left behind in the over one thousand parishes I have worked with is perhaps the most critical. They are called the “future of the parish” (incorrectly in my mind). The youth of your parish are both the foundation, the present, and the future, as well as the most critical constituency to assist from an S&E perspective. I say this because of what I have seen. Also, the Holy Scripture makes this clear: “*Train up a child in the way he should go, and when he is old, he will not depart from it.*” (Proverbs 22:6). This powerful Biblical message should resonate loudly in the heads of every parish leader and all clergy.

I was astounded at looking at the data to realize that the average American family spends between \$1,453 per child per year on ALL enrichment support (sports, music, dance, arts, education, language, etc.), with families earning more than \$100,000 spending \$2,123 per child - per year (Davis et al., 2023). Interestingly, in 2022, the average family spent \$833 per child per year just on their primary sport (which is a lot more for parents like me who had one 4-sport child, or for hockey parents who spend on average \$2,583) (Solomon, 2019; Project Play, n.d.).

However, 0.03% of all children who are good enough to play high school sports will play at the professional level (while their chance of being struck by lightning is 0.02%) (Jergins, n.d.). If you spend thousands of dollars per year on sports and enrichment activities for your child with only a 0.03% chance they will turn pro, how much are you willing to spend on their spiritual formation, given that 100% of them will stand before the awesome judgment seat of Christ?

I think sports and other enrichment activities for children are great. However, there is clearly an imbalance in what we are spending on preparing our children spiritually.

When I ask parishes how much they spend on their children's religious enrichment and training, they rarely have any idea. When we discuss their budget for the following year, they tend to focus more on additional spending on buildings and grounds, as well as special and social events, than on their youth. Even as they start to consider adding extra staff, it is often focused on operational and administrative staff rather than youth ministry. Imagine the difference in the spiritual preparedness and health of your parish youth if an employee was spending 100% of their time focused on what the youth need and how they can be better spiritually prepared.

The longer you wait, the more culpable you are if they wander from their spiritual path and journey. Yes, I suggest parents and grandparents and godparents must be held accountable for the spiritual progression of their children. I submit that your clergy and lay leaders must also be held accountable to ensure the best spiritual foundation is laid through the most impactful resources and programs. The process begins with all three **S<sup>3</sup>** elements in my Roadmap, which also focuses on youth **S**ervant leadership, **S**tewardship & Engagement, and **S**piritual formation and religious education. If you are aware of a better investment of your time and resources than in your youth, please let me know.

Perhaps some sobering data will get your attention. In 2019, Barna Group concluded that 64% of Christian youth leave the church when they leave their family's homes (Barna, 2019). Five years later, in 2024, the percentage of youth departing from church when they graduate from high school is up to 70% (Yoder, 2024).

Please stop reading and prayerfully think about how poorly we must be doing with the faith formation of your youth if we lose close to three-quarters of them when they are on their own and free to choose. Regrettably, I have seen some early data suggesting that they actually veered off of "the path" well before they left our homes. There is a school of thought suggesting that while they go through the motions of church life when we force them to attend, their minds have already started to move them in a different direction.

When we focus on the different demographics, the story is equally tragic. For example, the Pew Research Center identified that between 34% and 36% of millennials (born between 1981 and 1996) are "NONES" and now claim NO religion (Lipka, 2015). They have left and repudiated their childhood religion. Closer to the topic in this Chapter, the Science of Generosity Studies at Notre Dame (previously mentioned) reminds us how critical it is to teach youth about stewardship (caretaking) over their gifts from God as a cradle-to-casket responsibility.

So, my question is, what have you taught your children about their stewardship over God's gifts? What have you modeled for your children regarding your personal stewardship and engagement? Is the topic of stewardship and engagement one you embrace with your children or avoid? What do your parish youth education and other programs teach about their obligation to be stewards of Christ's church and people? And critically, do you have any form of parish program where you ask your youth to become

stewards on their own rather than being given a no-obligation, free ride on the coattails of their parents?

In the spirit of Socrates, I ask all these questions because of the over one thousand parishes that I have worked with, I can count the number that have a formal youth S&E process on one hand (perhaps with a finger or two left over). While well over half have some form of religious education program for youth (whether Sunday school or other programs), I never see the systematic education of youth on the definition and Scriptural foundation of stewardship and engagement. Indeed, almost all young people are not asked to do any of this work. Then we wonder why, as adults, they neither understand nor practice proper stewardship and engagement.

My common refrain is that you cannot give what you never had. You cannot be expected to teach a subject that is foreign to you. My father, of blessed memory, was an immigrant from Greece. Until the day he passed to the Kingdom Eternal, he never played baseball with me or taught me the game. I could be bitter, but I understood that in Greece, they did not play baseball. Thus, he never had that tool in his toolbelt and was unable to give me something he never had. This is easy to forgive.

However, once I possess some knowledge, my failure to teach it to my children is on me, and I cannot be as easily forgiven. In this very direct and challenging fashion, I ask you to reflect on what exactly you have taught your children about their obligation to be stewards of their gifts and their need to support and engage with the ministries of their parish.

Let me be specific. You must immediately begin a youth stewardship program in your parish. ALL children above the age of 5 should be asked to complete their own S&E Commitment focused on giving their time, talents, and treasures. This does not mean contributing the money their parents gave them but rather giving from among their first fruits (whatever that might be) and offering their service. Of course, the teaching of stewardship and engagement must be age-appropriate. I recommend a different form of S&E Commitment for (a) elementary school youth, (b) high school youth, and (c) college/trade school/post-high school youth.

The “little bits” might only be asked to offer the service of saying thank you, or God bless or pray for someone, or serve at the altar. The high schoolers can be asked to step up their stewardship by volunteering to work at a homeless shelter, running a philanthropy drive, working on a Habitat for Humanity house, etc. Post-high schoolers must similarly step up the service they can offer, which is more closely aligned with the ministries available to their parents. **Service and engagement in ministry must be cradle-to-casket.**

While it might seem challenging, I similarly expect your youth S&E Commitment to ask them to give their first financial fruits and tithe. In the beginning, I could care less about the amount they provide financially as long as they get into the habit of doing so. This is then expanded with the teaching that as they receive greater financial blessings



(allowances or money from chores), they are called to donate the first fruits tithe of those resources. In contrast, in all too many Orthodox parishes, I see parents who think they are doing the right thing by giving their children a dollar to donate to the parish in an offering. That is because that is the bad habit you were taught when you were young.

From the time I was five, I went to church with my Yiayia (Greek word for grandmother), Bessie. When the offering tray was passed, she would reach into her handbag (which always seemed to smell like moth balls) and hand me a dollar to put in the tray. (The dollar smelled like moth balls also.) Thus, when my daughters were old enough, I continued the tradition my Yiayia Bessie taught me and would give them each one dollar to put into the offering tray. Sometimes, Alexis would fold it into a paper airplane, and Eliana would play with it as it went in and out of the tray. But I thought I was doing the right thing. That was until I began to understand stewardship and was introduced to the big “I-word.”

The I-word to which I refer is inflation. That dollar my Yiayia gave me to put in the tray in 1960 (when I was five) is worth about \$10.73 in 2025. Thus, every time I donate a dollar (or give a dollar to my children to place in the offering tray), I now understand I am cheating God and His Holy Church to the tune of about \$9.73 a pop.

Worse than that is the knowledge of proportional giving that permeates the Holy Gospel. My uneducated and illiterate Greek immigrant grandmother could only help my Papou (the Greek word for grandfather) in his restaurant. To her, that \$1 in 1960 was a significant part of her income and net worth. To me, it takes about six of those bad boys to buy the Starbucks latte I like. By every measure of inflation or proportional giving, if I give \$1.00, I am not even fulfilling what my uneducated grandparents were teaching me. I challenge each of you by asking how you have done at giving a proportional tithe and offering and teaching your children to do the same.

The best advice I give to ALL young adults is to practice the “**10-10-80 Rule.**” Pastor Andy Stanley calls it “Give-Save-Live.” The 10-10-80 rule means each person donates the first 10% of what they earn to God’s kingdom. Whether to your parish or some other Godly ministry, the tithe should be cemented as what you do with your first fruits. The second 10% of your income goes toward your retirement or rainy-day fund. I have always advocated setting up some form of ROTH or regular IRA or other investment account and taking the 10% automatically out of your income and investing it wisely in a group of diversified index mutual funds or ETFs for the long term. Now, I am neither licensed to give financial investment advice nor should this be considered as such. Indeed, please ask your investment advisor. But whatever you do, invest religiously (pun intended) that second 10% of your income and allow the law of compounding and market accumulation to take over and make you wealthy.

Obviously, if you have a significant financial crisis or need (e.g., your car breaks down), you can “borrow” from your 10% savings account. I say borrow because if you are wise, once you are able, you will pay that amount back to your savings account and continue the constantly appreciating valuation growth of your portfolio.

When I present to youth groups, I actually run a number of scenarios showing them what their median income might be over time and how that second 10% will accumulate and grow, which allows me to suggest a potential range of what it could be worth when they are ready to retire. The number is mind-blowing to them always. The last time I looked at I assumed they made the median annual salary (conservatively \$60,000 in 2025) that grew 2% a year from age 21 until age 65, invested 10% of their annual salary in the market, and earned an average of 7% compounded. How much would they have at the retirement age of 65? The answer was \$2,068,609.

Of course, the number varies with their career and earnings trajectory, the rate of inflation, and the results of their investments. But no matter how you cut it, explaining to youth at age 21 that they will have several million dollars when they retire if they just follow my 10-10-80 Rule is always one of the most eye-opening parts of my presentation to youth. You can have some fun doing this at your parish.

Well, if the first 10% goes to God's kingdom and the second 10% goes to their retirement/safety net, what of the remaining 80%? That is the maximum they are allowed to live off of and spend. It would be great if they could learn to put more away, but the 10-10 first parts of tithes and savings are the minimum. Much like teaching S&E, the earlier you start your children and other youth you mentor on the 10-10-80 Rule, the more it becomes habit and easy, and the greater a difference they make with their tithes in the kingdom and the more they save for the future.

I try to practice what I preach. Thus, my wife and I started the 10-10-80 Rule when we were first married and beginning our life journey together. I confess that there were times when expenditures arose that chipped away my first two 10%. I always felt guilty and returned to the equilibrium of the 10-10-80 model as soon as I thought we could prudently do so and repay what we had borrowed. And while I confess to not having been the greatest investor, I can assure you that I was able to very comfortably retire at a far earlier age than so many of my peers because of the discipline of the 10-10-80 Rule.

While again, I am not an investment advisor, all we did was pick six solid and highly rated diversified mutual funds/ETFs (that were only periodically re-assessed) and used the tried-and-true process of "dollar cost averaging." Under this approach, every month, the 10% (minimum) savings portion was allocated among those six funds in a percentage that I rarely changed. I never looked at the daily uncontrollable market fluctuations or those accounts and absolutely NEVER engaged in buying individual stocks or investments. Instead, I chose a wiser, diversified approach. A Greek proverb says it best: "Φασούλι το φασούλι γεμίζει το σακούλι." ("Bean by bean, the sack gets full.").

I digress in this personal explanation for several reasons. First, to help you think about a valuable educational program you can consistently offer to all your Sunday school students (and candidly to some of your adult parishioners who never learned this effective strategy growing up). Second, you should offer valuable support from

professionals in your parish or community who would love to help teach and train your youth (and others). Third, the first 10% of tithe education ensures that you are “*training up your youth in the way they should go,*” as Proverbs teaches us, so that they become dynamic contributing stewards to your parish. In this way, your parish benefits and continues to grow and prosper, which in turn provides the necessary resources to make a difference in the kingdom.

Dear brother or sister, I cannot say it any more clearly than if you do not have a youth stewardship and engagement program, you have determined your parish’s unfortunate future and failed to properly train the youth God has entrusted to you. Of course, in the constant teaching of S&E, it is important to use different messages depending on their age and always use understandable examples/messages. But it is critical that when you conduct your parish S&E process, you separate the children and ensure they participate on their own at their level and do not merely ride on the coattails of their parents.

In this approach, the youth must pledge their time and talents in service of a ministry in addition to the 10% tithe of first fruits. Thus, the parish must sponsor many different service opportunities (including mission trips, which are always transformational). You should use creative processes to help youth start to discern their gifts and callings. I have seen parishes hold plays when young people model this understanding of stewardship of first fruits in very creative ways. The messaging must include monthly materials sent home for parents to reinforce the teaching and messaging their children are receiving directly from your parish.

One of the most powerful reinforcing steps a parish can take is to publicly recognize youth as they offer their tithes and offerings and services in ministry. Have them publicly share the ministry work they have done and the impact that results. Celebrate their commitment to service to others and engagement in the ministries of the parish. Reinforce the very behaviors you are seeking to cultivate in written bulletins, all communications, and live testimonials.

During an Igniting The Flame retreat, I learned about a young man in that parish earning an Orthodox Eagle Scout badge by having a food drive for the homeless at that parish. It was successful but not celebrated. Since parishes always allow me to offer the homily on Sunday, as part of my S&E message, I named the young lad and publicly celebrated the people he had helped feed. While he was an introverted, quiet type and uncomfortable tooting his own horn, he smiled when an adult publicly recognized his service.

I watched during the coffee hour when he was mobbed by all the adults who commended him on his exemplary service. Some even gave him more money on the spot to buy more food and give it to the local homeless shelter. Fast forward to today, the inspiration of this “young lad” and the encouragement of the public testimonial regarding the people he fed led the parish to embrace a food pantry ministry that grew so large they had to allocate more space. From the small story of a young lad who did

the Lord's work, a new parish ministry began. This is the same example of the young lad who heroically offered everything he had (five small pieces of bread and a couple of small fish) to the Lord, who in turn fed 5,000 men and likely equal numbers of women with 12 baskets left over.

It was a young lad who stepped up and gave everything he had to the Lord to cause it to multiply and feed everyone. And it was another young lad who, in exemplary fashion, stepped forward in the name of God to slay a giant who was persecuting his people. And let us now forget that virtually all the Apostles were in their teens or early twenties, as was the custom in those days when a Rabbi chose them. These very young adults eventually became the Apostles who created the Christian church we celebrate and are working to grow today.

Throughout history, God entrusted some of the biggest responsibilities to youth who lacked experience. In so doing, He taught us the need to do the same. If you want a Christian church beyond your generation, then nothing is more critical than investing in your youth today and teaching the best S&E practices.

## **STEWARDSHIP CALLING COMMANDMENT #8.**

### **W&T Always – Welcoming and Thanking.**

#### **A. DOSE.**

I have never met anyone who said they were thanked too much. While some, in humility, blush at accolades, most people are grateful for the acknowledgment of their generosity, service, kindness, or actions that resulted in an expression of gratitude. I previously discussed what I call **God's DOSE** for humans (**D**opamine, **O**xytocin, **S**erotonin, and **E**ndorphins). These chemicals represent the feel-good hormones and happiness and cuddle hormones that are hardwired by your Creator into your body, causing you to feel joy, happiness, and comfort as certain events take place. Thanking someone results in the release of these various chemicals and the concomitant joy that results.

Endorphins are pain-masking chemicals that help us push ourselves through pain and stress motivators so that we can overcome difficult circumstances. Dopamine is a performance chemical that is meant to continue to motivate us to achieve our goals. It is dopamine that is also persuasive and helps us overcome dependencies on bad things like alcohol, gambling, social media, and other addictions.

On the selfless chemical side, oxytocin is the chemical that is produced by positive feelings that we get from emotional bonds, including physical touch. It is a form of warm feeling from spending time with people that we like. Finally, serotonin is a chemical that is produced when we are respected, admired, and given positive treatment. It is a boost in our confidence that makes us feel awesome.

The bottom line in this review is to remind your parish that thanking is such a critical aspect that is oftentimes overlooked or underutilized. But your Creator designed you to react favorably to it. Who does not like to be thanked, even if you merely did what was expected of you? Expressions of appreciation reinforce the desired behavior, and for most people, the more they are thanked, and the more publicly, the better they react and the more their actions are reinforced.

## **B. Thanking Research.**

My Roadmap is not a psychology book; however, I would point out to you that virtually every study I have reviewed shows the positive results that can happen when a genuine thanking culture permeates an organization. For example, a 2014 study in Emotion concluded that thanking people made them more likely to seek an ongoing relationship with the organization or individuals. A 2012 study in Personality and Individual Differences concluded that grateful people were more likely to take care of their health. Doctor Robert Emmons, the leading gratitude researcher, has repeatedly found that gratitude increases happiness and ultimately reduces depression.

In 2012, a University of Kentucky study concluded that people who thanked more retaliated less and were more pro-social. Note here how those who participated in the expression of providing thanking and others actually improved their behavior. The 2014 Journal of Applied Sports Psychology study concluded that gratitude increased athletes' self-esteem, which was found to be an essential component of optimal performance.

I could go on to identify countless studies that have determined the criticality of thanking and reinforcing the kinds of behaviors and creating the type of culture within an organization that is most beneficial and desirable. However, I am confident that when you were thanked for your service, you felt that DOSE of positive hormones. Thus, I am hoping you will realize how critical it is for your parish to have a Thanking Ministry and culture of thanking personally, genuinely, preferably in writing, often publicly, and repeatedly for everything. By creating a culture of encouraging others to thank and be thankful, the emotional trajectory of your parish changes positively.

When the thank you notes are in writing, they are most productive and effective. The larger the parish, the more difficult it is to write all these personal notes of thankfulness and sign every one of them. So even if a form letter is required to thank a donor for a contribution or service, it is emotionally invaluable for the individual signatory to add a short couple-word personal note in blue in their pen and ink signature. Thus, one of the practices I routinely recommend is that thank you notes should be written for all stewardship contributions, volunteer activities, ministry service, contributions of anything, and sometimes even attending events. Ultimately, thanking people for serving others with genuine gratitude is the reinforcing behavior that is instilled in the best practices of those parishes that have an effective S&EM.

Public relations expert Ken Makovsky used to say, “You either have a thank-you culture, or you do not have a very good one.” I could not agree more. A positive parish culture is the consequence of gratitude for everything God provides and the service of our fellow parishioners. Let us positively exploit the DOSE hormones God gave us.

### **C. Welcoming & Mugging.**

Welcoming is one of the most overlooked elements of a very effective S&EM. The Pew Research Center survey of the top five things people look for in picking a new church identified welcoming as the second most critical factor, with 79% of the respondents focusing on its importance (Pew Research Center, 2016). (The quality of sermons was the number one factor, which I will discuss in Chapter 14 of my Roadmap.) The importance of a total welcoming experience cannot be overstated. If you do not have a separate welcoming ministry (which is preferred), then this is a natural part of S&EM.

Welcoming is one of the most important elements of being a Christian and in establishing the tone for a loving church experience within your parish. Welcoming helps newcomers feel that they've made the right decision to worship with you. In other words, it makes people want to come back because they're seeking that opportunity to become part of your parish family.

Not to be forgotten is the critical importance of a parish emulating the Kingdom of God, a culture that is overflowing with joy, peace, and love. One of the most essential elements of Holy Scripture is Christ's statement to the Apostles in John 13: 34-35 with the new commandment of loving one another. The Jews of the time understood the context of Scripture because only God could issue Commandments. Thus, Christ's Commandment is an affirmation of the loving and welcoming he was ordering as God the Son. When Christ said, “*By this men shall know that you are my disciple, that you have love for one another*” he was making our loving and welcoming embrace an imperative.

On one level, it is fairly easy to love and welcome those whom we already know, our family or our good friends. Of course, we should do that, although there is nothing particularly ingratiating or externally required of us in those particular acts. Thus, for purposes of S&E in your parish, please focus on welcoming those whom you do not know, who may be new or strangers, and even people who don't look like you. This is the fundamental act of what it means to be welcoming in its initial stage.

Just recently, I listened to a powerful YouTube discussion by an atheist who visited an Antiochian Orthodox Church for the first time. Of course, he naturally talked about the beauty of the church environment and services. But the welcoming of the people was what impacted him the most. He even observed the solemnity by which they acted in the services and the gracious way they welcomed him before and after. Yes, the Orthodox service is rich with tradition, pomp, and grandeur (what is jokingly referred to as the

“smells and bells”), but what impacted this particular atheist most was the way in which he was welcomed and loved. That’s the reaction you should want for your parish.

To dig a little deeper into what made the difference, our atheist friend started by noting that there were people at the entrance of the church (the Narthex in Orthodox Churches), where people who were not regular parishioners were all welcomed and greeted. He noted one particular woman who had just finished greeting a newcomer who, he later learned, was visiting for only the second time. What struck him was how this second-timer was immediately greeted and warmly welcomed lovingly without any desire or intention to force a conversion or an acknowledgment of a new religious tradition. He was merely extended grace and a loving, welcoming embrace. This was uniquely different for this atheist in that it caused him to stop, step back, and observe with fascination.

Our atheist visitor also said that this particular woman greeter was extremely patient in explaining to him what was going to happen at this church service and how they worshipped and patiently inquired if he had any questions. Even after this visitor identified himself as an atheist, the warm welcome, love, and graciousness that he received did not change. It caused him to form the opinion that this must be what it means to be a Christian. This atheist noticed this incredible welcoming experience so much that he repeated his discussion of it over and over again throughout the video.

What also made a huge impact on him was that in the middle of this woman's welcoming without judgment, the priest came into that outer Narthex part of the church with his sensor and blessed it and everyone in that space. The greeter immediately stopped the conversation and reverently bowed her head and crossed herself. Our atheist friend observed that while she was intently focused on helping welcome him to the parish, she was more focused on the solemnity of the moment and what it meant for her to practice her faith through this critical act.

However, I tell parishes repeatedly that welcoming newcomers and strangers in the entrance/Narthex (or better yet, in the parking lot), while absolutely critical, is not enough. Indeed, at that moment, there is a unique opportunity to find out some information about that visitor and ask them to sign a registry book as you would for anybody that you welcomed into a new environment. Parenthetically, I note that the information that you gain from that visitor should be shared with the priest so that at the end of the service and before the dismissal, he can warmly welcome them by name and invite them to stand up so the parishioners can recognize them and graciously greet the visitor during the coffee hour or common meal.

Some people may feel uncomfortable with that level of recognition, and standing up is a bridge too far. Nevertheless, the point of that exercise is to encourage all your parishioners to focus particularly on those visitors and welcome them during social time. In a comprehensive welcoming process, the greeter learns a little about the visitor so that during social time, they can introduce them to people who are like them. There is always a next level to the welcoming experience until they become part of the family.

At one parish I visited, before I even entered the church building, I was greeted by parish council members who identified me as a newcomer and asked me to sign their registry book. They asked me just a few general questions about whether I was visiting, whether I had moved into town, and whether I had ever attended an Orthodox parish before. They then stuck a very simple but beautiful stitched cross on my lapel that identified me as a newcomer to that parish. Thus, when I entered the church formally, I was immediately greeted by members of the welcoming ministry because they saw the cross and identified someone to whom an extra special warm welcome was in order.

Truly welcoming parishes go further and provide service information and books to follow along. In addition, it is wonderful to offer someone to sit with the newcomer and answer their questions, particularly if they are new to that faith tradition or worship experience. This level of care is invaluable for a true newcomer.

When we had a memorial service for my mother of blessed memory, my younger daughter had her roommate attend. At first, I was a little annoyed that they seemed to be speaking throughout the entire service until I realized she was answering non-stop questions from her roommate. In a memorial luncheon we had after the service, another non-Orthodox friend commented on how beautiful all the prayers for the deceased were. By taking the time to explain what people are seeing and giving them the unique opportunity to feel more comfortable and welcomed, we open Christ's church to others.

I mentioned that one thing you should do when you first greet a stranger is find out a little bit about them. I am not suggesting a full interview, but rather asking them where they are from, their family, their faith, their reason for visiting, or anything else conversational that allows you briefly to get to know them better. Most people tend to like to talk about themselves, and thus, this helps the newcomer feel important as they are welcomed. If you show genuine interest in who they are, you will have an opportunity to begin to form a relationship with them.

However, there is another critical (some people say, sinister) objective of this exercise. As you are conducting this "interview," immediately start to think about who within your parish family is most like that individual so that you can introduce them during the coffee or social hour after the services.

Welcoming cannot be done effectively just by a welcoming ministry since you are introducing the newcomer to other parishioners. Welcoming must become a Core Value or at least a cultural imperative of your parish community. This culture of welcoming is consistent with Christ's commandment to love one another and start to help the visitors see themselves as a part of your parish family. Thus, clearly, anyone who is introduced to the newcomer because of some commonality must be equally engaging and loving.

However, as I stated, the welcoming at the start of the church experience and even in the social hour is just the beginning of a total welcoming experience. If the newcomer either lives in your city or just moved there and is not just passing through,



someone in the welcoming ministry must invite them to attend another parish activity. It does not have to be another church service, although that is fine.

For example, letting them know about an upcoming Bible study, a men's/woman's group gathering, a book study, or even a social activity or philanthropy ministry activity is all great. The point is to try to get them to come back for something else so that they can start to see the dynamism of your parish community and begin to see themselves as potentially a part of it. As is true of any engagement activity, it is always the follow-up that makes the difference and underscores that the initial interaction was not just an accident but part of an intentional culture of welcoming and embracing.

When that invitation is extended to attend some other activity, it is best if the individual extending the invitation joins that newcomer at that event/activity and takes that opportunity to get to know them better. An introduction to others in the parish who share things in common with the newcomer is also a wonderful form of engagement. The more they start to feel part of a welcoming and loving community, the more they want to become active in it. But even if they never take the opportunity to join your parish community, they will always walk away there with that warm feeling of being welcomed and loved, and who knows what the future holds for them or your parish.

Back to the video about the atheist's visit to a welcoming Antiochian Orthodox parish. After the coffee hour, he was invited to stick around for a program that included an open conversation with the priest. Because this visitor felt so welcomed, he attended and listened attentively to that program. He had no intention of abandoning his atheism and joining that parish but wanted to learn something new and hang out with these nice people.

What happened after the program staggered his mind. The priest, having been introduced to him previously as a visitor who was an atheist, asked him what his experience was like at the parish and if he had any questions that the priest could answer. More powerful than that interaction was the fact that the priest invited this total (atheist) stranger, who definitely was not seeking to join the parish, to come to his house for a cup of coffee and further dialogue if he was interested.

Please do not miss what is particularly critical that happened here. Not only did the person who first greeted the parishioner at the church identify and welcome him in a very gracious fashion that put the visitor at ease but he was introduced to many others and invited to participate. This allowed the priest to welcome him again and see if he had any questions or issues. It is easy to see how this is an exemplary initial welcoming experience.

One metaphor I challenge you to think about is what would you do if you knew that Christ was coming as a visitor? What would you do to make the Lord feel welcome? Alternatively, what would you do to welcome a Saint or Angel who stopped by for a visit? How would you ensure the total welcoming experience was realized to the fullest? Begin to look at every visitor who enters your parish as the Lord, a Saint, or an Angel. One day,

you may just be right, and you will definitely create the kind of cultural expression of welcoming that is essential for the Christian Church to model and exemplify.

St. Paul's letter to the Hebrews reminded us, "*Let brotherly love continue. Do not forget to entertain strangers, for by so doing, some have unwittingly entertained angels*" (Hebrews 13:2). It is in the context of this critical Scriptural reminder that I challenge you, your parish leadership and parishioners, and your parish S&EM to focus on every stranger/visitor as if they were an Angel sent by the Lord.

### **Invitation.**

In the vein of a total welcoming experience, let me ask you what I ask every attendee at my Igniting The Flame live retreats. When was the last time you invited someone who is not a member of your parish to join you at a parish service or activity? Whether they are your friend, work colleague, neighbor, or someone you just met, are you welcoming them to your House of God?

Some faith traditions do this form of welcoming and evangelization very well. Indeed, a LifeWay Research nationwide survey found that 71% of Protestants or non-denominational church attendees had invited an individual to attend a worship service with them in the last six months and that 25% of these parishioners had invited at least three individuals in the last six months (Smietana, 2018).

I will never forget several law partners who were members of other mainline Christian denominations and left them to join two different non-denominational mega-churches. Even though they knew the depth of my commitment to the Orthodox Church, at least twice a year, they would separately invite me to attend a men's group, Bible study, or some other activity. In this way, they were always extending the grace of God and welcoming on behalf of their parishes.

Nothing is preventing your parish from embracing welcoming in the fullest sense. And for those of you who are always looking for a contemporary movie metaphor, I point to a poignant scene in *The Godfather*, where Don Vito Corleone said friendship was everything to him. He said it was more than talent and more than the government and was almost equal to the family. So, in that regard, I ask you to consider ensuring your parish embraces welcoming in the fullest possible way as a cultural imperative.

### **Mugging Welcome.**

I'll never forget I was doing a Zoom program for a rather small parish, and as I was speaking with an engaged group of parishioners, my ADHD eyes kept getting distracted by a multicolored wall in the background. I inquired about it and learned that it was their "Mug wall." Every parishioner brought a mug of their choice, and during coffee hour after church, they would use their coffee cup from the mug wall and consume the

beverage of their choice. They would then clean it and replace it on their peg on the extremely colorful mug wall.

This mug wall provided a creative and engaging way to allow each parishioner to express themselves so that others immediately had something to speak with them about, particularly if their mug had a message, picture, favorite sports team, etc. It also ensured that no one had to stay behind to clean up, as everyone was responsible for their mug cleaning.

Importantly, there were quite a few plain mugs with the church logo that were available for every visitor. And very powerfully, whenever a new person joined that parish, they had a ceremony where they would bring their mug and put it on a hook that was designated for them on the mug wall. When I call it a “mugging ceremony,” people typically laugh; however, I think it is easier to embrace creative and fun new traditions when a new parishioner joins the family.

Of course, this social event is not intended to replace the far more important and impactful sacramental way in which we welcome new parishioners into your church in keeping with your faith tradition. However, there is nothing wrong with having an enjoyable social welcoming engagement in a “mugging ceremony” or something similar. You can even have sippy cups wall for small children.

As you start to let your mind expand on what activities you can do to create this kind of cultural welcoming in your community, you can very quickly identify many new ways to welcome people. I encourage you to explore and experiment in your welcoming ministry. As with all experiments, some will succeed, and others will not be as effective. The concern is not a failure but rather that you experimented with something new, you learned something from it, and you iterated and made it even more impactful and powerful.

Please do not miss the key message of the critical importance of S&E in finding new and creative ways to welcome and love people consistent with what our Lord and Savior taught us about loving one another. St. Paul’s reminder that you are to look at everyone you interact with as a potential Angel is a powerful way to live. This message does not just apply to your Sunday church experiences. When you welcome people into your community, you will better represent the image and likeness of Christ here on earth and create the kind of parish that is worthy of being called Christian.

In my live Igniting The Flame retreats, I love displaying a cartoon that shows a large group of individuals interacting with each other, holding cups of coffee, shaking hands, and talking in a wide arc in a hall. Down at the bottom center of the arc, surrounded by nothing but empty space devoid of other humans, stands one lonely individual by themselves. The caption reads. “Our after-service coffee hour where newcomers can get to know the congregation.” The clear picture of the lone newcomer not being greeted or welcomed by anybody, surrounded by all those in the arc who are enjoying each other’s company, evokes a degree of laughter from all my attendees.

However, I point out to them that that is my experience as someone who travels many weekends visiting different parishes.

I go on to explain that even though I'm standing before them now, delivering this hopefully inspirational retreat when they see me in their coffee hour, I will likely be by myself. There's always a degree of little nervous laughter that ripples through the crowd. I suspect it is the nervous laughter of self-indictment as they recognize their guilt as having likely performed that way in the past.

Of course, I am always grateful to those individuals who welcome me. However, my point is that even after I present and preach to them, I experience the loneliness of being a visitor in a foreign land of a parish that is not truly welcoming and engaging. Perhaps they did not like me or my message. However, I leave it to you to decide what kind of parish you want yours to be. Will it be the loving and welcoming faithful community the Lord created, or will it be something else?

### **Additional Resources.**

If you are looking for additional resources to see how to improve your S&EM and parish, I highly recommend the following:

1. Robert Putnam's book Bowling Alone explains why organizations like churches have become increasingly interpersonally disconnected, leading to decline and ineffectiveness (Putnam, 2001).

2. Putnam's sequel of sorts, Better Together, provides several case studies to see how organizations, including churches (read the case study in Chapter 6), create greater unity, connection, and community (Putnam & Feldstein, 2004).

3. Fr. Michael White and Tom Corcoran's fantastic book, Rebuilt, Awakening the Faithful, Reaching the Lost, and Making Church Matter, describes how Nativity Catholic Church used effective welcoming and other ministries to reinvent itself and grow spiritually and in numbers of faithful PIPs. The Rebuilt strategy led this once-declining traditional Roman Catholic Church to triple their weekend church attendance and yield increased giving, flourishing, ministries, and a vibrant and solid spiritual revival.

One final point regarding research performed by the Pew Research Center. Immediately after the SARS-CoV-2 pandemic, they found that 66% of the people watching online services said that they had not watched any online service in the last month. A lot of data is now starting to come forward regarding the impact of the coronavirus closures on churches and their eventual recovery. While outside the current scope of my Roadmap, I encourage every parish to consistently focus on what I call **W.R.I.T.E.** a new chapter for your parish by never taking your parishioners for granted and always welcoming them as if they were newcomers.

My **W.R.I.T.E.** process focuses on

#1 **W**elcoming them back,

#2 **R**eaching out to them when they are absent,

#3. **I**nviting them to participate in services and ministries,

#4 **T**hanking them for everything that they do, and

#5 **E**ngaging them in all aspects of the parish life.

If you change the culture of your parish to always think of every parishioner as a newcomer and engage them as such, your community will knit itself into a tighter fabric of a family that is always looking out for each other.

#### **D. Food/Ethnic Festivals And Other Public Events Welcoming.**

One of the most common activities at some of the ethnic churches, particularly within the American Orthosphere, is an ethnic food festival. In every Greek Orthodox parish that I have ever been a steward of, there was always the quintessential Greek Festival that occurred over multiple days. Of course, it created an opportunity to share the great cooking and cultural traditions of dance and music, as well as some of the other artifacts that are found in our ethnic heritage.

However, my research uncovered that ethnic/food festivals were not created to share ethnic culture but rather in response to a lack of financial support from their parishioners. Thus, these parishes look upon the generosity of strangers who were intrigued by the ethnic traditions and food to fund parish operations. Needless to say, this is antithetical to the S&EM model I am trying to convey. I am not opposed to these festivals and think they can do some positive things in a community. However, using external fundraisers to replace the insufficient financial contributions of your parishioners is, to me, a grave sin of disrespect and lack of stewardship and engagement education.

That said, there is a critically important positive role these kinds of festivals, activities, and other forms of social interactions can play that should not be missed by any Christian parish. These activities provide a unique and powerful opportunity to welcome those individuals to your faith tradition and share with them the glorious ways you honor your creator and Savior.

Thus, if your parish has a food/ethnic festival, I strongly encourage you to ensure that every volunteer encourages every visitor to go into your church for a quick tour. The physical part of the tour must introduce them to any relevant parts of the sanctuary (e.g., icons in Orthodox churches, statuary in Roman Catholic churches, etc.). Most importantly, there should be a short (10-15 minute) talk by one of your most energetic,

enthusiastic, and empowering communicators. This is not the time to list the names of every individual who attended the Third Ecumenical Council or get into the detailed nuances of the faith traditions that differentiate you from all your visitors.

Rather, this is a unique opportunity to share with these visitors a little bit about your WHY, Core Values, Mission, faith tradition, sanctuary, and how your parishioners are called to live. A Q&A is always helpful as long as the presenter is sufficiently knowledgeable and not motivated to explain the superiority of your faith tradition. But what comes at the end of that brief presentation is critically important. You always invite the visitors to provide you with their contact information so you can send them a gift. As an aside, it always surprises me how many people will give you their contact information for the promise of some unknown gift.

What is critical is that within one week of gathering that information, you respond with whatever gift you had in mind (a prayer card, etc.) and, most importantly, an invitation for that visitor to come back to share social interaction and coffee. There, you will warmly and personally greet them and engage in conversation to get to know them better. This is not the time to try and convert them. Just love them and learn who they are, what their background is, what makes them tick, and what questions they are trying to answer.

Trust me, they would not come back if there was not something in their heart, gut, or brain that was causing them to want to engage. And remember, the key to faithful stewardship is always engagement. This first step might be the most important part of their journey to a new place of hope and promise. And you possess the roadmap to help them get there.

Please allow me to go down one rabbit hole with a positive example from a parish at which I am blessed to be a steward. When the parish of Saints Raphael, Nicholas, and Irene first started its Greek festival, all the parishioner volunteers were trained to suggest every guest go into the “church” for the tour. The quotation marks around the word church are because this parish prayed in a very humble converted bungalow house rather than one of the many beautiful Orthodox churches you can find in any city.

Once inside, Father Barnabas would provide an inspirational 15-minute introduction to the Orthodox faith. As suggested above, he would request everyone to share their contact information so we could send them a gift. The now welcomed, engaged, and intrigued guests would indeed receive a prayer card and the invitation to come back to our hall for a cup of coffee and dialogue.

An ever-growing stream of non-Orthodox individuals would come back. Before they knew it, many started joining one of the small men's groups or women's groups or attending some of Father Barnabas's Bible studies or his powerful “Journey to Fullness” spiritual formation program or some other activity. They stated that they wanted to bond with a group of wonderful parishioners and fellow newcomers who were just nice and loved Jesus.

I'll never forget one of the Sundays when I was visiting my parish, which is to say I was not on the road visiting another parish. Father Barnabas proudly announced that we had 7 Catechumens who were going to be joining the Orthodox Church. As is our habit, I met them all in the fellowship hall (another converted bungalow house) after church to welcome them home. I politely asked how they came to join us because not one of them had a last name that ended in a vowel and an "s" (which is the typical signal that they are of Greek extraction). Moreover, none of them had a spouse whose last name ended in a vowel and an "s." Not surprisingly, 100% of them said they came to a Greek festival for a good time and took a tour of our church, and the next thing they knew, a year or so later, they were properly catechized and became Orthodox Christians.

Now, hear me clearly: I have no problem with your parish having an ethnic or food festival or similar cultural activity. But under no circumstances should you depend on the generosity of those guests to cover the operating expenses of your parish instead of having the faithful undertake that responsibility. Second, please do not miss the opportunity to also share your faith with your guests and see if they are NONEs (with no religious affiliation) who might want to join you and your loving and welcoming community to get closer to Christ and each other.

As one final aside, I always laugh when I visit a festival-dependent parish, and they complain about how hard it is for them to find younger volunteers to work. I am not at all surprised by this because most of us have done a decent job of teaching our children math. They are far more capable than we are. I learned that young people can easily calculate the amount of time and effort it takes to get everything ready for a festival, divide it by the net proceeds, and then calculate how much each parishioner would have to contribute to make up for all that effort.

I challenge you to do the same thing at your parish. In almost every parish I have seen, the reality is a fairly nominal additional contribution from your parishioners would more than satisfy whatever the net proceeds are from the monumental undertaking of your ethnic festival. Leave it to the younger generation to lead us old-timers back to the source of sharing the love of one another and Jesus Christ.

## **E. Parish/Ministry Annual Reports, After Action Reports And Contingency Plans.**

### **Annual Reports**

I strongly recommend that you produce a graphically appealing and inspirational annual report regarding the impact you had over the preceding year. All public corporations have annual report requirements imposed for good reasons. Even companies owned by private equity firms frequently provide such annual snapshots of accomplishments for all stakeholders. Studies have found that all such annual reports serve multiple positive objectives, including legitimizing the entity and its impact (Samkin & Schneider, 2010). These high-level summary annual reports also enhance the integrity,

transparency, and accountability (**ITA**) of the parish and legitimately allow for humble self-promotion and recruitment (Khatun et al., 2016).

Studies have shown that most individuals do not have sufficient financial acumen or interest in extensive discussions of financial performance data. Thus, to maintain the highest ITA, your parish must report high-level and critical financial results in your annual report. The primary reason is to communicate the most important information about accomplishments and aspirations to all PIPs, APIPs, FIPs, and any other interested stakeholders (Abu-Nassar & Rutherford, 1996). The link below will take you to a couple of great examples of parish annual reports from a parish I have been blessed to serve that does S&E well (Assumption Greek Orthodox Church – Seattle): <https://stewardshipcalling.com/parish-annual-reports/>

### **After Action Reports.**

While I am down in the S&EM weeds, another infrequently used report you should generate is an “**After Action Report.**” This analysis for every S&EM event or other major parish or ministry activity can consist of four simple but critical questions:

1. What 1-2 things went really well? How did it make the event better?
2. What 1-2 things did not go well? What could have been done differently?
3. What 1-2 things went really well in your specific area of responsibility and on your sub-team?
4. What 1-2 things did not go well in your area of responsibility and needed to be added, deleted, or done differently?

The key is to keep all submissions short, succinct, and focused on the key elements, ideas, and conclusions. It is better to think in terms of bullet points rather than paragraphs. This feedback intends to help improve similar S&EM or other parish events in the future.

## **STEWARDSHIP CALLING COMMANDMENT #9.**

**The Four Types of Giving.- Annual Stewardship Tithe, Emergency Appeals, Planned Giving, and Capital Campaign contributions.**

The above sections have gone into extreme detail on the annual stewardship tithe, which is the critical foundation of my stewardship ministry. Thus, the rest of this Commandment #9 section will focus on the other three types of giving.



## **A. Emergency Appeals.**

Emergency appeals are the easiest to understand and implement as they follow some unfortunate tragedy to which your parishioners will be asked to respond. It typically occurs somewhere else but can even be found in your community. Normally, after a storm or cataclysmic weather event or war, people's lives will be tragically impacted. Your parishioners can be called on for a special one-time appeal for contributions where 100% of the funds or assets raised will go to the beneficiaries of that disaster. This kind of episodic giving helps people in need and makes donors feel better that they are able to share grace. Not much else needs to be said about this emergency appeal except that it should not be too often, which would desensitize your parishioners. And you must report the amount raised and the impact achieved, as well as any thank yous that result.

## **B. Capital Campaigns.**

During the capital campaigns, it is one of the four types of stewardship that every parishioner must consider. However, capital campaigns are typically conducted far less frequently and in an effort to support a major undertaking of capital improvements, whether it's in the form of a new building, a major addition, new pews, carpeting, iconography, painting, etc. These are incredibly significant expenditures that improve the capital assets of the parish, which is why they are undertaken far less frequently. Because of the substantial nature of the funds needed, they also require special fundraising activities and efforts. But a key point is to understand that a capital campaign solicitation should be conducted not in lieu of the annual stewardship tithes but in addition to and in cooperation with your annual campaign.

Many great materials, books, and consultants can help with capital campaigns, so I will not spend a lot of time discussing them in my Roadmap. Indeed, I am a strong and enthusiastic supporter of your parish hiring the appropriate capital campaign consultant to assist you in all aspects of a properly conducted capital campaign. While I have known a few parishes that have expertise among its parishioners to conduct an effective capital campaign properly, my experience suggests that every time a parish tries to "save a little money" by not hiring an experienced consultant, they end up more often than not, raising less money, or having a botched capital campaign that potentially leaves a less than favorable taste in the mouths of their donors. This, of course, makes the next capital campaign, or the continuation of the current one, far more difficult.

I offer the above advice as someone who does not sell these (or any other) services, so there is no self-interest in making this strong recommendation to hire professional capital campaign assistance. Thus, given the unique elements and aspects of the capital campaign, combined with the general distaste that most parishioners have of asking their fellow parishioners for money, outside consultants, in my opinion, are one

of the most useful expenditures of your funds that will generate far more than what they cost.

In some instances, a consultant may suggest a feasibility study to begin a capital campaign. Essentially, a feasibility study is a series of in-person interviews by the consultant with some of the potential lead donors and perhaps the sampling of other donors to try and engage an understanding of the possible fundraising capacity of the parish. Feasibility studies can be beneficial in some instances. It is important to understand that most feasibility study consultants will generally give you a number that they are fairly confident can be raised. This projection, therefore, should not be the upper limit of your capital campaign in your planning.

Whether a feasibility study is undertaken or not, there are some elements of a capital campaign that are worthy of note in this high-level summary. Capital campaigns are usually conducted over several years. The typical time frame is between three to five years. This is so that individuals can give a larger amount spread out over multiple years. These periods also sometimes align with the construction project in question. Thus, for smaller projects, a shorter capital campaign contribution cycle is typical. At the same time, for new churches or large expansions, it is not unusual to accept pledges and contributions for up to five years.

It is always important that your capital campaign remains grounded in the parish's WHY, Mission, and Vision. In addition, it is important to have a separate team working on the capital campaign. This team must coordinate with those involved in the annual stewardship tithes campaign, and the two must never cannibalize each other. However, the capital campaign materials and solicitations must focus on the most effective capital campaign possible with a dedicated team.

## **The Two Phases Of Capital Campaigns.**

It is also essential that a capital campaign reaches every parishioner so that everyone can have an investment in the new improvement. Nevertheless, the typical capital campaign reflects the understanding that Vilfredo Pareto was correct and, indeed, 80% of the funds will be contributed by approximately 20% of the donors. Thus, a typical capital campaign follows a two-phase process.

Phase One is known as the "**Quiet Phase.**" In the Quiet Phase, all the potential major donors of the parish (including any non-parishioner candidates, endowments, or other major donor sources) are solicited on a one-on-one, in-person basis. In a well-scripted presentation by people with the appropriate gravitas and relationship, the major donors are requested to make the largest transformational capital campaign contribution possible.

It is called the Quiet Phase because these solicitations happen quietly and with no visibility to the whole parish. The objective is to generate such significant pledges (or

contributions) from the major donors that at least 80% of the project's cost can be covered in the Quiet Phase. Once the Quiet Phase is completed and every potential significant contributor has been solicited and made their pledge, the aggregate amount pledged is then announced to the parish as the "**Public Phase**" begins.

In the Public Phase, the remaining parishioners are all solicited for their capital campaign contributions. Having a significant amount already committed by major donors helps generate enthusiasm in the minds of the other parishioners that this project will occur and that they want to be a part of it. While individual amounts pledged by any donor are not necessarily announced (subject to naming rights discussed later), it is important to ensure that every parishioner has the opportunity to participate in and feel the same sense of ownership in this expensive activity undertaken to improve bringing people closer to Christ and each other.

You must have high-quality and effective capital campaign materials for both the Quiet and Public Phases, as well as posted on your parish's website and in all materials provided to other stakeholders and visitors who may see it and decide that they want to participate in the capital campaign also. These materials should be aligned with the overall WHY, Core Values and Vision your parish is hoping to accomplish and be of the highest quality possible.

Every capital campaign must have continued, constant, and public thanking and updating the parish as a whole with regard to the progress being made. It is not unusual for a capital campaign to have one or more community-wide luncheons/dinners where progress towards the activity is updated, as well as the results of the capital campaign. In this way, people are encouraged to see the progress being made and make their capital campaign contribution, and, in many cases, encouraged to increase their capital campaign pledge.

In one capital campaign I was helping to lead for a parish, we had a congratulatory update luncheon and chose to have a young member of the community speak about the excitement the youth had for the new family life center that was part of this \$13.5 million overall project. The passionate and enthusiastic personal testimonial of this young woman was so inspirational that spontaneously, one of the major benefactors of the parish stood up and announced that he was adding another six-figure contribution on top of his already seven-figure pledge because he saw the vision of what was possible through the eyes of this young woman.

The following week, I was called by his estate planning attorney, whom I knew. He jokingly said, "Well, I guess you tagged my guy for another big pledge." We laughed, and I attributed it to the young woman who spoke and the Holy Spirit. This Jewish lawyer then surprised me by asking where to send the check as the donor wanted to contribute the funds immediately. Yes, the Holy Spirit touches all our hearts in different and powerful ways if we get out of the way. Coincidentally, that same donor made an additional immediate, even higher six-figure contribution later as he saw the beauty of what was happening!

By constantly celebrating, thanking, and providing testimonials, the Vision can be caught more easily and can be a powerful reinforcing magnet to God's Kingdom. All we must do is have a WHY inspirational enough, a Vision worthy enough, and the courage to invite faithful people to look at our roadmap and join us on the journey. The Lord will take care of the rest.

As with every S&E activity, complete integrity, transparency, and accountability are essential. While oftentimes, contribution amounts will be held confidential, it is important that you immediately acknowledge all contributions and pledges as and when received. You must also ensure that the appropriate records are updated and that the donors are continually informed of where their contributions are in relation to their pledges.

This is especially important in capital campaigns because their pledges have been committed over several years. It is sometimes easy to forget what has been committed and what has already been contributed. Thus, during a capital campaign, it is a good idea for you to continue to send quarterly updates to each of your capital campaign contributors. This lets them know what their pledge was and where they stand in relation to the completion of that amount. You can also occasionally remind them that they can increase their pledge.

At the same time, you must regularly report the aggregate amounts pledged and contributed to the parish at large, both in the monthly updates and in any quarterly or annual meetings of the parishioners. Oftentimes, you have seen those thermometers that show at the very top the total amount being raised and a red line that grows as your pledges or contributions reach that level. Whatever way is effective in your parish to communicate the progress is helpful, provided that you are actually making progress. Indeed, there's nothing more dispiriting than to see one of those thermometers or charts that never seems to be increasing. The bottom line is that regular visibility of the full ITA by which the capital campaign is being undertaken is essential for the continued support and growth of that fundraising exercise.

## **Naming Rights.**

An issue you must decide in advance is whether you will acknowledge donors who contribute specific big dollar amounts in exchange for naming rights over items being constructed or improved. People have widely different perspectives on this well-established capital campaign practice, and I will not attempt to mediate those differences. I merely mention that a strategic decision at the beginning of any capital campaign must be made about if and how any such naming rights will be offered. Regardless, it is not unusual to have a plaque of some sort that acknowledges ALL donors to any major Capital Campaign (i.e., a new church building, etc.), if nothing else, to provide a historical record of the generosity in your parish.

## Capital Campaigns vs Annual Stewardship Campaigns.

As mentioned previously, there are substantial books, materials, and expert consultants that can help a parish undertake a capital campaign. However, I wanted to provide a high-level summary of the very important distinctions between a capital campaign and the annual stewardship tithes campaign that should be undertaken at every parish.

### Similarities between Capital Campaigns and Annual Stewardship Campaigns

They both:

1. focus on the Parish's WHY, Mission, and Vision,
2. have a dedicated team running them,
3. reach every parishioner,
4. include personal solicitations,
5. have a schedule,
6. use effective media and materials,
7. include repeated, personal, and public thanking,
8. be conducted with integrity, accountability, and transparency.

### Differences between Capital Campaign and Annual Stewardship Campaigns

<b>CAPITAL CAMPAIGNS</b>	<b>ANNUAL ENGAGEMENT &amp; STEWARDSHIP CAMPAIGN</b>
The focus is a large one-time monetary pledge to be contributed over a period of several years	The primary focus is greater engagement with the parish liturgically, sacramental, and in ministry, along with an annual contribution of money (hopefully a 10% tithe or at least a percentage of income)
Have a beginning and an end	Are repeated annually
Often begin with a feasibility study or assessment of how much the parish can raise for the capital project, and each parishioner is asked to make a "sacrificial pledge" paid over 3-5 years	Every parishioner is strongly encouraged to tithe from their annual income or at least give the highest percent of their income over the course of the year

Begin with a “quiet phase,” where the top potential donors are solicited privately, before the “public phase,” when every remaining parishioner is solicited	ALL parishioners are solicited simultaneously
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I devoted two of my Stewardship Calling Ancient Faith Radio programs to Capital Campaigns, where I interviewed two experts regarding church capital campaigns you can download here:

1. Anthony Scott (March 31, 2019) [https://www.ancientfaith.com/podcasts/stewardshipcalling/the\\_difference\\_between\\_your\\_dreams\\_and\\_your\\_reality](https://www.ancientfaith.com/podcasts/stewardshipcalling/the_difference_between_your_dreams_and_your_reality)
2. Jerry Minetos (June 30, 2019) [https://www.ancientfaith.com/podcasts/stewardshipcalling/capital\\_campaigns\\_and\\_feasibility\\_studies](https://www.ancientfaith.com/podcasts/stewardshipcalling/capital_campaigns_and_feasibility_studies)

**C. Planned Giving.**

An ancient Greek proverb says, “A society grows great when old men and women plant trees in whose shade they shall never sit.” Sir Winston Churchill’s inspiration echoed this sentiment: “We make a living by what we get. We make a life by what we give.” Planned Giving is the vehicle to plant these trees and make a better living by making a charitable gift during your life or in your will/estate plan to benefit a charity that takes effect upon your death.

The 2020 U.S. Census identified approximately 73 million “Baby Boomers” (those born between 1946 and 1964). And one thing is true of all of us Boomers. We will all die. Indeed, as I said in the preface, there are far fewer miles in our windshields than in our rear-view mirrors. I raise this critical information not to be morbid but instead to identify a righteous and great opportunity path for your parish.

There are at least three reasons you should offer planned giving to all parishioners, with specific emphasis on those who are older. First, there is the opportunity for your parish to expand its ministries to better serve this mass of aging parishioners, many of whom do not have a will or estate plan. Second, this provides a new group to provide extraordinary mentoring and succession training for the younger parishioner leaders. Third, this group is the primary target of a planned giving campaign because it is at the top of people’s minds as they contemplate what they want their legacy to be.

Planned Giving also provides you with the opportunity to create an endowment fund to serve the parish with the earnings or gains from contributions. This way, living parishioners (of all ages) are encouraged through a comprehensive program to include the parish in their wills. An effective Planned Giving campaign and endowment ensures the perpetual ability of your parish to thrive.

The data suggest that Baby Boomers will transfer \$30 trillion over the next several years (Hall, 2019). Looking out over the next 25 years, the wealth transfer is estimated to be at least \$68 trillion (Osterlan, 2019). Imagine if even one-tenth of one percent of this wealth transfer is donated to the Boomers' parishes. That low level of giving would produce \$680 billion in church planned giving donations. Let that number settle in as you start to imagine what you could do with that generosity.

Strikingly, in survey after survey of why people made a planned gift in their Will, the number one answer is because they were asked. After interviewing countless people who made small and staggering gifts to some academic institution, hospital, or other charity, the data always showed it was the request that made the biggest difference. Of course, the donor had to believe in the organization to which they were donating. They had to trust the funds would be used for the purposes stated and that the WHY and Vision of the organization were worthy of their support. But if asking is the key to the door of massive wealth transfer, why do the majority of parishes not have planned giving programs with substantial endowments? Does your parish have a planned giving program?

There are several reasons parishes have not undertaken Planned Giving:

### **1. Education**

Previous studies showed that as many as 67% of people don't know what "planned giving" means. Moreover, the number of Americans with no Will has grown steadily from 67% in 2022 to 76% in 2025 (Lure & Whittle, 2025). This is a tragic number that over three-quarters of Americans have not taken the time to decide how they want whatever is left after their death to be distributed. Have you? If not, consider this your wake-up call.

Education about the importance of a Will/Estate Plan and the ability to give to the parish are critical opportunities the parish must undertake. While my Roadmap does not provide legal advice, what most people fail to realize is that if you don't have a Will, your State has one for you. Yes, when you die intestate (without a Will), the law of the State of your domicile determines how your assets will be distributed and to whom. Some States have unique ways of doing it (e.g., upon death, all your assets get equally divided between any surviving spouse and all your children). When your parish offers free educational programs in this area, you provide your parishioners with a wonderful service even if they do not include the parish in their Will. Estate planning lawyers, accountants, and financial advisors in your area are always willing to provide these free educational programs even if you do not hire them for your Will or Estate Plan (Walls, 2017).

The top four reasons why people don't have Wills include procrastination, they believe they don't have enough assets, thinking it will be too expensive, they don't know how or where to start (Lure & Whittle, 2025). Thus, if your parish offers educational opportunities, you can address most of the impediments. Giving to the parish cannot be a condition of offering such education, but when you have a captive audience of

believers, offering them this opportunity is natural and easy. Your Parish Planned Giving program can help your parishioners address all 4 of these impediments. It is also important to make your Planned Giving education and appeals a regular part of your overall S&EM and stewardship campaign, even though it will have its own solicitation process. Again, all four types of parish giving must be complimentary and not cannibalize each other.

## **Endowment Fund.**

To receive the planned gifts, your parish needs an endowment fund into which the donations are made. All funds must also be properly and professionally invested. While there are a variety of endowment fund possibilities, it is critical to address several items clearly at the outset.

First, it must be clear what proceeds can be disbursed and used for the purposes spelled out in the endowment document. Often, this is a fixed percentage of the endowment capital (3-5%). In some cases, only the earnings, dividends, and interest (and sometimes the capital gains) can be used. Regardless, there must be clarity on how much can be disbursed and used each year.

Some endowments establish an “inviolable amount” such that if the investment value is less than that amount, no distributions can be made from the endowment. This baseline can equal the amounts contributed by donors, a flat percentage (e.g., 90%) of contributed amounts, or some other formula. However, if you introduce an inviolable amount, it is critical to ensure that the recipient(s) of the charitable dollars from the endowment will be able to operate when proceeds cannot be distributed because of market declines.

Endowments should also have very clearly defined investment policies that identify where the endowment funds can be invested and what investment options are prohibited. The law provides a “prudent man standard,” and there are countless examples of investment guidelines available from investment advisors. If the parish has sophisticated investment professionals, they might be selected to manage it as a group subject to the investment policies. If the parish is not so blessed, then many professional investment advisors in your area exist to help perform that function.

Many decisions must be made in determining the investment guidelines and the applicable restrictions. Thus, this must be properly addressed before initiating a planned giving program and ministry with the right professionals. The endowment must also provide details about the ITA of the investments, who decides beneficiary donations, and how those awards are decided. Typically, most parishes relegate the distribution duties to their parish council or some other leadership group that is best able to determine beneficiaries, subject to the limitations set forth in the endowment documents.

Other elements frequently found in parish endowments include:



- a. Parish Assembly approves Endowment Fund, Rules & Regulations, Investment Guidelines, and any separate 501(c)(3) corporation.
- b. Parish endowments are under the ultimate control of the parish council, which is elected by the parish as a whole.
- c. Endowment boards & committees are appointed by the parish council or elected by the parishioners.
- d. Endowment boards & committees provide financial statements and disbursement and investment reports to the parish council, parish assembly, and all parishioners.
- e. Endowment funds must be held in the parish's name (however, a parish endowment corporation may hold assets in its name as long as the parish council has ultimate control).
- f. Endowment investments and financial statements are subject to the oversight of the parish council and are audited by the parish auditors.
- g. The parish council ultimately approves all endowment grants and transactions consistent with endowment rules & regulations or applicable donor restrictions.
- h. Endowment charters, rules, and bylaws must provide that on any liquidation, termination, or prolonged inactivity, all endowment funds and accounts revert solely to the parish (or its successor).

### **Formal Process Of Asking And Acknowledging.**

As stated previously, in surveys of donors making a planned gift during their life, the #1 reason was that they were formally asked and inspired by the WHY and Vision of the charity and provided an easy way to donate. While it is impossible to interview those who made unknown planned gifts in their Wills, the data suggest that parishes (or other organizations) with established planned giving education and solicitation programs are the reasons the donor makes the gift.

The data also suggest that only 4.5% of Americans made a charitable Planned Gift bequest, which means that 95.5% of your parishioners represent a Planned Giving campaign opportunity (Stiffman, 2019). I am offering you a mission field of available, possibly significant donors for your parish that includes almost 96% of the people who have already bought into the Vision of your parish (to one degree or another).

There are five starting steps to get a planned giving program started that include:

1. WHY: Determine your planned giving "why" and who / what receives the benefits.

2. TEAM: Recruit a diverse planned giving ministry team.
3. ENTITY: Create the endowment entity or account that will receive the funds.
4. TEACH: Educate why everyone should help achieve the ministry WHY.
5. ENGAGE: Engage everyone personally and communicate at least monthly.

I offer an easy 5-step process to get a planned giving campaign going at your parish.

1. Create a comprehensive Planned Giving education, follow-up, and communications campaign.
2. Plan a fun dinner celebratory event in about 11 months for anyone who makes a Planned Gift now or adds the parish to their Will.
3. Execute the Planned Giving education, follow-up, and communications campaign you established.
4. Publicize and announce the celebration event at least monthly and at every education event you host.
5. Have a fun gratitude party with a short, uplifting message and unveil the recognition plaque that identifies the participants in the planned giving program. After the endowment generates sufficient funds for distributions, you should include a brief presentation about the amazing things the earnings from the endowment funded and some of the future dreams of the parish.

After years of preaching Planned Giving throughout the American Orthosphere in all my programs, I am pleased that my Archdiocese finally hired a professional, Melpo Murdakes, to develop a fantastic program and materials you can access here: <https://www.goarch.org/departments/plannedgiving>

### **It's Easier Than You Think.**

Ninety-five percent of America's wealth is in stocks and property (Banner, 2018). Thus, a planned gift does not impact parishioner's cash flow, which allows people of all income levels to make planned gifts, even retirees. Also, naming your parish as a life insurance policy beneficiary is an easy way to give. Moreover, the data shows that the typical Planned Gift is 200 times the size of a donor's largest annual stewardship fund gift. Better yet, the research also indicates that parishioners who make Planned Gifts in their Wills typically also increase their annual giving (Banner, 2018). This makes sense because if a parishioner believes in your WHY and Vision enough to merit a posthumous gift, their increased generosity during life allows the parish to do even more currently.

Now, let's do some math to see what your parish is missing. The data shows that the average Will charitable bequest was \$78,630 (although it varies depending on age). Interestingly, at least 20% of Wills have two such bequests (Stiffman, 2019). However, if you conservatively believe that over time, you can get a significant number of your parishioners to make a planned gift, here is what your endowment can be worth:

# of Planned Gifts	Aggregate Endowment Value (using \$78,630 average gift)
50	\$ 3,931,500
100	\$ 7,863,000
150	\$ 11,794,500
200	\$ 15,726,000
250	\$ 19,657,500
300	\$ 23,589,000
400	\$ 31,452,000

If you do not want to accept the large number of opportunities, let me wake you up in a different way. Multiply the number of your parishioners who died last year by \$78,630 to estimate what your parish could have received if it had an effective Planned Giving Program!

### **E. Who Is The Chuck Feeney In Your Parish?**

Chuck Feeney co-founded the airport Duty-Free Shops and amassed billions living frugally. He said he wanted to die broke (Bertoni, 2012). Over 40 years, he anonymously donated over \$8 Billion to various charities. He was reported to have said: "If you want to give it away, think about giving it away now. It's a lot more fun than when you're dead" (Bertoni, 2012; Roeloffs, 2023).

There is a Chuck Feeney (or two or three) in your parish. Perhaps not with the same net worth, but you should never assume what people have accumulated or what they are willing to donate to your parish. For example, I received a call once from a parish council president informing me of the death of an older lifetime bachelor who was a very quiet and reserved schoolteacher. What shocked us all was when he donated \$1 million to the parish in his Will when most people never assumed he had that much to give. The

longer you wait, the more your parish loses. And for each of you reading who has not yet put your parish in your will, I ask you, when you disappear from this world, what will your legacy be?

## **Financial Stewardship Analysis + Donor Concentration Analysis.**

In several parts of my Roadmap, I alluded to how parish leaders frequently fail to understand what financial and other metric data is important and what can be delegated to a Finance Ministry to manage. Moreover, many parish leaders (including clergy) and parishioners do not have much training in financial statements or financial matters. As a result, about twenty years ago, I created my Stewardship Calling **Financial Stewardship Analysis** (“**FSA**”) process that includes a donor concentration analysis and Parish Data Dashboard (“**PDD**”) (previously discussed in this Chapter 10). Parishes can use these tools for both parish council and parishioner reporting.

### **The Why of the FSA.**

Each of us is called to be the best stewards over everything given to us so that we may have a “good account before the awesome judgment seat of Christ.” In addition to that personal stewardship responsibility, leaders of a church have an even greater duty to similarly be the best stewards they can be over everything entrusted by the faithful to their parish.

### **The Challenge.**

As mentioned previously, most parishes have some form of financial statements; however, it is easy to get lost in the minutia and details of particular line items and miss the big-picture perspective. Moreover, without knowing the **key performance indicators (KPIs)** such as in a PDD, parish leadership often focuses on less relevant metrics (e.g., average pledges, percentage of budget raised). I remember observing a parish council meeting where they discussed insignificant items for ninety minutes, such as how much was being spent on grass cutting (as if they were a committee of the whole).

Every budgetary element that can be assigned to a ministry should be delegated so the parish council (board) can focus on the more strategic matters, fulfill its WHY, and achieve its Vision. Finally, without a frame of reference of how you are doing in comparison to what’s good or bad or other parishes, it may be hard to know whether your most relevant results are decent and trending positively or the alternative.

## **A Solution – The Stewardship Calling FSA - Financial Stewardship Analysis.**

My FSA has been used by well over 275 parishes in the American Orthosphere to help provide greater financial stewardship and other data insights. It was developed

using the best stewardship practices and financial analytics, all adapted for Christian parishes. The FSA can provide a parish with a detailed financial analysis that is benchmarked against the norms of the other Orthodox parishes and other Christian church standards.

The FSA includes some of the most critical financial stewardship dashboard items I recommend, including:

- (a) what percentage of your total operating expenses are paid by direct financial stewardship;
- (b) what percentage of your total operating expenses are paid by strangers without whom your parish could not function like it does;
- (c) a proxy tithe analysis (PTA) to suggest how close you are to being a tithing parish;
- (d) what is your donor concentration, and how much of a donor concentration problem do you have that creates risk if major donors move or pass to the Kingdom Eternal;
- (e) what is your median giving (a more relevant measure than average pledge), and what percentage is the median of your mean level of giving;
- (f) what percentage of your budget is spent on parish-chosen charities and ministries;
- (g) several other analytics regarding your income and expenses.

The FSA also provides a comparison of the most relevant percentages to the over 275 other American Orthosphere parishes for which Stewardship Calling has performed an FSA. A critical starting point for your parish is to implement a proper **Chart of Accounts (“COA”)** that is aligned with the operations of the parish and best parish accounting practices. After detailed presentations and vigorous debate and amendment, if necessary, this COA must be approved by your parish Finance Ministry and parish council.

## **Elements of the FSA.**

### **The “Trinity” Of Income Sources**

In keeping with my Stewardship Calling’s FSA Model, a “trinitarian” approach helps categorize all your parish income into one of three buckets as follows:

1. “Stewardship” (the direct stewardship tithes contributed by your parishioners as their stewardship contributions),
2. “Disguised Stewardship” (the “nickel and diming” your parish does of its parishioners through passing trays, selling candles, soliciting additional donations for various items and needs, and ministry contributions), and
3. “N.O. Income” (“Non-Orthodox Income”) (replace Orthodox with your denomination, if different), which represents the proceeds contributed from non-parishioners from the parish external fundraisers (ethnic festivals, hall rentals, golf outings, and other special events through which non-parishioners contribute to parish income).

The first category of Stewardship Income is simply the aggregate funds contributed by the parishioners as their annual stewardship tithes. The second category of Disguised Stewardship represents the funds directly from the parishioners but not included in their annual stewardship tithes. As previously mentioned, the problem with this approach is that the continued “nickel and diming” of parishioners causes them to reduce their direct stewardship to retain “financial dry powder” because they know they will be asked to contribute to these special fund-raising events and activities.

Instead, your parish should introduce a “one and done” philosophy where parishioners are solicited only once for a true yearly stewardship tithe (to be paid in weekly installments throughout the year). Finally, the third “N.O. Income” category I use for American Orthosphere parishes represents the donations by total non-Orthodox (N.O.) strangers and patrons who attend your parish’s ethnic festival, rent your hall, or attend your fundraiser or golf tournament, etc.

### **The “Trinity” Of Expenses/Uses**

To help simplify the understanding of the operations of your parish, just as the income is divided into three buckets, so too are your expenses, as follows:

1. “Personnel, Administration & Operations” (that covers all the fully loaded costs of personnel (including their benefits), and other operating costs of your parish unrelated to the facilities or ministries),
2. “Occupancy” (all costs associated with the physical assets used and operated by your parish, including the cost of utilities, non-major capital improvements, and property and casualty insurance, etc.) and
3. “Other/Ministry” (this aggregates the expenses spent on philanthropy and ministries funded by your parish and includes the usually largest item of the support the local parish provides any regional Diocese or national Archdiocese/Metropolis).

As long as they are favorably benchmarked against local norms, the analysis of the first two elements of expense is not as instructive as the third item. Of course, costs

must be measured against standards and norms to ensure appropriate fiduciary and other responsibilities for the expenses incurred while also maintaining the salaries and benefits at levels necessary to attract the best personnel and keep them performing at their highest levels.

However, it is the third category of expenses that is most enlightening and which I spend the most time assessing with parish leadership. This is because of the extensive research on the correlation between increased church ministry and external philanthropy spending as drivers for increased stewardship contributions and generosity (Warwick, 2019; Winseman, 2012). The particular focus is on the portion of the ministry and charity expenses set by the parish rather than imposed by their Metropolis, Archdiocese, Denomination, National Jurisdiction, etc.

It is well recognized that the more philanthropic a church is, the more its stewards will contribute. This is so because when donors can see the impact of their donations, they are more generous because the benefits they see make them feel good. Moreover, the more a parish is visibly philanthropic, the more its stewards will likely redirect some of their other charitable generosity to their parish because they inevitably feel closer to it since it is comprised of people they know and see regularly rather than a large and faceless non-profit. However, at the core of all increased generosity is full ITA.

It is worth remembering the need to constantly assess both the percentage and dollars funding parish-chosen philanthropy and ministries to ascertain the degree to which it is living its WHY and fulfilling its Mission. When analyzing FSA data, I deduct the total of all your contributions to your Diocese/National church, etc., and merely focus on the dollars you expend on parish-chosen charities and philanthropies and compare that total to the aggregate of all parish expenses. In most American Orthosphere parishes, after deducting contributions to their Diocese/National Church, I find that a typical parish invests only 2%-4% of all expenses for parish-chosen charities and ministries. This is an extremely small percentage and hardly moves the charitable and philanthropic needle. Everything else is going to the basic operating and occupancy costs of the parish.

For a frame of reference, when I served on the Board of Directors of the Atlanta United Way, we actively promoted that 92 cents of every dollar we raised went to the member agencies serving the community's needs. This is a highly efficient funding organization (subject to the discussion in Chapter 11 about the importance of measuring impact vs merely costs). However, for most American Orthosphere parishes, only about two to four cents of every dollar spent goes into parish-chosen ministry and philanthropy, of course, ignoring that some portion of the clergy and staff salaries and contributions for national ministries support charitable work. It is no wonder why parish stewards are redirecting their increasing generosity toward the ever-growing number of philanthropic entities, 501(c)(3)s, and NGOs (Non-Governmental Organizations) doing charitable work.

Another common problem with the typical American Orthosphere financial statements is that the incredible philanthropic work of their women's charitable auxiliaries and other affiliated charitable subgroups are never reported on the parish P&L. For generally accepted accounting principles (GAAP) reasons, that may make sense. However, it substantially reduces the visual financial impact of spending on charity and philanthropy. For this reason, and to the chagrin of my accounting colleagues, I recommend parishes also produce a fully consolidated P&L showing both the fundraising and generous philanthropy of those parish-affiliated groups since the parishioners are also contributing to them. In this way, the parish can have a more accurate picture of its aggregate generosity and impact.

Ultimately, the FSA is designed to help parish councils separate the wheat from the chaff and learn to focus on the major metrics that matter, as discussed in greater detail in the previous section on the Parish Data Dashboard.

### **Donor Concentration Analysis.**

All financially sound enterprises routinely perform dependency analyses to ascertain the impact of losing any of their key donors/customers/clients. The same challenge exists for nonprofits such as parishes in the form of their donors/stewards. Yet one of the areas that churches get wrong in their financial analysis is their obsession with announcing average pledges, notwithstanding its irrelevance in most parishes. Your average pledge is largely misleading given the inevitable donor concentration that affects most parishes with an over-dependence on the generosity of a few large donors in relation to the much lower levels in the majority of stewards.

An example proves the irrelevance of averages. If a church had only three stewards, where one gave \$3, the second gave \$300, and the third gave \$3,000, the total collections would be \$3,303. When divided by the three donors, this giving produces an average pledge of \$1,101, which seems nice. However, the median is only \$300. And for those who have forgotten your math, the median pledge is the one in the middle, with half the numbers higher and the other half lower.

What this significant donor concentration problem shows is that if that \$3,000 donor were to pass away or move from the parish, the financial calamity would be substantial. It is for this reason and because of the continual problems of donor concentration within most Christian parishes that I never allow parishes I work with to focus on (or report) the average pledge because it is so misleading. Reporting the median pledge is far more insightful.

As I perform FSAs for parishes, I routinely find significantly detrimental donor concentration, even at otherwise apparently financially solvent parishes. While businesses typically look at the customer/client concentration, most parishes do not. I completed an FSA for a parish that anyone who knew them in their jurisdiction would rate as a top 1% parish. And in many dimensions, they were. They had a major campus



with all the facilities they could need, a growing congregation, dynamic clergy, and extensive ministries. Their strategic plan helped them identify how to go to an even healthier and higher level of service and performance, but they had never looked at their donor concentration.

When I completed their donor concentration analysis, they were shocked to find out their top 10 stewards provided over 36% of their contributions, and the top 10% contributed 53% of their income. I will usually calculate the percentage for the top 10 and 20 stewards and then the top 10% and 20%. Worse yet, once they looked at the names of those top ten donors (which were anonymized for my review for confidentiality purposes), they discovered that virtually all the top 10 were well into senior citizen status, which meant the likelihood of passing to the Kingdom Eternal was much closer. This became a clarion call for immediate action to understand the root causes and revise their S&E campaign to address this challenge.

I have worked with many other parishes that seem to be doing well, where their top 10 stewards produced well over 40% of total stewardship contributions and, in one case, almost 60% of total stewardship contributions (which is beyond DEFCON 1!). This level of dependency on an exceedingly small number of stewards places the parish at the highest level of financial risk, which can be avoided by focusing on managing this through a more effective S&E tithing process.

This donor concentration analysis is also critical for any parishes involved in a capital campaign or construction project, as sophisticated lenders know to ask for such an analysis. While few banks lend to parishes, and they take all the property as collateral, unlike other loans collateralized with real estate, no bank wants to foreclose on a parish after a default. Not only does it look extremely bad from a public relations perspective, but parish assets are not easily disposed of for full value. Accordingly, lenders do a complete and thorough analysis of cash flows to ensure sufficient coverage of all debt. A significant donor concentration is a material impediment to their comfort level as they have all too often seen the consequence of a major donor dying, moving away, becoming disenfranchised, and reducing or eliminating their contributions.

It is important to note the issue here is not the significant amounts contributed by the top 10 or 20 donors. God bless them and their recognition of their duty as Christian stewards and their generosity with their blessings. Note, I am not saying that even these highest donors are tithing or yet contributing at the levels they are capable of, and perhaps they, too, can be motivated to increase their generosity to a tithing level.

Another benefit of a Donor Concentration Analysis is to look at trends over a three-year period. The oldest year is the baseline, and the later years are color-coded red if the donor concentration percentage is increasing and green if it is declining. It is always critical to also look at the dollars being contributed and color code them also, with increased donations from the top stewards in green and decreases in red. The dollar increase can be growing, which is good, but making the percentage concentration worse

and then in red. This is one reason why I tell all parishes to calculate both percentages and dollars to see the fullest picture.

The donor concentration analysis provides extremely valuable information, which is why I recommend updating donor concentration data at least quarterly in the Parish Data Dashboard (PDD) (discussed previously). Of course, a critical relevant metric that is constantly measured and analyzed in the PDD is the number of financial stewards. Changes in steward numbers and their total contributions, as well as the percentage of operating expenses covered by the stewards, are three of the most critical PDD metrics every parish must understand.

## **STEWARDSHIP CALLING COMMANDMENT #10.**

### **Team, Tactics, Technologies - Not Everything Is A Nail.**

I love The old saying that if you are a hammer, then everything is a nail. However, that does not apply to your parish S&EM. You cannot always use the same old techniques and solutions. The use of the newest, best, and most effective and varied tools is essential. In this Stewardship Calling 10th S&E Commandment, I address a catch-all of critical S&EM improvements and best practices you should consider loosely grouped into Team, Tactics, and Technologies.

### **Stewardship Team.**

Every parish I have worked with or spoken to fails my test of the composition of the most effective S&EM team. There is no significant effort that doesn't require a team to excel. Holy Scripture makes this point clear in Ecclesiastes 4:9-10 saying, *"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."* This is confirmed by leadership experts Drs. Kouzes and Posner who concluded: "It takes a group of people working together with a common purpose in an atmosphere of trust and collaboration to get extraordinary things done" (Kouzes & Posner, 2010).

Being as clear and direct as I can, if your parish does not have a full S&EM Team that is committed, trained, enthusiastic, and disciplined, you will not sustainably achieve what God has made possible in your parish! Drs. Kouzes and Posner similarly confirm the high calling that can be achieved through service to engage in parish ministry:

When seen through the lens of a servant's heart, leadership becomes not just a job but a calling. Lives are changed for the better. Next-generation leaders are molded. Along the way, the sense of destiny God planted in each individual soul finds fulfillment (Kouzes & Posner, 2006).

Among the many duties of your S&EM team, members must communicate constantly with all parishioners and the leadership provided by your parish council and clergy (e.g., regular messages, thank yous, welcome packages, etc.). As described previously, the S&EM will require an expanded team of Ambassadors if the parish implements any of my suggested wHoly Engaged Processes (Plan A, B, or C).

To properly manage and execute all this holy work, I submit it takes 10 specific functions in three categories. In some cases, and for smaller parishes, a few of the ten functions can be handled by one person and still be effective. Sometimes, these functions are directed by other ministries (e.g., welcoming ministry, etc.), which is perfectly fine, provided they are coordinated with the S&EM.

Here are three S&EM team functional areas and a description of some of the tasks each function should perform to optimize your parish results.

### **ADMINISTRATIVE FUNCTIONS**

#### 1. Ministry Team Leader

Ultimately, this critical ministry requires a leader to ensure all activities are undertaken. This role also primarily interfaces with the parish council and parish assembly. The leader must also be instrumental in building a consensus on this ministry's WHY and Vision and ensure that all functions and operations are performed with excellence. As with every ministry, I always propose Co-Chairs for both redundancy and succession planning.

#### 2. Stewardship Communications

Communication is generally one of the most critical activities for every parish ministry. It is the absolute lifeblood of any S&EM since it requires enthusiastically sharing the passion for the parish's WHY and Vision and underscoring the countless numbers of lives impacted through parish stewardship. This ministry member can help coordinate the testimonials of lives impacted, which is an effective messaging strategy. They also coordinate communications with ALL parishioners through all media outlets (snail mail, email, social media, web, etc.). I previously summarized some of the best practices in parish communication that S&EM communications leaders use. However, I cannot say more emphatically that your parish will suffer and have poor results if you have an ineffective or inadequate S&EM communications plan and team.

#### 3. Stewardship Data Analysis

One thing that is hopefully clear as you go through my Roadmap is the critical importance of having good, reliable, current data. I always repeat W. Edwards Deming's quote. "In God we trust, all others must bring data" (Oxford Essential Quotations, 2018). Thus, your S&EM team must include someone

responsible for gathering, aggregating, and analyzing all the data, as well as delivering actionable information to the appropriate responsible individuals.

This person is usually the only member of the S&EM team who has access to the names and amounts pledged and contributed by parishioners, as that information is typically confidential. The parish priest should also have access to that data in case someone experiences financial distress that causes them to need relief from whatever their original stewardship pledge was. Ensuring the confidentiality of parishioner's data is essential.

This member of the S&EM team is responsible for producing all the stewardship reports, not only for the S&EM but also for your parish council and parish as a whole. They are also responsible for keeping your comparative data of prior years so that at any given point in time, the S&EM can identify where they are and how they're tracking against previous years, as well as the reasonable expectation of the budget.

## **TACTICAL FUNCTIONS**

While the above S&EM team members are focused on administrative activities, there are important tactical activities that must be accomplished if your S&EM is successful.

### 4. Stewardship & Engagement Ministry Campaign

The first of these tactical responsibilities is performed by the S&EM team members responsible for ensuring that the annual stewardship tithes campaign is conducted with excellence and according to plan. As discussed previously, the stewardship campaign is not merely a one-week or one-month activity. A properly conducted S&EM campaign will be year-long and includes continually provided education opportunities, constant updates, and communications, as well as testimonials regarding the impact of the stewardship ministry and encouragement for individuals to engage in parish ministries to a more extensive degree.

Thus, it is critically important for someone to manage the overall annual campaign and ensure that everything from the homilies of the clergy to the weekly communications in bulletins, as well as the content being updated on websites and in other forms to the parishioners is consistent with the overall stewardship plan that has been developed for the whole year. This person must also coordinate and manage whichever Plan A, B, or C of the wHoly Engaged process the S&EM chooses.

### 5. Planned Giving

I previously explained the critical importance of having a planned giving program and campaign for your parish. To ensure that it is consistently executed and integrated with the annual stewardship tithes campaign, a member of the

S&EM team should be responsible for planned giving. This would include the year-long education and participation selection process as well as hosting an effective year-end gathering of those who have made a planned giving commitment to the parish. This year-end event would present what has been done with the proceeds already invested in the endowment, as well as encouraging them to consider making additional contributions and ask their friends and family to join in this planned giving ministry of the parish.

## 6. Stewardship Ambassador Recruitment & Training

As mentioned previously, it is critical to have a group of Ambassadors who actually interact with the parishioners to solicit their engagement in ministry and their stewardship commitments. Thus, a team member should be responsible for helping to ensure the recruitment and training of the Ambassadors, as well as learning from the experiences of the Ambassadors in the field. This S&EM team member will coordinate closely with the annual stewardship campaign team leader to ensure that there are a sufficient number of trained and enthusiastic Ambassadors to help implement the annual campaign.

## **MINISTRY OR LIAISON FUNCTIONS**

### 7. Welcoming Ministry

The Stewardship Calling 10 commandments of an effective S&EM include the importance of a consistent and comprehensive welcoming ministry. To the extent your parish does not have a separate welcoming ministry (which it should), there should be a welcoming ministry team leader that is included within the S&EM. This individual will help ensure that well-trained individuals conduct all the Welcoming Ministry activities and that all Welcoming Ministry materials are continually updated to reflect the latest information at the parish and all the ministry offerings that exist. This team leader will also ensure that the Welcoming ministry is properly coordinating the “total welcoming experience” that your parish has chosen to implement as part of its welcoming ministry.

### 8. Thanking Ministry

The previously cited data underscores how critical a thanking exercise is in all S&EM activities. Thus, there should be a team member who is dedicated to ensuring that all actions are receiving the appropriate amount of thanking support. This includes providing the necessary materials, thank you cards, prayer cards, or other items that are used and given to donors as part of the thinking experience. As mentioned previously, the thanking function is typically one of the most overlooked aspects of any S&EM. It is critically important that donors and volunteers receive consistent reinforcement informing them of how grateful the parish is for their generosity and dedication to their time, talents, and/or treasures.

Coordinating all the thanking experiences is something that will help improve the results as you return to those individual donors for continued support.

## 9. Youth Stewardship

My previous discussion of the essential youth stewardship program means a member of the S&EM team must focus on implementing an effective, age-appropriate youth S&E program. Frequently, this individual would coordinate with the Sunday School program or other youth ministries at a parish and help ensure that the messaging that is conducted for the benefit of the youth in the parish is consistent with and supported by the same S&E messaging directed at the parents and grandparents. In this way, S&E messaging can be reinforced at all levels within the family, and opportunities can be presented for the family to discuss and share the aspects of S&E activities.

For example, the parish I was able to convince to deploy my Good and Faithful Servant Stewardship Challenge (discussed previously in this Chapter) found ways for parents/grandparents to “partner” with the children in creative ways. Some parents joined with their children in making the decisions about where their generosity would be deployed. In some cases, the parents and grandparents supplemented the money given to the children to encourage external generosity.

## 10. Small Group Ministry

Finally, if your parish does not have its own separate **Small Group Ministry (“SGM”)** (which it should), the S&EM can undertake the management of an SGM. This would involve recruiting and training SGM leaders, facilitating parishioner support and engagement in SGM, and helping to ensure that the SGM is supported and grown over time. This is a fairly significant undertaking, which is why I typically recommend that SGM be embraced as a formal ministry of your parish and not as a sub-activity of the S&EM. Nevertheless, it is critically important that SGM be implemented as much as possible because of its proven effect at helping to engage parishioners more liturgically, sacramentally, and in ministry, which in turn increases the level of financial and ministry engagement of parishioners.

In conclusion, as mentioned above, having a team to support all the necessary functions and operations of the most effective S&EM is critical. While some of the above activities can be exercised by more than one person or by the same person, if you leave any of the above activities unattended, the effectiveness of your S&EM will be diminished. It may seem like a massive undertaking and activity, yet this is the kind of focused energy that must be required to perform the critical functions of connecting individuals with the ministry opportunities that their God-given gifts can support.

## Technology – Websites, Kiosks, Texting, APPs.

A separate Chapter of my Roadmap could be devoted to how technology can drive greater success in S&EM activities. While people are used to deploying technology extensively in daily life at home and work, parishes are often laggards in technology deployment. Every data point directs our attention to the need for more technology to make engagement and giving as easy as possible.

For example, 49% of all church-giving transactions are made with a credit or debit card (Firch, n.d.). Moreover, almost every demographic of donors has become very comfortable with regular and monthly church online or electronic giving, including 40% of Millennials, 49% of Gen X donors, and 49% of Baby Boomer donors (Firch, n.d.). Indeed, 30% of donors aged 75+ say they have given online in the last 12 months (Firch, n.d.).

Another area I cannot stress enough is the need for every parish to spend significantly more time on its website and social media. I am astounded when I review parish websites before I meet with them how out-of-date, inadequate, and ineffective they are. Sometimes, I see bulletins and pictures that have not been updated for years, which signal to anyone looking that either the parish has nothing going on or does not care about keeping their information up to date. Here is my key takeaway: Every parish must review EVERY page of its website at least once a year (and preferably quarterly), clean everything up, and make it more appealing.

Why do I say this? The data is clear that websites are one of the most important tools available to all parishes. For example, one study reported that 17 million people each year who are not regular churchgoers visit church websites, and 52% of the visitors to your parish website are first-time visitors (Gray, n.d.). Moreover, the Pew Research Center found that (a) 30% of U.S. adults search for religious information online, (b) 21% use apps or websites, (c) 14% use apps to help them pray, (d) 15% of Americans listen to religious-oriented podcasts (Pew Research Center, 2023).

And this doesn't even consider the global audiences we can now reach from these media sources. Every month, when I get the report about my Stewardship Calling podcast and internet radio show or my Stewardshipcalling.com website, I am dumbfounded at the number of views and visitors my insignificant ministry has from everywhere, including four regular listeners from Iran who no doubt would be killed if they were found to be listening to my Christian content.

Moreover, a significant number of parish websites are not optimized for viewing on mobile phones even though, in 2021, we reached the point where a majority (51%) of website viewing was on mobile devices. Stop reading for a second and pull up your parish or ministry website on your mobile phone and see how optimized or ineffective it is on your predominant platform for viewing. Interestingly, the data suggest that the average U.S. adult now spends more time on mobile devices and apps than watching TV (Lee, 2019).

Let that data soak in, and consider what that means for your parish. I am astounded by how few parishes I work with have apps that connect people to their parish. On the other hand, I am always encouraged by the many ways a few parishes are using apps to communicate with their parishioners and provide them with the spiritual messaging and information they need on their journey to theosis.

Data recently reported found that 80% of people visit a parish website before they show up in person, and about 75% will form an opinion about a parish from their website (Blevins, 2019). Yes, it seems you still only have one chance to make a first impression, and your website is increasingly that vehicle. And lest you think you have a lot of time to form that impression, I have seen a variety of data that suggest that people will make a decision of whether to stay on a website or not in less than 5 seconds (Gordon, n.d.).

Go ahead and pull up your parish website, count off 5 seconds, and see what a newcomer sees. Unfortunately, given flash graphics and other wasted wizardry offered by web consultants, some parish websites take almost that long to load. With at least 64% of parishioners saying the website helps them connect with their parish, if you do not have a vibrant and active media ministry that includes top-of-line web, social media, and new technology applications, you are falling further and further behind in fulfilling your calling.

To make the case, an extensive case study that analyzed 1,008 parish websites from 30+ different countries (Shearer, 2020) found that:

- (a) 97% of people search for local organizations online
- (b) 96.2% of churches fail the “first impression test,” which consists of
  - (i) Is there a primary focal point?
  - (ii) Is there a responsive design?
  - (iii) Is there a reasonably quick load time?
  - (iv) No stock photos of people’s faces.
  - (v) is there easily accessible new visitor information?

A full 62% of parish websites fail to provide easily accessible new visitor information (Shearer, 2020). I cannot tell you how frustrating it is for someone who travels a lot working with parishes when I log on to see when services (or even my program) will begin, only to be unable to find the answer on the host parish website.

Here is more data that will hopefully help convince you that your website needs a thorough review and scrubbing (Laja, 2019):



- (a) One study showed that the “feel” of a website is the main driver of first impressions, with 94% of that feeling being due to design and only 6% of feedback being about actual content.
- (b) 80% of people will stop engaging with slow websites – (load in less than 3 seconds), and stock photos of people are disingenuous and are a turn-off, whereas great and authentic photography attracts people’s attention.
- (c) Users form an initial opinion of whether they will stay or leave a website in about 50 milliseconds (that’s 0.05 seconds)

Furthermore, 64% of parishioners say the parish website is an important factor in facilitating their participation (Clark, 2023). The features people say they use most on church websites are (in order): 1. listening and downloading sermons, 2. serving opportunities at the church, 3. finding service information, 4. the easy ability to forward content to others, 5. visitor information (Clark, 2023).

### **Technology Is A Giving Gateway.**

A recent study released by Barna in cooperation with GLOO identified that 75% of Christians surveyed would benefit from online giving options, 74% of Christians would appreciate a digital hub and online space for properly vetted theological material and offerings, and 70% of Christians wanted a better social media outreach and digital communications strategies (Barna, 2025). The good news is the same study identified that 54% of clergy agree somewhat that AI can help with parish outreach and community services

After the SARS-CoV-2 global pandemic, viewing church services online exploded. As mentioned previously, those parishes with proper technology, cameras, and web streaming excelled, and their parishioners did not miss a beat, even though they were unfortunately (and illegally, in my opinion) deprived of access to their churches and in-person services (but could go to liquor stores). Many parishes scrambled with difficulty to get the technology in place to still stream services to their faithful. Fortunately, many years later, most parishes have responded by focusing on this incredibly valuable outreach of services. This is so much so that in a 2023 study by Pew Research Center, 67% of parishioners were satisfied with the virtual worship services, and 68% appreciated the sermons they could access.

While the number keeps increasing, a full 16% of Americans describe themselves as “heavy users of religious technology,” with 10% declaring moderate use and another 20% as light users. Like it or not, the technology revolution is growing and will be an essential tool in the delivery of the most effective parish and ministry experience. If we want to bring increasing numbers of unchurched, the lost, or NONES (claiming no religious affiliation) closer to Christ, we need to go where they are and reach them effectively. I make no apology for using all the technology available today, just as our

ancestors made no apology when they started using the printing press, electricity, air conditioning, or email to serve and reach the faithful.

Not to be sacrilegious, but in some respects, this is our Pentecost moment. Just as the Holy Spirit descended on the Apostles and empowered them to speak all the languages necessary to reach all the people effectively, we must look at these technologies as the tools we need to reach increasingly larger numbers of current PIPs, our APIPs, and even the FIPs we all seek. You can express fear or give glory to God that he has made available to you all of the incredible tools you now have to spread the word of God and bring people closer to Christ and each other. Yes, I, too, fear the loss of interpersonal connection resulting from our ever-growing device dependency. However, at the same time, we cannot lose the opportunity to go where the people are and teach them who Jesus Christ is and why you believe what you believe.

I pick and choose the social media I am on, but I submit a parish does not have such a luxury. It is incumbent on parishes to use the advanced gifts and skills of their younger members to spread the word of God on all the social and other media that are reputable and widely accessed. I have long preached the “trash the trays” approach and have seen some really successful parishes deploy technology that enhances S&E so effectively. There is one I regularly visit that always invites me to contribute, and they will light a candle for me. They then show the massive stand with lit candles from those people contributing.

As previously mentioned, if you do not have an iPad or other kiosk device in the front area of your church (Narthex), you are missing out on making generosity convenient. Indeed, some of the most successful parishes have identified and provided six or more easy ways to give of your time, talents, or treasures, all of which busy Americans are increasingly finding valuable time savers. I have used technology to provide the names of my deceased family members to be read at a special service commemorating the dead and was happy to donate to the parish to light a candle in their memory.

I can go on and on, but I feel like I am just bludgeoning you as I know how poorly most parish websites, including probably yours, perform against any of the above metrics of best practices and excellence. This one is within your control, so please significantly improve your S&EM through the best use of the technology God has allowed man to create.

## **Parish Ministry Handbook (PMH) and Stewardship & Engagement Commitment (“S&E Commitment”).**

I finally reached the end of the S&E Chapter (yes, an Amen is appropriate) by covering the last two promised elements of the best practices S&EM, your **Parish Ministry Handbook (PMH)** and **Stewardship & Engagement Commitment (“S&E**

**Commitment**”). In the wHoly Engaged Personal and Small Group Visitation Processes, I explained that after your Council Of Ministries is formed, a **Parish Ministry Handbook (“PMH”)** should be prepared and given to all parishioners (and every new potential member).

Each ministry should prepare a paragraph or two discussing its WHY, some of the key ministry activities it undertakes, its Vision for the future, and the names and contact information of its co-leaders. It is also very helpful to have photos of some of the incredible activities each ministry undertakes since an image is often more impactful than words. All ministry summaries are then aggregated into one PMH. For old-timers, think of the PMH as your Sears Roebuck's catalog. For young folks, think of it as your Google Docs compendium or Amazon listing of all the major ministry work and activities at the parish.

Your PMH is shared with every parishioner during either the “Plan A” personal in-home visits or the “Plan B” small group gatherings discussed previously. It is also shared with every potential new parishioner to demonstrate how much your parish does in addition to its services and sacraments. New parishioners receive your PMH as part of their intake process to ensure that everyone becomes fully engaged in the incredible work of your parish.

Listing the co-chairs is critical both to facilitate ease of contacting them and also as a recruitment opportunity since parishioners might want to work with some of those leaders. It is also critical that your PMH is fully accessible on the parish website. This again serves the purpose of showing the world and any new members how vibrant and active your parish is, as well as helping recruit people to work in ministry.

I assembled a few sample PMHs for parishes I have worked with on my Stewardship Calling website here: <https://stewardshipcalling.com/stewardship-ministry-handbooks/>. Examples are from very large, medium size and even small parishes. Every parish must keep their PMH current, including any changes of leadership, new ministries or programs initiated, and document incredible ministry work with pictures.

### **Stewardship & Engagement Commitment (“S&E Commitment”).**

In the wHoly Engaged Personal and Small Group S&E Processes, the big ending ask of parishioners is to complete an S&E Commitment. The written form it takes can be widely variable, and there MUST also be an option for parishioners to complete it electronically online. In written form, it typically takes a trifold orientation of a regular-sized sheet of paper. On one side, ALL ministries are listed, and your parishioner is asked to identify which one they would like to join. Make sure to include a blank line where the steward can identify a new ministry they would volunteer to help form. In this way, your ministries can grow and expand as people with new gifts and talents arrive.

The other side begins with the demographic information of the steward. Here is one place where your parish can help itself and not insult your stewards. History shows that people generally don't change their names, addresses, and phone numbers from year to year. Therefore, your parish should have this form already completed with each parishioner's historical information. Certainly, if something has changed, they can strike through and make the correction. However, when your parish makes your stewards complete the same demographic information each year, it disrespects their time and acts as if they are unknown to you.

Under the demographic information should be the one line for the financial tithe with the encouragement that it be allocated and paid weekly (to reinforce the weekly first fruits Biblical foundation and also to reflect the need for cash flow to cover your parish operating expenses). A brief description of the percentage-giving-to-tithing approach with a Scriptural reference is also helpful.

I highly recommend that each spouse complete their own S&E Commitment since their ministry interests will likely be different, and we want no steward left behind. The only coordination might take place on the annual financial tithe if they keep their finances unified. As previously mentioned, each child (starting with elementary school age) should complete their own S&E Commitment that includes both the age-appropriate offering of talents and ministry work as well as some financial contribution of their resources.

Any additional creativity is welcome to make the S&E Commitment engaging and spiritually connected. For that reason, I highly recommend including the parish WHY statement. However, I confess that the best S&E Commitment I have ever seen was on a simple card with two lines on it.

“How much do you make: \$\_\_\_\_”

“Send it all into your church.”

And before you dismiss this, remember this is a Matthew 19:16-22 S&E Commitment card since Christ told the Rich Young Man to go “all in.”

I pray my S&E Roadmap has not been so overwhelming that you decide to do nothing. Nor do I wish you to suffer paralysis by analysis as you can't decide what to do first. The journey to best S&E practices is just like the journey to any distant location. It takes commitment, persistence, and to begin with a first step. I pray my Roadmap can help you on your journey toward your II Corinthians 5:10 Moment and the response, *“Well done, good and faithful servant.”*

## **EXHIBIT A”**

### **THE “GOOD AND FAITHFUL STEWARD CHALLENGE CAMPAIGN”**

*(Living The Parable Of The Talents)*



#### **A. What is the Good and Faithful Steward Challenge Campaign?**

In the Parable of the Talents (Matthew 25:14-30), the Master gave out differing amounts of money to three servants and came back to see what they did with their gifts. To those who were good stewards and put them out into the world and caused them to multiply, the Master rewarded them by bestowing the high honor of being “*Good and Faithful Servants*” and gave them much more.

This lesson teaches us to take whatever gifts we are given (regardless of how much or how little) and to use them to help others for God’s greater glory on our journeys to theosis and a “*good account before the awesome judgment seat of Christ*” (II Corinthians 5:10). This same lesson can be taught by an Orthodox Christian church, and in so doing, it will change its culture of stewardship and generosity.

#### **CHALLENGE SUMMARY**

1. You receive a cash gift
2. Use it to glorify God helping the less fortunate
3. Return a card noting:
  - Who you helped?
  - How they reacted or felt?
  - How it made you feel?

All you do is give all of your parishioners some money and challenge them to find creative ways of putting it out into the world and causing it to multiply. They then merely share what they did with the money, how it made them feel, and the recipient’s response. This way we teach proper Christian stewardship and generosity, and we change our parish culture and the communities in which we live and serve. This document describes some things to think about in doing just that.



**B. Here are some things to consider when designing your Parish's Good and Faithful Steward Challenge Campaign. <sup>4</sup>**

**1. Planning**

- Come up with a name/brand for the campaign.
- Plan it carefully before rolling it out. Create a series of messages (and testimonials) before announcing it. Try to keep it confidential until you make a big reveal announcement about the program after you have your PC (or Philoptochos or a donor) on board.
- Decide your goal for the entire campaign and design it to achieve your objectives – (X% parishioner family participation, \$X given back impact, 10% increase in parish stewardship contributions, etc.)
- Decide if it is just for all current stewards as of a specific date or some other way to distribute the funds. In any event, it is beneficial to ensure youth are directly included, either through their own Sunday School program, where they get a smaller amount, or to encourage a family decision about who gets the money.
- Decide if everyone receives a set amount or if it is a randomly chosen variable amount in the envelopes (i.e., to be similar to different people getting five talents vs. two talents vs. one talent or based on family size, etc.).
- Decide if you will ask the parishioners to contribute back any monies after they put the donated money to work if they are moved to do so. Or leave it up to them to decide for themselves. In any event, announce if anyone makes a significant gift back.
- Determine the timeline for the rollout and distribution of the funds, when you want the impact cards returned, and how they cause the gifts to multiply. You can do a rolling distribution, but consider having a reasonable endpoint (e.g., you are to report 3 months after you receive the envelope or by X date)

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<sup>4</sup> **For further information or questions, contact Bill Marianes at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com) [www.stewardshipcalling.com](http://www.stewardshipcalling.com)**

## **2. Designing**

- Pick the amount you want to give out. – (It's OK to solicit a donor or group (e.g., Philoptochos) to cover the amount or use a festival excess profit fund or other charitable fund to provide the money.)
- Consider laying a challenge out there – (e.g., the number of people helped = X, or the amount given out in the aggregate is raised in return contributions, or some other metric to demonstrate success).
- Decide if it's OK if they keep the amount for their personal needs if they are in need.
- Allow for anonymity when filling out the impact cards of what they did to cause the gift to multiply, but make sure everyone is encouraged to respond by turning their S&E Commitment back in.
- Consider doing a “marketplace event” or “charity fundraising event” where people can take the money and make stuff to sell to the public and use those proceeds as the multiplier to do something good in the community (determined in advance) as the beneficiaries of the amount raised at that event.

## **3. Marketing**

- Explain clearly the impact card they will complete, describing what they did with their money. Design a powerful impact card with Matthew 25 scripture and compelling image and places for them to: 1. identify what they “invested in (i.e., what they did with the money); 2. how it made them feel; 3. what they heard from the recipient(s).
- Anticipate and prepare an advance response for the skeptics and critics. Cover the response in advance in a positive way in the homilies and written materials in the bulletin, explanation letter, or all of the above.
- Create a Parish bulletin, website, and/or other reminders and continuously report stories of progress.
- Find a way to encourage families to discuss what they will do with the investment and all participate in its multiplying.
- Keep the program top of mind.
- Use this program as a way to encourage them to change their church stewardship habits to tithing, or at least percentage-giving, or the “round up” (where they increase their contribution to the following highest whole number percentage of their income that they donate to the church)
- Get a local newspaper, TV, or radio show to publicize this program.

- Create publicity regarding the successes achieved for the Parish, Metropolis, and Archdiocese publications to inspire others to “go and do likewise.”

#### **4. Deploying & Interim Communications Reporting**

- Orchestrate a big event, special Sunday, or series of events to have the most significant impact.

- Ensure a comprehensive process is implemented to engage every steward and ensure they receive an envelope and impact card with instructions.

- Keep the program at the forefront of the parishioners’ minds.

- Encourage people to personally share testimonials in church (and in written publications) regarding what they did and how it made them feel to supplement the anonymous responses.

- Post the impact cards on a parish bulletin Board (social media and website) where the stories can inspire people.

#### **5. Closing Schedule and results report**

- Set a timetable for deploying the investment donations and return of the impact cards (i.e., let the servants know “when the master is returning”).

- Publicize the final results and have people share testimonials about this program’s continuous impact on their lives and the community.

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#### **A PARISH UNDERTAKING MY GOOD AND FAITHFUL SERVANT CHALLENGE**

#### **Sts. Constantine & Helen GOC – Webster MA – Good and Faithful Steward Challenge**

[https://www.ancientfaith.com/podcasts/stewardshipcalling/who\\_gives\\_away/](https://www.ancientfaith.com/podcasts/stewardshipcalling/who_gives_away/)

<http://schwebster.org/about/good-and-faithful-servant/>



*Helping people and parishes discover and live their stewardship callings so that they may have a good account before the awesome judgment seat of Christ*

[www.stewardshipcalling.com](http://www.stewardshipcalling.com)



# CHAPTER 11. – Selected Additional Stewardship & Engagement (S&E) Suggestions.

## Size Matters.

As cited previously in Chapter 10 of my Roadmap, the Faith Communities Today 2020 Study of 15,278 religious communities from 80 different denominations estimated that there were between 350,000 and 375,000 congregations of all faith traditions within the United States. Interestingly, the majority of these congregations were considered small, with about 70% of the faith communities having 100 or fewer weekly attendees. As it turns out, size does matter when dealing with interpersonal relationships and S&E.

In the 1990s, British anthropologist Robin Dunbar concluded that there was a correlation between the brain size of humans and the average social group size. This concept has been known as “Dunbar’s Number”. It suggests that because of the size of our brains and ability to process relationships, individuals are likely only able to have about 150 close, personal, and meaningful relationships that are stable over time and where people truly know each other in sufficient detail (Dunbar, 1992).

Other data suggests there are about 2.6 individuals in the typical American Christian household. Thus, if you were to take a typically small Christian parish of about 100 people that regularly participate on Sundays and extrapolate the number of souls that are represented in those families, you would come to a size of about 250 to 300 individuals per parish. If Dunbar’s number is valid, it is easy to see how one clergyman would likely be unable to have the kind of close personal relationship with that number of parishioners. Obviously, when you get to parishes of a much bigger size and scale, the challenges become even greater.

This leads to one of the fundamental truths of American Christian churches that I advocate: **The bigger a church gets, the smaller it must become.** Well, to be sure, there are a lot of advantages in terms of scale, resources, and service opportunities that are available in larger parishes. However, the reality is that with the clergy shortage that permeates the American Christian sphere, this is becoming increasingly difficult. Thus, it would be completely unrealistic to expect our clergy to take care of all the spiritual needs of its existing faithful, let alone perform the evangelism and other philanthropy services that we expect of our clergy. Accordingly, the only solution is to do exactly what Christ did in creating the Apostles by organizing an army of faithful Christians to pursue the Vision and WHY of the Church, both amongst its existing parishioners and in the community at large.

Robert Putnam validates this concern in his two best-selling books, Bowling Alone and Better Together, discussed in Chapter 10 of my Roadmap. This research focuses on examining hundreds and hundreds of organizations within the United States to determine why the majority of them decline in membership after reaching a point of inflection, with only a few experiencing a sigmoid curve of reinvigorated growth (Putnam, 2001). This

research led to the sequel Better Together, which was a case study of some of those more successful organizations, including a church, which figured out how to grow effectively (Putnam & Feldstein, 2004).

It is impossible to properly cover all the great insights from the research covered in these two books in just a few sentences; however, the essence of this research focuses on “**Social Capital**.” Social Capital is the combination of (1) **the collective value of everyone you know** (i.e., **your social networks**) and (2) **the desire to do things for each other that our networks foster** (i.e., **reciprocity**). In essence, effective interpersonal organizations aggregate the collective networks of all its members and make them available to each other so that reciprocity is achieved, and when one person helps another person, the organization as a whole and all its members improve.

A concrete example of the Social Capital phenomenon was when my older daughter moved to Baltimore to attend Johns Hopkins University. Within a week of her being there, she called me to ask if we still had AAA service. After an extended interaction where I asked her what was wrong, she asked me what difference it made if I knew her problem since I was in Atlanta and she was in Baltimore. I finally extracted the information that her car wasn’t starting and specifically where she was at the time. I told her to sit tight and wait where she was. I never answered if we had AAA (which we did). I called a church friend from Baltimore and discovered that there was a great (Greek) mechanic whose location was not too far from where my daughter’s car broke down. Within a matter of minutes, I was back on the phone with Alexis to let her know that “Thanasi was on his way.”

Understandably, she asked, “Who the heck is Thanasi,” to which I responded, I had no idea, but he is trusted by someone whom I trust. Several hours later, she called to inform me that Thanasi had arrived and was able to start her vehicle, but he refused to accept any compensation. This was a teachable moment where I reminded her that she was part of a much bigger global Greek Orthodox Church family that had no genetic connection. She was no more than a telephone call away from someone who could solve any problem. I also took the fatherly opportunity to remind her that I had eyes and ears everywhere she was; however, I’m not sure that message got through.

The point of this funny but accurate anecdote is to demonstrate how, when the opportunity is presented, we can form large-scale, broad-based, nationwide community networks of faithful people willing to help each other even when we don’t necessarily have a direct interpersonal connection. This is one of the great mysteries and joys of the Christian movement both in the United States and globally. The notion of creating a connected family of faithful people who are not related but willing to assist each other by following the instructions our Lord gave us is one of the most potent messages of Christianity.

All of this is validated by the scientific and empirical research that demonstrates that you and your parish can create this kind of “social capital” and connectedness. This leads to the question of what you and your parish are doing to combat Dunbar’s Number by cultivating your parish’s “social networks” and ensuring that “reciprocity” is always offered. I have long wondered why your parish doesn’t call a representative of another parish in your faith tradition located in the cities where your youth will be attending college

to introduce your youth to them and ask them to offer a heartfelt welcome and assistance, if necessary. Of course, this means you must do the same thing by calling to welcome youth from other cities attending college in your area to welcome them and offer to provide any help needed. I believe this is a ministry EVERY Christian parish should adopt.

I conducted an experiment where I endeavored to personally reach out to every Orthodox student who attended Emory University in Atlanta with my younger daughter. These young adults all seemed genuinely grateful that someone they did not know but who shared a common belief reached out to offer them whatever assistance they might need, including getting a ride to church. Essentially, I offered to be their “Thanasi.”

One weekend, I got a call from a doctor in Philadelphia whose daughter I had contacted as part of my outreach ministry experiment. He was so touched and shared how it made his wife and him more comfortable knowing that local faithful Orthodox Christians were available to help their daughter. He then asked the magic question: “What can I do for you?”

A lesson I learned early on from my law partner, Carl Sanders, who was the former Governor of Georgia, was, “If you want me to like you, do something for me. If you want me to love you, do something for one of my children.” So, in that spirit, I told my new Philadelphia doctor friend that what he could do for me was pick a Philly-area school and do the same thing I was doing at Emory and welcome all Orthodox students from out of town.

He said that would be great, but he was a busy surgeon. I immediately responded, “B.S.” (although I used the real words, may God forgive me). He seemed surprised until I told him that I was a busy lawyer, but I found the time to reach out to his daughter and the other Orthodox youth at Emory. After a few seconds of silence, he chuckled and said, “You’re right. Of course, my wife and I can do that too.” I wasn’t sure if he would dump the duty on his poor unsuspecting wife; however, I ask you, is your parish reaching out to all the young people attending college near you from your faith tradition (or better yet, any child) and offering them to become part of your “adopted family of support?” If not, why not?

### Small Groups.

Let me be clear from the outset. When people try to force me to give them my top three S&EM tactics that will make the greatest difference in their parish, a small group ministry is always on my list! So, how can you overcome the challenge if your parish grows (God-willing) without the ability to hire more clergy while continuing to foster the close and loving family relationship your Lord desired for your parish? As with most questions, the answer is in the Holy Gospel, where we learn, “*For where two or three gather in my name, there am I with them*” (Matthew 18:20), and “*Let us consider how to stir up one another to love and good works, not neglecting to meet together, as is the habit of some, but encouraging one another...*” (Hebrews 10: 24-25).

Just as our Lord and Savior Jesus Christ could not be everywhere, our clergy are similarly limited by time and space. Thus, we must follow our Lord's example and create an "army of disciples" (my words, not his) that can extend The Word and help others. One of the most effective vehicles for doing this is the reincarnation of what used to exist in the ancient church and is currently called a "**Small Group Ministry**" ("**SGM**").

At its core, SGM allows churches to get more intimate through interpersonal relationships and interactions. Essentially, SGM consists of weekly (ideally) gatherings of up to about 10-12 people to 1. explore spiritual topics in greater depth and 2. get to know each other and help each other deal with personal life issues. Thus, a typical SGM will have two simultaneous principal objectives of spiritual growth and what I call "one-anothering" (where people get to know each other, help each other, and learn how to serve each other better).

You can organize your SGM groups in many different manners; however, the three most common constructs are:

1. **Geographic** (people who live near each other),
2. **Demographic** (with people of a certain common characteristic (e.g., men, women, young adults, singles, empty nesters, widows/ers, etc.), and
3. **Interest** (with people of similar interests gather, such as for a Bible study, reading a spiritual book, learning how to raise Christian children, women who have had miscarriages, or any other human characteristics that may bind a unique group of individuals together).

Indeed, your parish can mix and match small groups from amongst any of the above three constructs or others. Thus, it is perfectly fine to have some SGM groups that are gathering demographically or geographically. In contrast, others may be particularly focused on unique topics of interest that are shared across the group. I suggest you worry less about forcing an identical SGM organizational construct and more about gathering your parishioners together on a regular basis to grow spiritually and care for each other more effectively.

Many of the larger Protestant denominations and mega-churches have had enormous success with SGM as a vehicle to try and combat the aloneness that might occur when gathering together with thousands of worshippers. However, as St. Paul identified above, this SGM phenomenon has long existed since the ancient Christian church. Indeed, during the Ottoman occupation, Orthodox faithful in Greece would gather regularly in secret cave locations to continue practicing their faith, receiving spiritual education, and lovingly caring for one another.

In modernity, many different denominations are also taking advantage of the powerful insights and opportunities that are presented through an SGM. In their book, "Rebuilt: Awakening The Faithful, Reaching The Lost, And Making Church Matter." Fr. Michael White and Tom Corcoran explain how SGM revitalized their Roman Catholic Church outside of Baltimore. They attribute their SGM as being a critical catalyst to help transform their parish culture, which led to a tripling of weekend church attendance that subsequently resulted in increased giving, flourishing ministries, and a vibrant and solid

spiritual revival. Indeed, their Nativity Church has been very generous in providing regular podcasts to talk about how they have successfully implemented SGM and other best practices in their significantly growing church (<https://www.rebuiltparish.com/small-groups-equip-course>).

Another outstanding SGM example is discussed in the book Divine Renovation: From a Maintenance to a Missional Parish by Fr. James Mallon. Because of Fr. Mallon's Roman Catholic church size, smaller interchurch communities were formed that helped transform St. Benedict church into an even more caring and loving growing community of faith (Mallon, 2014). Countless other examples of SGM exist that have flourished within so many different Christian denominations, such that effective organizations have been formed to assist you with your SGM. For example, check out Small Groups.com at <https://www.smallgroups.com/>.

Similarly, North Point Community Church (<https://northpoint.org/groups>), Passion City Church (<https://passioncitychurch.com/atlanta/community/>), and Saddleback Church (<https://saddleback.com/connect/smallgroups>) are three large churches that have maintained a degree of intimacy and effectiveness as a result of their SGM. Indeed, several of my former law partners who belonged to North Point Community Church and Passion City Church would regularly invite me to some of their SGM men's group activities out of caring for me and with no expectation I would ever join their parish. That is loving "one-anothering!"

There are a plethora of benefits to creating a vibrant and effective SGM, of which I will only enumerate 10 that were poignantly outlined by Mark Howell, the founder of Small Group Ministries (<https://smallgroups.net/resources/free-downloads/>) and the pastor of discipleship communities at Canyon Ridge Christian Church (Howell, 2013):

1. Life change happens best in smaller gatherings of individuals.
2. SGM allows for church to become more personal as people enhance their one-anothering.
3. SGM provides a nearly unlimited leadership development pipeline, as SGM leaders are then trained to take on broader leadership positions within the parish eventually.
4. Off-campus small groups provide a nearly unlimited space at optimal times that reduces travel time and makes for far more congenial environments.
5. "Come over to my house" is a much easier invitation than "Come with me to church."
6. Small groups with more intimate interpersonal interactions provide the best opportunity for one-anothering.
7. Small groups can also provide a sense of family and connectedness for many whose biological family lives far away.

8. It is easier to ask questions in a small group than try to raise your hand at the end of a homily in the church service.
9. SGM makes it possible for more people to be cared for between Sundays. This point cannot be overstated. All too often, people come and go from a church service on Sunday and do not necessarily have the opportunity to feel heard or loved. They feel alone with whatever issue(s) they are facing, even though there are likely others in the parish dealing with the same or similar challenges. By allowing a smaller group of people to become more intimate friends and share their spiritual and life journeys, the loving care our Lord instructed us to project can be extended beyond “the Sunday experience.”
10. Finally, SGM provides an ever-expanding network for communications and impact. It’s easy to imagine that if small groups are meeting on a weekly basis, the parish can effectively communicate with a larger group of people more directly and intimately and ensure that their messages are being heard.

### **Starting a Small Group Ministry.**

As with anything new, starting an SGM requires recruiting the right people to lead each of the small groups, training them in the methodology your parish seeks to implement, and powerfully and repetitively promoting their existence and formation to encourage recruitment. It is not unusual for a new parish to begin with only two to five small groups and work out the kinks as they go, learn from each other, and figure out how to build a more effective SGM. However, the SGM must be considered as critical a ministry as any other in the parish and not merely relegated to a few individuals.

Another beautiful thing about SGM is that they frequently have no budgetary requirements. The SGM members have become increasingly comfortable bringing food or beverages or other fellowship offerings and sharing them willingly. Moreover, since the SGM gatherings take place at people’s houses, it leads to less wear and tear on your parish facilities and lower utility bills and other similar expenses. Some small groups may meet consistently at one person’s house, while others may rotate amongst several of your parishioners. It is less critical that they all operate identically than that they stay focused on the two crucial objectives of sharing spiritual formation information and one-anothering as they grow and love each other more closely.

A very effective way that some SGM has been administered is for the priest to identify a topic in their homily that is then expanded upon with some study questions and perhaps some additional reading. At the weekly SGM events, the participants discuss the clergy’s spiritual message, which is reinforced through dialogue. Other SGMs will focus on potentially going through a particular religious book, chapters of the Bible, or written teachings of a Spiritual Father of that faith tradition, etc. Any way they do it, the group can grow deeper in understanding what their faith teaches.

Some clergy raise concerns that without them being present at every SGM gathering, perhaps the theology won't be perfectly communicated. There are at least three responses to this concern, the third one of which may seem a little harsh. First, for Biblical scholars, this concern sounds familiar to the Apostles chastising others who healed in Christ's name but were not one of them (Mark 9:38-39). The Lord responded lovingly, instructively, and firmly to let others also do those good deeds in the Lord's name: "*For he who is not against us is on our side*" (Mark 9:40). Christ knew that recruiting as many believers as possible (with different discipleship skills) was essential for His message to be heard by the world.

Second, if SGMs are properly formed and effectively led by faithful parishioners who have the proper training, the opposite occurs. SGM gatherings afford the participants the opportunity to raise questions that they never got to ask during the church services or would never ask their priest. Unanswered questions can be aggregated by the SGM facilitator and shared with the clergy to get a more authoritative and proper answer. If enough SGM participants have a similar question, it can inspire a homily to go into greater detail on that topic.

Third, (and I mean this lovingly), it is important to not arrogantly assume that only "I" can properly train someone or best bring people close to Christ. Let's face it: not all of us are given the same gifts. Some do not communicate as effectively as others. Some are way too theoretical and never get around to the application of the message. Some of us do not hear and process information or communicate the same way or as effectively from the same people. I can go on, but if you are humble and honest, you know what I am saying. (I was always surprised when my wife explained something to our daughters that they seemed to understand when I was confident I had just explained it more perfectly right before her, and they didn't seem to get it.)

The bottom line is that to address the massive need for spiritual formation and "one-anothering," given the significant shortage of priests, we must figure out how to leverage the strength and time of the clergy. There is no way for one person to personally reach hundreds of parishioners effectively. However, they can stay in touch with and train their SGM leaders, which in turn will relay the message down to the faithful in a much more efficient and effective manner. This was Christ's distributed disciple approach (Luke 10:1).

Of course, I do not suggest that more interpersonal time and relationships with, and teachings from, your clergy are not essential. They absolutely are critical. There is a reason why Christ created Apostles, who, in turn, became the bishops and trained disciples and deacons and all other orders of individuals to help bring about spiritual education. However, the more you try to place all spiritual training and development on one priest at a parish, the more likely you will fail in achieving your ultimate objectives. Thus, leveraging the gifts, skills, talents, and abilities that God has given other individuals within your parish through the application of an SGM allows the parish to grow spiritually, in impact, and interpersonally. Your parishes can help bring people closer to Christ and each other by making your growing parish operate as if it were smaller and more intimate.

## Council of Ministries.

Another great parish innovation is organizing a Council of Ministries, which is the new evolution of the way your parish could operate more effectively. To make the case, let me provide a history of the American Orthodox church (and many other Christian jurisdictions in America) in a few sentences. Talk about aggressive! In the American Orthosphere of the early 1900s, our immigrant grandparents or great-grandparents would get together, and they would typically recruit an itinerant priest, often from their homeland, to come around every few months to offer church services.

Around the 1920s and 1940s (it varies by church and geography), we started seeing full-time priests being employed by parishes, working with the early precursors of parish councils and boards. In the 1940s-1950s, parishes created a model where we had professionally trained priests who came from theological seminaries to work with popularly elected parish councils and boards. These early parish councils reported to a parish assembly and were ultimately accountable to all parishioners. That is the model created in the American Orthosphere around the 1940s-1950s, and it is the same organizational model used in most church operations today.

You might remember the earlier data about how we are living in exponential times and that the speed of change is unimaginable and accelerating. So, here's my question: Can you think of any effective organization that is using the same operational structure it used 70 years ago? The honest answer is likely no.

The old parish council model made sense in the early days when there were not many ministries, and the parish council members did everything. Now, the president, treasurer, and secretary have regularly assigned duties (and are required to fill offices by most State corporate laws). However, most of your remaining parish council members have no real assigned duties and are merely members of a "committee of the whole." Let us explore the effective innovation of a **Council of Ministries** ("**COM**").

In a COM, all activities of your parish are considered ministries and headed by co-chairs. There are no more committees. If it is important enough for your parish to focus on, it should be characterized as a ministry of the parish.

This includes the obviously critical ministries in the areas of liturgical practices, music, education, philanthropy, outreach, stewardship, evangelism, etc. But it also includes tactical activities such as buildings and grounds, finances, and every other activity undertaken by your parish. In this way, there are endless opportunities for your parishioners to engage in service and to use whatever gifts they have been given. Naturally, all liturgical and sacramental ministries must report to your clergy. However, the clergy cannot do everything else alone. Thus, all operational activities must be included in the COM.

The ideal is for each of your parishioners to attach themselves to one or more parish ministries that speak to their talents and calling. In this way, the foundation is laid to create a "**full participation parish**" where everyone can maximize their engagement liturgically, sacramentally, and in ministry service to others. People's sense of calling may change over time. For example, when my children were young, my wife worked with the



youth ministry, and for 15 years, I coached church league basketball. However, once our daughters grew up, my wife started a women's small group reading ministry, and I moved full-time into my Stewardship Calling ministry. In this way, there is always an outlet for you and your other parishioners to be engaged in parish ministries by using your gifts to serve others based on your situation, calling, and experiences.

Dear brother or sister, you know that too many people treat their parish as a "Sunday only" experience. They focus on how quickly they can get in and out on Sunday and then act as if they are done being a Christian for the week. That's part of the challenge and problem. The critical foundation must be laid to provide a way to bring all parishioners into living their Christian faith 24x7x365 by engaging in the ministries of your parish.

The COM consists of the clergy, your three elected parish officers (President, Treasurer, and Secretary), and all the co-chairs of each ministry. Your COM meets at least quarterly to ensure that all ministry leaders are informed about the status of the major strategic initiatives of the parish (hopefully, from your parish strategic plan), and each ministry informs the others about their major activities and progress toward accomplishing their respective plans.

The COM also ensures that each ministry is aligned with the parish's WHY, Mission, Vision, Core Values, and strategic plan. In your quarterly meetings, your COM members should share best practices, challenges experienced, synergies, and strategies for how they can all work better together. The ministry leaders in your COM are also the training ground for future leaders of the parish in other initiatives and capacities. Thus, they should receive periodic leadership training, as discussed in Chapters 4-8 of my Roadmap. By working together to achieve the objectives of their ministry and the common Vision of the parish, greater parish health and effectiveness are achieved.

As your parish establishes its COM, you should share with other parishes the ways you implemented this revised organizational structure, lessons learned, and innovations implemented. I would love to create a central repository for such knowledge and best practices. In the meantime, one COM model developed in 2015 as part of the Greek Orthodox Metropolis of Atlanta strategic plan I was blessed to lead can be viewed here: <https://atlstrategicplan.org/wp-content/uploads/CompletedGoalMaterials/1-5-CouncilofMinistries/COM-Goal-1.5-after-HQ-09.27.17-1.pdf>.

## **What Can You Do Until Your Parish Council Is Replaced With A COM?**

The sooner you can revitalize the ancient and no longer effective parish organizational management structure to a Council Of Ministries, the more effective your parish can be at fulfilling its Vision and living its WHY by providing an opportunity to maximize parishioner engagement. However, in the interim, for jurisdictions that must maintain a parish council structure in keeping with the third major stewardship and

engagement principle of “PPS” leadership alignment (discussed in Chapter 10 of my Roadmap), the COM can be implemented alongside the existing parish council structure.

Other than the President, Treasurer, and Secretary, most of your parish council members do not have defined duties and can be assigned to be liaisons to the various ministries. In that capacity, they are not running the ministry (unless they are also serving as a ministry co-head if no one else is available). If you have 20 parish ministries and 13 members of your parish council, after the three officers, your remaining 10 parish council members at large each pick two ministries to which they are liaisons.

The parish council liaisons attend the meetings of the ministries to which they are a liaison to understand and support what they are doing. Your parish council liaisons then bring any major ministry accomplishments, plans, or impediments to your parish council meeting. If this is done, imagine how your parish council meetings can be completely transformed to focus on the ministries of the parish rather than busy work.

### **New Parish Council Meeting Agenda After COM**

A more productive parish council meeting agenda after COM implementation can look like this:

1. Clergy offers the opening prayer and spiritual formation message.
2. The Parish Council President briefly addresses any major changes or issues since the last meeting and any matters requiring a vote of the entire parish council.
3. The Treasurer offers a brief financial update, preferably focusing on the Stewardship Calling Parish Data Dashboard discussed in Chapter 10 of my Roadmap. (The full financial statements should have been previously emailed to the parish council members along with minutes of the previous meeting.)
4. The Secretary shares any major correspondence and takes any corrections to the minutes previously circulated.
5. Parish Strategic Plan Head Coaches remind everyone of the parish’s WHY and Vision and provide an update on any major strategic planning milestones or accomplishments.
6. Each Parish Council Member briefly shares any major news or developments from the ministries to which they are liaisons. Not every parish council member has to report if their ministries have nothing materially new happening.
7. Clergy offers the closing prayer.

Notice what this agenda does. You have now become a future-oriented, strategic and ministry-driven parish. There is no committee busy work wasting the time of the

leadership. There are no endless non-strategic or less important discussions about who will cut the grass or provide lunch, etc.

Instead, you focus on understanding where your parish is in terms of its strategic initiatives, and your time is better spent understanding the incredible impact of your ministries and ways you can support this powerful work of engagement and help it grow. In this way, you focus more on ministry and less on unproductive committee discussions.

Please do not waste people's time by reading and approving minutes or reviewing every bill or financial statement line item (which is the job of your Finance Ministry). Minutes and financial information should be circulated in writing and in advance, along with the documents needed to understand any issues requiring a vote.

And by way of spoiler alert, your COM helps create your parish budget since every ministry is asked to do a zero-based (ground up) budget of what they need to achieve their WHY and Vision. Once you add your operating expenses to the COM ministries' budgets, you will finally create a budget worthy of a parish, bringing people closer to Christ and each other.

### [Is Your Budget Worth The Paper It Is Written On?](#)

I know to some of you, this may sound like a very confrontational title; however, hear me out. First and foremost, your parish budget must be taken very seriously and should be done in accordance with the best practices on both a ministry and financial accounting reporting basis. As mentioned previously, in a perfect world, your parish financial statements would be subjected to an annual independent audit. I recognize that many churches cannot afford this, and in such cases, they should ensure that there is an internal audit that is as independent as possible that is then reported to your parishioners to maintain the maximum integrity, transparency, and accountability (ITA).

Fortunately, there are a variety of software packages now that can assist parishes with establishing a proper Chart Of Accounts and accounting system to properly and timely record everything. In this regard, it's also critical that you implement financial accountability standards that ensure minimum protections, such as ensuring that the same person who counts the money is not the person who deposits it, requiring two signatures for every check, validating that all expenditures are done in accordance with whatever approved budget, etc.

So, if you follow all the above and other best practices, why did I include such a disparaging title about your budget? The answer comes from reviewing many hundreds of parish budgets and working with over 1,000 parishes (admittedly mostly within the American Orthosphere). I always ask every parish leader how they created this year's budget. They inevitably say they started with last year's budget and made any adjustments for inflation or known upcoming expenditures. Then, when I ask them how they created last year's budget, they basically refer to the prior year's budget with a few adjustments and so on. At this point, I rather humorously and confrontationally state that "The only real budget your parish ever created in its history was the very first one, and

you have been compounding the felony ever since.” This usually gets a humorous response and simultaneous acknowledgments of the sad truth of the statement.

So, my first criticism of parish budgets is the fact that they are not budgets at all but rather adjustments from last year’s budget. And they merely focus on funding the operational costs of your parish. This statement usually leads parish councils to ask me how they should do budgeting, which is actually the right question they should have asked a long time ago. My answer is to create a faith-based, mission-driven, vision-fulfilling budget focused on the ministries and operations of the parish necessary for it to fulfill its WHY. Those in the business world are used to this form of “zero-based budgeting.”

To do this, first, your parish council should create and organize every ministry your parish needs as well as all ministries it should have if it is properly fulfilling its WHY and Mission. Second, your parish council asks all COM ministry leaders to answer two critical questions: 1. WHY does your ministry exist (i.e., what is the fundamental purpose for your ministry and what problems and challenges are you addressing), and 2. what are the total financial resources you need to fulfill your WHY. This will typically require your ministries to undertake a Why Discovery process and do their own budgeting.

At the same time, your parish council should undertake a detailed zero-based budgeting approach to assess all your required operating budgets and expenses and ensure that they are properly categorized and include appropriate adjustments for inflation, additional services needed, and any other year-to-year adjustments. Once both processes are completed, your parish council adds its operating budget to ALL the COM ministry operating budgets, which becomes the parish budget.

Needless to say, this first real parish budget will likely substantially exceed by probably many orders of magnitude your existing subsistence parish budget that never addresses the needs of your ministries. This will bring your budgetary process from a bare minimum survival operating budget to a WHY-fulfilling, thriving ministry budget worthy of Christ’s church. By reorienting everyone’s focus to your parish and ministry WHY, Mission, and the Vision of where your parish will be in a couple of years, you can ensure a transformational budget will help inspire your parishioners to fulfill the calling of the Lord.

## Ministry Fairs.

As mentioned previously, your parish’s critical focus should shift to its ministries and encourage higher levels of engagement of your parishioners liturgically, sacramentally, and in ministry so as to become full-time (not Sunday-only) Christians. The instructions your Lord gave you to “*make disciples of all nations*” require that **you should actually live and not merely lip-synch your faith**. Thus, you must focus substantial energy to ensure that all your ministries are operated with as much excellence and impact as possible by using all the best practices and recruiting the greatest number of ministry workers.

In reviewing my Stewardship Calling wHoly Engaged Stewardship and Engagement commitment process outlined in Chapter 10 of my Roadmap, your primary focus is to identify opportunities for your stewards to engage in the ministries of your parish. In addition to the Parish Ministry Handbook (**PMH**) (discussed in Chapter 10 of my Roadmap), one of the best ways to promote and present your various parish ministries is through a ministry fair. This event is usually done on some Sunday after church and replaces a more traditional coffee hour or luncheon. The Ministry Fair allows each of the ministries in your COM to establish a table or booth to describe WHY it exists and what it does and encourage other parishioners to catch and see its Vision and join the ministry.

Your Ministry Fair does not need to be relegated to a once-a-year exercise and can be done very effectively three times a year. It is nice to offer it once at the beginning of the year, a second time in the Spring to encourage continued summer activities and a third time at the start of the Fall. This Ministry Fair is meant to supplement the continuing efforts of your ministries to recruit newly engaged parishioners throughout the year. The focus is always to highlight the various life-changing ministries and results your parish is providing in a rapidly changing world.

This is also a wonderful opportunity to present the greatest amount of creativity that the various ministries can offer in promoting what they do. For example, a wonderful multiethnic parish that I took through strategic planning in Harrisburg, PA., did a Ministry Fair that featured at each table the food and beverages of the home countries of each of the ministry co-chairs. As you walked from table to table, you not only learned about the various ministries, but you also actually enjoyed some of the cuisine of the ethnically diverse ministry leaders. It became an extremely enjoyable event in which everybody participated, both for the opportunity to engage more deeply in ministries and also for the great social interaction that it created. You should let your God-given creative juices flow to find imaginative ways to feature the transformational work of your ministries and encourage greater parishioner engagement.

While I previously discussed in Chapter 10 of my Roadmap how critical it was to have a current and effective website and social media initiatives, your parish ministries can provide the best content. Every ministry should have its own page on your website that is regularly updated with stories and photos showing its impact and activities. In addition, the COM should ensure that all ministry activities are prominently featured on the parish calendar. As someone who looks at parish websites every day, I cannot tell you how depressing it is to see a parish calendar that is fairly blank except for Sunday services. Honestly, this tells me that either your parish has no ministries or does not care to recruit for them or share their impact.

In Chapter 10 of my Roadmap, I share a large amount of data explaining how critical your website (and other social media) is to telling your parish's story, sharing its WHY and Mission, and inspiring people to want to join you. Check your parish calendar on your website right now and tell me what it says about your parish. Is your parish one full of opportunities to use my gifts to help others and come closer to Christ and my fellow men, or does it tell the story of a building that is empty of joy and purpose except on Sunday?

And He gave some to be apostles, some prophets, some evangelists, and some pastors and teachers for the equipping of the saints for the work of MINISTRY, for the edifying of the body of Christ till we all come to the unity of the faith and of the knowledge of the Son of God, to a perfect man, to the measure of the stature of the fullness of Christ; that we should no longer be children, tossed to and fro and carried with every wind of doctrine, by the trickery of men, in the cunning craftiness of deceitful plotting, but, speaking the truth in love, may grow up in all things into Him who is the head – Christ... (Ephesians 4:11-15).

### Sometimes Impact Is A Better Metric Than Expenses.

Non-profits in America are often first evaluated by how small a percentage they spend on overhead/marketing/fundraising/administration, etc., rather than the impact they achieve. Which charity would you rather invest in, one that spends 2% on overhead and only raises \$100,000 for its cause or one that spends 40% on overhead but raises \$100 million and has a substantially greater impact? The answer is obvious; however, as Dan Pallotta, who raised millions for worthy causes, made clear in his TED Talk, American non-profits are unwisely directed and incited to spend as little as they can rather than spending whatever is necessary to have the greatest impact (Pallotta, 2013).

Two charities that Dan Pallotta formed respectively raised \$194 million for breast cancer research and \$180 million for AIDS services that were forced to shut down because they spent 40% on marketing, donor experience, talent recruitment, training, and reasonable salaries, notwithstanding having the greatest impact. The obsessive focus solely on limiting expenses regardless of impact is misguided, and it prioritizes the wrong things.

In my examination of some of the biggest dilemmas/challenges faced by parishes and other non-profits, higher employee turnover than desired kept re-occurring. The departures are not because of the inadequacy or unfulfilling nature of the work performed by the departing employees but rather because of the higher wages offered by for-profit businesses for talented people who parishes trained to excel at Servant Leadership. Indeed, a parish's ability to properly invest in the development of its staff and ensure Servant Leadership is enculturated in its ethos and culture has the counterproductive impact of making these individuals more attractive to businesses that can benefit from the already-trained servant leader.

However, the news is not all bad. Acknowledging the non-profit sector pay gap compared to the for-profit sector can be significant (especially for management/leaders), Handy and Katz (1998) argued that this differential leads to a positive self-selection in the caliber of some leaders who are more committed to the non-profit cause than if they worked for a business. While the debate between the relative productivity of non-profit and for-profit workers continues (particularly complicated by the impact of volunteers working alongside paid staff), the economic reality is that a non-profit employee well-trained in Servant Leadership is very valuable to a business that can recruit them away for higher compensation (including offering equity) (Preston & Sacks, 2010, pp. 106-

119). This creates a hiring and development dilemma for all Servant Leader non-profits like your parish. How are you developing and evaluating your parish and ministry leaders? Are you trying to spend as little as you can or trying to have the greatest impact you can at bringing people closer to Christ and each other? **Impact eats efficiency for lunch!**

## CHAPTER 12. The Why And How Of Spiritual Formation And Religious Education (“SFARE”).

### The Critical Importance Of Missing Spiritual Formation And Religious Education (“SFARE”).

The third of the **S<sup>3</sup>** challenges that all parishes face I call **Spiritual Formation And Religious Education (“SFARE”)**. This distinction is nuanced and differentiates all the elements of forming a spiritual Christian who understands and practices what it means to be a true and actively practicing member of your faith tradition. One vehicle to create that understanding is formal religious education. However, one can provide religious education for students of history who have no intention of spiritually forming their lives around what that historical faith teaches. For this reason, while they are interrelated, I urge parishes to consider both Spiritual Formation **AND** Religious Education (hence the **SFARE** acronym).

I am not a trained theologian, and I only minored in education and did my student teaching at Northwestern about a million years ago. Thus, I am not competent to create specific SFARE content except in particular areas in which I have some expertise. Moreover, I pray my Roadmap will benefit Christians from all Christian denominations, and thus, there will be excellent SFARE content unique to each such denomination. But there is an important point I wish to make. A SFARE ministry leader should scour ALL available content and resources to identify the best available to achieve your objectives consistent with your theology.

There is so much about which all Christians agree (I will explore in more detail in Chapter 15 of my Roadmap) that it would be arrogant, conceited, and foolish not to avail your parish of such wisdom. “Not invented here” syndrome that rejects everything not from familiar or “approved” sources is a waste of the intellect and wisdom your Creator gave you. It was Socrates who was attributed to have said: “The only true wisdom is in knowing you know nothing.” He went on to say: “True wisdom comes to each of us when we realize how little we understand about life, ourselves, and the world around us.”

American writer and cultural anthropologist Mary Catherine Bateson summarized Socrates’s wisdom generically by concluding that what defines us is not what we know but rather what we are willing to learn. For almost forty years, I was blessed to be a partner at two global law firms. For over thirty years, I was blessed to also toil in the American Orthosphere Christian landscape, teaching, preaching, and hopefully reaching Christians willing to discover and live their stewardship callings. As I have now entered my seventieth year of life and completed my fifth post-high school degree/certificate, I am only now discovering how much more there is for me to learn.

Being hungry and thirsty for learning and wisdom is the core of what an SFARE ministry (and every clergy and lay parish leader) must inspire in the parishioners entrusted to you. You are on a journey of learning and living with the prayer you can achieve theosis and hear “*well done good and faithful servant*” from the Lord (Matthew 25:21). You are not merely in pursuit of another degree (which is always a great thing).



You and your SFARE ministry must pursue trying to know Christ better and help your fellow parishioners (and those who check out your ministry however they access it) do the same thing. One key element on my Roadmap is the critical importance of a parish providing the most effective and exhaustive SFARE programs and ministries possible.

The empirical data from every source identifies that our Christian parishes have not done the most effective job of proper SFARE. There have been educational programs, but they have been offered untethered to knowing what the specific objectives were and establishing measurement methodologies to assess success or failure. For example, as I mentioned previously, I ask every parish I present to if they have an effective “Sunday School” program for their youth. (I hate that name because, in my experience, the last thing your youth want after 5 days of regular school is another “school” experience.) 100% of these parishes respond affirmatively. I then asked them how I would know it was effective.

The typical response is something like, “Well, I think we have a good Sunday school program.” I respond: “Well, of course you do since you designed it. I hope you didn't design a crappy experience for your youth. But my question remains, how would I, as an independent observer, be able to discern that you have an effective Sunday school program.” I have timed it, and it generally takes about 5 to 7 minutes of questions before someone will finally ask the fundamental question, “How would we even measure effectiveness?”

At this point, I say, “Aha, so what you're telling me is that you have no idea what you're trying to accomplish with your Sunday school program, no data to identify if your objectives are appropriate, and you have never measured the effectiveness of your existing program. This, of course, regrettably means you truly have no idea whether or not your Sunday school is effective.” OK, I generally don't offer this conclusion this directly and harshly, but I make sure they get my point.

Once they acknowledge the harsh truth that I have spoken, they agree that they have not undertaken any systematic efforts to ascertain their fundamental objectives and then build a program that achieves those goals in the most effective manner possible. This is the moment of awareness when parishes realize that while all efforts were extremely well-intentioned and appreciated, our previous efforts have largely been potentially ineffective because we have no idea whether they have actually achieved their desired result. Think about your Sunday school program and see if you can answer my question of how an outsider could be convinced it was effective.

Now, do something more challenging and ask the same question about your adult SFARE programs, if you have any. Regrettably, most parishes that do not have a Small Group Ministry (see discussion in Chapter 11 of my Roadmap) have NO formal SFARE programs for adults, other than the occasional, sparsely attended Bible study. We will never reverse the horrible trend of religious disaffiliation and lack of spiritual formation if we do not address this critical shortcoming. I submit this should be mission-critical for your parish, and yet it is rarely addressed.

As I mentioned previously, the longest-running study of religion and youth is the National Study of Youth and Religion at the University of Notre Dame

[\(https://youthandreligion.nd.edu/\)](https://youthandreligion.nd.edu/). If you care about youth and young adults and their SFARE, I believe required reading is one of their first books presenting their enormous data, Soul Searching: The Religious and Spiritual Lives of American Teenagers (Smith & Denton, 2009). Among their fascinating research findings is that parents are the number one predictor of the religious beliefs and practices of their children.

It is not their peers or social media or video games (which all do have some influence). It is unequivocally up to you, the parents (and grandparents and godparents), to provide the SFARE necessary to “*train up a child in the way he should go so when he is an adult, he will not depart from it*” (Proverbs 22:6). Thus, if your adult SFARE youth and young adult programs are nonexistent or ineffective, you are destined for a worse outcome for the future of your youth.

And for those clergy who complain that the attendance at their Bible studies or other educational programs is so sporadic and small, I say glory to God for those who come. But I also ask what you are doing to find out why the others are not there or how what is offered can be improved. I mean, no disrespect, but when people have a choice, they will gravitate to what is most valuable to them and the best offerings.

As I began the Servant Leadership Chapter in my Roadmap, every parish problem is a leadership problem. As a leader, you must figure out what is not working and why. Remember that leadership guru W. Edwards Deming said that when most people repeatedly act the same way (e.g., do not show up for a class or church), the people are not the problem. The leader needs to research and fix the disconnect.

If you do not know how to fix something, then you own the responsibility of finding someone in your parish or denomination with the expertise to help you figure it out. As you reflect on your upcoming II Corinthians 5:10 Moment, do you want your account to Christ to be: “Well, what I offered was ineffective, and I did not figure out why or make any corrections to bring people closer to You and each other.” Dear brother or sister of the laity who read this, you too have this SFARE obligation personally for yourselves and your children/grandchildren/godchildren/nieces/nephews, etc. We must all help our clergy offer the best SFARE resources possible.

For any Bishop reading my Roadmap, let me respectfully suggest you, too, have the calling to provide the best SFARE resources and programs for all your parishes and parishioners. Indeed, if a Diocese, or even better, a national church, were to create best-in-class and effective SFARE programs and materials, all parishes and parishioners would benefit dramatically.

And finally, for any seminary leaders who read my Roadmap, it is really in your wheelhouse to make this happen and then offer it to the parishes and parishioners, thus creating a direct connection with potential supporters. (More on that later in Chapter 13 of my Roadmap, where I present a strategic foresight analysis for a reimagining of theological seminaries). So, let us look at our parishioners through different critical lenses to discern how you can offer the most effective SFARE ministry.

## Wake Up Call To Action - Christians Want Answers.

Sixty-six percent of Christians have questioned what they believed about their religion or God (Barna, 2017). Make sure you read that right that 66% of your parishioners (and perhaps even you) have religious doubts. And while 26% say they still do, and 40% say they worked through those doubts, 46% said they worked through their doubts by leaving their church or worship gatherings (Barna, 2017). Where were your effective SFARE programs to provide faith-based answers to those with doubts and the half of them who left because you did not give the answers? I apologize if this sounds harsh; however, I wanted you to understand why my hair is on fire and why I hope my Roadmap Ignites The Flame for you and your parish!

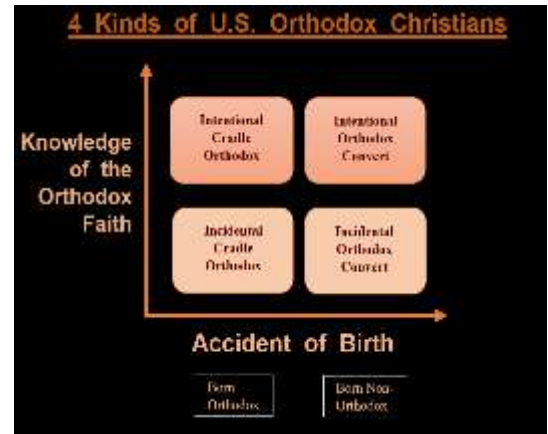
Christians want answers to their faith questions now more than ever and will use clergy and all available technologies and resources to find them. As I will present in greater detail in Chapter 13 of my Roadmap, the research shows your parishioners desire your parish to answer their faith and life questions, especially with respect to cultural and contemporary issues (Gryboski, 2024). These answers will also help parents provide Biblical formation to their families. This is critical because most parents do not feel equipped to do so properly at present and are finding their Sunday Schools ineffective. In short, Christians seek to understand their faith tradition's beliefs about deep, critical, cultural, social, and moral questions (Moreno-Riaño et al., 2023).

## The SFARE Job Has Gotten More Difficult - The Four Kinds of Parishioners.

I will begin by reiterating the significant demographic and sociological transformation I have discovered in the American Orthosphere churches; however, I submit the same transformation has occurred (or is occurring) in other American Christian Jurisdictions. The Pew Research Center has done extensive continuing work on the switching and intermarriage within the Christian churches in the United States. Their 2007 and 2015 Religious Landscape Studies concluded more than 34% of US Christians have switched religious affiliations (Pew Research Center, 2015). Interestingly, when Pew isolated the Protestant denominations, they discovered that the switching percentage rate increased to 42%. This high level of transition does not even include what Pew calls the “reverts,” who are those who leave their denomination and then return to it later.

Some of these Christian jurisdiction transitions occur due to increased intermarriage, and others arise due to locational moves or travel convenience. However, the more interesting group is the fairly large number of Christians who change religious affiliation due to their study and belief they have found a different faith tradition that brings them closer to Christ. As I describe the impact of these transitions on the American Orthosphere, I urge you to consider how these same transitions impact the spiritual education and other activities of your faith tradition. For non-Orthodox readers, replace the word Orthodox in the description below with the name of your Christian denomination and see if the analysis does not also apply to your church.

After three decades of working with and studying over 1,000 parishes throughout most Jurisdictions within the American Orthosphere, I discovered a fascinating sociological shift that your parish must consider and address. My model to the right demonstrates the differences in educational experiences and needs of “cradle” Orthodox (those born into the faith) and “converts” (who join later in life, usually from another faith tradition).



The cradle/convert dichotomy is further differentiated by the smaller percentage of converts (“Incidental Converts”) who merely convert to Orthodoxy for their Orthodox spouse so they can marry in an Orthodox church. They would say, “Yeah, sure, okay. I can be an Atlanta Falcons fan, an environmentalist, or Orthodox because she is, and she wants me to be.” They do not make a conscious and informed decision to understand what it means to be an Orthodox Christian. They merely decided to accommodate their new Orthodox spouse. Those Incidental Converts have no burning desire to learn about or become actively practicing members of their new faith, so they will generally do the minimum to allow their marriage to be blessed in the church. Their understanding of the faith and what it means is probably not very different from the Incidental Cradle Orthodox that describes most of us born into the faith.

However, we are blessed to have the Intentional Orthodox Converts. These are brothers and sisters in Christ who were raised in a different faith, felt some inadequacy in their beliefs, and went on an intentional journey to find the “original church” and studied Orthodoxy. In contrast, the much larger percentage of Cradle Orthodox born into the faith are characterized as “Incidental Cradle Orthodox” because we were baptized and confirmed as infants with no fundamental knowledge of our faith. Given the historical and demonstrated failure of the majority of American Orthosphere youth Sunday School programs, compounded by the relative lack of depth of understanding of the faith by our parents (who themselves never learned their faith as children), this monolithic group within the Orthodox church requires significant SFARE but often do not realize it.

We can tell you when we can have peanut butter and jelly sandwiches during the Lenten fast because that's what our Yiayia (grandmother) taught us. However, the vast majority of we Cradle Orthodox were not properly or fully catechized in understanding what it means to be an Orthodox Christian. We need structured and far more intense SFARE than our Intentional Convert brothers and sisters who underwent such education in their catechetical classes. However, there are those fewer Cradle Orthodox in your parish who realized the inadequacy of their spiritual formation and undertook a journey of SFARE to become what I call “Intentional Cradle Orthodox.”

We can spend significantly more time on this fascinating transformation of Christian churches in America, but my key point is that you likely have four different constituencies in your parish. Thus, a “one size fits all” SFARE strategy will actually fit

none of them. Accordingly, you now need four different SFARE strategies to effectively reach your four different kinds of parishioners as you meet them where they are and bring them closer to Christ and each other.

These four different strategies apply to every parish ministry or activity, as well as messaging. I know the church is not a business, but your parishioners are the same humans who are also customers/clients of firms. Unfortunately, they use some of the same consumer-centric psychology when thinking about their parishes until they fully understand what it means to be a disciple of Christ. Thus, I am encouraging you to appreciate that you have four different kinds of parishioners (“customers”), each with differing needs that each require different SFARE.

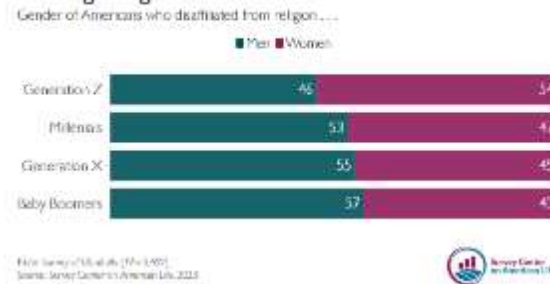
Please note, however, that I am stridently NOT asking you to bow to the demands of the ever-growing consumerist society on those things fundamental to your faith tradition. These are the elements I call the capital “T” and “B” Traditions & Beliefs. Later in Chapter 15 of my Roadmap, I will introduce you to my concept of “**Foundational Christian Truths**” to define those non-negotiable elements of being a Christian. You can add your faith’s Core Values (discussed previously in Chapter 7 of my Roadmap). However, for everything other than your Foundational Christian Truths and Core Values, I submit that you should consider the needs of your faithful and seek to help them learn their faith better.

The Pew Religious Landscape study identified that 47% of adults who were raised in the Orthodox faith left it (Pew, 2015). I am betting that you do not know why approximately half of your Cradle Orthodox adults have left your parish/church. These same (or worse) departure statistics permeate almost all Christian denominations, as I have previously identified. So, this is a universal American Christian challenge not relegated to merely one faith tradition.

If your business lost almost half of its clients or employees, you would no doubt try to find out why, whether through an exit interview or dissatisfaction survey, or call. And yet, for arguably the most important engagement a human can make (getting closer to Christ), we let them leave with nary a worry. Is it any wonder the U.S. is experiencing an unimaginable and higher-than-ever departure and churn rate for Christians? I hope you agree this is very problematic! While not every departure can be remedied or prevented through greater SFARE, the evidence from countless interviews and many surveys demonstrates a significant portion of churn would be prevented. All it takes is a greater focus on ensuring your faithful know what it means to be a Christian of your denomination through proven and effective SFARE.

The data I previously cited confirmed that 39% of Millennials are religiously unaffiliated (it was 10% in 1986). This is a 4x increase in disaffiliation in the last 35 years. Barna Research preliminary data reported on a webinar I recently attended shows that, for the first time, the number of young females leaving the church is statistically significantly higher than that of young males. This amplifies the data pictured on the right, demonstrating how younger women are leaving the church at a much more rapid pace (Cox & Hammond, 2024). Understanding why this new seismic shift is occurring and creating the most effective SFARE to address what is missing is more critical now than ever.

Women Outnumber Men Among the Young Adults Leaving Religion



While you should mourn the 40-50% of faithful you have lost, the intense need for further SFARE is equally (if not more) critical for the 50%-60% who stayed to ensure they have a strong foundation for the future. Ask yourself, how engaged are your parishioners in the sacramental or liturgical life of your church? How engaged are your parishioners in the ministries, and what opportunities do you offer to serve others? How engaged are your parishioners in ensuring that their children/grandchildren understand the depth of their faith? While I strongly advocate for work to be done to tend to the lost sheep (Luke 15:4-7), it is equally as important (if not more urgent) to critically evaluate the SFARE you are offering to ensure it meets the needs of the flock who maintains at least some affiliation.

### The First-Time Experience Educational Exercise.

I use an exercise with parishes that I take through strategic planning to open your eyes to what it is like for someone unfamiliar with your faith traditions and practices. Please try this yourself next Sunday. Go to church with a sheet of paper or index cards and pretend you are a new visitor to that parish and denomination. From the moment you drive on to the parish campus until you depart, write down all the questions you have and things you would not understand. Be diligent throughout the entire service and write down everything a first-timer might wonder about. (I hereby authorize you to tell your clergy you have my permission to be distracted on this exercise for the betterment of your parish.)

At my strategic planning retreats, I have everyone publicly share their lists with someone transcribing the questions and comments. In one parish, we came up with six single-spaced pages of questions, concerns, and items after they were transcribed. If you do this, especially with a group, your eyes will be opened to so many things you do not notice because you have been “going through your habitual motions” on Sunday. The best parishes take this list, add more observations from the parish council and others, and then create SFARE programs and strategies to ensure that not only every

visitor but every parishioner has a clear understanding of what everything is in your parish and why everything happens the way it does.

Among the statistically significant data I accumulated in my Stewardship Calling surveys of parishes I work with, within the American Orthosphere parishes, parishioners report that their minds are wandering 70% to 80% of the time during the Divine Liturgy (other than during the homily when the priest is speaking to them). Perhaps this is not as acute a problem in some mega-churches with engaging music and homilies. However, for any church with a more traditional liturgical service repeated every Sunday, the data suggests your parishioners are often zoning out. This challenge is most likely the result of one of the following three causes.

First, your parishioners do not fully understand the religious significance of everything going on. This is an SFARE issue/opportunity. You can help them spiritually and educate them on the joy and mystery of the service, and then you can observe the difference in their attentiveness and engagement. As an aside, this is where congregational singing can make a huge difference. Later in Chapter 14 of my Roadmap, I will share those insights from a very respected theologian who is one of the biggest fans of congregational singing. Those of you in African Orthodox churches, U.S. mega-churches, and some Protestant faiths understand the power of engaging the parishioners in dynamic music as part of the service. For most Orthodox surveyed, the current music is not engaging, inspiring, and merely performative by others. Let me repeat, facts do not care about our feelings!

Second, your services or homilies are not inspiring or engaging. In the next section of this Chapter, I will provide guidance on how to make homilies most effective (which are the number one thing people look at when deciding on a new church). These same best practices are also applicable to your other SFARE programs, so please stay tuned.

For those denominations with rigid liturgical practices (like my Orthodox church), the opportunity for variation is limited. However, even in those cases, effective clergy find ways to increase attentiveness and engagement. A “Teaching Liturgy” is an example where the priest, at set intervals, stops the rhythm of the service to offer a short explanation of the significance of what is happening. I know a highly effective priest who does formal Teaching Liturgies quarterly but also periodically will “break character” (what actors call stopping to engage with the audience) and merely call attention to one important thing being prayed or practiced. This is extremely effective to reengage everyone.

Anyone who sat through classes knows the difference in learning outcomes between engaged participants and those who are passively “watching the show.” Effective SFARE is a big part of that solution. But unless you survey and discuss with your parishioners what they need and want or do not understand, you are just guessing what to offer and how. The best providers of any service or teaching constantly engage with their intended recipients to find out how to deliver the information better.

One of my favorite cartoons I use in my live Igniting The Flame retreat shows a parish council meeting where the president is fussing at the pastor by saying to him:

“We’re trying to run the church, pastor, but you make it sound like you want us to do something, well, spiritual.” Every priest I have spoken to has one or more stories about a parish council member who said something similar when they confuse the parish for their business and lose sight of the WHY, Core Values, and Mission of a Christian church. I remember one Greek Orthodox priest telling me about a parish council member who inquired, “Father, can we skip offering the Divine Liturgy this Sunday so we can open our Greek festival earlier.” A truly teachable moment. Dear brother or sister in Christ, we all have much SFARE to do!

## The World Has Changed.

The Lewis Center for Church Leadership of Wesley Theological Seminary concluded that in the current age of easily accessible information and the internet, the traditional Sunday School has outlived its usefulness in providing religious information and answers (Gryboski, 2024). Recognizing these trends, Pope Francis said, “The people of God want pastors, not clergy acting like bureaucrats or government officials” (Spadaro, 2013). More recently, Pope Francis urged clergy to teach, preach, and meet the faithful where they are. Pope Francis asked Vatican representatives to avoid “rigid ideological positions” that interfere with a greater appreciation and understanding of the reality of the current times” (Winfield, 2023).

While the Roman Catholic Pope's pronouncements are not binding on clergy outside of his church, similar expressions about meeting parishioners where they are and tending to their current needs are being communicated in clergy forums that extend to all faith denominations, including my Archbishop and Ecumenical Patriarch. The question is how to create the most effective SFARE programs and ensure they are delivered in the most impactful and effective manner possible.

## Being A Human Light Bulb And The Light Of The World.

Bottom line, I believe you are a human light bulb. A light bulb is just something into which energy is introduced, and the darkness is illumined. Darkness is not a thing. Darkness is merely the absence of light. Thus, in your area, what you focus on, what you teach, what you preach, whatever the location of your ministry, you are a light bulb crushing the darkness. And this is a sacred calling.

Look no further than Holy Scripture to find guidance. You were called to be “*the light of the world*” (Matthew 5:14). Think about that. You are called to bring light into whatever dark part of the world God has placed you. And you are called to let your light shine, not for your ego, not for your self-aggrandizement, but ultimately for your salvation so that others, seeing the good you produce, will glorify your Father in heaven. Thus, every time you look in the mirror, understand that the reflection you see is the image and likeness of God and the light of the world.

There is much Scripture that talks about light. St. John starts powerfully speaking about “*In Him was life, and the life was the light of men*” (John 1:4). Very quickly, St.



John shifts to another man named John whose calling was to “*Bear witness of the Light*” (John 1:7). And then, a few generations later, you came along also to be a witness to the Light so that through you “*others might believe.*” This is what your sacred human light bulb ministry calling is all about. If you accept this call from God (not me), you might wonder how to be the brightest and most effective human light bulb. I submit for your consideration the following steps and stages for you and your fellow SFARE human light bulb guides.

## How To Improve Personally And Enhance Your Parish SFARE By Journeying From “Teacher” To “Preacher” To “Reacher.”

Let me first define terms. There are three kinds of SFARE human light bulbs: “Teachers,” “Preachers,” and “Reachers.” Throughout your life, you may fit in various places on that spectrum at different times and in different situations. I respectfully ask you and all other clergy or individuals involved in parish SFARE to read this extensive Roadmap in the rest of this Chapter and carefully assess where you are on your journey from Teachers to Preachers to Reachers.

**Teachers** share information. They are **informational**. **Preachers** take information and inspire us with it. They are **inspirational**. But it is the last group, the **Reachers**, who take that inspired information and actually get us to do something with it. The Reachers are **transformational**. The data from study after study show that your faithful needs substantial additional SFARE, and the individuals who are the best vehicles to take you on that journey are Reachers.

Think about it in another way. Informational Teachers speak to the neocortex part of your brain to pass along information. It's a very cerebral exercise. But inspirational Preachers are talking to your heart and gut, where our emotions control our limbic brain and how we feel. Ultimately, it is the Reachers, those transformational motivators, who get you to apply that knowledge, wisdom, insights, emotion, and feelings and use your reptilian brain to control your limbs to do something with it.

Let me provide another way to look at this. Teachers are roughly the equivalent of a 10-watt light bulb. That's fine. It produces some light, but the darkness is scattered only briefly and over a little space. But what if we 10x that? See, Preachers are 100-watt light bulbs. Oh, we love to have 100-watt light bulbs in our houses.

However, there is another 10x improvement on a Preacher, namely being a Reacher. That is a 1,000-watt floodlight that eviscerates all darkness because its reach is so powerful and widespread. It is my fervent hope and prayer that you and everyone else involved in your parish SFARE ministries (especially our beloved clergy) take the challenge to become the most effective Reacher of your human light bulb ministry imaginable.

Now, some of you are probably saying, well, Marianes, that's a nice theory, but do you have any evidence of that? To answer, I will apply the (lowercase “s” and “t”) “sacred tradition” in the Orthodox church. I humorously call it the “Orthodox Dead Guy”

rule. Our Orthodox theologians and scholars like to pick the oldest “dead guy” we can find who said something like the point we wish to make to prove we must be telling the truth. Thus, I am going truly old school and traveling to BC.

Cicero once said that the three rules for an orator are to teach, to delight, and to reach. He articulated it very clearly by saying, “Teaching is a necessity. To delight is beauty. But to persuade is a triumph.”

It is the journey of going from just teaching to preaching to reaching that your parish SFARE ministry can transform the SFARE of your parishioners. Yes, dear brother or sister, you have the opportunity to become a global human light bulb that provides your faithful and others the much-needed light by bringing people close to Christ and each other.

### The Need For A Better SFARE Formula.

So, how do you transform SFARE in your parish? I have learned there are formulas for just about everything we do. About a million years ago, I got my M.B.A. from the Goizueta Graduate School of Business Administration at Emory University, where I had an amazing professor of quantitative methods, the late Dr. Philip Carlson. One day, he was teaching us “queuing theory.” That is basically logistics optimization that involves a lot of math. My class arrogantly thought we were a bunch of geniuses, and Dr. C. taught us a lesson I have never forgotten and will share with you.

Dr. Carlson wrote a problem on the chalkboard and left the room, telling us to come to his office when we had solved it. After 90 minutes of trying, none of us succeeded. Our class spent all weekend working on that problem in small groups. Three days later, Dr. C. came into the class smiling and wrote a very long formula on the board. The dumbest kid in our class solved the previously complex problem in less than three minutes. Our wise professor looked at us and said: “I’m going to teach you the most important thing you will ever learn from your entire M.B.A. experience. Every problem is easily solvable if you have the right equation.” Take that lesson to the bank because I have learned it repeatedly in my life.

A different formulation (pun intended) of Dr. Carlson’s great advice is most often attributed to Albert Einstein but is more properly attributed to a 1966 article about manufacturing manager skills by William H. Markel (Quote Investigator, 2014): “If I had only one hour to solve a problem, I would spend up to two-thirds of that hour in attempting to define what the problem is.”

Our Creator educated us with ten pretty good formulas (read that, Commandments) in a roadmap of how to live a righteous life (Exodus 20:2-17; Deuteronomy 5:6-21). Our Lord and Savior added His additional formulas in the Beatitudes (Matthew 5:3-12). Later, our Lord gave His Apostles a great formula of actions to take that included healing the sick, cleansing lepers, raising the dead, and casting out demons (Matthew 10:5-15; Mark 6:7-13). Powerfully, Christ added a most critical formula of what it took for us to be His disciples by sharing love (John 13:34-35).

## What Is The Formula For You To Become A Reacher And Transform Your Life And Your Parish SFARE?

Here is my formula for you to memorize in your Reacher journey and process to most effectively transform your parish and personal SFARE:

$$3K + 3P + 3A = \Delta$$

(Where  $\Delta$  is the changed behavior that results from an effective parish SFARE delivered by Reachers.)

Allow me to unpack my SFARE Reacher Formula as follows:

### The 3Ks involve the Reacher

1. Knowing yourself,
2. Knowing your audience,
3. Knowing your content.

### The 3Ps involve the Reacher

1. Personally communicating,
2. Passionately communicating,
3. Persuasively communicating.

### The 3As involve the Reacher effectively communicating

1. Action desired,
2. Action steps,
3. Action rewards.

## The 3Ks.

### **1. Knowing yourself**

To be most effective, every Reacher must know their WHY and how their WHY allows them to provide the best SFARE your faithful need. Here's a test for you. In one sentence, why are you here on this earth, and why do you do what you do? So, do you know what you wish to accomplish in your human light bulb ministry? It is critical for any Reacher to authentically know and live their WHY to be an effective deliverer of the message of Christ. If a Sunday school teacher, clergyman, or other SFARE Ministry

worker is not walking their talk and living their WHY, they cannot be an effective SFARE Reacher.

I left a very productive law firm and practice “to help people and parishes discover and live their stewardship callings so they can have a ‘good account before the awesome judgment seat of Christ.’” The blessing that I get to live my WHY every day and, in every interaction, inspires me to try to become a better SFARE Reacher. And for you “Potterheads” out there, look into Harry Potter's “Mirror of Erised,” and you will see what you want most for your human light bulb SFARE ministry (Rowling, 2002). What would you see in that mirror reflecting that begins to give you the point of trajectory to become a better Reacher?

The late great professor at the Harvard Business School, Dr. Clayton Christensen, was a dedicated follower of Jesus Christ. He wrote a phenomenal book called How Will You Measure Your Life. In it, he asks you to consider, “Is there something I can leave the world that is bigger than me that will help others become better people” (Christensen, 2012)? This is the journey of a Reacher seeking to transform people on their journeys. When you ask yourself how you are more effective in living a Christian lifestyle, you improve your SFARE Reacher results.

In Simon Sinek’s powerful Start With WHY TED Talk (Sinek, 2010), he challenged you, who seek to be a Reacher human light bulb, by asking you to know your purpose, your cause, and your belief. Why does your organization (parish) exist, and why should anyone care? Have you thought about it, and can you articulate the specific WHY of your SFARE ministry and parish? Because if you cannot, it is unlikely that you will be an effective transformational Reacher human light bulb. Sinek reinforces the concept that our newest homo sapiens brain, the neocortex, is responsible for our rational and analytical thought and language, which more closely aligns with what I believe Teachers do. But that part of our brain does not drive people into action.

The valuable contributions Dr. Gershon of Columbia University Medical School added in his phenomenal book, The Second Brain (Gershon, 1998) was how your enteric nervous system in your guts (the “second brain”) uses its 100 million neurons connected to your brain to form your state of mind and actions. This is the connection to our limbic and reptilian brains, which is the domain of the Reachers who drive behavioral change. It is your reptilian brain that drives you to take action. It was that part of the brain that caused cavemen who saw a dinosaur to run and hide from that danger. So, all three parts of your brain perfectly align with my human lightbulb SFARE ministry focus of Teaching (neocortex brain), Preaching (limbic brain), and Reaching (reptilian brain).

Here is the bottom line for SFARE practitioners who seek to be the most effective Reacher. Your Creator perfectly designed your parishioners and aligned their brains, hearts, guts, and limbs so that you can improve the trajectory of your SFARE human light bulb ministry. Knowing, articulating, and living your and your parish’s WHY serves as an example to help others see your light and transform their lives. This is how effective Reacher Dr. Martin Luther King, Jr. inspired people by sharing his drive to ensure that our man-made laws are aligned with God’s laws. Knowing your WHY is the first step on your Reacher journey.

## 2. Knowing Your Audience.

Every effective SFARE Reacher knows their audience and tailors the complexity and elements of their message to have the greatest impact. You must think about and understand who your target demographic audience is and what kind of message will best resonate with them. You must understand who they are so that you can talk with them and not merely at them. When engaging with them, find out what they worry/wonder about. My favorite question to ask the audience is, what keeps you up at night? What questions do you ask to understand your audience better? And here is a big shocker for some people, but when you actually engage with your audience and you ask them these profound questions, they will answer you.

Once they tell you what is on their minds, you will be able to shape better the SFARE content you are delivering more effectively. You also must know what persuades them and what does not. And stop using the arguments and advancing the content that is unpersuasive. In other words, you need to speak their language, not your language. You need to learn the language of your target audience and stop trying to convince them to change to your language.

You should also ask yourself who can most benefit from what I have to say. Who are the people who could really value the content that I'm producing? Once you know your target audience, you will focus on how to reach them and not merely on how to teach them or preach to them. Everyone only has a limited amount of time every day, so anything you can do to focus your energy on what is most effective is time well spent. Albert Einstein supposedly once said, "Everything should be made as simple as possible, but not simpler." (Not to burst your quote bubble again, but while Einstein might have said something similar, the written record seems to favor attribution to either poet Mark Scoggins or a 1950 New York Times article by composer Roger Sessions who paraphrased this quote attributing it to Einstein (Quote Investigator, 2011).)

And if you ever listened to a loquacious presentation about something that seemed to go on and on and on (you might be feeling I'm doing that right now), you will recognize that you tuned out a while back. In your SFARE presentations of any kind, ask yourself if you have lost effectiveness. Have you lost connection with your audience because you do not understand what they want and need?

One of the examples I love to use about knowing your audience is something I once communicated that had \$300 million in value for a client whose business I sold. It is powerful when you can economically quantify the value of your words. I repeat them below for you to marvel at the effectiveness of my Reacher communications skills:

### Section 9.5 Claim Against Escrow; Sole Remedy.

Notwithstanding anything to the contrary in this Agreement, any and all claims for which Buyer may be entitled to indemnification under or in connection with this Agreement (other than with respect to any Post-Closing Covenant Default, Individual Seller Closing Default, the representations and warranties in Section 3.2 and Section 3.4(b) or any

claims arising from fraud, criminal activity or willful misconduct) shall be satisfied solely and exclusively out of (i) the Escrow Fund available under the First Escrow Agreement and (ii) reduction of the principal amount of the Buyer Note, to the extent permitted pursuant to Section 2.5 and the Buyer Note, and Buyer hereby waives any and all rights to recoup or recover such claims or any portion thereof exceeding the Cap from any Seller or Seller Representative (other than with respect to any Post-Closing Covenant Default, Individual Seller Closing Default, the representations and warranties in Section 3.2 and Section 3.4(b) or any claims arising from fraud, criminal activity or willful misconduct). After Closing, (i) the provisions of this ARTICLE IX shall constitute the sole and exclusive remedy available to any party to this Agreement for any claims (other than claims arising from fraud, criminal activity or willful misconduct or with respect to any Individual Seller Closing Default) for any breach, misstatement, misrepresentation or omission by any other party relating to any representation or warranty contained herein (except the representations and warranties in Section 3.2 and Section 3.4(b)) or a certificate delivered hereunder or for any breach of any covenant or agreement that is not a Post-Closing Covenant Default or Individual Seller Closing Default and (ii) each party hereby unconditionally waives any other rights against any other party hereto that it may have at law or in equity for Losses occurring as a result of or in connection with the transaction contemplated by this Agreement (other than with respect to any Post-Closing Covenant Default, Individual Seller Closing Default, the representations and warranties in Section 3.2 and Section 3.4(b) or any claims arising from fraud, criminal activity or willful misconduct).

If you are a normal human, you stopped reading after about one sentence to prevent your head from exploding. You would call my great wordsmithing above **“Legalese”** because this was not written for you or using phrases you would use or appreciate. It was written for a judge who might resolve a claim against my client. That judge, my intended audience, would know why every word or phrase was there. Knowing your audience and tailoring your SFARE message to them is critical.

And don't use words they might not understand when more accessible words are more effective. As I began my religious studies several decades ago, I once objected to someone who I thought kept talking about “exiting Jesus.” They said they wanted to talk about “exiting Jesus this” and “exiting Jesus that.” I powerfully objected and said, “We should be inviting Jesus in and not exiting Him.” I was standing up for the truth!

I was eventually told they were just trying to impress me by using the term “exegesis” and not “exit Jesus.” Many normal people have no clue what exegesis means, but theologians, educators, and clergy throw it around like we use it every day. It is wonderful when they are talking to peers, and it is likely meaningless when they are talking to the average PIP (Parishioner In Pews). These wise theologians merely mean an explanation or interpretation of a text that is usually Holy Scripture. Put another way, it means “an explanation.”

I use this as an example of what I call “**Theolese**” (the theological version of legalese). So, to all clergy and SFARE Reachers, if your target audience is theologians and academicians, by all means, “exegesis them” to death. Exegete everything. But for everyone else, use the language of the people. See, I believe Pentecost has a lot of meanings, one of which is being a more effective human light bulb Reacher by speaking the language the audience can understand.

One last exercise I like to use when training SFARE Reachers is to put a saying on the screen and force them to vote for one of three choices. Either the saying is 1: the absolute truth, 2. NOT the absolute truth, or 3. they don’t know. When I am before a non-Greek speaking audience, this is what I display:

Ἐν ἀρχῇ ἦν ὁ Λόγος, καὶ ὁ Λόγος ἦν πρὸς τὸν Θεόν, καὶ Θεὸς ἦν ὁ Λόγος.

(If it is a Greek audience I use: “В начале было Слово, и Слово было у Бога, и Слово было Бог.”)

Everyone generally votes, “I don’t know.” Then I put the following on the screen, and I ask them to vote again:

“In the beginning was the Word, and the Word was with God, and the Word was God.”

Everyone recognizes the words from John 1:1 when they are in a language they understand. The point is that you can speak the absolute truth, but no one will know it unless you talk to them in the language they can understand! See, there comes Pentecost again with the Holy Spirit teaching the Apostle Reachers to speak in the various tongues to which they would minister.

I carry an icon of Pentecost with me to remind me of this event and what it means for my communications. I celebrate those little burning flames over the heads of the Apostles where the Holy Spirit came down, teaching them to speak in tongues because not everybody they would Reach spoke the same language. My dear brother or sister, you are an heir of the Apostles. So, please learn and speak the language of your target audience if you hope to Reach them as a most effective human light bulb SFARE evangelist.

### **3. Knowing Your Content.**

The third K rule is to “Know thy content.” And this one is really, I think, encapsulated by Stephen Covey’s work, The Seven Habits of Highly Effective People, where he says, “Begin with the end in mind” (Covey, 2004). Can you tell me what the ending conclusion you want your audience to reach with your message? If you cannot, then stop delivering your message because you’re probably not going to get anyone where you want them to go.

To be effective, you need to do three things: 1. tell them what you're going to tell them, 2. tell them, and 3. tell them what you told them. It's that simple. So, what is the most effective way to deliver and communicate your message? Sometimes, it might be a little counterintuitive. You might think that because you are a good writer, you ought to communicate in writing. However, perhaps your audience would respond better to another medium, tool, or technology. A one-size-fits-all message fits no one. You must explore how you can best deliver your content to your target audience. If your homily or SFARE content is the same for older adults, young adults, and teenagers, you can be sure you are probably not Reaching them all.

Here is a data point I previously shared with you that blew me away. Statistics show that only 20% of email messages are ever opened. Approximately 61% go straight into people's spam filters, and the other 19% just do not get read. However, 98% of text messages are read, and 95% are read within three minutes. If you are wondering why your parish emails are not getting the responsiveness you want, perhaps it is because you have not adapted to the ways your parishioners are communicating.

Another consideration is the necessity to proofread everything you put out so many times you are sick of reading it. Once people find the first typo (as you did somewhere in my Roadmap for the intentional typo I left in), they begin to wonder about your credibility or professionalism. With the advent of spell check, Grammarly, and other automated tools, there are few excuses for ineffective Reacher communications.

You have heard the phrase practice makes perfect. This is the secret sauce of any presentation or SFARE program you deliver. You must have rehearsed it so many times that you can deliver it in your sleep and regardless of what technology calamity occurs.

If you ever drive by me in the week before a live presentation, you will always see my mouth flapping. It is not merely because I am loquacious or talking on my phone. I use drive-time to practice the next presentation (or portions of it) as close to 50 times as possible before I deliver it. How many times have you listened to people speak, and every third word is "uhm" or "aw" or "right?" (The latter phrase is my worst habit.) All these filler words are used because you do not know your material or feel comfortable speaking it to reach people. This is why repeated practice is so critical.

And there is nothing better than recording yourself before you present. You will notice the distracting things you do that reduce your Reacher effectiveness. A Federal Judge preparing me for a moot court competition once praised me after my oral argument by saying I would make a great aircraft parking attendant because of how distracting my constant hand motions were. Obviously, that was not what I was going for, and I went to work by duct-taping my hands to the podium until I could deliver my argument without distraction. (Intentional, powerful, occasional, and well-timed hand gestures are critical, so I added them back in later.)

Practicing your presentation repeatedly is the analog to proofreading your writing. Nothing makes you a more effective Reacher than having absolute command of your content as you look your audience in the eye. This is why I tell clergy to please get out of the pulpit and stand on ground level, and even move into the congregations' space to



make it more interactive and interpersonal (and to make sure they are not sneaking peaks on their smartphones).

If you are making a SFARE presentation online, make sure there is a chat room or place for people to ask questions or interact. If it is a public presentation, make sure the chat is monitored to keep the whackadoodles in check. Creating a personal relationship is very important in effective Reacher communication.

It is also helpful to ensure all your SFARE content uses pleasing graphics, pictures, and fonts and provide footnotes or cross-references to any authorities or data cited. Make it easy for people. In my live Igniting The Flame program, anytime I cite authoritative content, you will see a footnote or other reference indicator to let my audience know I am citing facts and not opinions.

It is also critical to know your audience in the fonts you use in your materials. Those wonderful creative scripts and small fonts that young people can see, we older Baby Boomers cannot read clearly. Ensure you know your audience and tailor the appearance of what you present to them and their styles of learning and visualizing.

Don't ever read your presentation. Don't ever read your presentation. Is this clear? If you want to be a Reacher of anything important, NEVER READ your presentation! If you want to read something to me, skip the presentation and email it to me. You are wasting my time if you do not wish to have a personal conversation with me.

I know some of you take a lot of time to get your words perfect, and writing it out helps you. But when you look down and read, it is highly impersonal, and you have no idea when your audience has checked out and start smartphone scrolling. And trust me, they will check out of your presentation on and off no matter who you are or what your message is if you merely read it.

Plus, there is something about reading that makes most of us do so in a monotone and without the inflection changes, modulation, and passion that we use when we make eye contact with our audience. Reading is not the way to communicate the Word of God or Christian teaching. Sorry, clergy and Bishops, but this is the truth! Please stop it.

No one likes to be read to unless you're a little child at bedtime. Look at your audience. Look around the room/church and try to see every person at least once. Force yourself to make eye contact. You will never know if that "perfect" phrase you wrote made an impact on me if you just look down and read it rather than see how I react. And I know that when you look down and read what you wrote, you are not trying to make a connection. You will sound "scripted" because you are, and you can't help sounding that way when you read.

There will also be no flexibility or impromptu additive commentary that is normal in interpersonal communications when you "read" (not read to) your audience. Some of my best one-liners and self-deprecating humor that create maximum engagement and enjoyment are ad-libs, impromptu reactions to the audience, or random neuron firings. **Skip your version of "perceived perfection" and go for "engaged impact!"** We would all much rather you forget some great phrase you wrote if you look at us, engage with us, and make an interpersonal connection. That is what the Reachers do.

I'll never forget a Bishop who tended to read his remarks and asked for my advice. I told him to stop reading and, if necessary, have a bullet point list with one word for each topic or point he wanted to make. He could periodically glance down at his list as he kept talking. He was still on the fence until I good naturedly asked him why he didn't trust the Holy Spirit to guide him.

He smiled at my "upstream teachable moment" and gave it a try in front of a large audience. It included many people who did not know him, which is a classic time when readers like to stick to their prepared text. After the presentation, I had to stand in a very long line of people congratulating him and thanking him for the profound and meaningful message he had spoken with such passion and impact. That night, he was a true Reacher.

I know another foreign-born clergyman who told me he wrote and read his remarks because he was not as comfortable with the English language. I gave him all my pep talks and research on why that was not the most impactful. He gave me the "you don't know what it's like to be a foreigner like me" look of continued doubt.

Because I could read my audience of one, I told him about the time I served in a high international office in a nonprofit and had to make an address in front of a room full of successful businessmen and politicians in Athens, Greece. Growing up with immigrant parents/grandparents raised in the mountains of Greece, I learned χωριάτικος Greek. This is the colloquial (informal) villager version rather than the formal educated Greek.

With all the caveats at the beginning of my speech about how messed up my Greek would be, I delivered my entire remarks with great passion and from memory but in the version of the villager version of the native tongue I knew. It was riddled with wrong tenses, declensions, pronunciations, and even some wrong word versions. Yet the impact of the standing ovation at the end was only surpassed by the number of leaders who commended me for showing them respect for trying to communicate with passion in their native language (even though their commendations were delivered in almost perfect English). Personal connection, passion, and respect make all the difference in the world. And this is the Reacher word I hope all laity, clergy, and Bishops reach for (pun intended). Just trust the Holy Spirit and speak from your heart!

As far as we know, Christ never read a Parable. I know you are not Christ, but if you are representing Him, then Reach people by showing them respect by looking at them and seeking to have a dialogue engaging with them. To review, the best SFARE Reachers Know themselves, Know their target audience, and Know their content (the 3Ks).

## The 3Ps.

### **1. Personally communicate.**

Let's unpack the three Ps, starting with personal communications. A very interesting analysis identified storytelling as perhaps the most powerful technique in delivering content. The researchers tested interpersonal communications and

discovered that about 65% of them were made up of social topics and personal stories (Hsu, 2008). By the way, this includes gossip because those are individual stories of a different nature.

Storytelling engages your brain because you are trying to follow the tale and are wondering what comes next. It is one of the most natural ways of communicating and an effective way to impart actionable content and communicate. Is it any wonder that Christ's principal messaging form was the Parable? Be like Christ if you want to be a human light bulb, SFARE Reacher!

Remember when Christ was asked, "*Why do you speak to them in parables*" (Matthew 13:10)? He never seemed to give them a lecture, or study guide, followed by a test. Christ's answer to that question was (and I will paraphrase to make the language more accessible).

I use parable stories to help them see the picture of what I am saying to help them get its impact. Sometimes, people hear Me speak but don't really appreciate My message. Has that ever happened to you? Now, imagine I tell them a story. Think of the last time you heard a good story told by a great storyteller. Could you relate to their message and engage with them in a more accessible way? I once told a story, and when the person saw themselves in the story and took the same action as my story hero, their life was much better. Would you like to hear that story and improve your life?

If you paid attention, all I did was take Holy Scripture, and rather than merely quote it, I summarized it in contemporary language as if we were speaking to each other. When you make a story realistic, your message is more approachable and understandable, and people can figure out how to apply it. (But we will get to that when we cover the "3 As" later).

You have a unique voice and should speak in your voice. You can't speak as effectively in anybody else's voice. So, tell them your story the authentic way you tell stories, and people will relate with you the more you use real-life examples. They don't have to all be your personal examples or stories. It is OK to use stories of others from which your audience can learn a key message as long as you can tell it as effectively in your voice. When you make your Reacher message personal, you make it understandable, realistic, approachable, achievable, meaningful, and coming from you in your voice.

### **Context and Relevance are Critical.**

One of the most important Reacher effective SFARE points that clergy and lay leaders get wrong all the time is forgetting to provide context. In every homily I preach, I will remind the parishioners several times that unless you know the context of the Holy Scripture, you will miss a big part of the message.

Let me give you a practical example. Every Christian has heard countless Luke 15 sermons about the Parable of the Lost Sheep. The problem is that the people you are preaching to are, for the most part, not shepherds. I grew up in the city. What do I know about sheep? So, a shepherd looking for a lost sheep does not resonate with me.

Now allow me to give you that same homily a little differently. "You have four children and are at the airport. One of your children wanders off and disappears. Do you say, no worries, I have three other kids? Or do you go after the one that ran away?"

See, you get that example because it is contextually relevant to any parent. And for those of us who have lost kids at airports (fortunately temporarily, and it wasn't my fault), we really get it. For audiences who are not parents, a different story would be more impactful. Always explain it in terms that provide relevance.

Let me provide a second example of the importance of preaching context to be a SFARE Reacher. Many of you have preached or heard Matthew 6:25, where Christ says, essentially, don't worry about the food or drink, and don't worry about your clothes. This message does not resonate with the typical American congregation because most parishioners have plenty of clothes and have not missed many meals. But once you look at the context of the time, the story becomes more impactful.

The people Christ was speaking to generally had to work all day so that they would have enough food to eat that night with only a little to spare. They also generally had two frocks; one they had washed for the next day and the other they were wearing. They constantly worried about whether they would have enough food and clothes to wear. When the Lord told them to ignore those critical things that were top of mind for them and instead focus on God and their life and broader purpose, He got their attention. He was Reaching them by telling them not to worry about what they probably worried about the most. Next time you share that parable, ask your parishioners to imagine not worrying about having no car (or internet if preaching to youth).

When I preach the Parable of the Good Samaritan, I go to great lengths to make sure the modern parishioners understand how much the Samaritans and Jews hated each other and never could interact in any way. I sometimes joke and pick the sports team most "disfavored" by people in that city and ask them what would happen if someone entered their church wearing the jersey from that team. They laugh, but they get it. This makes the story of the Jews ignoring the stricken Jew but the Samaritan touching and helping him much more impactful. If you do not share the context of the Holy Scriptural parable, your parishioners may miss a critical message that is relevant to them today.

Reachers want to reach their audience and make it meaningful and relevant, whereas Teachers merely want people to hear the historical story even if they cannot apply it in their lives. This is why, in the most effective Reacher SFARE programs, the context and modern relevance of Holy Scripture are critical if you wish to be that human lightbulb that causes people to change their behavior.

## 2. Passionately Communicate

The best Reachers speak with such passion that you are ready to follow them into the battle. Some do it with drama, some with voice modulation, and some with examples of ultimate humility. Regardless of the vehicle, passion is powerful! It remains one of the most potent motivators.

I will say it bluntly now. **If you cannot preach the word of God with passion, you have no business preaching it.** If you cannot talk about Christ with passion, you will never convince someone He is your Lord and Savior. Among my biggest pet peeves are clergy or laity who read the Gospel in a service as if they were reading the next stops on the subway. Read it like you mean it and are pronouncing the word of God and Christ to the hungry and thirsty people. Because you are! Pretend Christ is right next to you when you share His word. Preaching is not enough if you want to create disciples of Jesus Christ. You must be a Reacher!

SFARE Reachers must be humble and real, and at times even self-deprecating. The only TED Talk I know of that was permitted to go on for over 26 minutes, rather than the mandated 18 minutes, was the late Billy Graham's (Graham, 2008). He was speaking to a polite but relatively unusual audience of technology people (likely non-Christians). He started by completely disarming them with the following self-deprecating story:

Some years ago, I was on an elevator in Philadelphia coming down. I was to address a conference at a hotel, and on that elevator, a man said, "I hear Billy Graham is staying in this hotel." And another man looked in my direction and said, "Yes, there he is. He's on this elevator with us." And this man looked me up and down for about ten seconds, and he said, "My, what an anti-climax." I hope that you won't feel that these few moments with me is an anti-climax (Graham, 2008).

After raucous laughter, Reverend Graham immediately transitioned to this engaging story:

I was on an airplane in the East some years ago, and the man sitting across the aisle from me was the mayor of Charlotte, North Carolina. His name was John Belk. Some of you would probably know him. And there was a drunk man on there. And he got up out of his seat two or three times, and he was making everybody upset by what he was trying to do. And he was slapping the stewardess and pinching her as she went by.

And everybody was upset with him. And finally, John Belk said, "Do you know who's sitting here?" And the man said, "No!" He said, "It's Billy Graham, the Preacher." The drunk said, "You don't say." And he turned to me, extended his hand, and said, "Put her there." He said, "your sermons have certainly helped me." And I suppose that that's true with thousands of people (Graham, 2008).

Even one of the most incredible and effective Reachers who spoke to millions and converted countless souls to Christ showed the personal humility to begin with self-deprecating humor that completely disarmed any hostility in the audience and made him equal to everyone there. After disarming and engaging this atypical audience, they were ready to hear his talk about technology, science, and God, where he offered:

Albert Einstein. I was just talking to someone when I was speaking at Princeton. And I met Mr. Einstein. He didn't have a doctor's degree because he said nobody was qualified to give him one. But he made this statement. He said, "It's easier to denature plutonium than to denature the evil spirit of man." And many of you, I'm sure, have thought about that and puzzled over it (Graham, 2008).

Reacher Graham went on to blow their minds by closing with:

Your soul is that part of you that yearns for meaning in life and which seeks for something beyond this life. It's the part of you that yearns really for God. I find young people all over the world are searching for something.

They don't know what it is. I speak at many universities, and I have many questions and answer periods. And whether it's Cambridge or Harvard or Oxford, I've spoken at all those universities.

I'm going to Harvard in about three or four, no, it's about two months from now to give a lecture. And I'll be asked the same questions that I was asked the last few times I've been there. And it'll be on these questions.

"Where did I come from? Why am I here? Where am I going? What's life all about?" Even if you have no religious belief, there are times when you wonder if there's something else. Thomas Edison also said, "When you see everything that happens in the world of science and in the working of the universe, you cannot deny that there's a captain on the bridge"...

I didn't make good grades in high school. I didn't make them in college until something happened in my heart. One day, I was faced face-to-face with Christ. He said, "I'm the way, the truth, and the life." Can you imagine that? I am the truth. I'm the embodiment of all truth.

He was a liar. (LONG PAUSE) Or he was insane. Or he was what he claimed to be.

Which was it? I had to make that decision. I couldn't prove it. I couldn't take it to a laboratory and experiment with it.

But by faith, I said I believe him. And he came into my heart and changed my life. And now I'm ready when I hear that call to go into the presence of God (Graham, 2008).

The long pause after he suggested Christ might be a liar caused everyone in the room to be speechless and stop breathing. Listening to the talk, you might think the pause lasted 15 minutes long before Billy Graham followed it up by suggesting perhaps Christ was “insane.” As he slowly laid out his story, they wondered if they had just heard one of the greatest Christian Reachers call Christ a liar or insane. But it was only a matter of seconds before he confronted them with the third option: “Or He was exactly who He said He was” (Graham, 2008). By the time he added that option, they realized he had sucked them into a powerful, personal, confessional commitment.

Many famous people (including President John F. Kennedy) have said, in some version, “**The only reason to give a speech is to change the world.**” If you are not prepared to change the whole world, perhaps you can be a Reacher of one person and transform their understanding of what it means to be a disciple of Jesus Christ.

Interestingly, studies routinely show that most things sound or read better when delivered with passion. No doubt, you would agree. You have attended passionless presentations where the presenter might have been sharing incredible jewels of wisdom. But during the boring talk, you were wondering if, when committing hara-kiri, you stab yourself in an upward or downward stroke. However, I am confident you have also heard presentations where a Reacher has inspired or motivated you, such that you felt better, more empowered, and/or perhaps even ready to conquer the world.

There is a great saying in the business world that people buy on emotions and justify with facts. That's essentially what Simon Sinek was telling us happens if you start with why and captivate people (Sinek, 2010). When you reach the parishioners and get their attention on something that matters, you are a SFARE Reacher.

Passion creates several phenomena: energy, contagious enthusiasm, and dedicated disciples. All three of those things are essential if your human light bulb SFARE ministry is going to the Reacher level. The curator of all the TED conferences, Chris Anderson, routinely says that most successful TED Talks are delivered by speakers who have a passion for their ideas and consequently deliver their talks with emotion and imagination. Notice he didn't say they are always passionate, but they have a passion for their idea that they can communicate in a very effective way.

Every one of us speaks differently. Every one of us has a different presentation style. Some of you like some person's style and dislike another person's communication method. But you can be passionate about things that matter, and that is how you need to communicate.

Melissa Cardin from Pace University is a management professor who has researched passion in communications. She routinely identifies a direct correlation between the presenter's perceived passion, or how the audience perceives that person's passion, and the likelihood that people will do what is asked of them (Cardon, 2009). So, the moral of the story is that if you want to move to the Reacher status, you must elevate your passion in messaging and communicating.

Here's an interesting byproduct about why you should learn to be more passionate. Scientific research shows passionate leaders are more creative, set higher

goals, exhibit greater persistence, and record better performance consistently. So, the level of passion permeates more than just your communication style.

Nick Morgan is the CEO of a group called Public Works and is a top communications theorist and researcher. He has concluded (Morgan, 2014):

Passion is authentic and charismatic....

We don't fully trust people until we've seen them get emotional – angry, sad, ecstatic - because these moments allow us to take measure of their values....

...because someone who is radiating a strong emotion is fascinating, eye-catching, and lit up in a special way that we call charismatic.

Being a Reacher involves being charismatic. There is a way that you can do this. If you can see somebody get angry, then you have a better insight into that person. You can connect with them at a different level. Even if what gets them angry does not make you angry. However, they seem more real and authentic in that regard.

In a Harvard Business Review article, Nick Morgan said: “Focus not on what you want to say, but why you're giving the presentation” (Morgan, 2008). In other words, go back to your WHY to be an effective Reacher. He added: “Let the underlying emotion come out in every word you deliver...Then raise the stakes... **Imagine that somebody in the audience has the power to take everything away from you unless you win him/her over with your passionate argument** (Morgan, 2008).

For those of you who say, “I can't give a passionate speech like Reverend Billy Graham,” then focus on why you are doing what you are doing and why doing it is so important. If that does not provide the necessary passion in the way you communicate, then do not try. But it is important not to be afraid to be vulnerable to the people you communicate with in whatever way you are comfortable being vulnerable. All Reachers and the most effective SFARE human light bulbs have their style that always includes a commitment to being passionate about what they deliver that can bring people closer to Christ and each other.

### 3. Persuasively communicate.

Among the most effective messages are those that are persuasive. You are not just sharing interesting information. You are trying to get someone to agree with what you are sharing. Unless that is your motivation, you will never be a Reacher. Persuasion is the essential ingredient in making effective SFARE programs and messages and the personal and parish systemic change that can occur. If you have not been uncomfortable with anything so far, this is your time to get uncomfortable because being outside your comfort zone is where the magic happens.

To begin, let me share with you the difference between persuasion and manipulation for those worried about evangelism and direct messaging. Manipulation involves the dishonest presentation of information, whereas persuasion requires



education and information to help inform desired behavior. So, let us explore some nuances you can consider in your SFARE messaging and programs.

As it turns out, humans are hardwired biologically, psychologically, and socially to react to certain magic **W**ords, **A**ctions, and **P**hrases, what I call “**Magic WAP.**” This is not just my opinion. Science validates this conclusion.

A study on gratitude and generosity by Francesca Gino of Harvard Business School and Adam Grant of Wharton School discovered that, as it turns out, your mama was right. Saying “please” and “thank you” is an incredibly persuasive thing. In their scientific study, they discovered that a sincere thank you results in a 50% increase in the amount of additional help that is offered as a result of the appreciation (Gino, 2013).

Think about this as you consider how to engage your parishioners better. Or how about the next time you go up to somebody in line that has ticked you off? You have two choices. You can go in “guns blazing,” or you can enter smiling and loving. What science tells you is that sincerity, thank you, please, and helpfulness will be more effective.

Here is another simple example of the power of the word “because.” Did you know that the word “because” is one of the most powerful words in the English language because it substantially increases the likelihood of people doing what you want? And yes, I have tested it in person. An example of this is discussed in a 1989 study by Harvard social psychologist Ellen Langer cited in Robert B. Cialdini’s fantastic (must-read) book, Influence: The Psychology of Persuasion (Cialdini, 2006).

In this experiment, someone tried to cut in front of a group of people standing in line to use a photocopy machine. In the “control group,” the person cutting in line said, “Excuse me, I have five pages. May I use the copy machine?” Interestingly, 60% of you chuckleheads (I mean nice people) said OK. That means 60% of you are really wonderful people and show patience and kindness. Bravo.

In the first experimental group, the person cutting in line said, “Excuse me, I have five pages. May I use the copy machine because I’m in a rush?” Fascinatingly, the experimenters found that 94% of the people agreed. Almost everyone allowed the cutter to go in front of them, and the only thing that changed was the words “because I’m in a rush.” Now, you might think it was the “I’m in a rush part” that made the difference.

Then, these smart experimenters used a third group where the cutter said: “Excuse me, I have five pages. May I use the copy machine because I have to make some copies.” Well, duh, that’s what everyone in line at the copy machine had to do. Shockingly, 93% of the people still said yes. This demonstrates that “because” works even when what you say afterward makes no difference. I wanted you to know this because your SFARE messaging and programs can be better. (See what I did there?)

Think about how many times we say things based on our lived experience that make no sense today or to someone who is of a different culture or age. When my younger daughter was about 7 years old, from the back of the car, I heard her ask: “Dad, why do you keep saying roll up the window?” Now, for any of you who are too young to remember, all we had was crank windows when I was growing up in the dark ages. My daughter was blessed to grow up only in vehicles with electric windows. Thus, as it turns

out, it is critical to make sure that the WAP (Words, Actions, and Phrases) you use have the greatest understanding and impact. (And, by the way, the phrase “as it turns out” has also been shown to create the impression of more importance of what you say next.)

Let us focus on how you can embrace what Robert Cialdini’s research proved are the seven principles of persuasion: 1. reciprocity, 2. liking, 3. consensus, 4. authority, 5. scarcity, 6. commitment and consistency, 7. unity (Cialdini, 2006). Let me unpack them quickly.

**1. Reciprocity.** People say yes to those whom they owe. It is human nature. If somebody does you a favor, you are more inclined to want to reciprocate with a favor. Further, personalizing the offer makes people feel special. That is why those of you who are in parish/ministry fundraising know you always write a little personal note at the bottom of every letter (especially on form letters). When you write a little personal note on a letter, it makes a much greater impact.

This is why Chapter 10 of my Roadmap emphasized the critical importance of having a Thanking Ministry at every parish. Furthermore, reciprocity is amplified if you go first and the favor is meaningful, unexpected, tailored, and or personalized. Let me share a great study of the power of reciprocity.

At a restaurant, in the control group, the waitress/waiter just presented the bill. Later, they checked the number of tips to get a baseline. In the first experimental group, the waitress/waiter would present the bill and give each person a mint. On average, the tip was 3.3% higher. Now, 3.3% more does not seem like a big number. But what if your parish or ministry consistently got 3.3% greater financial contributions, volunteer time, and people engaging with your church services or listening to your homilies, webinars, Bible studies, podcasts, blogs, etc.? That is probably worth a little mint (or its equivalent).

However, the next experimental group got two mints each. Amazingly, tips were 14.1% higher. An insignificant additional gift got more and better attention and responsiveness. However, these great experimenters went further, and in the final group, the waitress/waiter would give everybody a mint, start to walk away, and then come back and say, “For you nice people, here’s a second mint each.” In this specific special recognition, tips went up a shocking 21.3%. The power of your thanking actions and reciprocity can powerfully drive behavior.

I am not suggesting you give out mints at the end of each parish service or SFARE program; however, if you think about reciprocity and thanking, the results of every ministry you offer will improve. And for those who come to our Orthodox church services, everyone (including non-Orthodox) receives a piece of blessed bread at the end of each service and has an opportunity to be personally greeted by the clergyman who hands it to you. Clergy, please don’t underestimate the value of this personal time and gift experience.

**2. Liking:** The second principle of liking reflects that we prefer to work with and say “yes” to likable people. Hopefully, this is a “BGO” for you (Blinding Glimpse of the Obvious). Working with people who are similar to us and giving us genuine compliments or other interactions that improve likeability makes a difference. Clergy and those delivering

SFARE programs, please do not lose sight of how valuable likability is in increasing attendance and retention.

In addition, physical attractiveness helps. And if you are not physically attractive, no worries; just make sure the SFARE and other work that you produce is appealing, neat, and well-designed. This is important for all your online SFARE and other programs and social media where you try to increase intimacy with your target audience.

**3. Consensus:** Uncertain people are far more likely to follow similar people or when someone else like them follows a leader. One of the best examples of this is the hilarious and informative 6-minute TED Talk by Derek Sivers, which includes a 3-minute video about how to start a movement (Sivers, 2010). Take a break from my Roadmap and enjoy: [https://www.ted.com/talks/derek\\_sivers\\_how\\_to\\_start\\_a\\_movement](https://www.ted.com/talks/derek_sivers_how_to_start_a_movement). Please think about these elements of group dynamics when you begin a new SFARE program or another parish ministry.

There is also a comfort level created when we're acting within a social norm or group. This was tested in a hotel using those infernal "save the planet/water/etc." messages to encourage you to recycle your towels. For the baseline group of guests they used no message, and the first experimental group received the standard message focused on "save water/," "save energy," "save the planet," or "save the whales," etc., which got 16% of the people to recycle.

However, when they changed the message to show a building consensus by saying: "The majority of people who stay at our hotel recycle towels at least once," the towel recycling rate jumped to 44% of the guests. However, the winning message was "The majority of people who stayed in your room recycle towels at least once." When they showed a narrow consensus around your room (even though it was a temporary room), almost 50% recycled. People you did not even know created this social norm. By changing the messaging to help you see yourself as a recycler, you became part of the consensus social norm.

Creating positive social norms, building consensus, and ensuring effective communications are critical in designing the best SFARE programs and parish messages, especially for youth and other new or impressionable parishioners. You may recall a similar discussion about the criticality of positive communications and building a consensus when I presented the best practices in the Stewardship & Engagement Chapter 10 and the Strategic Planning Chapter 7 portions of my Roadmap. This should underscore how foundationally integrated the Stewardship Calling S<sup>3</sup> model is such that when all three elements are fully and effectively implemented, your parish can be the healthiest and most effective.

Unsurprisingly, approval from certain types of individuals or groups matters. This is true whether you are following an expert in a relevant field or past participants/users. For this reason, ratings, reviews, and testimonials have a powerful influence. The Parable of the Samaritan Woman at the well was made more powerful because she went back to her village and said: "*Come, see a man who told me everything I ever did. Could this be the Messiah*" (John 4:29)?

This is why, in the Stewardship and Engagement Chapter 10 of my Roadmap, I stressed the importance of having testimonials in your parish. This is equally valuable for your SFARE Programs, as word of mouth will spread the value of your SFARE ministry more than your flyers. How much time have you spent reading reviews from people you did not know about a product on Amazon before you clicked to buy it?

The wisdom of large crowds creates consensus power over you, whether they are peers, friends, people like you, celebrities, etc. And it does not matter if those with authority are paid or unpaid. Thus, the most effective Reachers and providers of SFARE focus on building that consensus.

**4. Authority.** The fourth category of persuasion is authority. People say yes to requests consistent with the counsel of legitimate experts. Believe it or not, titles, positions, and experience can matter in such cases. Not only does the degree matter but where you got the degree from may also be considered. Notice how many times I've dropped the "H-bomb" (Harvard) when citing some of the research sources in this Chapter. We do not want this to be true, and it should not matter, but it does in the area of persuasion. So, what happens if you do not have any credentials? You earn them or cite other authoritative sources of authority.

At the first parish I delivered my live Igniting The Flame of True Stewardship and Engagement program, someone asked me how many times have you done this? I said, I have an "N" of one, and you're it. Decades later, having presented to over 1,000 parishes and completed strategic plans covering over a quarter of the American Orthosphere, parish leaders assume I am an expert. But anyone who buys into that hype is missing the opportunity for further growth and to stay abreast of constantly changing environments and information. Nevertheless, in SFARE, you must know what you are doing and speak the truth with accurate data, information, and confidence. However, as shallow as it may seem, clothes and appearance are superficial cues that sometimes signal authority.

Please do not forget to flip this around. When speaking to a very youthful audience, do not show up looking like you are going to a Fortune 100 board meeting. The way we use our appearance to create authority should be context-specific. By definition, when a clergyman wears his collar (or Cassock in the Orthodox tradition), there is an immediate attribution of theological authority.

At the risk of offending you, please think about the authorities you cite. If you are talking to a youthful crowd and you tell them about the ancient practices and the lifestyle of a monastic living in the desert in the third century, they may politely listen but wonder how that experience is relevant to them. If your SFARE message is important, and it always should be, you must find a way to make your SFARE content relevant and relatable to a young person in 2025. Thus, again, thinking about the context of your audience is critical in every SFARE program or activity because something or someone credible to one audience may be irrelevant to another.

Trappings, accessories, and indirect cues accompany authoritative roles and can create a different impression. Now that I am not actively practicing law and am exempt from jury duty due to my age, I can share this true story where I used the authority of the

appearance of a Bishop to persuade a judge. My “pro bono client,” Metropolitan Alexios, was called for jury duty. He called me to get out of jury service because he said his ecclesiastical position refused to allow him to sit in judgment of another human. As rational as that was, I had to tell him that clergy in Georgia, including Bishops, were not exempt from jury duty. He nevertheless insisted he could not sit in judgment of anyone and told me I had to do something about this! Well, that’s what a lawyer whose WHY was being a “problem solver and dream facilitator” did!

On the morning of his first day of jury duty, I picked him up at the Metropolis where he resided, and he came out in his plain black cassock. I made him go back in and put on his most ornate engolpion (the long gold chain with an icon of a Saint in the middle of a large medallion), plus his black miter headgear with the flowing black robes and had him carry his metal staff. You must show up for jury duty by 8:00 a.m. in DeKalb County and sit in the big auditorium with approximately 300 other potential jurors to see who will get called. When we arrived early, we intentionally hung out outside.

Promptly at 7:55 a.m., when everybody was seated and quiet in the massive and packed auditorium, His Eminence and I slowly processed down the main aisle from the top. I told him to smack his metal staff on the ground with every step he took. Boom! Boom! Boom! We made an entrance. If you could have seen the expressions on the people's faces, you would have been captivated by the scene unfolding.

On top of everything, Metropolitan Alexios actually looks like Santa Claus with a thick white beard and bushy white eyebrows, all surrounded by the black cape attached to his Mitre hat. I, of course, was dressed in my finest black lawyer’s suit, white shirt, and red tie. I had gotten a haircut and polished my shoes for the occasion. With everyone watching, we powerfully approached the Clerk of the Court. The two of us were a sight to see. Do you have the picture?

We processed all the way to the front of the big auditorium, where I announced to the County Clerk that I represented this Metropolitan of the Greek Orthodox church, who could not sit in judgment of another human and thus had to be exempted from jury service. I then received the expected lecture from the Clerk, who reminded me that no such exception existed in the law. I eloquently argued my case citing ancient ecclesiastical authority, blah, blah, blah, blah, yet the Clerk of the Court stood firm. She was the only one in the room trying to pretend she was not impressed by the “bling” my Metropolitan was wearing.

I told her I would take my case to the Presiding Judge. She argued I could not do so, which was probably correct. Nevertheless, I reminded her that the Presiding Judge was the presiding judge for a reason, and I would take my argument to him. She demanded to join us, and I agreed. As she told us to exit the large auditorium and wait outside for her, we turned around, and the unimaginable occurred. I wish I had been smart enough to have scripted it.

As we turned to leave, by the grace of God, with over 300 people in the auditorium staring, it just so happened that a parishioner of the Greek Orthodox Cathedral of the Annunciation (the Metropolitan’s home parish) was sitting in the front row. So, Gunther (a German convert professor married to a Greek woman) stood up, bowed down, and

kissed the Metropolitan's hand (as is our custom). This was pure gold and high theater that even impressed the unshakeable, long-time Clerk of the Court.

The Clerk joined us before the Presiding Judge. I got a minute or two into my argument, and the Judge, likely feeling uncomfortable with the obviously holy man of God who looked like Santa, quietly smiling at him from his dark robes, hat, and holding a metal staff before the judge interrupted my "attempted eloquence" and furtively asked: "Counselor, what do you want from me?" I asked to excuse Metropolitan Alexios from jury duty because he could not sit in judgment of another and would thus be excused anyway during voir dire (jury selection). To everyone's shock, including the Clerk and me, the Judge immediately agreed.

Now, the first rule of negotiation is when you get what you want too early, thank the other party, and see what else you can get. So, I asked the judge what would happen a year later when His Eminence was called again for jury duty. (Using titles also helps.) I wondered how we would get him out of having to come for jury duty then. The Judge, wanting to get us out of his Chambers, asked: "What do you want me to do?" since we both knew that only the Georgia Legislature could change the law to grant such an exemption. So, I did what Reacher lawyers have been doing for millennia and made up a creative remedy on the fly.

I asked the judge if he would permit me to get all the Superior Court judges to sign an Order excusing Metropolitan Alexios from having to come back for jury duty. (In modern parlance, we now call this a preemptive pardon.) I was not asking for an exemption (which only the Legislature could grant) but merely a "you do not have to show up" Order (something which does not really exist for potential jurors in cases such as this). He smiled and told me that it would be fine with him if I could get an Order signed by all the Judges. Of course, I asked him if he would be the first signature. With the holy man of God (who looked like Santa) staring at him intently, the judge smiled again and agreed.

This good judge had no clue that I would enlist the assistance of a good Greek Orthodox judge I knew to help me. Six months later, all the Judges signed the Order. About a year after that, guess what happened? Yes, Metropolitan Alexios got another jury summons and called me. I told him not to worry (although I was concerned since such an Order was unprecedented and untested). I called the Clerk of the Court (now a full 18 months after the "Grand Entrance," as it later became known) and started to explain who I was. Before I could finish the first sentence that began with: "I am sure you don't remember me..." she interrupted and said let me guess, Metropolitan Alexios got another jury summons, and you want him excused. Before I could respond in the affirmative, she said: "Send me that Order you got signed and tell him to have a good day, and he doesn't need to show up."

Now, I don't know if what persuaded the Clerk was the appearance of an impressive-looking authority person (Metropolitan Alexios, not me), my appeal to the Presiding Judge's authority, or my obtaining an unprecedented signed Order (or the tickets to the Greek festival I sent her with the thank you note after the Grand Entrance, which is not a bribe since technically she had not done anything for me). But at least one lesson is that authorities can be persuasive and persuaded. The second takeaway is not

to call me if you want to get out of jury service. It is your public duty! (And thirdly, see how captivating a good story can be when you are trying to make a point?)

**5. Scarcity.** People say yes to scarce, rare, or dwindling opportunities. People want more of the things they can have less of. This is just human nature. So, you need to inform people of the unique features, how uncommon or rare something is, or a unique opportunity that is coming up. Have you ever had a chance to venerate the remains of a Saint? This is perhaps a once-in-a-lifetime opportunity for many.

Do you know when they sold the most regular Coca-Cola? In 1985, they announced they were going to stop selling the original formula and switch to a new formula. Sales of original Coke went through the roof. If you've ever participated in eBay auctions and you see people who win at the end, they have a word for them. Snipers. They're waiting in the weeds for the scarce last 10 seconds to out-bid you.

If you ever book on hotels.com, they are phenomenal at doing this scarcity thing, which Amazon has now copied, when they tell you, "there are only a few left, so order now." Everywhere we go, we are being persuaded to act by a sense of scarcity. So, where does this fit in with your SFARE ministry?

What is the most valuable thing for a Christian? Time is a major scarce asset, but nothing is more valuable than salvation. And how much time do you have left before your II Corinthians 5:10 Moment when you account before the awesome judgment seat of Christ? You don't know.

If it comes soon, are you ready? If not, what are you doing now? Our lives compete against the scarcest commodity on the earth, namely time. The one thing your parish can do is use its SFARE ministries to make maximum use of that scarce commodity to help your parishioners hear "*well done good and faithful servant!*" when it matters most in their II Corinthians 5:10 Moment. Tell me it is not worth communicating to your faithful that you have the anecdote to the scarcity of earthly time in the form of eternal life with their Creator. Now, that is something you cannot get anywhere else.

**6. Commitment and Consistency.** People say yes to requests aligned with their existing public actions, commitments, and statements. Experiments have proven that if you want somebody to do something, get them to allow you to put a sign on their front lawn for whatever that is. Regardless of what the issue is, the minute they put that yard sign up, studies show they are far more likely to continue to act consistently with that public statement and action.

I can affirm that once I put the license plate holder on my car that says "Orthodox Christianity" on the top and "for 2,000 years" on the bottom, my driving improved. I no longer cut people off or exchanged dirty looks. After all, I didn't want them to think that is how Orthodox Christians acted.

It is important to reward your audience for investing their time with you. Whether you are delivering a church service, homily, or SFARE program, find a way to reward your audience for the sharing of the opportunities you have with them. They have given you that valuable asset of time, and the more they feel the reward, the more consistent and loyal they will become. If they offer a testimonial in church about the power of your

Small Group Ministry or Bible study, it will make them far more likely to continue to engage at a higher level and encourage others to join with that to which they publicly associate themselves.

If you ask people to take a small step, studies show that they will do a lot more to continue to be congruent with that first step. By the way, this is why people always ask you to “like and subscribe” to their post/website/reel/program. Do you really care whether some random person in Poughkeepsie, New York, “likes” your parish or SFARE program? YES, because that public action makes them more likely to continue to tune in or join you or invite others. We are social animals.

The same thing is true when people forward your latest homily or SFARE webcast/podcast. By encouraging public comments, you drive congruence and support. This is another reason it is so critical to have parishioners give testimonials before the dismissal from your church services. If you can get people to make a public commitment or endorsement of any nature, to any degree, the impact will be great for them and others.

Let’s briefly return to Robert Cialdini’s great book on Persuasion, where he discussed that the more we share an identity with someone, the more we will say yes to them. Create a connection or commonality, and you will get a commitment that will drive consistency. This is as critical in attending church service as it is for the salvific SFARE ministry you will offer.

There are some additional wonderful talks on the most effective ways to communicate and persuade by psychologists Steven Pinker, Robert Cialdini, and Steve Martin that I think are essential for all clergy and lay communicators who wish to be more effective Reachers: <https://www.youtube.com/watch?v=bJPPVDnvhRs>  
<https://www.youtube.com/watch?v=cFdCzN7RYbw>

To review, the best SFARE Reachers Personally communicate, Passionately communicate, and Persuasively communicate (the 3Ps).

The 3As involve the Reacher effectively communicating.

## The 3As.

I will end this section of the formula for the best Reacher communications and SFARE ministry programs by briefly focusing on the three **As**, by reminding you to identify the always: 1. Action desired, 2. Action steps, and 3. Action rewards. They are all interrelated, but when aggregated, they drive the most effective human light bulb Reacher effectiveness, with powerful SFARE ministry offerings being the secret sauce.

You must begin by explaining the action you wish to take from any SFARE activity or program. Reachers are not merely passing along information (like Teachers). Reachers are trying to change your behavior. Thus, it is always critical to remember to



“make the ask.” Your SFARE programs are not complete until the dots are connected with a concrete desired action.

After asking for a particular behavior or action as a result of your SFARE program, you should provide the action steps the parishioner should take. What sometimes seems obvious to you may be novel to your parishioner because they have never thought about the Action you requested. Or perhaps they do not know how to do what you have identified. I cannot tell you how many times I have heard PIPs (Parishioners In Pews) honestly admit they do not know “how to pray.”

All their life, they have been told to pray and have attended church services, which are often nonstop prayers. But somehow, flying solo in prayer is a dialogue with God many PIPs are unprepared to undertake. Providing helpful action steps can be the difference between a great idea never being implemented and a new righteous habit being formed. This is similar to the Action Plans I identified in the Strategic Planning Chapter 10 of my Roadmap.

Finally, nothing makes a difference or creates a new habit more likely than focusing on the action’s reward. Ultimately, an effective Reacher explains what they want you to do, how to do it, and how it will make you feel or what you will receive. And there is probably nothing easier to promise (or “sell” if you prefer) than a SFARE program that brings you closer to Christ.

Understanding the salvific message of our Lord is perhaps the greatest gift you can offer any parishioner. And this should be the end result of your best-in-class SFARE programs. You should recognize that this message is a persistent theme in my Roadmap. Your SFARE ministry must be leading your parishioner someplace with the best of rewards and an achievable path to get there.

To review, the best SFARE Reachers clearly identify the Action desired, Action steps, and Action rewards (the 3 As).

### One Size Fits No One.

Please do not assume that a one-size-fits-all SFARE pathway will work. If you return to the beginning of this Chapter 12, where I present the four different types of parishioners in your parish, you will remember the critical importance of meeting people where they are and giving them what they need. Therefore, do not expect an Incidental Convert to react as positively to an intense study of the Book of Revelation when they could probably benefit more from a rudimentary SFARE program about your faith or Christ.

It is also critical to create multiple feedback loops from and with your SFARE participants to build rapport, find out about issues/questions before they just leave, and share new ideas, successes, transparency, and accountability. Christianity has the most valuable offerings of anything, and for reasons that cause me to write my Roadmap, we are keeping them well hidden, under-promoted, and less effectively delivered. Your SFARE ministry offerings should be some of the most valuable things available to your parishioners.

However, if you have not taken the time in your parish to deliver SFARE excellence, tailored to the audience, clear about what you are teaching and asking, with supportive ways to achieve that rich reward that comes from your ask, then you will continue to have the negative trends I previously identified. However, I am confident that if you have read this far, you are either a Reacher human light bulb or using my Roadmap to help you on that journey. Either way, this SFARE ministry work is among the most important your parish can do as you bring the light of Christ to a dark world. All you have to do is remember my simple Roadmap formula where  $3K + 3P + 3A = \Delta$  (effective parish SFARE).

Simon Sinek actually put the Reacher journey into a great context by advising: “Words may inspire, but only actions create change. Most of us live our lives by accident. We live life as if it happens. But fulfillment comes when we live our lives on purpose” (Sinek, 2017). Please let those words sink in for a moment. Because the difference between the Teacher or Preacher and the most effective Reacher is the application of the above formula that drives you to be unsatisfied until parishioners put your SFARE wisdom into action. Live on purpose!

### [A Few Final SFARE Reacher Thoughts and Suggestions.](#)

People tend to suppress new ideas. We basically focus on what we know and are comfortable with. Christ faced this challenge throughout His ministry. On top of that, Groupthink is a very powerful tool that keeps people from considering new ideas, approaches, or options and keeps them rooted in the tyranny of the past (Janis, 1972).

This is when we stop looking for or exclude new data experiences or research that is inconsistent with our preconceived notions. My PhD scientist daughter and I joke about this all the time when I tell her, “Wait, I don't want to read that additional scientific study because it may be inconsistent with my pre-conceived conclusion.” You have to be able to look at what you do not know more robustly and become obsessed with acquiring more knowledge because otherwise, your conclusions can become faulty or suboptimal or lack credibility when assessed by an objective audience.

I have seen too many Christian parishes subject to Groupthink, where we stop considering other options or questions and refuse to embrace them. I have also seen even greater examples of parishes stuck with Groupthink's first cousin, what I call “**Smallthink.**”

**Smallthink** is the disease of the devilish drive to act insignificantly or put band-aids on problems rather than think big and solve root causes. Our fear of failure or fear of anything new keeps us from experimenting, learning, innovating, and ultimately succeeding with the critical work of SFARE. Smallthink is what I see most frequently in parishes and church-world, and thus have to battle most fiercely as I pursue my Stewardship Calling ministry.

Some attribute this to the “evil one.” I do not know its source or origin, but I affirm that fear is the biggest impediment to transformation and freedom. Many times, the issues are complex. But more often than not, they are simple and right in front of us.

You have probably heard of Occam's Razor, the problem-solving construct made famous by "William of Ockham" (not Occam). Reportedly, English theologian, logician, and friar William wrote the Latin phrase: "Numquam ponenda est pluralitas sine necessitate," or alternatively "entia non sunt multiplicanda praeter necessitatem" (Plurality must never be posited without necessity) (Borowski, 2012). The more modern colloquial version of Occam's Razor holds that in the face of two or more competing theories, the simpler explanation should be preferred. This is great wisdom in trying to describe how to create the most effective SFARE program.

Let me provide an example I call the "two, four, six paradox" to see if I can prove the Groupthink or Smallthink hypothesis by running an experiment with you. I will give you a sequence of numbers. I have determined the relationship between these three numbers. You have to experiment by telling me what the relationship that I have determined between these three numbers is.

Here is the way I conduct the two, four, six paradox experiment in some of my Leadership Training programs. I will pretend you are a participant. You will write down a sequence of three numbers and give it to me. I will either say YES, it is consistent with the relationship I have determined, or NO, it is inconsistent with my relationship. You can send me as many sequences of three numbers as you want until you are convinced you have scientifically determined what is the relationship I have determined between these three numbers.

I wish we could do this together in real-time. I love doing this in my Igniting The Flame and other live programs, and you should try it sometime. When a professor did this experiment, the smartest kid in the class stopped after sending him four three-number sequences. After only four tries, this bright student was convinced they knew the professor's pre-determined relationship between the three numbers.

The "slowest" (read that, most methodical) student took 17 exchanges of sequences of numbers before they announced they understood the professor's relationship between the numbers 2, 4, 6. All the students came in with an amazing array of three-number sequences and theories of the relationship the professor had created, which they proudly shared with great confidence.

Some said the number in the middle is the average of the numbers on either side. Others postulated they must be all even numbers. There were even more creative suggestions. Every student was told they were wrong in their guess of the professor's theory. I have had the same experience when I tried this. What is your theory about the relationship in that sequence?

The actual relationship was merely that each succeeding number was larger than the preceding number. It did not matter by how much. It was just bigger. Did you get it right? This is proof of Occam's razor "simplest is best" theory!

The best way I've heard this concept articulated was again from Robert Cialdini's book about Persuasion. He said we all fool ourselves from time to time in order to keep our thoughts and beliefs consistent with what we have already done or decided. We will discount those theories that are inconsistent with our actions (Cialdini,

2006). Sherlock Holmes said the same thing in more detail: “It is a capital mistake to theorize before one has data. Insensibly one begins to twist facts to suit theories, instead of theories to suit facts” (Doyle, 1891).

Do you really know why your SFARE or any other ministries are not succeeding, or are you just stuck in Groupthink or Smallthink and doing the same thing over and over and hoping a different result occurs? If so, here is a freebie if your parish or ministry has a website with SFARE content.

This came from great research done by Nielsen Norman Group - Dr. Jakob Nielsen with co-founder Dr. Donald A. Norman (former VP of Research at Apple Computer). Notice how I am credential-dropping with the Apple reference to persuade you as to the validity because you've never heard of these guys. When they tested people reading websites, they found that 79% of users merely scanned any new webpage they came across (Nielsen, 1997). Only 16% read word by word.

This led the Nielsen Norman Group to develop some great techniques to improve your webpage presence and effectiveness. I will briefly share six ideas that you should consider now by looking at your parish or ministry website or other SFARE content (Nielsen, 1997).

1. Use highlighted keywords. Use technology to highlight what you want people to focus their attention on.
2. Have meaningful, not clever subheadings. Those cute ideas that you came up with, like my “WAP” and “human light bulbs,” may not always be as effective in every context.
3. Bulleted or numbered lists are far more effective than prose. Notice my current use of these numbered items.
4. One idea per paragraph. Users will skip the other ideas. So those of you who, like me, have written a thesis on each web page, forget it.
5. The inverted pyramid style. This means start with your conclusion and then build it out. As Steven Covey said, “Begin with the end in mind” (Covey, 2004). Tell them what you want them to learn. Tell them. And then tell them what you told them.
6. Half the word count or less than conventional writing. So, go back and cut whatever you have written on each web page in half.

Yes, I confess that I am “guilty as charged” for violating every rule on my Stewardship Calling website. However, I violate the rules intentionally because I am not selling anything. I merely use my website as a web-based public filing cabinet of content to help you and your parish. However, your parish that is trying to drive behavior from its website would be wise to re-evaluate everything using the above rules.

I will give you one more test that I perform before my first ZOOM session with a new parish. Read and review every page of your website at least once a quarter and

keep editing. I will guarantee you there is outdated information, dead links, old photos, and many other things that need to be cut out or revised on your website or other online SFARE content. Do it now before you give the wrong impression to a seeker. Remember, you only have one chance to make a first impression, and first impressions are extremely hard to overcome.

## The Best Reacher Talks.

I am a huge fan of TED Talks. Their motto is “ideas worth spreading.” I believe that a Reacher's motto is to have an idea that's actually worth sharing and transforming someone's behavior.

Chris Anderson, the curator of TED, was asked what the biggest secrets of the most effective TED Talks are. Chris offered four keys (Anderson, 2016):

1. Pick one single idea and explain it. Just one idea, that's it.
2. Give your listeners a reason to care about that idea.
3. Build your idea piece by piece by piece. Don't give them too much. Tell them what it is and then build it up so that they get to the end and go, “OK, yeah, I get it now.”
4. Make your idea worth sharing.

## The Importance Of Religion And The Best SFARE.

I want to prove what Chris Anderson said by sharing one of the most powerful 1:38-minute talk on the importance of religion and SFARE (Christensen, 2014). The late, great Harvard Business School professor and visionary Dr. Clayton Christensen recorded it. (Notice how I dropped the H-bomb again to persuade you it must be an important message of truth.)

Now, I will take a “shot” at Harvard (sorry, Harvard grads). They apparently made Clay include the heading next to his name and the title of the talk: “His personal views, not HBS.” When you watch it or read it below, you will realize why, God forbid, Harvard, formed by the Puritans, actually had to make someone who was advocating for the importance of religion disclaim their association with that important message!

Here is the link. I hope you watch it because it is so powerful and expertly produced. But I am including the transcript below for those not near a computer or iPhone. (Is that anyone anymore?) <https://www.youtube.com/watch?v=YjntXYDPw44> (Christensen, 2014):

Some time ago, I had a conversation with a Marxist economist from China. He was coming to the end of a Fulbright Fellowship here in Boston.

And I asked him if he had learned anything that was surprising or unexpected. And without any hesitation, he said, yeah. I had no idea how critical religion is to the functioning of democracy.

The reason why democracy works, he said, is not because the government was designed to oversee what everybody does, but rather democracy works because most people, most of the time, voluntarily choose to obey the law. And in your past, most Americans attended a church or a synagogue every week, and they were taught there by people who they respected. My friend went on to say that Americans followed these rules because they had come to believe that they weren't just accountable to society, they were accountable to God.

My Chinese friend heightened a vague but nagging concern I've harbored inside that as religion loses its influence over the lives of Americans, what will happen to our democracy? Where are the institutions that are gonna teach the next generation of Americans that they too, need to voluntarily choose to obey the laws?

Because if you take away religion, you can't hire enough police.

This is a mic-drop moment! You got it, didn't you? Did it make an impact? This is how powerful one minute and thirty-eight seconds can be in the hands of a Reacher. Do you appreciate how critical your SFARE ministries are and why I spend so many words on providing you with a Roadmap to improve them?

As I have repeated throughout my Roadmap, Pastor Rick Warren said that leaders of a church are either risk-takers, caretakers, or undertakers. Think about that because the job of the Reacher is not to be an undertaker. I never signed up to help bury any of Christ's churches under my watch.

Steve Jobs put it in a different perspective when he had an imminent death sentence facing him. He said, "Remembering that you're going to die is the best way I know to avoid the trap of thinking you have something to lose." Take the moment when you have it and where you have it. (Jobs, 2005)

My favorite basketball coach, John Wooden, who won 10 NCAA men's championships in 12 years (including seven in a row), once said: "Don't measure yourself by what you have accomplished, but by what you should have accomplished with your ability." In other words, it is not good enough to be at the top of the game if your game can elevate the game to a new level.

This is the Reacher's way to look at the gifts God gave you. Remember the admonition of St. John Chrysostom, who challenged all leaders "to discern the spiritual gifts of all those under his authority and to encourage those gifts to be used to the full for the benefit of all." Again, notice it requires you to inspire those in your parish to use ALL their gifts to the FULL. And not just for their benefit but for the benefit of ALL.

In this Chapter 12 of my Roadmap, we explored the difference between being a Teacher, a Preacher, and a Reacher. You have the choice. You can be an informational

Teacher 10-watt bulb, and there's nothing wrong with that. Or you can elevate your game to a 10X multiple and be an inspirational Preacher 100-watt light bulb. Or you can take it to where God has probably asked you to go and become a transformational Reacher of a thousand-watt floodlight.

One road to get there is by my  $3K + 3P + 3A = \Delta$  (where Delta = effective parish SFARE). Know your why, target audience, and content. Personally, Passionately, Persuasively communicate. Give people your Action desired, Action steps, and Action rewards.

As I wrap up this Chapter by providing you with a Roadmap to hopefully help you on your Spiritual Formation And Religious Education journey, whether clergy or lay leader, you have reached another of my Matrix Moments (Wachowski & Wachowski, 1999). You are Neo, and I am Morpheus. So, given what you have just read, which one will it be? Take the blue pill, and you remain a Teacher. The green pill, and you elevate your game to a Preacher. Or you can take the red pill I have offered you and become the Reacher God has called you to become.

Choose wisely, my friends, because what may hang in the balance is the most important thing. We all seek “*a good account before the awesome judgment seat of Christ.*” When I wake up every day, I ask myself what I ought to do. My motivation is the knowledge that we, as Christians, have in front of us the most extraordinary gift of 24 hours to make a difference in the world as a Reacher. But the most incredible day you will ever see is when you get to stand in front of your Lord and account for your life.

Perhaps you will consider this as your call to action to be the Reacher God has destined you to be. Maybe this is your call to be the “light of the world.” The beautiful thing is you have the free will to decide how you will answer it. Will you choose an effective SFARE path, or will you just live life as it happens? I have provided you with one Roadmap. If you don't like mine, please find another. Regardless of which roadmap you choose, I pray you use the powerful gift from God of free Will wisely! Godspeed on your Reacher journey.

## CHAPTER 13. The Use Of Strategic Foresight With Spiritual Formation And Religious Education (SFARE).

To demonstrate how useful strategic foresight and future smart analytics can be to parishes and ministries, I will describe its essential elements and share an expanded analysis of some work originally performed for Holy Cross Seminary (“HCS”) in Brookline, MA. After completing the work and applying everything I learned from the study, I sent it to the Seminary President with the title: “**Thinking Too Small: Not Making Disciples In Our Nation Let Alone All Nations. The Case for Orthodox Christian Seminaries Ver. 2.0.**” I did this not to be provocative but rather because as I followed the data and strategic foresight process, I realized that not only had HCS been thinking too small, but my original premise of merely looking at one Orthodox Seminary was itself misguided and thinking entirely too small to solve future challenges. Strategic foresight provided me with the vision needed to see what needed to happen.

The first Christian seminarians were Christ’s Apostles. They lived and worked with the Lord and received consistent and constant religious education in words, examples, actions, and interactions. Hundreds of years later, that form of hands-on training and mentoring evolved into the innovations of theological institutions (precursors to modern-day seminaries) and monasteries designed as institutions to provide the necessary religious education.

While tools and training have evolved, if the seminaries are responsible for training the clergy who educate the laity, the decline of the modern-day church reinforces a truth attributed to too many people and sources to be confident as to its origins: “If you always do what you’ve always done, you’ll always get what you’ve always got” (Quote Investigator, 2016). Given the rapidly changing dynamics and demographics of Christ’s church in America today, a “future smart” reexamination of how Christ’s churches train disciple-makers seemed to be in order (Canton, 2015).

Christians need trained theologians to help them properly understand God’s and Christ’s words and deeds. Declining church engagement, the growing number of those leaving Christian churches, and the advent of unfiltered content on the internet and through artificial intelligence make **Spiritual Formation And Religious Education (“SFARE”)** more critical than ever. For all Christians, learning the word of God and the message of Christ is essential.

And yet, from an Orthodox church perspective, understanding God’s words and how they all fit into a proper life is challenging without the assistance of a trained theologian (Vassiliades, 2017). Orthodox monasteries and seminaries currently are the only sources to train Orthodox clergy to help interpret and share the words of God and Christ. In a country exceeding 330 million people, there are only approximately 353 theological seminaries (of all denominations) in the United States (Faithlife Corporation,



2023), of which approximately 270 are accredited by The Association of Theological Schools (The Association of Theological Schools, 2024).

A summary of the current state of religion in America concluded: “We’ve heard it all before: church attendance is down, seminary enrollment is on a decline, Americans are selecting ‘none’ when asked about religious affiliation—headline after headline declares either the irrelevance or obsolescence of religion” (Wenner, 2023). The acute shortage of clergy reported by every denomination partly results from insufficient institutions forming the next generation of heirs to the Apostles (Fearon & Strothers, 2023).

Research from the Center of Applied Science in the Apostolate identified 60% fewer priests over the last 50 years, with over 3,500 Roman Catholic churches without priests and with significant retirements on the horizon for Baby Boomer clergy (Fearon & Strothers, 2023). Within the American Orthosphere, almost every week, I work with a parish that needs a priest or a second one; however, with inadequate numbers graduating from our seminaries, the challenge is getting more severe each year.

This problem is exacerbated by the large number of clergy that are at or rapidly approaching retirement age, with no successors in sight. One recent statement at an Orthodox church conference estimated that as many as 33% of the clergy in this denomination would be retiring in the next 3-5 years. Nowhere near that number of seminarians are graduating to fill those vacancies, let alone the openings that exist today. Imagine what it would do to airline travel if we lost 33% of all pilots. Thus, my fervent concern shifted to how we will properly educate and train the pilots of our journey to Christ and each other.

## What is Strategic Foresight?

One of the tools that is available but infrequently used in church-world involves a strategic foresight future smart analysis. The use of these tools is not only enlightening but can lead to a transformational vision for a parish or ministry. I present these now (rather than in the previous Strategic Planning section) to show how they can be practically used to assess something critical to the SFARE efforts.

Strategic foresight is about anticipating, mapping, and creating desired futures. Framing objectives by scanning information to forecast alternative future visions with plans to achieve them is critical. “Future smart” is a process of anticipating, mapping, and harnessing the unimagined by examining and extrapolating trends to predict the future (Canton, 2015). Indeed, as Peter Drucker (and possibly President Abraham Lincoln) said: “the best way to predict the future is to create it” (Drucker, 2004). Humans have the inherent capacity to imagine the future through helpful processes and tools motivated by curiosity, fear, or need (Slaughter, 1993). This is a unique opportunity for leaders to facilitate processes that imagine better futures (Kouzes & Posner, 2017).

There are six future smart steps moving from “framing” objectives through “scanning” information to “forecasting” alternatives and determining a “vision,” “plan,” and “actions” to implement the desired future state (Hines, 2006, p. 18). Being future

smart explores today’s potential to imagine an unpredictable future. An early academic article about future smart defined futures literacy as “the capacity to explore the potential of the present to give rise to the future,” focusing on greater awareness of situations and the impacts of change over time (Miller, 2007, p. 347).

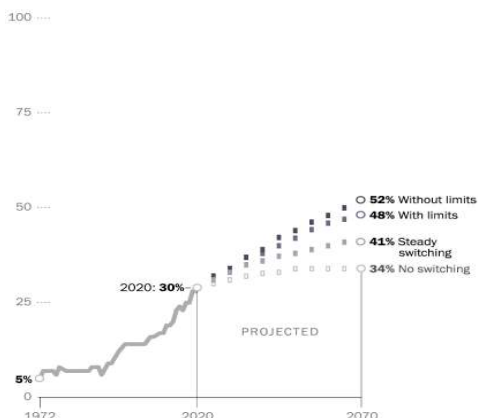
Becoming future-smart is challenging because of the various approaches to achieving it juxtaposed against the divergent cultural backgrounds and desires of diverse people and organizations. This leads to the need for a “futures literacy framework” that focuses on individuals being cognizant and conscious about the future and examining different assumptions and paths that vary depending on present desires and intentions (Benavides-Rincón & Díaz-Domínguez, 2022, p. 3).

While the future cannot be perfectly predicted accurately, the discipline of future smart studies focuses on providing examination, exploration, and mapping to partake in creating a desired future (Slaughter, 1993, p. 372). Thus, focusing on the present is predicated on seeking possible futures by “developing and interpreting stories about possible, probable and desirable futures” (Miller, 2007, p. 347).

## Horizon Scanning.

Horizon scanning systematically researches trends, threats, and opportunities on the horizon that might shape the future. Scanning the horizon involves intentional and systematic research of relevant trends and the threats/opportunities in the future that could impact an organization’s ability to achieve its objectives (Cheah, 2020). Horizon scanning can begin a process of looking to the future to identify events and results that could occur to serve as an early step in creating strategies (Cuhls, 2020).

**U.S. ‘nones’ will approach majority by 2070 if recent s**  
*% of Americans who are religiously unaffiliated*

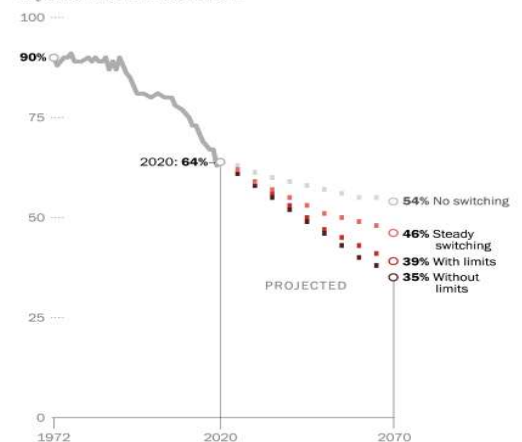


Note: Historical data describes trends among U.S. adults, based on surveys of adults. The 2020 Americans of all ages. In 2020, we estimate that the religious composition of people of all ages Sources: General Social Survey (1972-2006), Pew Research Center surveys (2007-2021).<sup>1</sup> “Modeling the Future of Religion in America”

PEW RESEARCH CENTER

For example, as the two charts to the left and right indicate, the Pew Research Center calculates that in 40 years, if current religious attrition rates continue, 52% of the U.S. population may identify as “NONES” (with no religious affiliation) while only 35% might identify as Christians (Pew Research Center, 2022).

**U.S. Christians projected to fall below 50% of population**  
*% of Americans who are Christian*



Note: Historical data describes trends among U.S. adults based on surveys of adults. The 2020 Americans of all ages. In 2020, we estimate that the religious composition of people of all ages Sources: General Social Survey (1972-2006), Pew Research Center surveys (2007-2021).<sup>1</sup> “Modeling the Future of Religion in America”

PEW RESEARCH CENTER

Horizon scanning is described in a straightforward video as a “systematic process of gathering information to identify future risks, opportunities, and developments” (Big Bang Partnership, 2023, <https://www.youtube.com/watch?v=31iwzGVy10s&t=6s> (starting at the 4:30 mark).

## The Orthodox Seminary Tsunami.

So, what does the situation look like as we scan the reality of all the Orthodox seminaries? The data provided below was as of the Fall of 2021 due to the difficulty in obtaining more recent data.

<b>Seminary</b>	<b>Students</b>	<b>FTE</b>	<b>Professors (FTE)</b>	<b>Jurisdiction (dominant)</b>
<b><u>Saint Vladimir’s Orthodox Theological Seminary</u></b> (Crestwood, New York)	<b>79</b>	<b>64</b>	<b>12(7)</b>	<b>Pan-Orthodox (OCA/Antiochian)</b>
<b><u>Holy Cross Greek Orthodox School of Theology</u></b> (Brookline, Massachusetts)	<b>76</b>	<b>71</b>	<b>8</b>	<b>Pan-Orthodox(GOArch)</b>
<b><u>Saint Tikhon’s Orthodox Theological Seminary</u></b> (South Canaan, Pennsylvania)	<b>43</b>	<b>43</b>	<b>10 (4)</b>	<b>Pan-Orthodox (OCA/Antiochian)</b>
<b><u>St. Stephen’s Course in Orthodox Theology / Antiochian House of Studies</u></b> (Distance/Boliver, Pennsylvania)	<b>200 *</b>	<b>192*</b>	<b>9 (3)</b>	<b>Pan-Orthodox (Antiochian)</b> * Most are certificate programs
<b><u>Holy Trinity Orthodox Seminary</u></b> (Jordanville, New York)	<b>40</b>	<b>3</b>	<b>9</b>	<b>ROCOR</b>
<b><u>Saint Herman’s Orthodox Theological Seminary</u></b> (Kodiak, Alaska)	<b>18</b>	<b>10</b>	<b>3</b>	<b>OCA</b>
<b><u>St. Sophia Ukrainian Orthodox Theological Seminary</u></b> (South Bound Brook, New Jersey)	<b>18</b>	<b>4</b>	<b>0</b>	<b>UOC</b>
<b><u>Christ the Saviour Carpatho-Russian Seminary</u></b> (Johnstown, Pennsylvania)	<b>4</b>	<b>4</b>	<b>0</b>	<b>ACROD</b>

(Sources: Krindatch, A. (2020). U.S. religion census 2020: Dramatic changes in American Orthodox churches.; OrthodoxWiki.org. (2022). List of seminaries and theological schools.)

Of the previously cited 353 U.S. theological seminaries, there are only 8 Orthodox seminaries in the United States, each of which has small enrollments and few full-time faculty, yet are extremely land-rich (OrthodoxWiki.org, n.d.).

The three major mainstream Orthodox seminaries producing clergy are St Vladimir’s - Orthodox Church in America (64 FTE), Holy Cross - Greek Orthodox Archdiocese of America (71 FTE), and St Tikhon’s - Orthodox Church in America (43 FTE). This represents 178 full-time equivalents across the three years of Orthodox seminary education (approximately 59 graduating each year). Not all 59 graduates will be ordained as priests, and many of those who do will wait to find a wife first since, in

the Orthodox church, clergy cannot get married after they are ordained. Thus, it is hard to envision a positive future where fewer than 59 new clergy each year are available to serve the needs of the approximately 1,348 parishes in the Greek Orthodox Archdiocese, Orthodox Church in America, and Antiochian Orthodox Church (Krindatch, 2020).

In 2020, the median age of clergy was fifty-seven years old, according to a survey of 15,278 religious communities from 80 different denominations and faith traditions (Thumma, 2021, p. 8). Furthermore, approximately 25% of clergy in Protestant churches expect to retire before 2030 (Roach, 2023). While there is no statistically significant research on the number of Baby Boomer or “soon-to-retire” American Orthosphere clergy, the author has traveled the country for over three decades working with over 1,000 American Orthosphere parishes and can anecdotally confirm the median age is likely higher in Orthodox churches due to the small number of clergy graduates to succeed older clergy. This makes the future trends potentially worse for American Orthodox parishes.

In June of 2024, The Orthodox Studies Institute (“OSI”) published an article with data about the Orthodox priest shortages. In this analysis, OSI reported that the second largest Orthodox denomination (OCA) found that as far back as 2020, approximately 30% of their priest were already over 65 years of age (Namee, 2023). OSI attempted to calculate the expected number of clergy vacancies (for any reason, including retirement or laicization, etc.) over the next five years (starting in 2024) compared to the numbers of graduates from all the existing Orthodox seminaries. The bottom line was that they projected at least 115 vacancies a year, with all the seminaries producing only 30 ordination candidates (Namee, 2023).

These 85 net excess vacancies a year are made worse when considering, as previously noted, that Orthodox clergy who want to marry must do so before ordination, which causes some graduates to delay becoming ordained. Still others seek different ministry options. Thus, the net shortfall of 85 a year is likely undercounting the actual situation. This is a crisis of epic proportions and should make everyone associated with Orthodox seminaries and the Hierarchs who must fill parish vacancies lose sleep at night. The order of magnitude of the pending tsunami that is only visible through the horizon scanning strategic foresight lens is unimaginable.

## [Past Is Prologue For The Future.](#)

Orthodox seminaries, designed centuries ago by monastics and theologians, focus more on understanding the past rather than the present or future. First-century seminaries followed the learning of the Apostles and were hands-on communities living together with other Christians and under the guidance of an older mentor. Indeed, the first-century church was a seminary teaching and training people in experiential communion. In the 3rd-5th centuries, an “episcopal” (Bishop) model of religious education began to train clergy. At the same time, starting in the 3rd century, monastics were trained in monasteries to teach others (Viola & Barna, 2012).

Seminaries and monasteries have existed in the Orthodox Christian world for many centuries. However, the modern-day seminary movement was fueled, in part, by the Catholic Reformation and The Council of Trent as far back as 1545-1563 AD. (Espinoza, 2017). In other words, they were designed for an audience and age that has not existed in hundreds of years. Furthermore, this over 500-year-old seminary structure was not designed to be future smart or focus on trends, possibilities, and needs. Thus, the seminary model needs substantial reimagination considering new methods and modalities of teaching, a greater emphasis on community engagement, and a focus on future circumstances and needs of the faithful (Gonzalez, 2015, pp. 127-129).

## The Five “A” Seminary Trends.

When examining the most significant current trends facing Orthodox seminaries that will significantly impact the future, limiting the list to five is difficult. Many additional independent and interrelated global, cultural, socio-moral, familial, technological, and ecclesiastical trends play a role in challenging the future smart journey of Orthodox seminaries. However, these five “A” trends are critical to understand and consider in horizon scanning and providing strategic foresight to institutions attempting to teach a timeless theology in an ever-changing world. Here is a concise summary of these top five trends.

### **Antiquated:**

Seminary education today is much like it was a century ago, with a few theologians teaching historical truths. The ancient model of seminary religious education was predicated on theologians speaking to informed, reasonably educated audiences. While that may work for seminarians seeking formal training, the changing world and communications landscape requires a greater emphasis on **Practical Applied Theology (“PAT”)**, which is sometimes referred to as “stories of doubt and information” (Muller, 2023, p.4). The father of practical theology, Friedrich Schleiermacher, inspired subsequent practical theology futurist George Lindbeck to conclude: “The structures of modernity press individuals to meet God first in the depths of their souls, and then, perhaps, if they find something personally congenial, to become part of tradition or join the church” (Lindbeck, 1984, p. 22).

The Lewis Center for Church Leadership of Wesley Theological Seminary noted that the “faith formation by osmosis” of focusing on Sunday worship for what I call the “**PIPs**” (**Parishioners In Pews**) is insufficient. Even loyal followers are reducing their Sunday attendance and, therefore, may require different future smart alternatives for **those** things that can be offered in alternative forms (Gryboski, 2024). Consideration of these alternatives raises natural resistance from many Orthodox Christians, who are traditionalists by nature, and because the Holy Eucharist can only be offered during a Divine Liturgy or Baptism (absent exigent circumstances before earthly death).

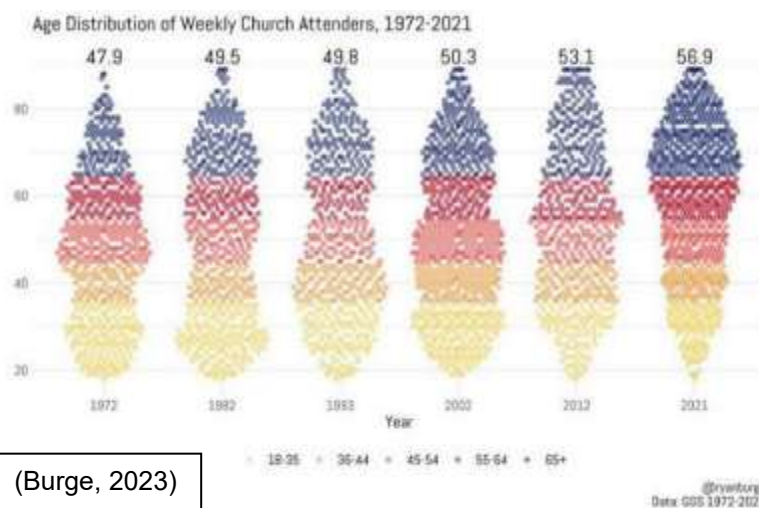
However, an exponentially changing world with massive innovations in communications, social media, and access to seemingly endless information sources creates a greater desire for learning PAT that people can apply in their modern lives

(Muller, 2023). The ineffectiveness of merely a Sunday school and weekly worship approach requires updating with future smart alternatives (Gryboski, 2024; Lindbeck, 1984; Muller, 2023).

### Aging:

As the chart below demonstrates, the PIPs are aging fairly rapidly (Burge, 2023). The average age of weekly PIPs increased from 47.9 to 56.9 over the last 50 years, while the overall age of Americans has only increased from 43.8 to 48 (Smith, 2023). In addition, the numbers of clergy facing retirement and seminarians are materially increasing.

A demographic and empirical study of the Pinetops Foundation estimated that by 2050, 40 million young people with current affiliations with American Christian churches could become disaffiliated “NONES” (with no church affiliation) (McDowell, 2023; Pinetops Foundation, 2018). The current trend is a noticeable shift from younger seminarians to older ones, with a 12% decline in seminarians in their 20’s compared to a 6% increase in those over 50 (and even a 3% increase in those in their thirties) (Tanner, 2017, p. 22).



(Burge, 2023)

The Orthodox Church jurisdictions are experiencing relative growth in older men enrolling in one of the newly expanded diaconate programs. Indeed, the most recent class at Holy Cross Greek Orthodox Seminary has 60 adult men in a diaconate program (Orthodox Observer, 2023). This growth in adult men willing to explore vocation fulfills St. Paul’s instructions to St. Timothy: “...then let them serve as Deacons...” (1 Timothy 3:10). While not yet ecclesiastically approved, a future smart trend could result from early efforts within Orthodoxy that are focused on restoring an ancient female diaconate (St. Phoebe Center for the Deaconess, 2023).

When looking strategically, it is clear that the basic model of Orthodox clergy formation in seminaries has not materially changed over time or with the times. The actively engaged Orthodox Christian faithful and clergy are aging at increasingly rapid rates and are not being replenished by greater or equal numbers of younger parishioners or seminarians (Smith, 2023; Tanner, 2017). The younger generations are increasingly disconnected from their churches and faith and require different strategies from what worked for the older aging populations (McDowell, 2023; Pinetops Foundation, 2018).

## Antagonism:

Orthodox Christianity in America is declining and under attack from secularism, governmental interference, other faith traditions, and internal missteps. From the beginning of America's founding, President James Madison did not trust the government or courts to preserve religious freedom, thus necessitating the 1st Amendment to the United States Constitution (Iwuchukwu & Stiltner, 2012). This belief has proven well-founded as secular America is increasingly banishing religion to private churches and banning it from any public square presence (Iwuchukwu & Stiltner, 2012, p. 96).

Much has been written about the attacks of secularism and governmental interventions against Christianity, especially for those who believe religion is more relevant for the "infancy of human history" versus more mature humanity (Byrd, 2017, p. 7). Over the next 40 years, Muslims are expected to achieve 45.7% population growth compared to only a 21.4% population growth for Christians (Dyvik, 2023).

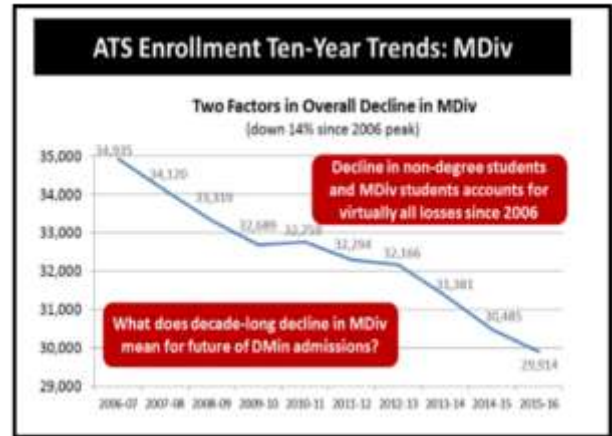
While, due to current events, the modern American focus is laudably on antisemitism and islamophobia, the underlying dogmatic and historical antagonism between Islam and Christianity remains and is a growing trend globally (Ibrahim, 2023). Roman Catholic Pope Francis sounded the alarm about clergy misconduct by stating: "When ministers overstep in their service and mistreat the people of God, they disfigure the face of the church with chauvinistic and dictatorial attitudes" (Wooden, 2023).

Following the original "kiss of peace" in 1964 between Orthodox Ecumenical Patriarch Athenagoras I and Pope Paul VI, repeated by Ecumenical Patriarch Bartholomew and Pope Francis in 2014, the seminaries and theologians of the future should make more significant efforts to reunite Christ's fragmented church. This is more in focus because 2025 will be the 1,700th anniversary of the Council of Nicaea that gave Christians the Nicene Creed (Wooden, 2024).

Bottom line, the level of antagonism to Christianity is growing from multiple places, including increased intolerance from various governmental, non-Christian, and secularist sources (Byrd, 2017; Iwuchukwu & Stiltner, 2012). In addition, anti-Christian sentiment is the focal point of an increasingly unaccepting Muslim population who seek to replace a Judeo-Christian approach with one in keeping with some of the stricter elements of Islam (Ibrahim, 2023).

## Apathy:

As the chart to the right demonstrates (Tanner, 2017), seminary enrollment is declining, and the church engagement data is trending in the wrong direction. One of the most identified modern trends is the growth of the NONES who claim no religious affiliation. Current estimates are that NONES comprise 30% of American adults (Michel et al., 2024). Many millennials and Gen Zers are also NONES, many of whom attended church as children and then left (Michel et al., 2024).



As of 2015, 47% of the “cradle Orthodox” born into the Orthodox Christian faith had already left the church (Pew Research Center, 2015). In addition, 22% of Americans form a new fraternity of “**SBNRs**” or “**Spiritually But Not Religious**,” with varying definitions of what that means (Alper et al., 2023). The children of NONES now claiming no religion, unlike their parents, have lost a church connection, which will inevitably make reaching them more complicated. Lord Carey, former Archbishop of Canterbury, warned, “**Christian faith is always just one generation away from extinction**” (Bingham, 2013). A significant trend is a substantial decline in enrollment for Master of Divinity degrees, which represents the typical degree for an American Orthodox clergyman (Tanner, 2017).

## Answers:

In increasingly tumultuous times with a constant stream of alternative forms of information and messages, Christians are looking to their churches and seminaries to provide them with the correct theological answers (Moreno-Riaño, et al., 2023; Winfield, 2023). With the growing recognition that past sources of spiritual formation are ineffective and insufficient, the seminaries must provide the answers people seek and help clergy articulate theologically sound information regarding thorny contemporary social and moral issues of the day (Gryboski, 2024).

A panel of religious experts using Pew Forum data concluded that American Christians want their church to answer their questions, especially on cultural and contemporary issues. These answers will also help parents provide Biblical formation to their families. This is critical because most parents do not feel equipped to do so properly at present and are finding their parish youth and adult Sunday Schools ineffective. In short, Christians seek to understand their faith tradition’s beliefs about deep, critical, cultural, social, and moral questions (Moreno-Riaño et al., 2023).

Recognizing these trends, Pope Francis said, “The people of God want pastors, not clergy acting like bureaucrats or government officials” (Spadaro, 2013). More recently, Pope Francis urged clergy to teach, preach, and meet the faithful where they are. Pope Francis asked Vatican representatives to avoid “rigid ideological positions” that interfere with a greater appreciation and understanding of the reality of the current times”



(Winfield, 2023). While the Pope's pronouncements are not binding on Orthodox clergy, and these sentiments are not universally shared within the conservative Orthodox church, messages about meeting parishioners where they are and tending to their current needs are being communicated in clergy forums from the current Greek Orthodox Archbishop of America and Ecumenical Patriarch.

## **Eight Strategic Foresight Implications Of The Data And Trends.**

### **1. Seminaries must stop thinking too small – their mission has changed.**

Orthodox seminaries think too small because they focus on merely training a few priests rather than also being the source of religious education for all laity faith formation. Instead of simply being an exclusive venue for a select few men who can live on a central campus for three full years, the future smart Orthodox Seminary will realize they are now meant to be the source of theological understanding and education for laity and clergy alike, regardless of geography. While they must continue teaching the timeless Orthodox theology, they must move beyond reciting history lessons from the Holy Gospel and explain what those parables mean to contemporary Americans. This is an entirely different Practical Applied Theology strategic education orientation and direction than is currently pursued.

### **2. Seminaries must use every available tool, technology, and technique to reach the current faithful and future converts.**

The Orthodox seminary degree and educational model must expand to include different types and categories of learners, including (a) those of different ages (second/third careers), (b) those on different educational tracks and journeys that may take much longer, (c) embracing part-time students and converts to the faith that have different faith formation needs and abilities, (d) more significant roles for deacons and lay religious educators, (e) some form of female diaconate, which is a theologically controversial issue within Orthodoxy today, and (f) eventually some form of artificial intelligence/robotic students/teachers.

### **3. The seminary model must evolve to embrace new types of “students.”**

Seminary training is based on a centuries-old model that does not work as effectively with today's environment and students. Not everyone learns the same way, so different teaching modalities must be deployed. In addition, the three-year classroom-only journey has not prepared clergy for the real-world experience they face in their parishes. The curriculum must expand to include leadership development, greater homiletical and communication skills, and contemporary issues and crisis counseling, to name a few highly demanded skills of the current laity. In addition to substantially expanding the technologies used to learn and teach, asynchronous tracks with selected extended residential experiences must be offered. In addition, an apprentice program must be formalized so that new clergy can learn “on the job” with experienced and accomplished older clergy and laity.

#### **4. Seminaries must tackle the tough questions and teach a way of life.**

Specific outreach and recruitment of converts to Orthodoxy are essential to address the aging clergy who are soon to retire and provide a clergyman who knows the unique journey and challenges that converts to Orthodoxy experience. With fewer than 1,000 Greek immigrants arriving in the United States each year and an estimated 90%-95% of marriages that include a spouse who is a convert to Orthodoxy, the future smart Greek Orthodox Seminary must have a distinct shift to fully engage converts. This includes recruiting diverse clergy and preparing all clergy to deal with the melting pot reality of the United States, which is the opposite of Greece, where most of the population claims to be Greek Orthodox Christians, and the Greek Orthodox church is incorporated in Greece's constitution.

Seminaries have historically tended to be more traditional rule enforcers than modern disciple-maker teachers. Thus, future smart strategies must thread the needle of addressing contemporary moral issues in a Christ-centered manner that does not depart from the doctrinal truths of the Orthodox faith. Youth and adults alike want to know what the Orthodox Church teaches about the day's critical social and moral issues. Rather than merely teaching history and avoiding controversial issues, seminaries must move their graduates from mere "Teachers" to effective "Preachers" and ultimately to "Reachers" who meaningfully tackle the challenging issues and change behaviors as Christ did. This involves a teaching style that provides a loving pastoral road map that the faithful of modernity need and want. In short, the future smart Orthodox Seminary will migrate from offering merely institutional theology by adding compelling Practical Applied Theology.

#### **5. Seminaries must expand their donor base and who they consider "customers."**

Orthodox seminaries currently do not provide what donors are willing to fund based on their meager development successes. The seminarian scholarships are fine but are not attracting the significant charitable capital available within the American Orthosphere. Major Orthodox donors are contributing tens of millions of dollars to other colleges and universities because of a perceived value proposition or impact that the Orthodox seminaries have not articulated.

#### **6. The disparate, fragmented, and under-resourced Orthodox seminaries must merge to form a few fully effective theological centers.**

One reason significant donors are not providing needed funding to Orthodox seminaries is that too many are land-rich but have insufficient students or faculty. In short, there are too many inefficiencies in the Orthodox theological education system. The substantial land holdings of several Orthodox seminaries should be sold and consolidated into two (or three) Orthodox seminaries of excellence in the East, Midwest, and possibly the West. The massive duplicative inefficiencies result from historical Orthodox Jurisdictional differences and exclusivity that cannot continue if the paradigm is to change. The Orthodox Patriarchs formed the Assembly of Canonical Orthodox Bishops of the United States of America (on whose Secretariat I am blessed to serve) to

pursue Orthodox unity in America. The seminaries must lead the way in that critical mission essential to Orthodoxy surviving and thriving in America.

### **7. Orthodox seminaries must offer programs of excellence and impact.**

There is no convincing evidence that the current Orthodox seminaries are programs of academic excellence. The sparse publications of their small faculties are not extensive or frequently cited. The faithful do not turn to Orthodox seminaries for guidance when seeking Orthodox information and thought leadership. Academic excellence and rigor must be the new standard, along with consistent Orthodox theology.

### **8. Orthodox seminaries must lead the way in unity and evangelism.**

Similarly, the Orthodox seminaries must be the institutions that reach out to their religious counterparts to find common ground and work together to advance Christ's teachings and church. It would be easiest to first expand the dialogue with the Roman Catholic institutions due to historical commonality and closeness of doctrine. However, with a dedicated Christ-centered focus, all Christian institutions can find some common ground and work together to strengthen Christ's church in America until we overcome our doctrinal differences.

## **The Holy Scriptural Path Forward.**

"The best way to combat Antiquity, Aging, Antagonism, and Apathy is for Orthodox Seminaries to lead the charge by providing Answers through teaching laity and clergy alike how to follow Christ's example and the Holy Gospel in America today. In following the call of the Lord to "*love one another*" (John 13:34-35) and "*make disciples of all nations*" (Matthew 28:19-20), these strategic issues can be addressed, and a brighter future can be fulfilled. Seminaries provide the opportunity to follow the advice to "*Train up a child in the way he should go, And when he is old, he will not depart from it*" (Proverbs 22:6).

## **An Entirely New Strategic Plan Suitable For A Strategic Foresight Future Vision.**

### **WHY: "Share Christ"**

This Call to Action focused initially on Holy Cross Greek Orthodox Seminary in Brookline, Massachusetts. However, based on the future smart analysis and research, I believe it applies equally to all Orthodox seminaries. Indeed. If they each embraced this call to action simultaneously, the strategic objective of Orthodox unity would be more easily attainable.

The most critical thing every person and organization must know is their WHY – the fundamental purpose for which they exist. In the beginning, the WHY of the Apostles was clear: they were to **Share Christ**. That critical WHY has been lost or watered down over the generations and replaced with tactical objectives that obfuscate the essential

WHY. Sharing Christ is a powerful calling for a seminary, seminarian, and Orthodox Christian.

The historical view of preparing seminarians is necessary and must continue with excellence. But it is no longer future smart and sufficient. Orthodox seminaries have thought and acted too small. The fundamental WHY a seminary should exist is to fulfill the Apostles' job, which was to "Share Christ." Thus, every decision and strategic investment must be evaluated against whether it will better help Share Christ.

### **Mission: "Make Disciples and Disciple Makers"**

Similarly, the Mission must not be too small. The Apostles' original disciple-making mission statement has been lost in the (necessary) minutiae of accreditation and survival in modernity. The seminaries must reclaim the original Mission instead of merely granting a degree to a few clergy. This includes making clergy and laity disciples and empowering them to make other disciples in the future. The loss of focus on the "what we do" that a Mission Statement provides helps explain some of the significant numerical and other negative trends.

Ultimately, a future smart Orthodox seminary will train the clergy disciples and disciple-makers and make itself effective at interacting with all laity with the same objectives. All laity should look upon their Seminary as a place where they can become better disciples of Jesus Christ and learn how to prepare themselves, their children, and others with whom they interact to become disciples. Every seminary decision must be calibrated against the objective of making a disciple of Jesus Christ and transforming them into disciple-makers.

Thus, the seminaries need to use their faculty, students, research, scholarships, technology, and asynchronous classes to prepare and provide religious education materials for the laity of all ages. This would solve one of the most critical challenges in every Orthodox parish that I identified from all the results of the Effective Parish Assessment (<https://www.effectiveparish.org/>) and Stewardship Calling Vision and Planning Process (<https://stewardshipcalling.com/strategic-planning/>), namely the need for high-quality, appropriately **Orthodox Spiritual Formation And Religious Education (SFARE)** content, materials, and programs.

### **Strategies:**

Thus, seminaries must invest in high-quality content preparation/accumulation and effective technology delivery platforms. This will (a) expand the offerings of the seminaries, (b) introduce them to a greater pool of potential candidates, (c) endear the seminaries more directly with the faithful PIPs, (d) create a broader potential donor base of PIPs willing to pay for selected educational programs and contribute to the Seminary to expand its offerings, (e) better address the religious education needs and stresses of their graduate priests in the field, and (f) provide high-quality evangelism content to potentially better reach NONES and converts.

## Strategic Plan:

I cannot stress enough that every Seminary undergoes a comprehensive, strategic planning process. While there are various ways to undertake such a task, I am extremely biased toward the version of strategic planning described in Chapter 7 of my Roadmap, which takes best practices and modifies them for use and effectiveness, specifically within the American Orthosphere. This Stewardship Calling Vision and Planning process answers four fundamental questions: 1. Why do we exist? 2. Where are we now? 3. Where do we want to be? and 4. How will we get there? It is specifically focused on addressing the current issues and opportunities to meet the needs of the future.

Ultimately, the extensively diverse Seminary **Strategic Planning Team (SPT)** will determine the most critical strategic focus areas after accumulating all the necessary research and data. This would entail assembling a very broad and diverse SPT comprised of not merely the members of the Board but also representation from the full set of stakeholders so that Smallthink and Groupthink are banished. However, this future smart analysis has identified at least three significant strategic focus areas for which future smart seminary strategies must be developed. These include the following areas:

1. academic excellence and effectiveness,
2. stakeholder outreach, and
3. innovation.

Unless these types of methodical, systematic, and comprehensive processes are undertaken, there is no catalyst to change the vision and direction of the seminaries, which will merely continue to struggle in survival mode.

In Chapter 7 of my Roadmap, I laid out the comprehensive multi-month process I recommend to determine the appropriate WHY Statement, Core Values, Mission Statement, Strategic Areas of Focus, S.M.A.R.T. Goals and Action Plans, and other elements of a best-in-class strategic plan for each Seminary. This future smart analysis has identified the following suggested WHY and Mission Statements and at least three significant Strategic Areas of Focus for which future smart seminary strategies should be developed.

Seminary WHY Statement: **“Share Christ”**

Seminary Mission Statement: **“Make Disciples and Disciple Makers”**

Seminary Strategic Areas of Focus:

- 1. Academic Excellence and Effectiveness**
- 2. Stakeholder Outreach**
- 3. Innovation**

## The Best Way To Predict The Future Is To Create It.

To truly dream of and plan for the future, we must look to the ultimate day of renewal and reunification. At that time, the Lord returns to unite His people. This second Singularity event brings all of God's creation back to the Eden He originally created for us, by whatever name each faith tradition calls it.

Preparing our earthly lives to be worthy of that sacred place should always be a central focus of Christians. It must, therefore, also be at the core of what every Orthodox Seminary prepares Christians and their clergy to work toward and receive. Much has been written about the “Σύμβολον τῆς Νικαίας” (Nicene Creed), originally inspired by the Holy Spirit in 325 AD when the first Bishops of the Christian church gathered in Nicaea (Burn, 1909). While historical and interpretive differences exist to this day among various Christian churches, including the pesky “Filioque,” there is a general consensus that this prayer includes the affirmation of a belief in “one, holy catholic and apostolic church.”

The only of these clear words that may require explanation is the word “catholic.” It is lowercase and does not refer to the Roman Catholic church of today. It is the translation of the original Greek word καθολικός, which means universal (and derives from the Greek word καθόλου, which is often translated as “according to the whole”) (Wilson, 2021). Lest we be guilty of the earlier criticism of seminaries focusing on historical teaching rather than Practical Applied Theology, what does this have to do with Orthodox seminaries 2.0?

The “moon shot” future smart call to action is that the Orthodox Church, which claims its founder as the first-called Apostle St. Andrew, leads the way for the singularity of Christian churches in America. This is not just unifying the 12 Canonical Orthodox Jurisdictions and the 6 Oriental Orthodox Jurisdictions or, with its twin, the Roman Catholic Church, but also with ALL Christian churches. In this way, we prepare mankind for the second coming of our Lord and Savior, Jesus Christ.

The Orthodox Seminary version 2.0 must include a team and effort focused on the earthly Christian singularity to prepare for the Divine singularity. Leadership requires leading. And there is arguably no more significant leadership challenge than truly becoming “one holy catholic and apostolic church.” Inspired by the Holy Scripture, we can pray: “*Now, Lord, look on their threats, and grant to Your servants that with all **boldness** they may speak Your word*” (Acts 4:29)!

Given this preliminary horizon scanning and trend analysis, one could argue that the Orthodox seminaries in America are at the most critical crossroads ever. With an aging population of PIPs and clergy, an increasing number of NONES, migration away from theology by young adults, secularization and hostility toward religions in America, and many of the other negative trends identified in this preliminary future smart analysis, one could quickly lose faith and hope.

Yet, none of what is identified here that faces the current American Orthodox church or its seminaries comes close to rivaling the challenges faced by the first clergy and trained theologians, the 12 Apostles, and other disciples of Christ. They faced hostility, ignorance, and threats of earthly death. Along the journey of evangelizing the

teaching of Jesus Christ in prior centuries, the Apostles and their successors took detours, had disagreements, resolved conflicts, and regrettably, all too often fragmented Christ's church. With that track record, why should anyone have a positive perspective for the future?

Each person and leader must prayerfully answer for themselves why they have faith they can do this critical hard work of making Orthodox seminaries better suited to address the present and future challenges. However, in so doing, people of faith working on version 2.0 of Orthodox seminaries who recognize their inadequacies for this critical work might be wise to consider at least four messages from their Creator:

- (a) *"But Moses said to God, 'Who am I to go to Pharaoh, the King of Egypt, to bring the children of Israel out of the land of Egypt?' Then God said to Moses, 'I will be with you'"* (Exodus 3:11-12).
- (b) *"Now faith is the substance of things hoped for, the evidence of things not seen"* (Hebrews 11:1).
- (c) *"For I shall consider a plan of peace for you, to give you good things and not calamities"* (Jeremiah 36:11). (Other versions of the Holy Bible place this passage in Jeremiah 29:11 and translate it as: *"For I know the plans I have for you,' declares the Lord, 'plans to prosper you and not to harm you, plans to give you a hope and a future.'"*)
- (d) *"I have fought the good fight, I have finished the race, I have kept the faith. Finally, there is laid up for me the crown of righteousness, which the Lord, the righteous Judge, will give to me on that Day..."* (2 Timothy 4:7-8).

Today can begin the journey of making all Orthodox seminaries future smart so they may become the *"City on the Hill"* (Matthew 5:14). ALL GLORY TO GOD!

# CHAPTER 14. Specific Additional Spiritual Formation And Religious Education (SFARE) Suggestions, The Power Of “Sermilies,” And The Future.

## Most Effective SFARE Communications.

“The single biggest problem in communication is the illusion that it has taken place.” This saying attributed to George Bernard Shaw (and too many others to be able to attribute appropriately), as well as one of the most iconic old movie lines of all times: “What we have here is a failure to communicate” (Rosenberg, 1967), reminds us of how critical it is to communicate effectively. And there is arguably no more vital content to share effectively than that which brings people closer to Christ and each other and helps them on their journey to theosis.

The previous extensive Teacher to Preacher to Reacher Chapter 13 of my Roadmap detailed how you, your clergy, and your parish can improve all SFARE programs and messages based on the latest research. This Chapter 14 of my Roadmap focuses more on how clergy and laity most effectively deliver the Word of God (through homilies, sermons, and SFARE programs). In many respects, this Chapter is a personal (hopefully inspirational) letter from me to you supported by Scripture and data. So, as they say, “Let’s talk.”

After surveying more than 35,000 adults, the Pew Research Center concluded:

About half of U.S. adults have looked for a new religious congregation at some point in their lives, most commonly because they have moved. And when they search for a new house of worship, a new Pew Research Center study shows, Americans look first and foremost for a place where they like the preaching, and the tone set by the congregation’s leaders. Fully 83% of Americans who have looked for a new place of worship say the quality of preaching played an important role in their choice of congregation (Pew Research Center, 2016).

Clearly, the message from the priest (and any other layperson who teaches Holy Scripture) is at least as significant as it was in the time of the Apostles when they established Christ’s church. Given the plethora of competing messages and communications platforms, I would argue that anytime you deliver the Word of God is even more critical in modernity in America.

At the same time, second on the list of what draws people to a church in that extensive Pew study was how church leaders communicated with and welcomed the faithful and seekers (Pew Research Center, 2016). In the Stewardship and Engagement section in Chapter 10 of my Roadmap, I shared research and specific strategies for a comprehensive way to improve the welcoming of current and potential new parishioners. However, the data shows that our preaching, teaching, homily, etc. experiences and



church communications are not always as welcoming and engagingly effective as they could be.

So, what can clergy and laity do to improve our church communications and how we communicate daily? Famous controversial author Ayn Rand said: “Live and act within the limit of your knowledge and keep expanding it to the limit of your life. If you don’t know, the thing to do is not to get scared but to learn” (Rand, 1957). This author was an atheist, yet her challenge to pursue lifelong learning is at the core of proper Christian theology and signifies a journey of discovery to theosis or oneness with Christ. (See, even atheists can get some things right!)

The focus on life-long learning is why I chose the Roadmap metaphor for the title and stories in this book as an additional subliminal emphasis on a road of continuous learning. It is also why I would pursue a Doctorate in Strategic Leadership to work with Christian organizations with a graduation date one week after my 70<sup>th</sup> birthday. We should never be done learning about God and becoming a better Christian leader and followers. Leadership guru John Maxwell famously said, “Live until you die” (Maxwell, 2007). I have adopted and adapted that motto: “Live and learn until you die.” This should be the journey you should pursue as you learn to be more Christlike so that when you stand before His awesome judgment seat during your II Corinthians 5:10 Moment, you are prepared to be welcomed.

However, it is essential to remember that merely saying we are followers of Jesus Christ and going through the motions is not sufficient. The first person who joined Christ in the Kingdom Eternal was the sinner on the cross, and the first human destined for whatever version of hell your faith tradition teaches was one of our Lord’s Apostles. So, we must be mindful that our journey toward the Lord requires continuous spiritual formation and religious education, and we should never consider ourselves fully ready or worthy.

To help us, St. Paul clearly explains how vital homilies, sermons, and similar forms of effective Christian SFARE communications are as a part of the life-long learning journey. St. Paul teaches:

*In the presence of God and of Christ Jesus, who will judge the living and the dead... I give you this charge: Preach the Word; be prepared in season and out of season; correct, rebuke and encourage--with great patience and careful instruction (II Timothy 4:1).*

An impactful delivery of the Word of God can and should be one of the most transformative forms of communication. Parish councils and SFARE ministry leaders can also communicate more effectively with all parish constituencies using the same model of careful instruction in the SFARE ministries. The empirical data shows that even in these tumultuous times, many people with unquenched hunger and thirst want to understand what Christ taught and how they can apply these critical teachings in their daily lives. In short, you can help yourself and others “*lead a life worthy of the calling to which you have been called*” (Ephesians 4:1).

## The Power Of A Powerful Sermily.

Let me quickly define my terms. The words homily and sermon are often used interchangeably. Some distinguish between the two by concluding that a “sermon ” is a talk about a spiritual topic, whereas a “homily” is a commentary that generally follows and explains a reading of Holy Scripture. To make it more complicated, a SFARE talk or program can (and arguably should be) both at the same time.

I am not a clergyman, and yet all the parishes I attend while working on their strategic plan or who host one of my Igniting the Flame live retreats allow me to offer the sermon in the church service, which I always turn into a homily because of my constant effort to take Holy Scripture stories and bring them to life and make them actionable. Thus, to clarify (or muddy the waters), I believe the most effective SFARE communication is a combination of both sermon and homily, which I call a “**Sermily.**” A Sermily is a sermon, homily, talk, lesson, or presentation about a spiritual topic, including any commentary generally following and explaining a reading of the Holy Scripture.

I submit that Sermilies can be offered in any church service, small group gathering, retreat, parish program, Sunday school class, or anywhere SFARE content is shared. They can be offered by clergy, theologians, and watch this, by lay people also. Of course, most clergy’s biggest fear is that some crazed layperson may say something incorrect according to that faith tradition’s teaching.

However, the other side of that coin is that the priest cannot be everywhere and conduct every Sermily to every audience in every setting. Moreover, how many times have theologians and clergy (even within the same denomination) disagreed and caused schisms? Finally, and this is tough love, not all clergy are the most effective communicators and presenters. The right message presented uninspiringly or merely read is ineffective and can be viewed negatively by a hungry audience. Thus, clergy should empower and entrust the “right” vetted laity who they believe have sufficient education, theological understanding, and faith and who are especially effective communicators to provide Sermilies where the clergy cannot be present, especially in Sunday School, Small Group Ministry and other SFARE programs.

Regardless of the definition or who delivers it, all the data underscores how critical a good Sermily can be. This is especially true in those Christian churches which are not liturgical and thus place prominence on the Sermily. Those of us from older and liturgical churches like my Orthodox churches understand the place of the critical importance of the Sermily while also believing the climax of the service is the all-powerful Eucharistic offering of the body and blood of Christ. Indeed. Michael Bakalis’s book, A Church at the Crossroads identifies from the survey and other data he reviewed that, much to the chagrin of the clergy and Bishops:

What is clear, however, is that in twenty-first-century America, reliance on the Divine Liturgy alone is not enough to attract and retain adherents to the Orthodox faith. Thus, teaching and preaching must be elevated to almost equal importance in the Orthodox Sunday service (Bakalis, 2014, p. 49).

Notice he did not say the Eucharist and Divine Liturgy are unimportant. However, if almost 50% of those raised in an Orthodox church have left it (Pew, 2015), one must ask why and what we can do to reverse those unsustainable trends, regardless of how uncomfortable that discussion and research is. Regardless of faith tradition, SFARE efforts must start with the most effective Sermilies and build out from there.

Indeed, one large church with which I am familiar is experimenting with an integrated SFARE strategy that is fascinating and makes sense. The priest offers a particular Sermily to the adults in the church that makes three critical faith-based and Scriptural points. The Sunday school teachers take some of their class time to provide an age-appropriate summary version of those same three messages to all children in every age group. At the end of church, the family picks up a hang tag for their rear-view mirror with summary bullet points on those three messages.

Studies show parents often spend more time in the car with their kids than many other interactions. So, rather than letting them jabber aimlessly, or worse yet, play on their smartphones, the driving parent reads a talking point from the hang tag one at a time and engages their children in a discussion about what they learned on that topic and what they think and how they might apply the message. Now, the wasted and often frustrating drive time becomes Christ/God time, and the parents and kids have a meaningful dialogue about salvific things that matter.

I cite the above without knowing what their study will show is the long-term effect of this experiment. My point is that they are experimenting with different ways to deliver SFARE and Sermily content most effectively and help their faithful convert more time to their faith journey. Indeed, this is the biggest operational criticism leveled at almost all Christian parishes. They have tried to convert the lifelong daily journey to theosis to a bite-size hour or two on Sunday, leaving all the remaining time for secular activities.

Here is my big SFARE idea. **You are a Christian 168 hours a week and must live and act like it consistently and constantly. Merely entering a church on Sunday does not make you a Christian any more than entering your garage does not make you a car.** To be a Disciple of Christ, you must embrace His message of love 24x7x365 (John 13:34-35). Unless and until your parish SFARE programs convert your faithful from “one/two-hour-a-week Christians” to intentional full-time Christians, your SFARE programs are not fully effective.

I submit this is the ultimate performance metric for your SFARE ministries. Do you make active and engaged full-time disciples of Jesus Christ? Not part-time hourly workers punching a one day a week one-hour time clock until they die. Instead, consider what your parish would look and act like if your parishioners lived fully as Christians until they died on this earth and started over in the Kingdom Eternal. Go big or go home, but please stop accepting the behavior of being a part-time Christian.

### [The Secret Sauce Of Practical Applied Theology \(“PAT”\).](#)

To achieve this big vision of becoming Intentional Christians, I submit most, if not all, Sermilies must be focused on **Practical Applied Theology (“PAT”).** This places the

emphasis not merely on describing a historic event or story completely accurately and consistent with one's faith understanding. It adds the context of how to guide today's laity on how to apply it in their lives. It needs to be "both-and" not "either-or."

As I describe later in Chapter 17 of my Roadmap, **PAT Sermilies** are grounded in the Holy Gospel and also focused on how that message or theological principle applies in the daily lives of your parishioners. Appreciating the roles of theologians and academic scholars, the PIPs frequently rate Sermilies as impractical if what is proposed does not meet the test of being practically applicable. I cannot urge strongly enough clergy and Bishops and others involved in SFARE to always focus on PAT. Some of the clergy I have featured in my Roadmap have successfully implemented PAT in all their Sermilies, and the results show significantly increased engagement in church services, sacraments, and ministries and growth in the number of more engaged parishioners. Please do not underestimate the power and life-changing impact of an effective PAT Sermily.

### Creating Parishioner Expectations.

The main Gallup research cited extensively in my Stewardship & Engagement Roadmap Chapter 10 established unequivocally that the most effective Christian churches are ones that create and make clear their expectations of their faithful. The most effective parishes do not timidly accept anyone who shows up and offers whatever scraps are left over. SFARE ministries and messaging and communications from clergy and laity alike must provide clarity of what is expected of their parishioners. They should unapologetically request that their faithful offer their first fruits to Christ as he instructed be done.

For example, in the Church of Jesus Christ of Latter-Day Saints (a/k/a the Mormon church), there is not only a tithing expectation but an expectation that their youth will give at least one year of service to their church. When I attended a wedding at the Greek Orthodox Church in Salt Lake City, my wife and I went to the Mormon genealogy center. We spent over four hours creating our family trees using their amazing technology. Two young men who were performing their year of service to the Mormon Church helped us the entire time we were there.

To provide another example of the positive impact of parishes that make SFARE and service expectations clear, I attended a Greek festival at another church during the summer. I saw five young men in suits and ties (while the rest of us wore shorts and t-shirts in the heat). These young men carried many books. I congratulated them for their appearance and discussed the books about their faith they were offering. They explained they were in their year of service to the Mormon church and were going to other church festivals and events to share their faith. They indicated they were not specifically targeting other religions in our parishes but just going wherever people were gathered. I observed the children from that church dancing on stage while these young Mormon lads were witnessing their faith. Please tell me which you think is the better way to educate their youth on service to others.

I will not engage in irrelevant and futile arguments about whether one church or another is an “authentic” Christian faith (please read Chapter 15 of my Roadmap, where I discuss Oneness In Christ). I merely note that some parishes and denominations make their expectations clear of what it means to be a disciple of Christ. Interestingly, they seem to be the churches that are growing in America and not just trying to “hang on” like those that provide no clear expectations and are thus declining. So, which future do you want for your parish?

## Purposeful And Intentional Christians.

A priest at one of the parishes at which I am a steward and a close personal friend, Fr. Barnabas Powell, is a convert to Orthodoxy after having been a Pentecostal minister. He coined the phrase I love: “being Orthodox on purpose.” Replace the word Orthodox with whatever faith traditions to which you subscribe and ask yourself, are you creating Christians who are “\_\_\_\_\_ on purpose?”

When I speak of the need for the most effective Sermilies and SFARE programs and offerings, I am not referring to their entertainment value. However, I submit that they must engage parishioners or other audiences to communicate effectively. Humor is one way to engage people, even in critically important theological conversations.

Another way is through storytelling since the previously cited data proves we communicate most frequently through stories. Christ’s Parables have stood the test of time not just because the Lord told them but because their PAT meaning and impact were critical and compelling. Thus, we love to retell these timeless lessons.

SFARE ministries and programs and every Sermily must feed the absolute hunger and quench the abundant thirst your faithful have to try and understand what it means to be a good person and a disciple of Jesus Christ, as well as what He expects of us in our daily lives. We are constantly reminded in both theological and secular discourse to find our WHY, and yet, for all the data informing us of the importance of the Sermily, most anecdotal and empirical data identify SFARE programs and Sermilies are missing the mark. Ironically (or perhaps providentially), the Greek word ἁμαρτία, means “sin.” However, the literal translation is “missing the mark.” I submit that the data tells us that for too often and too long, our SFARE and Sermilies have been “sinful” in the sense of missing the mark.

## “It’s The (Sermily) Stupid!”

This title for this section is an attempt at an alliterative humor take-off on the advice given to Presidential candidates that it is always “the economy stupid.” In SFARE, the similar key starting point is always the Sermily. Bishop Robert Barron wrote a powerful explanation as to why many faithful are leaving the church:

A second major concern that can and should be addressed is that of bad preaching. Again and again, people said that they left the Church because homilies were “boring, irrelevant, poorly prepared” or “delivered in an

impenetrable accent... That said, homilists can make a great leap forward by being attentive to one fact: **Sermons become boring in the measure that they don't propose something like answers to real questions** (Barron, 2012). (emphasis added)

The empirical research tells us there are elements of an effective worship experience you can make more engaging; however, perhaps the easiest place to start is where the clergy address their faithful - face to face.

Thom Rainer, CEO of the Church Answers resource for church leaders, constantly reaffirms the Pew Research Center data about the "primacy of the pulpit" as the critical factor for those looking to find a church home and grow closer to Christ (Rainer, 2008). In his book Surprising Insights from the Unchurched and Proven Ways to Reach Them, he discussed the results of an extensive survey conducted by LifeWay Research of 7,000 pastors in his Southern Baptist Convention. A statistically significant 1,066 clergymen identified the time they spent preparing their Sermonies for that Sunday

21% of clergy said they spent more than 15 hours

23% of clergy said they spent 11 to 15 hours

25% of clergy said they spent 8 to 10 hours

23% of clergy said they spent 5 to 7 hours

8% of clergy said they spent less than 5 hours

To summarize, a full 1 in 4 clergy spent between 8 to 10 hours a week preparing their Sermon, and almost as many spent 11 to 15 hours, with another 21% spending more than 15 hours a week. I like to ask the clergy I work with how much time they spend each week on their Sunday Sermon. I am always surprised (and often distressed) at the answer. The same question could be asked of the Sunday school faculty or other SFARE ministry presenters.

As importantly, Thom Rainer's research reinforced the correlative relationship between time in Sermon preparation and church health metrics. The data show that the greater the time in Sermon development and rehearsal, the more likely the parish is to be effective at evangelizing, have a higher retention rate of members, and have a higher weekly per capita giving (Rainer, 2008).

Closer to my American Orthosphere home, I urge everyone to heed the encyclical from the Orthodox Church In America on preaching:

True, the power of the Word of God is forever, but the quality of preaching is directly related to the effort expended by the preacher in such cases... Considering that we are in the "race for salvation" and continue to "fight the good fight," we must use every moment to know and love God, the Gospel, and its invitation to salvation. Christians have a sacred duty to preach. Where not already offered, seminaries should introduce homiletics courses into the curricula: where such are already offered, they should be supported and strengthened. Provisions for continuing education and

refresher courses for priests, deacons and the other ranks of the clergy should be made (Holy Synod of the Orthodox Church in America, 1989).

There is Hierarchical consensus with all the data pointing in the same direction of the Sermily as one of the most critical parts of the Sunday experience and a clearly critical SFARE opportunity to bring the faithful closer to Christ and each other.

Perhaps few theologians in history are better known for effective Sermilies than St. John Chrysostom. His nickname was the “Golden Mouth” because of his renown for his effective (albeit long) Sermilies. It was not uncommon for St. John to get on a roll and preach for over an hour. I remind parishioners of this fact when I get on a roll with one of my Sermilies to a parish.

The undeniable fact is that a Sermily is a critical part of your parish SFARE ministry, whether it is delivered by the clergy in church or a layperson in a ministry or another setting. Thus, the question remains: what can you do to help your clergy and SFARE laity present the most effective Sermilies?

### Sermilies To Be The Light Of The World And Your Role.

The term “communication” originates from Latin words that mean to “share,” “impart,” or “share in common.” In short, communication emphasizes how people utilize messages to create meanings within and across various contexts, cultures, channels, and media to achieve the primary goal of understanding. To what end are your parish and parishioners called to communicate?

As mentioned previously, the Lord gave you a job description to be the “*light of the world*” (Matthew 5:14). The light that shines to expunge the darkness is the effective Teaching, Preaching, AND Reaching when you carry Christ’s Light into a dark world in which your parishioners live. Dear brother or sister, if it seems like I am bludgeoning you at this point, you are correct. Given the data, you and I must prioritize this third leg of my critical S<sup>3</sup> needs in American Christendom by better using SFARE programs and Sermilies to eradicate the darkness.

The light that is missing is YOU. You need to know and live what it means to be an intentional Christian. You also need to be part of the solution of recruiting those who are necessary to deliver the most efficacious SFARE ministries and Sermilies possible. The next time you wonder if you have something worth saying to help Christ’s church, please know that He already answered that question in the affirmative. That is a settled issue. And it doesn’t matter if you’re part of the “Men in Black” (i.e., clergyman) or a lay person. YOU are the chosen light of the world, and you have to live and deliver Sermilies that point the way to Christ.

Indeed, in Holy Scripture, our Lord explains why your responsibility is so critical. “*Let your light so shine before men, that they may see your good works and glorify your Father in Heaven*” (Matthew 5:16). Does this help you understand that **you were chosen to be the mirror through which God can be seen**? Not just because of your creation in His likeness but because of the living example you set of what it means to be a child

of God. The Orthodox Study Bible expands your sacred calling: “Christian values have both a personal and a public function, for our virtue can bring others to glorify the Father” (p. 1275).

In other words, when you fail to shine the light of your gifts and message, you are obscuring the ability of others to see your Father and Lord. You are the selected beacon of light, and so whatever it is you have to say or communicate via Sermily, SFARE ministry, or other actions, you are the chosen representative of the Father of all creation. How about that for a heavy rap? Whether you are clergy or laity, you are now responsible for your SFARE and Sermily preparation and delivery through words and the action of being an intentional Christian.

## The ”Other” John And You

Even the most unlikely of us have been given voice for a reason. Imagine you were an aesthetic monk living alone in the wilderness around “*the fifteenth year of Tiberius Caesar,*” as was described in the Gospel of Luke, which is most naturally understood as a reference to 29 AD. But in the Gospel of John, we read: “*There was a man sent from God whose name was John. This man came for a witness, to bear witness of the Light, that all through him might believe*” (John 1: 6-7).

No more or less a figure than a humble monk known as John the Baptist, who had nothing and lived most simply, was given the lofty status of bearing witness to The Light. However, his job is not yet complete and remains to be done to this day. YOU, my brother or sister, have been chosen to continue this work with me and others. To start, understand that you communicate in everything you say, everything you write, and everything you do. You represent God and have a choice as to how you represent your Creator.

So, let’s paraphrase this passage of Holy Scripture from John 1 ever so slightly. “There was a person sent from God whose name was: \_\_\_\_ (insert your name). You came for a witness, to bear witness of the Light, that all through you might believe.” And this sacred duty as a follower of Jesus Christ applies whether you are clergy or laity.

Communication is not always spoken or written, and it doesn’t need to be complicated. In fact, it shouldn’t be. As one of the smartest men in the world, Albert Einstein, allegedly once said, “If you can’t explain it simply, you don’t understand it well enough.” There is no need to try and impress someone with your loquaciousness, pomposity, verbosity, or sesquipedalianship. (By the way, that last word means someone who overuses big words. See what I just did there?). Fancy doesn’t mean good or effective. Sermilies and SFARE programs that are most effective speak the language of the audience and cause them to want to do what you suggest will make them better people.

One of the most famous speeches of all time is Abraham Lincoln’s “Gettysburg Address.” It is only 272 words, but it continues to inspire people over 162 years after those words were spoken. Everyone can remember parts of Martin Luther King’s



practical and effective “I Have A Dream Speech.” If I start the phrase, “Ask not what your country can do for you...” you can probably complete it. How about this one:

“We hold these truths to be self-evident, that all men are created equal, that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness” (Hancock et al., 1776).

All four of the above examples were Sermilies that made a difference. They were preached and delivered in different times, places, and ways yet all included critical messages offered by our Lord. And only one of the presenters was a man of the cloth. This impact of a proper SFARE program or Sermily can be felt for generations that follow, regardless of who delivers it. This is why I urge you to exert extraordinary extra emphasis on your parish SFARE ministries programs and Sermilies.

And fear not that you might not be fully understood. The power of the Lord’s parables (with your PAT modern-day applications and stories) is your secret weapon. When the Apostles wanted to learn how to offer better Sermilies and asked the Lord about his use of parables, our Lord responded:

*The knowledge of the secrets of the Kingdom of God has been given to you, but to others I speak in parables, so that, “though seeing, they may not see; though hearing, they may not understand” (Luke 8:10, stated slightly differently in (Matthew 13:11).*

This may seem like a very puzzling response. You would think the Lord would want to be clear in His communications. And it is obvious that his Apostles did not always understand the point of the stories He told. But our Lord’s message is that the mysteries of the Kingdom are told to all but are revealed to the faithful and hidden from those with unresponsive hearts (Orthodox Study Bible, 2008, p. 1291).

You, as a faithful disciple of Jesus Christ, have the responsibility to share the critical mysteries of the Kingdom with others to enlighten them. This is exactly what the Light is supposed to do. So, please do not walk away from this call by the Lord to deliver Sermilies and SFARE programs to the best of your ability, both in word and deed. In living and telling the stories of your life, you can powerfully convey the mysteries of the Kingdom to the faithful and seekers. Can you think of a more noble pursuit?

## [How To Deliver Effective Sermilies.](#)

This topic is so important that I devoted three extensive Stewardship Calling podcasts and programs to help clergy and laity improve the effectiveness of their communications, Sermilies, and SFARE programs.

**Part 1** aired on Stewardship Calling Live on Ancient Faith Radio when I interviewed Fr. Barnabas Powell of Sts. Raphael Nicholas and Irene Orthodox Church in Cumming GA , and Faith Encouraged Ministries on how he develops his incredibly effective Sermilies (Marianes, 2019).

**Part 2** aired on Stewardship Calling Live on Ancient Faith Radio when I interviewed Fr. Nicholas Louh of St. John the Divine in Jacksonville, Florida, and Healthy Minds and Healthy Souls Ministry on his extremely effective Sermily practices and techniques (Marianes, 2020).

**Part 3** aired on Stewardship Calling Live on Ancient Faith Radio when I interviewed one of the most experienced and entertaining Reachers who was inducted into the prestigious National Speakers Association Hall of Fame (Marianes, 2020). Ken Futch is the author of the highly acclaimed book *Take Your Best Shot*, which is filled with priceless insights and strategies for turning situations into opportunities. In this book, Ken describes how, as an adult, he accidentally shot himself in the head and now says his head only fears his pursuit of new story material. In my legal career, I often quote Ken's grandfather from Burgaw, North Carolina (I can offer no Roadmap to there), who famously counseled: "You should always tell the truth, but you don't always need to be a tell'in it." Ken provides exceptional advice for all SFARE programs, clergy, and laity.

Listening to the different ways these most effective clergy and lay communicators share the Word of God would benefit any clergy or laity who offer Sermilies. Each of these three experts uses different techniques, so there are things you can learn to augment your effectiveness. There are few opportunities like the Sermily to have the greatest spiritual formation and religious education impact!

### **"Festivus" Airing Of Grievances And Third Rail Issues.**

As I mentioned at the outset of this Chapter 14, I want this to be as if you and I are speaking. In the spirit of the Seinfeld episode with Frank Costanza's made-up "Festivus" holiday, let us begin with the "airing of grievances." The following guidance is directed primarily to clergy and others directly sharing the Word of God. (Some of this guidance is particularly directed to those in the Orthodox and any other of the ancient churches.)

### **"D!n; z3b3'fj@kq&u^q#:k{\$np9\$w\'' - Make The Word Of God Understandable**

Someone in your seminary or other training may have given you the misguided direction to sing the Holy Gospel instead of reading it. I am sure they cited some ancient authority. But please STOP doing that! It is highly ineffective if you want to communicate with normal humans.

You do not sing your words when you speak in daily life. It is much harder to decipher and understand what is being said. It is particularly distracting and annoying when you intone a long (five-minute) AMEN with your voice modulating more than a cat that has been stepped on. Sorry to be so direct, but someone has to tell you the truth, and speaking truth to power is difficult. Please preach the Word of God in the most clear, effective, and passionate manner you can if you want people to understand and act on what you are saying.

If you want to impress people with your vocal ability, join the choir. Singing the Gospel distracts from the clear comprehension of the words and the importance of the message. Moreover, when you speak it, let us know you are sharing the Word of God and not seeing how fast you can read something. Speak it enthusiastically and clearly with vocal emphasis, where important. And if you must hold the Holy Gospel in front of you, either use a microphone or ensure you are not speaking into the Book.

### **Be Careful and Watch Yourself**

As mentioned previously, I highly recommend that clergy watch a playback of an entire live-streamed service. The same is true for any Bible study or SFARE program presenter. You will undoubtedly see or hear things that distract from the message. The best SFARE messages and programs are so inspiring that they make the listener want to act on what they heard. But if you distract or annoy them, then even the best message is obfuscated. I sometimes have the bad habit of ending sentences with the question, “right?” I am not really soliciting your participation or affirmation, and thus, this bad habit is distracting.

When you watch a church live stream or program, you will see things that need cleaning, microphones that need to be adjusted, and camera angles that are not optimal. Not only should you watch your church services and programs, but you should also have a critical watch party with other professional communicators in your parish. Just like pro athletes with their coaches watch tapes of their past performance to improve, every SFARE and Sermily program should undergo that same scrutiny. I routinely record my presentations and then focus on fixing distracting gestures or less effective content. Have you ever wondered why they have a red circle on the floor for TED Talks? It is to corral wandering speakers like me so that their constant movement is not distracting. But planned and sporadic direct interaction with your parishioners is great. So do not do SFARE programs or Sermilies from such great distances that the personal connection is lost.

### **Pentecost Happened for a Reason**

In that same vein, if you have an immigrant or ethnic church (or specific service), pick the language of the greatest number in the service that day and do not try to recite everything in every language of everyone attending (with one exception). The data show that unnecessary repetition in different languages increases parishioner distraction.

The one exception may be the Lord’s prayer. Look over your congregation and recruit those PIPs who speak different languages to memorize it (or read it, if necessary) in their native language. You speak it first in English, then announce the next language, and then the assigned PIP says it in their language. It reinforces the message of the prayer and Pentecost and also shows the growing diversity of your parish family, as people from those lands will immediately feel more comfortable.

Michael Bakalis reports a study of what would make Greek Orthodox parishioners more engaged in worship. The number one answer was they wanted to understand what was being said in the church service because it was in the language they understood (Bakalis, 2014). In that same survey, the top four things parishioners wanted out of the Sermily were for it to be: 1. educational, 2. connected to current social issues, 3.

inspirational, and 4. actionable (Bakalis, 2014). Nowhere did your parishioners say they wanted another history lesson. They want and need to know how to apply Christ's teachings in their lives.

And while I am at it, allow me one more perhaps controversial research-based observation that someone serious about growing Christ's church must say. When I present the data concluding that clergy must speak the language of the parishioners, I not only mean the ethnic language they use. Even when the Orthodox Divine Liturgy is spoken in the English language, it is often incomprehensible because the English translation used is not the English the parishioners know and speak. No one I know uses the word "thou." And ancient practices are not used today. The reference to "the doors, the doors" when Catechumens were excused in the ancient church is (thankfully) not practiced today as we actively invite all Catechumens to stay in the service. Because we have books and educated parishioners, we do not need to repeat things many times in a service so people can remember what is said. This beautiful Divine Liturgy was written in the fourth century AD and used words, phrases, terms, and practices that were appropriate to that audience and that time.

Now, 1,700 years later, in a different land, we speak and act differently. One of the most valuable contributions an Orthodox Christian could ever make would be to take the ancient Divine Liturgy and merely update the words and references to modern-day understanding and practices and then watch the massive increase in engagement and application of what is shared. Pentecost must also inspire us to take timeless messages and rephrase them in more accessible and understandable language to make them actionable. It is my prayer that modern-day Orthodox theologians will have the courage to practice Pentecost and leadership to translate St. John Chrysostom's beautiful service to speak more effectively to those who need it the most in modernity.

### **Make The Service Or SFARE Program Interactive**

I previously cited all the data about how passive services lead to greater distraction and less effectiveness. Even if your faith tradition is as old as my Orthodox one is, there are ways to engage the faithful. You can have parishioners or youth read the Epistle, Lord's Prayer, and Nicene Creed or any other special hymns, prayers, or psalms in your service. Embrace congregational singing and audible prayer recitation, and then watch the level of participation increase. Make your services as joyous as possible. Solemnity is fine for serious parts of services, but joy is also welcome and very effective. Always find a way to think about your SFARE and Sermilies and turn opportunities into teachable moments.

### **How Do You Rebuild What Is Not Working In Your Parish Or A Parish That Is Not Working Well**

Almost every parish I work with is challenged by one or more things that are not working. Sometimes, I am called to serve a more significantly troubled parish trying to reboot, revive, or re-energize and need a "fixer." However, occasionally, I get called to help a parish doing well that realizes there is a next level they can reach and want to engage in continuous learning and improvement. Regardless of which parish defines yours, I pray my Stewardship Calling **S**<sup>3</sup> most critical needs addressed in my Roadmap

can help you. I also recommend Fr. Michael White's and Tom Corcoran's phenomenal book Rebuilt and the web-based programs and conferences they offer at <https://www.rebuiltparish.com/> all under the "Rebuilt" brand (White & Corcoran, 2013).

They inherited Nativity church, a Roman Catholic parish outside of Baltimore that was headed in the wrong direction, searched the country for best practices, and then experimented with how to apply them in their Roman Catholic context. This is the journey I advise your and every other Christian parish to begin. While I earn no money from anything I do, including recommending books, this is one I recommend you buy. However, if you do not, allow me to summarize three key discoveries they made and expand on them for a teachable moment that may allow you to consider some new things.

## **1. Change The Focus From Church People To The Unchurched**

I started with the one you might find most controversial. This focus caused them not to ignore their current parishioners but intentionally wonder about who was not coming or gave up coming to their parish. This seems consistent with the Great Commission, and that is why I emphasize focusing on your APIPs (Absent Parishioners In Pews) and FPIPs (Future Parishioners In Pews). By still serving the loyal faithful while also casting your gaze up and out, you will discover a whole world of seekers or lost souls wandering in the wilderness, asking questions (often silently) that no one is answering. You can be the Light in that darkness.

Fr Michael's and Tom's journey throughout the country to examine successful and growing parishes brought them to Pastor Andy Stanley's Northpoint Church, one of the largest congregations with many campuses throughout Atlanta and the world. Andy is fond of saying Northpoint is "the church for the unchurched." While they will happily accept those from your or my parish who are unfulfilled and seeking, Northpoint's intentional and primary focus is on reaching those who are wandering and NONES. This intentional outward focus allows them to see opportunities everywhere they look. They identify opportunities to meet the faith needs of many and reach greater geographies by using creative SFARE programs and ministries.

Every parish I see that is struggling is so inwardly focused on its navel that they have lost sight of the vision of being the Light of the world. Is that where your parish is? I am not suggesting an "either/or" between PIPs and FPIPs. As always, I recommend an "all/and" mindset to address the needs of PIPs, APIPs, and FPIPs. Once the Nativity Church started looking for and at people outside the four walls of their struggling church, they saw ways to improve and expand SFARE programs and ministries to help everyone inside and outside their parish. They recognized that they had been "competing" for people's weekend time, such that if what they offered was an ineffective or bad experience, the seekers would look elsewhere.

Through outstanding SFARE programs and highly meaningful Reacher Sermilies, surrounded by a best-in-class welcoming and engagement experience, former Catholics

and new seekers found a spiritual home to grow closer to Christ and each other. While those of us in liturgical and sacramental churches primarily focus on the Eucharist, until seekers understand what it means to accept the body and blood of Christ, they need more. By changing your focus to raise your eyes and see all your PIPs and looking for the APIPs and FPIPs, you start to build a transformational community of believers.

## 2. Prioritize The Weekend Experience

The second key focus of the Rebuilt parish of Nativity was the critical SFARE opportunities on Sunday and the entire weekend. People have fewer work conflicts on weekends, which presents opportunities for vibrant parishes seeking to engage their faithful in being intentional Christians for more than just a 60–90-minute service.

At the same time, Fr Michael and his team recognized that to have the greatest SFARE impact in their church services, they needed to create what they called an “Irresistible Environment” in their Roman Catholic parish that consisted of three critical areas for improvement:

1. Music - the water on which the experience sails,
2. Message - a great message can change one’s perspective on God or their life (i.e., the Sermony is how people feel fed),
3. Ministers - clergy and “volunteer ministers” create the “there - there.” This includes hosting ministries (e.g., parking, greeting, ushers, information desk, and café/coffee hour ministers afterward to create “layers of welcoming”) (White and Corcoran, 2013).

Nativity Church also did what I have been advocating your parish do in every one of the Stewardship calling **S**<sup>3</sup> areas of focus in my Roadmap, namely, define and assess their effectiveness. Accordingly, Nativity Church created some specific questions in a survey to evaluate their success at prioritizing the Weekend Experience. Test your parish by asking these questions from their survey (with a few editorial additions from me) (White and Corcoran, 2013):

- What’s our overall “Sunday experience” grade?
- What’s our “parishioner” penetration grade?
- What % do you see Sunday?
- What % do you see other than Sunday?
- What’s our welcoming experience?
- How do we engage them during the services?
- What’s our music / chanting experience?
- Is our homily an ἀμαρτία? (i.e., does it miss the mark)
- How much time did we spend on it?
- How much time did we spend rehearsing it?
- Did we speak from the heart or the page?

Did we speak with passion and enthusiasm, or did we read?  
Did we “make it real” or just deliver a history lesson?

### **3. Move People To Action From “Consumers To Contributors”**

Earlier in my Roadmap, I decried the “consumerist” perspective that we have allowed to creep into our parishes and SFARE ministries. I call it the “Burger King®” mentality, where parishioners treat their church like the old restaurant’s motto and want to “have it your way.” Nativity Church looked at everything they did from the perspective of how they could move parishioners to action from “consumers” to “contributors” as their parishioners become people who take responsibility for their faith development. I call this turning on the human lightbulb as we convert religious “consumers” into true “disciples and disciple-makers” through the most effective Sermilies and SFARE ministries and programs you can offer.

At Nativity church, they characterize their PIPs in four levels you might find relevant for your parish (White and Corcoran, 2013):

1. “Non-churched “ (those with essentially no parish relationship),
2. “Consumers” (church meets some obligation in their lives such as curbing guilt or a place to take their children, etc.),
3. “Contributors” (parishioners who take ownership over their faith journey and contribute something of themselves),
4. “Super disciples” (those parishioners who go “all in”).

The point is not to sit in judgment of anyone but rather to create the right SFARE programs and ministries that will allow your parishioners to go from whatever current level of engagement they have to the next higher one. Being a disciple of Jesus Christ as our Lord defined it is the ultimate objective, and your parish SFARE ministries are the roadmap that makes that destination a reality. I submit that some of the effective vehicles for this journey are discussed in the Stewardship and Engagement Chapters 9-11 of my Roadmap.

For example, using a Small Group Ministry (discussed in Chapter 11 of my Roadmap) is one of the most effective ways to strengthen a parishioner’s faith and relationships with other PIPs. However, if you adopt the Council of Ministries model discussed in Chapter 11 of my Roadmap, there will be a greater number of ministries in which your parishioners can engage their gifts and talents. Higher levels of engagement in ministry and spiritual growth from effective SFARE programs will inevitably lead to greater financial contributions and opportunities for them to invite their friends or others to experience that same level of joy and meaning your parish SFARE programs provide.

Changing bad habits is not easy or quick. However, it is some of the most rewarding work and opportunities for growth as a Christian and human.

Many parishes I work with have found it highly effective to host a quarterly SFARE program with a dinner and an outside engaging speaker on a topic of general interest to the PIPs. I am aware of some amazingly effective Reacher presenters who will fly in for a Wednesday night or Saturday afternoon to provide powerful messages and inspiration on a SFARE topic that has been identified through parishioner surveys to be of interest. Indeed, my live Igniting The Flame retreat was designed with the intent to inspire parishioners to identify and live their stewardship calling and become the Light of the world. With a little creativity, your parish can have a regular schedule of powerful programs parishioners want to attend.

### The Future Is Present.

I am old enough to remember when parishes were not air-conditioned, there were no computers, fax machines, email, smartphones, items that began with the lower-case letter “i,” texting, websites, social media, streaming, and ZOOM. After each such innovation was introduced, the “Church Chicken Littles” pulled out the Book of Revelation and found a way to predict the end of the world, the Apocalypse, the Second Coming, etc. Every technological innovation was ruled heretical and from the devil, signaled the end of civilization, and had to be shunned.

To be sure every new “improvement” brought with it new challenges. We should all be concerned with the mental health and addiction issues arising from the impact of social media, technologies, and screens on the current youth. Although, when I was young, I remember parishioners confirming that the music and long hair worn by The Beatles signaled the end of civilization. I cannot get over how much of a lack of faith in God all these Church Chicken Little sentiments represent. They evidence a complete lack of faith in the very durable and evolving complex human being God created.

Of course, parishioners and faithful Christians must contemplate any innovation and discern how to emphasize its usefulness and diminish its negative impact. Every day, as new innovations arise, a new language is needed to intelligently discuss what is occurring and properly turn the energy of innovation into a force multiplier of good and righteousness. In some respects, every day of innovation is Pentecost as we learn to speak in different tongues. This inspired me to think about Pentecost as I was asked to conduct an Igniting The Flame weekend retreat for a large group of clergy and deliver a Sermily to these theologically wise and holy men. Here is what I preached:

Today, we gather as a faithful community to celebrate the glorious feast of Pentecost, a momentous occasion in the life of the Church. Pentecost, meaning “fiftieth day,” is a day of great joy and significance, commemorating the descent of the Holy Spirit upon the disciples and the birth of the Church. As Greek Orthodox Christians, we embrace this sacred



day with reverence and awe, recognizing the transformative power of the Holy Spirit in our lives.

On that blessed day of Pentecost, the disciples, who were gathered in prayer and supplication, were filled with the Holy Spirit. The sound of a mighty rushing wind filled the room, and tongues of fire appeared, resting upon each of them. In that instant, the disciples were granted the gift of speaking in different languages, enabling them to proclaim the Gospel to people of various nations.

The Holy Spirit, the third person of the Holy Trinity, was sent by the Father to empower and guide the Church. The Spirit breathes life into the Church, animating her with divine grace and sanctifying her members. Just as the wind gives life to all living creatures, the Holy Spirit invigorates our souls, renews our hearts, and sustains our faith.

The feast of Pentecost reminds us that the Holy Spirit is not limited to a singular moment in history. Rather, the Spirit continues to dwell within the Church and within each one of us, offering guidance, comfort, and strength. Through the sacraments, particularly the sacraments of baptism and chrismation, we receive the indwelling of the Holy Spirit, becoming living temples of God's presence.

Moreover, the Holy Spirit unites us as one body, the mystical body of Christ. He enables us to partake in the divine life and grants us spiritual gifts for the edification of the Church. We are called to use these gifts for the service of others, bearing witness to Christ's love and mercy in the world.

As we celebrate Pentecost, let us open our hearts and minds to the transforming power of the Holy Spirit. Let us seek His guidance in all our endeavors, that we may be instruments of His peace and agents of His love. May the Holy Spirit, the Comforter, fill us with His presence, so that we may be faithful witnesses to the Gospel and instruments of God's grace in the world.

May the grace of the Holy Spirit, the love of the Father, and the peace of our Lord Jesus Christ be with you always. Amen."

I hope you found the above as spiritually uplifting as did the clergy who loudly applauded this simple country lawyer's theological eloquence. Several asked if they could borrow parts of this Sermily, to which I was honored to say yes. The expressions on their faces change immediately, however, after I explained that the entire above short Sermily was created by ChatGPT, an **Artificial Intelligence** ("AI") tool. Indeed, the first iteration was near perfect, and I only had to remove that pesky Filioque for my Greek Orthodox clergy audience. Imagine that a neutral AI tool can get complex Orthodox theology approved by clergy theologians and explained in language accessible to the common PIP. So, now what?

I am not suggesting clergy or laity use ChatGPT or other AI to write their Sermilies or other SFARE content. Indeed, none of my Roadmap's text was written using AI (other than the above Sermily example). However, I did use my computer, Microsoft Spell Check, and Grammarly to help with grammar and spelling. Also, for fun, I used AI to develop the cover image for my Roadmap (which only took four iterations of me describing what I wanted and about 15 seconds of AI computer processing time).

Now, please imagine how you might use AI to assist you and your parish on its complex journey of SFARE. I know this thought will be roundly criticized by all those who similarly chastised me when I suggested parishes use computers and email to reach their parishioners. I can take the criticism because I believe that the same God who created you and me gave us the gifts to develop these tools for our use to glorify Him.

Just imagine if you challenged your youth to use the AI tool of their choice to help them write a 300-word commentary about some spiritual topic. Then, have them read and share what their tools produced, critique the various iterations, and learn from the tool's mistakes. It has long been proven that hands-on learning is the most effective and is the stickiest. If you did such a thing, you would have them ensure that the full citation of the source that the AI tool was included. Then you might assign them to review the source text, verify the accuracy of AI's interpretation, and identify where it got wrong (as I did in reminding ChatGPT that we Orthodox did not accept the later addition of the Filioque).

### [ZOOM, ZOOM, ZOOM, and The Internet 3.0.](#)

I was an early adopter of ZOOM when it was still being beta-tested. Everyone thought I was nuts being an early adopter of a "work in progress" technology. Then SARS-CoV-2 hit, and the world closed down! I was so far up the ZOOM learning curve that my Stewardship Calling ministry did not skip a beat. Indeed, I was in the middle of helping two Dioceses and one parish develop their strategic plans. When I asked the bishops, clergy, and laity if they wanted to wait until "whatever this Covid thing" was behind us or shift to ZOOM, they all joined me on the "new-fangled" technology bandwagon. I had to teach a lot of parishioners how to use the tool (and still do), but we finished all the strategic plans in record time without meeting in person. Now, I have a new scalable service that allows me to handle a greater number of parish strategic plans (and all the other parish consulting) simultaneously because I do not have to be on the road constantly.

And yes, I am exploring finding an AI tool I can use to heat-map SWOT data and deliver Effective Parish Assessment first-round reports to accelerate the processes even faster. I frequently have 4 or 5 parish ZOOMs a day, and countless programs are being delivered using this tool, which did not exist until recently. Soon, ZOOM will be replaced by another better tool, and you can bet I will be an early adopter trying to find a way to scale up the service of the parishes faster and better.

I implore you to move up the “law of diffusion of innovation” curve and experiment with and embrace technologies in your parish and SFARE programs and ministries as much as possible. There are caveats, as with everything. This is particularly true when dealing with our youth. In a January 7, 2025, Digital Discernment podcast on Ancient Faith Radio, my friend Dr. Ann Bezzerides, who teaches at Holy Cross Seminary and runs the Crossroads program for youth, advised all parishes and leaders to consider: “Life lived in the digital world will not quench your thirsty soul.”

This also tells us that the ether or airwaves in which we communicate using our computers are never better or more effective than in-person activities. This is why I discussed the personal wHoly Engaged Stewardship and Engagement process Plan A in such detail in Chapter 10 of my Roadmap. Of course, where the opportunity is optimal, you must focus on the highest level of human interaction. However, as people move further from our parishes and our lives become busier, using technology to supplement the “hand-to-hand combat” that is Christian formation is increasingly essential.

## A “Moonshot Mindset” For Your Parish and Parishioners.

I confess to being a fan of Dr. Peter Diamandis (“X Prize,” Singularity University, etc.) not just because he’s a fellow Greek but because he is focused on two themes I am passionate about: abundance and future opportunity. He constantly reminds us that we live in a world of abundance (especially in America). With a focus on how you can harness that abundance to make the world better, you can fulfill what I call your stewardship calling.

A big focus of Peter’s current work is AI. But more than that is his critical encouragement for what he calls a “**Moonshot Mindset**” to encourage people to use their gifts (including creativity) to solve the biggest problems and challenges. I love Peter’s six attributes that define a Moonshot Mindset he released in an email to followers:

Here are six key characteristics of that Mindset:

#1. You understand that “**The day before something is a breakthrough, it’s a crazy idea.**” Your Moonshot Mindset gives you permission to tackle crazy ideas.

#2. You are willing to take the risks necessary to transform industries and society for the better. You recognize that those with a Moonshot Mindset are the innovators making the world a better place, moving humanity forward, and charting the future.

#3. You understand that a Moonshot within the realm of your Massive Transformative Purpose (MTP) (what I call your stewardship calling) can be the adventure of a lifetime, giving you joy and a purpose-driven life.

#4. You are willing to target billion-person challenges. You recognize that “The world’s biggest problems are the world’s biggest opportunities.”

#5. You understand that Moonshots striving for a 10X improvement (or 1,000%) offer a one-hundred-fold benefit compared to 10% incremental improvement but are rarely one-hundred-fold more difficult to achieve. A 10X improvement is 100 times more worth it, but it's not 100 times harder.

#6. As a leader, you know that Moonshots focus and motivate your team, help you attract the best talent in the world, and allow you to solve interim problems while creating interim products and services along the way (Diamandis, 2021).

This Moonshot Mindset is not relegated to the business world alone. I encourage you to consider a Moonshot Mindset in your parish and spiritual journey. Any observant parish leader can, with some attention and perhaps assistance, identify big parish challenges. They are all around.

However, God did not give us great creative minds merely to observe problems. He gave us the ability to harness our creativity and the ideas of others to collectively solve them as we build communities of followers dedicated to a spiritual journey of theosis together. At one level, my entire Roadmap is a recruitment document. I hope to inspire you to take at least one idea, suggestion, or proven technique of excellence and use a God-given Moonshot Mindset to benefit yourself, your parishioners, and your parish.

## [A Few More Words About Two Letters \(AI\) - The Future Is Present Part 2 And What This Means for Your Parish SFARE.](#)

Have you and your parish embraced new technologies as much as you can? They will not only make your life easier and more efficient but, if used wisely, make you and your parish more effective. The most effective parish of the present is constantly experimenting and changing with the times operationally (again, I am not speaking theologically). I previously provided you with the data that only 20% of emails are read, whereas 95% of text messages are read in under three minutes. Yet, I suspect your parish has not fully deployed text messaging as much as it should/could. They are both fairly recent tools and yet one has already eclipsed the other. God gives you tools to use for a reason.

Like it or not, **Artificial Intelligence (AI)** is such a tool, but it is not without its valid concerns. Those researching how AI will incorporate human ethical standards in the future are asking, "whose ethics" will we use (Rainie et al., 2021; Rainie et al., 2022)? Thus, as AI increasingly controls more processes, systems, technologies, machines, human interactions, and decisions, uncertainty about what, if any, ethics and values will be incorporated into AI solutions is one of the most significant ethical issues and challenges of our time. This is a perfect place for those of us in faith-based communities to play a prominent role. You can wait for others to decide on such ethical boundaries, or you can be part of this discussion that will shape the future for everybody.

The proliferation and pace of AI is mind numbing. Stanford concluded that \$13.8 Billion was spent on AI investment in drug discovery in 2020 alone. This spending is more than 4.5 times higher than the previous year (Zhang et al., 2021). Equally remarkable is that the quality of AI speech has advanced to the point that people can increasingly not tell the difference between humans and AI-controlled machines (Zhang et al., 2021).

More critically, the Stanford study showed that companies in 2020 were less concerned about AI's personal or individual privacy risks than they were the year before. Thus, some ethical concerns are declining in importance. However, the resolution of the countless ethical issues in AI medical research, the justice system, and life in general depends on whose ethical standards are used and embedded in AI solutions.

This same Stanford Institute for Human-Centered Artificial Intelligence "AI Index Report" interestingly found that humans were more generous than AI machines. Similarly, judges were more lenient toward certain first offenders than AI-enabled machines (Zhang et al., 2021). The hypothesis is that the AI-enabled machine calculated a higher probability that the criminal would commit another crime and become a recidivist. In other words, the AI-enabled devices in the study, while programmed by humans, lacked human compassion and morality. Thus, ethical judgments in the world of AI appear to be different than in the human world, and perhaps ethical decision-making in the 21st Century is not moving in a "positive" direction as a result of AI (Rainie et al., 2021).

Christian churches must play a critical role in these discussions, particularly since a 2019 global survey reported by a corporate technology leader (Oracle) reported that 64% of the respondents had more confidence in a robot than the person who managed them (Oracle Cloud, 2019). So much for the human factor of trust, which is an essential component of any ethical or Christian approach, Servant Leadership, and everything parishes hold dear.

And yet, some limited examinations have found that human biases and values are easily embedded in AI solutions. Thus, not only will some AI technologies replace humans and seem objectively trustworthy, but these solutions can also be programmed with inherent and potentially unobservable biases and potential "inequity and inequality" (Mascarenhas, 2018). What will this capacity do to your parish's SFARE programs that will be created in the future using these technologies?

## [The Future Transhuman Era And The Church](#)

A famous research organization, The Gartner Group, has advanced the theory that we are entering a "transhuman era" where everything can be created, hacked, and changed. This includes not only the technologies we use but also our brains and bodies. Innovations like Elon Musk's Nerualink (<https://neuralink.com/>) currently allow quadriplegics to control computers with their brains alone.

However, advancements in this technology are planned to allow any human to control technologies merely by thinking of the desired action. Every technology that interfaces with our brains or other senses can also have its own reasoning abilities and

values. What does this mean for the definition of human existence and the Christian values we embrace and promote? The question remains: what will be our ethical and moral compass in these more unknown dimensions we will likely face in the 21st Century (DuToit, 2019)?

American computer scientist and futurist Ray Kurzweil (Peter Diamandis's business partner) has written extensively about AI and is famous for his prediction that by 2045, humans can "multiply our intelligence a billion-fold" due to creating wireless connections between our brains and a source of knowledge contained in the ether we call "the cloud" (Kurzweil, 2005). How will ethical behavior be assessed in 2045 when humans have this billion-fold increased "intelligence" due to wireless connections between our brains and some source of knowledge in the cloud?"

Through these AI-facilitated processes, Kurzweil believes we will achieve the actual combination of people and machines (Kurzweil, 2005). I posed this projection to a group of clergy at a retreat and asked them what they thought. Naturally, their minds immediately gravitated to the meetings they could miss and the busy work they could delegate because of a humanoid robot. They reacted differently when I asked them why that same humanoid robot couldn't conduct a church service, hear a confession, administer last rites, deliver a more impactful Sermily or SFARE program, or provide the Holy Eucharist. Yes, I know what you just thought.

Futurist Ray Kurzweil also predicted that AI and technology will bring us to what is referred to as the "singularity." This phrase has many meanings, including the modern view of the period when technological expansion becomes uncontrollable (Technological Singularity, 2025). Some also use this phrase to describe the moment of creation of the world, which technologists call "the big bang" and which Christians have described in Genesis Chapters 1 and 2 (Kruger, 2021).

Notice the similarity between the AI-facilitated technological singularity of uncontrollability and the Christian creation story in Genesis 1:1-31. The Christian version finds a force we call God creating automatically self-replicable environments, plants, animals, nature, and humans. And what is critical about the Christian singularity story is that the Creator repeatedly believed that all He created was "good." God endowed His humans with a true north compass and understanding of how to act ethically with all His creations, including other humans, animals, and the environment in which they all lived. And God reinforced this ethical hardwiring by sending His Son to teach and establish ethical standards of behavior. There was no lawyer-written "code of conduct" present or necessary.

Unlike technologies today, Christians believe that humans are hardwired initially by their Creator with goodness, righteousness, and ethical understandings. But those values are often compromised by the God-given exercise of free will in how they choose to live in their "garden." Indeed, we can use the humorous double entendre metaphor to say that as soon as God finished "designing" and "programming" His AI human creations, He stood back and concluded they were not merely "good," but they were "very good" (Genesis 1:31) (Maximos et al., 2008).

Suppose visionary philosopher and businessman Ray Kurzweil is correct. In that case, we are much closer to what is described in Matthew 3:2, as John the Baptist called for repentance because *“the kingdom of heaven is at hand.”* One thing Christians know about the place we call Heaven is that ethics is once again integrally hardwired into the entire environment. So, if Christian Singularity comes in the 21st Century, the outlook for ethical behavior is, like all God’s creation, “very good.”

The empirical data show that humans have not modeled perfect integrity and trust thus far in the 21st Century. What will happen once AI takes over certain decisions with its own inherent programmed bias from its human programmers, plus any bias that AI will develop on its own without legal limitations or regulation?

So, is there an answer we can explore to address this potential 21st-century ethics void? As it turns out, like Dorothy in *The Wizard of Oz*, who always had the ruby red slippers to take her home, we have always possessed the answer. All we need to do is go back to the beginning. The real beginning. Because *“In the beginning was the Word, and the Word was with God, and the Word was God.”* (John 1:1) (Maximos et al., 2008).

Christian researchers can conduct studies where Christ-centered values are programmed into AI technologies and environments to see how more ethical and righteous the outcomes and solutions can become. Imagine an AI decision-making technology that made all its decisions based on the following:

- (a) *“A new commandment I give you, that you have love for one another as I have loved you”* (John 13:34).
- (b) Parable of the Good Samaritan *“go and do likewise”* (Luke 10:37).
- (c) *“And you shall love your neighbor as yourself”* (Matthew 22:39).
- (d) *“Let your light shine before men, that they may see your good works and glorify your Father in heaven”* (Matthew 5:16).
- (e) *“But I say to you who hear: Love your enemies, do good to those who hate you, bless those who curse you, and pray for those who spitefully use you.” “Give to everyone who asks of you...” “And just as you want men to do to you, you also do to them likewise”* (Luke 6:27; 30-31).

## [The Future And Spiritual Leadership.](#)

Some studies have found that leaders who practice a newer leadership model called Spiritual Leadership could have their spirituality positively impact the organizations they lead, thus creating better environments. These studies identified a unique closeness between the leaders practicing Spiritual Leadership and their followers (Chaston & Lips-Wiersma, 2014).

Moreover, followers and leaders reported that the closer relationships fostered by Spiritual Leadership made all stakeholders feel like the enterprise was a “good” place to be and work. Does a “good” place remind anyone of God’s assessment of His creation? Thus, a Spiritual Leadership model embedded into AI might create a more positive culture demonstrating higher ethical behavior and trust.

This embedding experiment is my second call to action here (Chaston & Lips-Wiersma, 2014). Even in the face of AI dominance likely to overtake everything in the rest of the 21st Century, a Spiritual Leadership model and Christian ἦθος (ethos) exist to maximize positive interactions, righteous outcomes, and ethical behaviors. But to do all that, we must “...seek first the kingdom of God and His righteousness...” (Matthew 6:33) (Maximos et al., 2008).

## The Sky Is Not Falling.

OK, perhaps all this technology talk has scared you. As the Holy Gospel repeatedly (supposedly 365 times) says: “*Fear not!*” All technologies, including the internet, ZOOM, and AI are tools made by humans who were made in the image and likeness of God. And like any tool, they can be used for good or bad. Hitting you on the head with a hammer is criminal, but using a hammer to nail a roof on a Habitat for Humanity house is righteous. Thus, the question is not necessarily how to avoid all tools but rather how we use all tools for good and avoid their negative applications.

At its core, AI is merely a **Large Language Model** (“LLM”) that aggregates and integrates massive amounts of data from countless sources at unprecedented rates of speed. While one must always be concerned about what sources your AI LLM of choice aggregates its information from if you are relying on it for judgment and information, AI tools can immediately be used to help your parish create much more fascinatingly engaging images you can use.

As I mentioned previously, the image on the cover page of my Roadmap was created by AI from a series of “prompts” (AI-speak for instructions) I gave it. AI tools can take the video of your Sermily and create shorter “snippets,” which you can republish on specific points for greater reach and impact.

AI tools can be used to harvest virtually limitless information about the demography of your parishes’ neighborhoods to help in your community service ministries and even evangelization efforts. Using AI can help you research and write better parish bulletins or other content (including SFARE content) as long as you carefully curate and verify everything). Indeed, as previously mentioned, I await the day very soon when Christian technologists create a verified and properly vetted Christian AI LLM for use in such parish educational and communications efforts, and yes, even in speeding up the first draft or Sermily preparation or editing.

There is already a plethora (and growing) number of AI tools to help with parish administration, scheduling, event planning, graphic design, communications with constituents, prayer requests, and delivery, speech-to-text (and text-to-speech) tools for the differently abled, and countless other applications.

Smart SFARE practitioners will no doubt think of many creative and effective ways to use AI and all it offers to challenge us old-timers and the generation of youth who will eventually find it as ubiquitous as we find smartphones. Do not fear the tools God has given you to tame and use. However, do not sit idly by and allow them to be developed



and programmed without the fundamental and timeless truth our Lord has presented from “the beginning.”

These last sections of Chapter 14 of my Roadmap are not meant to engender fear. Instead, they represent the musings of a Christian futurist who sees an essential role you and your parish must play in developing the future in which you wish to live and raise your family. Throughout history, Christians were called on to step into the breach and use their foundational truths to protect and advance humankind. This is such a time. We must demonstrate faith, fortitude, and Servant Leadership to use all new advancements properly and wisely. Like Edison’s lightbulb, we must be the light of the world amid darkness and bring people closer to Christ and each other.

**So, my Moonshot Mindset challenge is that YOU, and YOUR PARISH, innovate and determine how to embed Christ’s teachings and a Christian ἥθος and mindset in an AI tool that provides the righteous and ethical truths that will be the “Light of the World.”**

# CHAPTER 15. The Roadmap To Oneness In Christ.

## The Failure Of Christian Leadership To Advance Oneness in Christ (“OIC”).

Before I can discuss the unity of Christ’s Church in my Roadmap, it is imperative to start by focusing on the ultimate objective of life, namely theosis and Oneness in Christ. Jesus Christ offered this, and St. Paul implored the Galatians (and, by extension, you and me) to accept this unifying offer. To achieve this lofty end, we must ignore the trivial ethnicity, status, gender, and other dividing distinctions and instead focus on **Oneness In Christ (“OIC”)**. In this way, we fulfill Moses’s explanation in Genesis that the origins of being one with each other and one with all humanity whom They created.

OIC is the foundation of the challenge now that Christ’s Church in modernity stands fractured, divided, arguing with each other, and moving farther away from OIC, demonstrating a leadership failure. Yes, I again repeat that every church problem is a leadership problem. Holy Scripture answers how to achieve OIC.

After examining the current OIC leadership chasm, a very high-level exegetical inner texture analysis provides a way back to the Light and Christ’s Great Commission “*to make disciples of all nations*” (Matthew 28-19). Using as my motivation the 1917 Balfour Declaration (providing a roadmap for a 31-year journey to create the country of Israel) (Gold, 2017; Vereté, 1970) and President Kennedy’s 1962 “moon shot” declaration (that the U.S. would land on the moon within the decade) (Kennedy, 1962) I will propose a possible Roadmap that might help achieve the unimaginable.

I respectfully submit that Christian leaders (including me) have failed to fulfill a fundamental promise of God and Christ that we are all one. Moses first explained this reality in the creation story, which Christ amplified in His final prayers with the Apostles, and St. Paul repeated to the Galatians and others. Yet, as we explore Christ’s Church in America today, **we are many in division and weakness rather than one in unity and strength**. Those who claim to be Christian leaders must confess our failure and cure this departure from the “**Oneness In Christ**” (OIC) given to us by our Creator and Savior.

**Spoiler Alert:** As you will read below: “I do not accept as righteous the continued emphasis on religious differences and the desire to prove that one faith is ‘more right’ and ‘more authentically Christian’ than another, thus demanding conformity to all your beliefs and customs.” I choose the path of “**respectful affiliation rather than absolute subjugation**” because I believe this is what Christ meant in his commandment of love, his prayer for Oneness, and how the Apostles formed and practiced Christ’s Church from the beginning (as evidenced by the Council of Jerusalem).

Let me be clear. **I do not feel the need to be right with all men, but I very much want to be right with God and Christ!** Indeed, in the section below entitled “**The House of God,**” I will introduce a metaphor to hopefully help you reimagine the way you think

about your Christian faith and the different divided Denominations and Jurisdictions through the lens of OIC that is based on what I call “**Foundational Christian Truths.**” Please do not read ahead and allow me to build the case first.

## The OIC Promise.

St. Paul made OIC clear by saying, “*You are all one in Christ Jesus*” (Galatians 3:28) (the “**OIC Promise**”). This OIC Promise is reiterated in Christian baptismal services because St. Paul explicitly stated: “*For as many of you as were baptized into Christ have put on Christ*” (Galatians 3:27). Putting something on makes a statement about you; however, having something in you defines you.

Jesus Christ placed divinity in each of us. St. John poignantly describes the Lord’s prayer for us “...*that they all be one, as You, Father, are in Me, and I in You; that they also may be one in Us... that they may be one just as We are one*” (John 17:21-22). St. Paul affirmed this reality after being blinded by the Light of the Lord to see clearly: “*I have been crucified with Christ it is no longer I who live, but Christ lives in me*” (Galatians 2:20). Imagine what it means for God and Christ to be in you and all of us together as one. Living and teaching this is the duty of Christian leaders, the failure of which you should lament.

OIC is not a leadership challenge new to modernity. The Apostles faced it repeatedly in the nascent Christian Church. In the 49 AD Jerusalem Council (Acts 15), they wrestled with and resolved the circumcision and other controversies threatening to divide Christ’s Church through a conciliar process of consensus. This led to St. Paul’s Epistle to the Galatians (Paroschi, 2018). Centuries later, issues such as the Nicene Creed were resolved at the First Council of Nicaea in 325 AD and further clarified in 381 AD at the First Council of Constantinople (Marianes, 2023). Unified Christians eventually agreed we were: “*Εἰς μίαν, ἁγίαν, καθολικὴν καὶ ἀποστολικὴν Ἐκκλησίαν*” (“One, holy, catholic, and apostolic church”). The added emphasis on the word one underscores our early Christian leader’s consensus confirmation of OIC. So, where, when, and how did we get off track?

## The OIC Leadership Failure Confession And Challenge.

Admitting failure is difficult, especially for leaders (Gollwitzer et al., 1982). Accusing others of failure is popular because research proves accusers with some culpabilities are evaluated more favorably when they point out the shortcomings of others (i.e., accusation effect) (Rucker & Pratkanis, 2001). I refuse the projection benefit of this accusation effect and instead claim full responsibility for my sin of OIC omission.

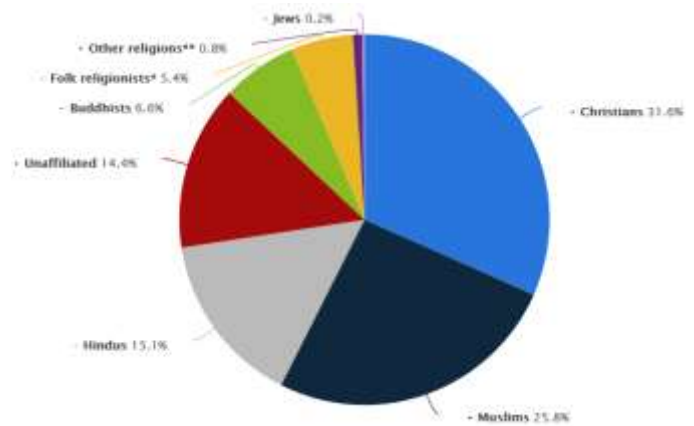
If you are a Christian, what do you say when asked to which Church you belong? Is it the faith tradition in which you were baptized, a later one you embraced, or the Church most convenient for your current lifestyle? Or do you claim OIC as a member of Jesus Christ’s Church? Are you leading people to OIC or instead to your current Church, parish, jurisdiction, faith, congregation, religious group, or tradition (i.e., Denomination)?

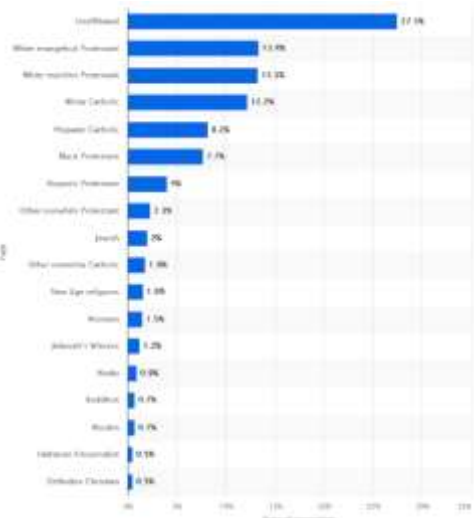
There is nothing wrong with celebrating whatever heritage/traditions you inherited from birth or embraced later in life. If you are courageous enough to read on, your challenge is to reflect on whether what you do and say promotes the righteous theological tradition of OIC or something less. For those now thinking your Denomination is OIC (to the exclusion of others), please note your confirmation biases and consider if you are genuinely practicing OIC. As much criticism as I expect to receive (including from some in my Denomination), these three OIC Roadmap Chapters 15, 16, and 17 advance my thesis that **Christian leaders must become OIC Disciples (“OICD”) rather than merely Denominational Disciples (“DD”)**.

### The OIC Leadership Failure Data.

Lexicographers reduce the negativity associated with DD by defining a Denomination as “a religious group that has slightly (emphasis added) different beliefs from other groups that share the same religion” (Cambridge Dictionary, n.d.). By introducing the undefinable term “slightly,” the absence of OIC is admitted. One cannot be “slightly” different but “one.”

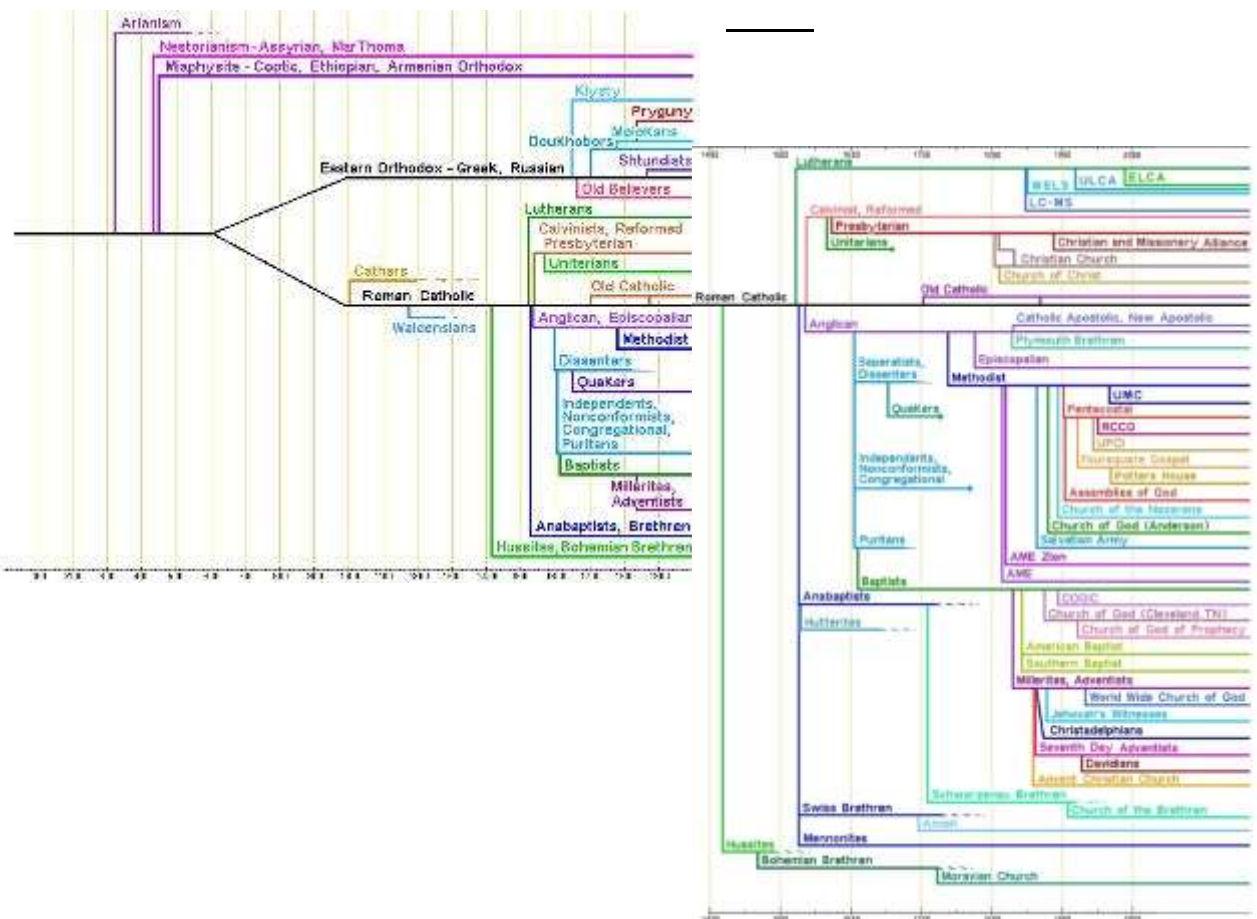
Following W. Edwards Deming, who insisted, “In God we trust, all others must bring data” (Oxford Essential Quotations, 2018), in 2010, Christians comprised 31.4% of the global population, which is projected to remain unchanged through 2050 (Pew Research Center, 2015a). Christianity is not growing, is not becoming more focused on OIC, and is unsuccessful in making “*disciples of all nations*” (Matthew 28:19). The chart to the right depicts global religious beliefs as of 2022 (Galan, 2025). Indeed, the massive division of global Christianity is proven by the existence of over 30,000 Denominations (Noll, 2002), growing to 45,000 Denominations (Coffey, 2022).





The absence of OIC and OICD is not merely a global phenomenon. The chart to the left manifests the massive division that exists in the 2022 Christian church in America (Korhonen, 2025). This clear consensus of massive division is reconfirmed by countless mainstream empirical researchers, including Olson (2008), Zubkov (2010), Lindner (2012), Pew Research Center (2015b), Public Religion Research Institute (2023), List of Christian Denominations (2024), among many others. Indeed, Damick (2017) and Wax (2020) summarize the major tenants and differences of the vast numbers of divided Christian Denominations in the U.S.

The following (incomplete) diagram graphically depicts the dissent from one Christian Church to a divided Denominational explosion (Rollison, 2023).



	% of U.S. Adult Population		% of U.S. Adult Population		% of U.S. Adult Population
<b>Evangelical Protestant Churches</b>	<b>26.3</b>	<b>Mainline Protestant Churches</b>	<b>18.1</b>	<b>Jehovah's Witness</b>	<b>0.7</b>
<b>Baptist in the Evangelical Tradition</b>	<b>16.9</b>	<b>Baptist in the Mainline Tradition</b>	<b>1.8</b>	<b>Orthodox</b>	<b>0.8</b>
Southern Baptist Convention	6.7	American Baptist Churches in USA	1.2	Greek Orthodox	+0.3
Independent Baptist in the Evangelical Tradition	2.9	Other Baptist denomination in the Mainline Tradition	+0.2	Russian Orthodox	+0.2
Baptist Missionary Association	+0.3	Baptist in the Mainline Tradition, not further specified	0.8	Other Orthodox church	+0.2
Free Will Baptists	+0.2	<b>Methodist in the Mainline Tradition</b>	<b>5.4</b>	Orthodox, not further specified	+0.2
General Association of Regular Baptists	+0.2	United Methodist Church	3.1	<b>Other Christian</b>	<b>0.3</b>
Other Baptist denomination in the Evangelical Tradition	+0.2	Other Methodist denomination in the Mainline Tradition	+0.3	Metaphysical	+0.2
Baptist in the Evangelical Tradition, not further specified	6.9	Methodist in the Mainline Tradition, not further specified	0.4	Spiritualist	+0.2
<b>Methodist in the Evangelical Tradition</b>	<b>+0.3</b>	<b>Nondenominational in the Mainline Tradition</b>	<b>0.9</b>	Unity, Unity Church, Christ Church Unity	+0.2
<b>Nondenominational in the Evangelical Tradition</b>	<b>2.4</b>	Interdenominational in the Mainline Tradition	0.2	Other Metaphysical	+0.2
Nondenominational evangelical	1.2	Other nondenominational group in the Mainline Tradition	+0.2	<b>Other</b>	<b>+0.3</b>
Nondenominational charismatic	0.5	Nondenominational in the Mainline Trad., not further specified	0.6	<b>Jewish</b>	<b>1.7</b>
Nondenominational fundamentalist	0.3	<b>Lutheran in the Mainline Tradition</b>	<b>2.6</b>	Reform	0.7
Nondenominational Christian	+0.3	Evangelical Lutheran Church in America (ELCA)	3.8	Conservative	0.6
Interdenominational in the Evangelical Tradition	0.5	Other Lutheran denomination in the Mainline Tradition	+0.2	Orthodox	+0.2
Community Church in the Evangelical Tradition	+0.2	Lutheran in the Mainline Tradition, not further specified	0.8	Other Jewish groups	+0.2
Other nondenominational group in the Evangelical Tradition	+0.2	<b>Presbyterian in the Mainline Tradition</b>	<b>1.8</b>	Jewish, not further specified	+0.2
Nondenominational in the Evang. Trad., not further specified	5.8	Presbyterian Church USA	1.1	<b>Buddhist</b>	<b>0.7</b>
<b>Lutheran in the Evangelical Tradition</b>	<b>1.8</b>	Other Presbyterian denomination in the Mainline Tradition	+0.2	Theravada (Vipassana) Buddhism	+0.2
Lutheran Church, Missouri Synod	1.4	Presbyterian in the Mainline Tradition, not further specified	0.7	Mahayana (Zen) Buddhism	+0.2
Lutheran Church, Wisconsin Synod	+0.2	<b>Anglican/Episcopal in the Mainline Tradition</b>	<b>1.4</b>	Vajrayana (Tibetan) Buddhism	+0.2
Other Lutheran denomination in the Evangelical Tradition	+0.2	Episcopal Church in the USA	1.0	Other Buddhist groups	+0.2
Lutheran in the Evangelical Tradition, not further specified	+0.2	Anglican Church (Church of England)	0.2	Buddhist, not further specified	0.3
<b>Presbyterian in the Evangelical Tradition</b>	<b>0.9</b>	Other Anglican/Episcopal denomination in the Mainline Trad.	+0.2	<b>Muslim*</b>	<b>0.6</b>
Presbyterian Church in America	0.4	Anglican/Episcopal in the Mainline Trad., not further specified	+0.2	Same	0.2
Other Presbyterian denominations in the Evangelical Tradition	+0.2	<b>Restorationist in the Mainline Tradition</b>	<b>0.4</b>	Shia	+0.2
Presbyterian in the Evangelical Tradition, not further specified	+0.2	Disciples of Christ	0.2	Other Muslim groups	+0.2
<b>Restorationist in the Evangelical Tradition</b>	<b>3.4</b>	Restorationist in the Mainline Tradition, not further specified	+0.2	Muslim, not further specified	+0.2
Assemblies of God	1.4	<b>Congregationalist in the Mainline Tradition</b>	<b>0.7</b>	<b>Hindu</b>	<b>0.4</b>
Church of God (Cleveland/Tennessee)	0.4	United Church of Christ	0.8	Vaishnava Hinduism	+0.2
Four Square Gospel	+0.2	Congregationalist in the Mainline Trad., not further specified	+0.2	Shaktite Hinduism	+0.2
Pentecostal Church of God	+0.2	<b>Reformed in the Mainline Tradition</b>	<b>+0.2</b>	Other Hindu groups	+0.2
Pentecostal Holiness Church	+0.2	Reformed Church in America	+0.2	Hindu, not further specified	+0.2
Nondenominational, Independent Pentecostal	+0.2	Other Reformed denomination in the Mainline Tradition	+0.2	<b>Other World Religions</b>	<b>+0.2</b>
Church of God of the Apostolic Faith	+0.2	Reformed in the Mainline Tradition, not further specified	+0.2	<b>Other Faiths</b>	<b>1.2</b>
Apostolic Pentecostal in the Evangelical Tradition	+0.2	<b>Anglican/Episcopal in the Mainline Tradition</b>	<b>+0.2</b>	Unitarian and other liberal faiths	0.7
Other Pentecostal denomination in the Evangelical Tradition	+0.2	Anglican/Episcopal in the Mainline Tradition, not further specified	+0.2	Unitarian (Universalist)	0.2
Pentecostal in the Evangelical Tradition, not further specified	0.7	<b>Restorationist in the Evangelical Tradition</b>	<b>1.7</b>	Liberal faiths	+0.2
<b>Anglican/Episcopal in the Evangelical Tradition</b>	<b>+0.3</b>	Church of Christ	1.5	Spiritual but not religious	+0.2
<b>Restorationist in the Evangelical Tradition</b>	<b>1.7</b>	Christian Churches and Churches of Christ	+0.2	Other liberal faith groups	+0.2
Church of Christ	1.5	Restorationist in the Evangelical Trad., not further specified	+0.2	<b>New Age</b>	<b>0.4</b>
Christian Churches and Churches of Christ	+0.2	<b>Congregationalist in the Evangelical Tradition</b>	<b>+0.3</b>	Wicca (Wiccan)	+0.2
Restorationist in the Evangelical Trad., not further specified	+0.2	Conservative Congregational Christian	+0.2	Pagan	+0.2
<b>Congregationalist in the Evangelical Tradition</b>	<b>+0.3</b>	Other Congregationalist denomination in the Evangelical Trad.	+0.2	Other New Age groups	+0.2
Conservative Congregational Christian	+0.2	Congregationalist in the Evangelical Trad., not further specified	+0.2	<b>Native American Religions</b>	<b>+0.2</b>
Other Congregationalist denomination in the Evangelical Tradition	+0.2	<b>Holiness in the Evangelical Tradition</b>	<b>1.9</b>	<b>Unaffiliated</b>	<b>16.1</b>
Congregationalist in the Evangelical Tradition, not further specified	+0.2	Church of the Nazarene	0.2	Atheist	1.6
<b>Holiness in the Evangelical Tradition</b>	<b>1.9</b>	Free Methodist Church	0.2	Agnostic	2.4
Church of the Nazarene	0.2	Wesleyan Church	+0.2	Nothing in particular	12.1
Free Methodist Church	0.2	Christian and Missionary Alliance	+0.2	<b>Don't Know</b>	<b>0.8</b>
Wesleyan Church	+0.2	Church of God (Anderson, Indiana)	+0.2		
Christian and Missionary Alliance	+0.2	Other Holiness denomination in the Evangelical Tradition	+0.2		
Church of God (Anderson, Indiana)	+0.2	Holiness in the Evangelical Tradition, not further specified	+0.2		
Other Holiness denomination in the Evangelical Tradition	+0.2	<b>Reformed in the Evangelical Tradition</b>	<b>+0.2</b>		
Holiness in the Evangelical Tradition, not further specified	+0.2	Christian Reformed Church	+0.2		
<b>Reformed in the Evangelical Tradition</b>	<b>+0.2</b>	Other Reformed denomination in the Evangelical Tradition	+0.2		
Christian Reformed Church	+0.2	Reformed in the Evangelical Tradition, not further specified	+0.2		
Other Reformed denomination in the Evangelical Tradition	+0.2	<b>Adventist in the Evangelical Tradition</b>	<b>0.5</b>		
Reformed in the Evangelical Tradition, not further specified	+0.2	Seventh Day Adventist	0.4		
<b>Adventist in the Evangelical Tradition</b>	<b>0.5</b>	Other Adventist group in the Evangelical Tradition	+0.2		
Seventh Day Adventist	0.4	Adventist in the Evangelical Tradition, not further specified	+0.2		
Other Adventist group in the Evangelical Tradition	+0.2	<b>Anglican/Episcopal in the Mainline Tradition</b>	<b>23.9</b>		
Adventist in the Evangelical Tradition, not further specified	+0.2	Catholic			
<b>Anglican/Episcopal in the Mainline Tradition</b>	<b>23.9</b>	<b>Mormon</b>	<b>1.7</b>		
Catholic		Church of Jesus Christ of Latter-day Saints	1.6		
<b>Mormon</b>	<b>1.7</b>	Community of Christ	+0.2		
Church of Jesus Christ of Latter-day Saints	1.6	Mormon, not further specified	+0.2		
Community of Christ	+0.2				
Mormon, not further specified	+0.2				

(Source: Pew Research Center, 2008)

When analyzing various Protestant, Roman Catholic Orthodox, and other Denominations, the lack of OIC becomes palpable, and the emphasis on DD is evident. The data all point to the absence of OIC, highlighting the many U.S. Christian subdivisions that prove we are not the “one, holy, catholic and apostolic church” (Nicene Creed).

## Time Is Even More Critical In The American Orthosphere.

The problematic Christian OIC data is, in many cases, worse in the American Orthosphere. For example, empirical research shows that:

(a) 47% of the adults raised in the Orthodox Church in America have left it (Pew Research Center, 2015);

(b) 39% of American “Millennials” (born between 1981 and 1996) are “NONEs” and repudiate the Church of their upbringing and now claim NO religious affiliation (Barna Group, 2019; Lipka, 2015);

(c) 64% of youth with a Christian background in 2019 dropped out of Church at some point during their 20's (up from 59% in 2011) (Barna Group, 2019).;

(d) only 26% of Orthodox adherents regularly attend church services (which is only 21% in my Greek Orthodox Church) (Krindatch, 2010);

(e) my statistically significant surveys of **Parishioners In Pews** (“PIPs”) throughout the American Orthosphere report that approximately 70% to 80% of the time, their minds are wandering during the Orthodox Divine Liturgy (other than during the Sermily when the priest is looking at them);

(f) Based on the Stewardship Calling Financial Stewardship Analysis of over 275 American Orthosphere parishes, 99% of Orthodox churches are dependent on ethnic food festivals, property rentals, and other third-party income to survive because, on average, Orthodox Christians only give 0.5% to 0.8% of their income to their churches rather than a 10% tithe;

(g) As the American Orthosphere census data outline demonstrates, there has been an approximately 16.7% decline in the number of reported Orthodox faithful (including all cradle Orthodox and converts) in the decade ending 2020 (Krindatch, 2020).

I could present more empirical and statistical evidence of the crisis facing the American Orthosphere Jurisdictions or other Christian Denominations and parishes; however, the trends, declines, and challenges are accelerating rapidly with each passing year. Is this a “good account” for you to preside over churches that are significantly declining in numbers of faithful, relevance, impact, and services primarily due to the inefficiencies of being divided?

All theological sources, directions of our Bishops, and current operational situation point toward the need for a meaningful change. Not a change in the timeless theology of Christianity that has been present since our Lord founded His Church. However, we need a fundamental shift in the Vision of how we operate and a roadmap to help address the above challenges by providing sound data and research, best practices, and synergistic and combined resources and solutions. I pray this Roadmap offers such support.

### [Abbreviated High-Level Socio-Rhetorical Inner Texture Exegetical Analysis.](#)

Given the dissent from one unified Church founded by Christ to the divided, fragmented, and constantly further-subdividing 200+ Denominations in the U.S. and 45,000+ Denominations globally, the data exhibit a failure of Christian leadership in maintaining OIC. This leadership failure is explained by Case's and Maner's (2014) experiments confirming division results from the poor leadership of those seeking to maintain their power and authority.

This divisive leadership stands in stark contrast to the unifying OIC Servant Leadership offered by Christ (Greenleaf, 1970, 1977; Patterson, 2003). Exploring the God-inspired Holy Scripture provides an insightful transition to a solution. Understanding Holy Scripture's complexity is possible through the Holy Spirit's presence (Kennedy, 1999). The socio-rhetorical processes of Robbins (1996) and Henson et al. (2020) provide templates to appreciate Holy Scripture "textures better."

OIC is possible because Christ modeled Servant Leadership, Authentic Leadership, and Transformational Leadership (Dixon, 2021; Northouse, 2022). This analysis will focus on St. Paul's Transformational Leadership (TL) in Galatians 3:27-28, with support from John 17:21-22 and Genesis 1:26 (collectively, the "**OIC Promise**") by applying Henson et al.'s (2020) socio-rhetorical Inner Texture six-category approach. Conducting a proper inner texture analysis of such short pericopes is inadequate. Thus, while not a complete exegetical analysis, an abbreviated summary of a few highlights illustrates the point I wish to make.

### **1. Textual Units**

Instead of traditional paragraphs and punctuation, ancient writers used themes and narrational units to shift focus and understanding (Henson et al., 2020, p. 84). The OIC Promise theme moves readers from the creational understanding of humans as children of God (Genesis 1:26) to the imagery of their connection through baptism in an intimate and personal way (Allen et al., 2008, p. 1593).

### **2. Repetitive Patterns**

Because of few educational texts/tools, ancient writers taught through repetition (Henson et al., 2020, p. 86-88). The OIC Promise texts repeat Oneness from Genesis 1:26 with God's identification as Creator/Father by using the plural "*Us*" to teach the Holy Trinity's (Father, Son, and Holy Spirit) unified omnipresence from the beginning that connects everyone as a family (Allen et al., 2008, p. 5). St. John repeats the description explaining how God is in Christ, and He is in His followers (John 17:21). The repetition continues through St. Paul's promise that through baptism, we put "*on*" Christ and the OIC is complete (Galatians 3:27).

### **3. Progressive Patterns**

The progressive pattern of inner textures uses the techniques of chiasm, encapsulation, development, and connection (Henson et al., 2020; Robbins, 1996). Focusing on chiasm with a resolution in the middle (Henson et al., 2020, p. 89), the OIC Promise offers a critical, perhaps shocking revelation in the middle. The Galatians are challenged, "*There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female*" (Galatians 3:28). This pericope has been quoted/misquoted as modernity continues its predictable pursuit of division vs. OIC. However, St. Paul clearly states our external differences have no place in Christ's Church, where "All are one in nature, and so all are equal in dignity" (Allen et al., 2008, p. 1593).

### **4. Open-Middle-Closing Patterns**

This pattern focuses on a plot with a beginning, middle crisis, and final solution/denouement (Henson et al., 2020, p. 92). The OIC Promise begins by identifying



everyone as “*sons of God through faith in Christ Jesus*” (Galatians 3:26), followed by the challenge of differences in ethnicity (Jew vs. Greek), freedom (slave vs. free), and gender (male vs. female) (Galatians 3:28).

Baptism is the solution through which everyone can “*put on Christ*” (Galatians 3:27) that leads to the final salvific restoration/connection to the Torah (Old Testament) “*And if you are Christ’s, then you are Abraham’s seed, and heirs according to the promise*” (Galatians 3:29). This promise of connection between God and His creation is celebrated in Orthodox and other Christian church baptisms (Allen et al, 2008, p. 1593).

## 5. Argumentative Patterns

This element exposes the author’s thesis, rationale, and examples leading to a conclusion (Henson et al., 2020, p. 93; Robbins, 1996). St. Paul begins the Oneness with God (Galatians 3:26) to use the journey through baptism to bring us OIC (Galatians 3:27), tearing down the external trappings of our different status/national origins/genders (Galatians 3:28) to unite everyone as one just as we began our journey when the Holy Trinity created us (Genesis 1:26; Galatians 3:29).

## 6. Sensory-Aesthetic Patterns

This final element uses sensory/self-expressive feelings to expose the author’s intent (Henson et al., 2020, p. 94; Robbins, 1996). St. Paul connects OIC with “*Abraham’s seed*” (Galatians 3:29). St. John’s recitation of Christ’s prayer invokes the aesthetics of three examples of two becoming one (God in Christ, Christ in us, and all of us in God) (John 17:21). This unmistakable sensory element of our creation (Genesis 1:26) outlines the OIC Promise objective explaining our life’s journey brings us full circle to our Father/Creator who exists in us (Allen et al, 2008, p. 1459).

## The OIC Leadership Failure Premise.

This above highly abbreviated partial OIC Promise inner texture exegetical analysis leads us to briefly examine why our leadership failures allow **Oneness In Christ Discipleship (OICD)** to be replaced by **Denominational Discipleship (DD)**. Insightfully, Hauerwas (1980) concluded Christians must first acknowledge the divisions and differences in our churches mirrored in our currently divided world (p. 59).

Thus, like all “12-step programs,” our Lord desires us to take the first leadership step to overcome our division by acknowledging and admitting we are missing OIC. Many treatises have chronicled the countless divisions in Christ’s Church. Others try to justify why their Denomination is more authentic or righteous. Perhaps they might acknowledge their DD advocacy is the antithesis of the OIC the Lord taught and sacrificed his life to achieve.

I am acutely aware of the consequences of announcing, “The emperor has no clothes” (Anderson, 1837) and antagonizing the “Group Think” comfort provided by the psychological drive for consensus that stifles disagreements (Janis, 1972). However, each leader defending their Denomination’s correctness by explaining why another disciple of Christ is wrong tears at the fabric of the Lord’s OIC.

The OIC Promise requires us to love one another, acknowledge our differences, and work to achieve salvific unification with God, Christ, the Holy Spirit, and each other. Christ's final "commandment" that everyone must "*love one another*" was modeled when the Lord was crucified for all humanity (John 13:34-35). This pronouncement challenged the Apostles since they believed only God could issue "commandments," thus defining who Christ was. When this Love Commandment is combined with the OIC Promise, DD must give way to OICD.

Risking ostracism or ex-communication (as has been the consequence in the past within the Orthodox faith when non-traditional arguments are advanced) (Helmholz, 1982), I call upon over 40 years as a mergers, acquisitions, and outsourcing lawyer to identify eight reasons that consolidation/combinations/mergers frequently fail (Marianes, 2023):

1. No real reason and sense of urgency to combine,
2. Absence of a formal deadline,
3. The timing is not optimal,
4. Lack of commitment by the required stakeholders,
5. "Friendly Fire" usually in the form of internal people (i.e., DD) trying to protect their turf, positions, identity, authority, agendas, financial situations, etc.,
6. External forces who fear the impact of consolidation,
7. Lack of the requisite resources, experienced and dedicated leaders, and teams charged with accomplishing the consolidation,
8. It is demanding work.

Countless treatises identified reasons mergers/combinations fail (Bekier et al., 2001; Faelten & Driessen, 2016; Freund, 1975; Koi-Akrofi, 2016). Fewer treatises tackle the Christian thorny (pun intended) challenge of cross-Denominational mergers/consolidations (Pietrylo, 2018; Simmons, 1996; Tomberlin & Bird, 2020). The presumptuous attempt in my Roadmap to briefly outline a future vision of American OIC is offered with great humility and sincerity.

## **Christ's House – Foreshadowing The Roadmap To Christian Unity.**

Before I provide you with my **Christ's House** metaphor, which I believe can lead to OIC, let me respond to my critics, who will rightfully allege I am not a theologian. This is why, on theological issues, I turn to experts for guidance. I was struck by St. Paul's instructions to the Romans, where he chastised them for "virtue signaling" when they condemned those claiming to be Christians who did not fast or eat like them. His bold words to them (and us) were:

*Receive one who is weak in the faith, but not to disputes over **doubtful things**...Who are you to judge another's servant? To his own master he*

*stands or falls. Indeed, he will be made to stand, for God is able to make him stand (Romans 14:1, 11).*

The indictment not to judge is palpable and enlightening. The words “**doubtful things**” are footnoted in the Orthodox Study Bible with the following instructive teaching:

In Orthodox Christianity, there are things that cannot be compromised, and there are areas of flexibility. God is gracious and allows diversity in “**doubtful things**” (verse 1), matters not related to “**essential doctrines**” and moral teachings. The “weak in faith” (verse 1) are people who assign primary importance to secondary matters. The two examples of flexible areas here involve food restrictions (verse 2) and the calendar (verse 5), things which the weak try to use to judge others or to divide the Church. In both cases, we are commanded to give flexibility to others, just as God Himself does (verse 3) (*Orthodox Study Bible*, 2008, p. 1545)

So, to my Denominational Disciple (DD) brothers and sisters, I say, **προσκυνέω** (let us attend) and pay attention to the wisdom in the above guidance from the Orthodox Study Bible. I urge you to take to heart the teachings of God, Moses, Christ, St. Paul, and the Orthodox Study Bible. Who are any of us to judge the Christian discipleship beliefs of others? This leaves us first to discuss and prayerfully discern those “**essential doctrines**.” To that end, in the spirit of OIC, I humbly offer the following **Christ’s House** metaphor.

### “Christ’s House” Metaphor.

I believe the puzzle of a divided Christian church might be analyzed through the lens of a metaphor of a house. Every house in America (no matter what it looks like or where it is built) must have a solid and similar foundation. Most of the time, it is some form of concrete or other reinforced material that can withstand the weight of the house to be built on it and the natural elements, including wind, rain, and erosion. Occasionally, houses are built on extremely solid and densely packed earth or stilts. However, time has repeatedly proven that any foundational substance other than concrete is not as stable and cannot easily withstand the test of time.

Indeed, the National Association of Home Builders found that nearly 75% of all houses in the United States are built on concrete slab foundations, with another 18% or so built over basements that, in turn, have concrete foundations (National Association of Home Builders, 2024). The fact that less than 10% of U.S. houses are not supported by concrete foundations tells us everything we need to know about building something on solid footing in the U.S. (I leave the amazing Pyramids to building differences in Egypt.)

Additionally, in the U.S., 92% of houses are wood framed, with the other 7% being concrete framed and the remainder steel framed (National Association of Home Builders, 2024). However, what goes over the wood (or other) framing, how big the house is, how many bedrooms and bathrooms, common areas, dining rooms, kitchens, colors, utilities, appliances, and endless other details differ so widely that, for the most part, one house

looks nothing like the other. This is increasingly true even in planned seniors' communities with set model styles but widely differing insides.

Regardless of the exterior and interior covering and house size and composition variables, the interior decorations vary 100% in every house. Also varying widely are the various traditions and rituals practiced by the people who live in those houses, the languages they speak, the foods they eat, the beliefs of the inhabitants, and countless other traditions. So, while the foundation and framing elements are almost entirely uniform, everything else varies from house to house. Yet we still call all of them houses.

## Foundational Christian Truths.

So, what does construction data have to do with Christian unity and OIC? What if the foundation represented the most critical core elements (the “**essential doctrines**” referred to in the OSB) that we would need to be genuinely called Christians? I call these essential doctrines “**Foundational Christian Truths**” and submit they would inevitably include at least the following:

1. **God is one eternal being in three persons (Father, Son, and Holy Spirit).**
2. **The three persons of God are exactly who They say They are.**
3. **Jesus Christ (God the Son) took a human form, lived on the earth, was crucified and died for our sins, was resurrected, and ascended into the Kingdom Eternal.**
4. **The Holy Spirit was given to us to help us live righteously.**
5. **The Holy Scripture is God’s inspired word, which was written by humans and reveals Christ.**
6. **We are called to practice Christ’s commandment to love God and each other.**
7. **Salvation is a gift from God, received by faith and lived out through love and righteous conduct.**
8. **Christ will return to renew and reunite all of creation.**
9. **\_\_\_\_\_...**

Notice that **Foundational Christian Truth #5** acknowledges the Bible as God’s inspired word but does not go so far as to say that only one language and linguistic interpretation is the only truth. Language is man-made, varies from place to place and even from time to time, and has some fluidity and interpretive differences. New words are constantly added to our dictionaries, and definitions are always subject to change. A soft drink (regardless of brand) may be called a soda in Boston, pop in the Midwest, or a Coke in the Southeast. But irrespective of its brand name, it is still a soft drink. Yet, as

Dr. Russell Huizing explains, the aggregate mosaic of all pieces of Holy Scripture reveals the truth that is Christ.

I leave a **Foundational Christian Truth #9** empty with an ellipsis to signal openness for reasonable discussion of added Foundational Christian Truths. I submit that the teachings of Christ and Holy Scripture, plus the decisions of those universally recognized Ecumenical Councils, support the above items. I am confident that the DDs reading will want to load up the list of Foundational Christian Truths with their detailed beliefs, rituals, traditions, and insistence on perfect adherence to their views to be called a Disciple of Christ. This is the behavior that has gotten us to the House Divided that Christianity represents today. We must stop this unproductive and divisive approach that unravels rather than unites. I recommend **respectful affiliation rather than absolute subjugation**.

Allow me to propose that the best question is: what are the non-negotiable Foundational Christian Truths that define a Christian versus the secondary stylistic manifestations that were NOT mandated by Christ and were instead created and imposed by men? If the Foundational Christian Truths represent the required concrete foundation present in God's house, can you righteously say that a person who speaks a different language practices a different custom, fasts differently, likes performing a unique ritual (not inconsistent with Foundational Christian Truths) is any less (or more) of a Christian than you? If you believe they are not Christians because they do not do precisely every man-made rule you follow, then how are you different from those in the First Ecumenical Council who were defeated notwithstanding their insistence that the ritual of circumcision (not mandated by Christ) was required to be a Disciple of Christ.

I love rituals and traditions as much or more than the next person. And I have come to appreciate most (although not all) of the rituals and traditions of my Greek Orthodox Church. However, as an Orthodox seminary distinguished professor confirmed to all the Orthodox Bishops, man-made lowercase "t" traditions and lowercase "p" practices have changed over time depending on the circumstances and place and were not mandated by Christ. Thus, perhaps, they are not foundational to being a Disciple of Christ.

In fact, Christ made clear in John 13:34-35 that we would be known as His disciples if we had love for one another. He didn't mention using incense or speaking only Greek, bowing, genuflecting, crossing ourselves, singing, chanting, not using guitars, and on and on for all the things that DDs cite to divide OIC (and many of which I choose to do, without judging others who do not).

I know some of my Christian friends from various denominations will want to challenge me on this. Some of my Denomination will insist that unless you do everything exactly like is done in American Greek Orthodox churches today, you are schismatic, a heretic, charlatan, apostate, heterodox, not a "real" Christian (and a few more invectives I have heard used by supposedly holy people). Please let me challenge my brothers and sisters with a few questions.

When the Ottoman Turks invaded Greece and banned religion, forcing the Greek Orthodox faithful to perform secret services and religious education in caves (as featured

on the old two Drachma currency in Greece), were they no longer Christians? Their Church, services, rituals, and practices looked nothing like yours do today. But I would advise you to be cautious about challenging their discipleship or piety. Indeed, perhaps we should add to the Foundational Christian Truth list NOT sitting in judgment of others as directed by Romans 14:11.

If one group wants to follow a Patriarch in Antioch and another in Rome, so be it. If a group following the Foundational Christian Truths wants one language and a particular type of service, while a different House of God wants a different language or ritual, how does that violate the OIC our Lord prayed for us at the end of His life? The early Church proved this is not a problem. The Gentile Church in Corinth was different from the Jewish Church in Jerusalem. But they were both ONE body in Christ regardless of their various practices. What else can St. Paul be telling us in Galatians 3:28? Indeed, the Orthodox Study Bible footnote for this passage specifically teaches:

We share one human nature in Christ. Therefore, valuing people based on opinions and ethnicity (neither Jew nor Greek), pride and social status (neither slave nor free), or gender (neither male nor female) has no place in the Church. All are one in nature, and so all are equal in dignity (p. 1593).

Before you stop reading and anathematize me, please prayerfully consider what it means for us ALL to be One In Christ and why you feel the need to declare anyone else not worthy of the title "Disciple." If this sinful and unworthy servant is ever permitted into the Kingdom Eternal with Christ, I want to meet the penitent thief on the cross who committed such sins that he merited death by crucifixion. And yet, he was saved by our Lord's Grace. I do not know for sure, but I am reasonably confident he never attended a Roman Catholic Mass or Orthodox Divine Liturgy and probably failed to "properly" fast or participate in the sacraments. And yet, Christ saved him and allowed him to be the first to enter the Kingdom Eternal with Him.

After the horrible schism in 1054 AD, no one thought unity was possible ever again. Then, many centuries later, two men, a Pope and an Ecumenical Patriarch, changed their minds and lifted the respective man-made ex-communications. When the Oriental Orthodox men had different interpretations of the nature of Christ from the other Eastern Orthodox men, there was also a disagreement between men and not Christ. And now, centuries later, those man-made divisions have primarily been reconciled.

If you look at all the differences in the world, it was because men intervened, came up with their interpretations or practices, and were willing to divide Christ's Church to prove they were right. I find that completely an anathema to Oneness In Christ. And I am ashamed of the arrogance and lack of humility it shows when looking at anyone else who believes in Christ, embraces the Foundational Christian Truths, and declares that person any less of a Disciple of Christ. (By the way, I am not picking only on the male gender, as I suspect females have had their moments of schism. I am merely identifying humans as the source of all division and acknowledging it always seemed to be men in charge who created our most significant divides.)

Yes, I am a proud Greek Orthodox Christian, and yes, I am honored to be an Archon and serve my Ecumenical Patriarch, Archbishop, Metropolitan, parish priests, and fellow Disciples of Christ, with whom I sometimes disagree on non-Foundational Christian Truths. However, all human leaders (including me) come and go and change over time as they die on this earth and transition to the Kingdom Eternal. The one leader who NEVER changes is the ultimate Divine Leader, Jesus Christ. It is to my Divine Savior that my unabashed loyalty remains in perpetuity. And since He commanded me to love (not just tolerate) everyone else and to seek Oneness with Him, my Creator, and the Holy Spirit, who guides my life, then that is what I will do.

So, if you believe in certain **Foundational Christian Truths** that are non-negotiable because Christ (not me or some other human) said they were, then what other traditions you follow or how you conduct your services makes you no less a Christian than me. Just as how differently you decorate your house makes it no less a house. This is why my Roadmap asks if you are a DD (Denominational Disciple) who must insist all your practices and non-foundational beliefs are the only true and correct practice, or are you an OICD (Oneness In Christ Disciple) who follows what Christ says and is unwilling to divide His Church by man-made ritualistic differences that constantly change over time.

In many old churches, the men were on one side and the women on the other. There were no pews, choirs, air conditioning, and many other ritualistic differences that are no longer practiced in any modern American Christian church. This does not make your parish or mine any less Christian, especially when the **Foundational Christian Truths** (concrete foundation) upon which everything rests are the same. The differences in construction, appearance, or other lowercase “t” traditions and lowercase “p” practices honored in the different houses are less critical than unabashed loyalty to the foundation that is Christ. I ask you to pray about this and for unity and OIC.

## [How Does The Miracle of Pentecost Fit In? \(the “Pentecost Principle”\)](#)

It would be impossible to briefly describe the power and importance of a singular event in history that transformed all of history. In the most straightforward lay description, on Pentecost, the Apostles gathered together were literally “smacked upside the head” (as we say down South) by a Divine force that was promised throughout history but finally appeared. It took the form of powerful winds and fire to underscore its singular importance. As the promised third person of the Holy Trinity, the Holy Spirit descended on the Apostles, the unimaginable occurred. They immediately could speak perfectly in different languages (tongues) so that everyone could understand what they were saying. I believe this has both a practical and metaphorical impact that we should not miss. I call it the **“Pentecost Principle.”**

To be sure, among the messages I take and preach from this history-changing event is the necessity of those who impart the word of God and Christ to do so in the language of the people to whom they are speaking. But it must also mean that there is still OIC (Oneness in Christ) notwithstanding such vast diversity.

I am reminded of this fact every time I watch an Orthodox Divine Liturgy in Africa on YouTube. Not only is the language entirely different, but how they celebrate the Divine Liturgy looks nothing like what I see in the U.S. every Sunday. (Watch this joyous communion dancing at the end of the Divine Liturgy: <https://www.youtube.com/watch?v=3VNptldyVzo>. Here are a variety of joyous celebrations of the Eucharist: <https://www.youtube.com/watch?v=yIKo-55vlhM>)

Notice that the entire congregation and even the clergy are dancing and singing (what, I cannot tell you) in a most joyous celebration of this sacred tradition. I unreservedly accept the **Pentecost Principle** that these faithful Orthodox Christians are celebrating the primacy of the same God, Christ, and Holy Spirit I accept, albeit in a method more suitable to their culture and traditions. I refuse to sit in judgment of their differences and ignore their OIC because they do not use the language, instruments, or methods I am accustomed to.

To me, the Pentecost Principle is The Holy Trinity's acknowledgment that we can speak different languages and indeed express our faith in various practices and traditions and still believe in "One God, Father almighty..." and in "...one Lord Jesus Christ, the Only Begotten Son of God..." and the Holy Spirit, the Lord, the Creator of life..." And yes, with those Foundational Christian Truths mutually shared, I can still accept you as my brother or sister in Christ even if you do things differently than me or hierarchically report to different church leaders (Bishops, Popes, Patriarchs, etc.) and even have a distinct linguistic human understanding of specific Biblical passages.

### **St. Paul's Constant OIC Teaching.**

St. Paul redirected our attention so that we must use our unique skills to serve the same God who united everyone and kept us focused on unity and not divisiveness (Allen et al., 2008). St. Paul consistently preached the unity of people in one Spirit, even among people of different circumstances (Ephesians 4:1, Romans 12:1-2, Romans 15:1-6). In his ministry, St. Paul advised everyone to remain humble in their faith (Ephesians 1:1) as we acknowledged our servanthood (Lingenfelter, 2008). St. Paul practiced what he preached by referring to himself as the least of the Apostles (I Corinthians 15:9), even though his teachings and letters compose the most material part of what we acknowledge as the New Testament.

St. Paul's Ephesians 4:1 "mic-drop moment" was a proclamation, "***I, therefore, the prisoner of the Lord, beseech you to walk worthy of the calling with which you were called...***" He claimed authority as the Lord's prisoner/servant, yet he did not command a particular behavior (Duvall & Hays, 2012). Instead, St. Paul humbly pleaded with all people to understand everyone was called to a unique life and faith journey.

St. Paul told all Jews, Gentiles, and others they were each called to use their unique gifts. He also diverted their focus from God's gift to them to their obligation to do something with those gifts (Allen et al., 2008, p. 1603). Thus, everyone with "*ears to hear*" (Matthew 11:15) can thank God for their gifts as they recognize their duty to use



them righteously while celebrating the diversity of others around them who have different blessings.

By now, dear reader, it should be clear that I am strongly advocating you join me in getting serious about ***Εἰς μίαν, ἁγίαν, καθολικὴν καὶ ἀποστολικὴν Ἐκκλησίαν***” **One, holy, catholic, and apostolic church**. To do this difficult work, let’s explore how all American Orthodox Christians can be united in an OIC American Orthodox Church and how the Roman Catholic Church (and eventually other Christian Denominations) can join the American Orthodox Church to form the American Christian Church and rebuild Christ’s unified House of God based on **Foundational Christian Truths**.

# CHAPTER 16. Orthodox Unity - The AOU (American Orthodox Unity) Roadmap.

## Brief Ortho-history.

Much has been written about the formation and history of the Orthodox Church and its various iterations and divisions over time. Historians and theologians love to debate the nuances and demonstrate why their understanding of history is correct, and others are wrong. And they are more competent than I am at engaging in such scholarly discussions/debates.

If one reads the history of the early Christian Church, one cannot help but recognize that it was subject to substantial variations and differing interpretations demonstrative of humans attempting to stay true to what they thought was their understanding of the Lord's ministry and words. I express no criticism or other judgment regarding the significant number of such interpretive disagreements that one might expect when humans are involved in a deliberative process.

Thus, in keeping with the principal message of the **Oneness In Christ (OIC)** and the identified **Foundational Christian Truths** in Chapter 15 of my Roadmap, I do not engage in such discussions and sometimes arrogant antagonisms that distract from a focus on Jesus Christ. I focus on the **PAT (Practical Applied Theology)** and how one can live as a disciple of Jesus Christ in today's America as best as a layperson can understand it. I leave it to others who are more competent and willing to debate how many angels can dance on the head of a pin and to which jurisdiction such angels belong. As for me, I have enough trouble being a disciple of Christ in today's times without such distractions.

And for my Orthodox colleagues who take issue with unity (for reasons I do not understand), I offer the direct words of the Orthodox Ecumenical Patriarch: "**That the past and present bestowals of the ecclesiastic status of Autocephaly have only aim: 'the orderly functioning of any individual church, and not the production of false impressions and division of the One, Holy, United and Apostolic Church of God.'**" The clarity of our Orthodox Ecumenical Patriarch specifically reminds us of the very call for unity. OIC began with our Lord's prayer before the end of his earthly life, which was affirmed in the Ecumenical Council of Nicaea.

As an aside, there are several treatises that I believe attempt to provide a fairly dispassionate and truly outstanding historical account, which are worthy of consulting if you have questions. Several such texts, including the well-written and thorough new history, are represented by Bouteneff (2017), Geffert & Stavrou (2016), McGuckin (2014), McGuckin (2020), and Ware (2015).

I have spent countless hours absorbing expert theologian and historian Dr. Peter Bouteneff's (2017) Eastern Orthodox history book, which provided an incredibly comprehensive explanation of the roadmap of Eastern Orthodoxy. And if you are

objective and dispassionate (which is hard for a cradle Orthodox to be), the reality is that every decision, argument, issue, and division within Orthodoxy was always the result of a couple of men arguing. And whoever had greater political (or military) clout prevailed.

A good historian is able to explain how those arguing men made logical points. Yet, we dogmatically hold onto every final decision as if it came from the Lord himself rather than honestly acknowledging it to be mostly the result of who had more power and influence and thus won the argument (or war). Perhaps you will argue that the Holy Spirit guided every decision, and I pray that is the case. However, reading the objective history tells a story suggesting that it always came down to disputes among men who used military, governmental, or other superiority of numbers to prevail. And before you argue with this conclusion and tell me where I am wrong, read Bouteneff (2017).

I recognize the **Denominational Disciple Antagonists (DDA)** who all claim extreme pioussness and confident correctness in disputing some of these historical accounts because they do not fully support their DDA purity tests. However, for purposes of my Roadmap, it is enough to assert that the Orthodox Church (in the fullest sense of that phrase) attempts as much as humanly possible to be the extension of the early church of Jesus Christ. However, like all other Christian denominations, particular practices and beliefs were resolved by different men over time using power, influence, and conquest. Something about this reality sounds antithetical to a conversation about Christ's church.

However, in making such a statement, I am not advancing a DDA argument that Orthodoxy is the only true religion, as no human is capable of making that statement definitively with assurance, notwithstanding the stridency of their advocacy. The record of men arguing and fighting (not always just politely disagreeing) tells a different story. I nevertheless concede that, for the most part, many of the leaders in charge of the Orthodox Church in history generally tried to stay as true to the teachings and practices of Christ, the Apostles, and the early Church. Throughout the messy history of disputes and disagreements, Eastern Orthodoxy has mostly maintained a conciliar approach through synods of Bishops using a consensus decision-making process attempting to mimic the Apostles closely.

Along the way, in 451 AD, a division within the Orthodox Church occurred between

(a) the "**Oriental Orthodox Churches**" (derived from the Latin word "*orientalis*," meaning "Eastern") consisting of the

1. Coptic Orthodox Church of Alexandria,
2. Syriac Orthodox Church of Antioch,
3. Armenian Apostolic Church,
4. Malankara Orthodox Syrian Church,
5. Ethiopian Orthodox Church,
6. Eritrean Orthodox Church), and

(b) the rest of the Orthodox churches, frequently referred to as the "**Eastern Orthodox Churches**," are listed in the Section on the State of Orthodoxy below.

Simplistically stated, the division within Orthodoxy arose when the Oriental Orthodox Hierarchs did not accept the decision of the Council of Chalcedon that Jesus Christ was “one person in two natures” (simultaneously fully Divine and fully Human) vs. their belief that Christ was one nature of God. (Theologians and scholars would add substantially more words in describing this distinction that is beyond the scope of my Roadmap and unnecessary to make my point.) Nevertheless, some theologians and DDA purists continue this debate today even though it is of no consequence to the **PIPs (Parishioners In Pews)** in any Orthodox church.

I can say this comfortably because in doing strategic plans and many other programs for Orthodox parishes in both branches of Orthodoxy, the PIPs cannot describe why Eastern and Oriental Orthodox are separated theologically (although we have different rituals). It just does not matter in today’s America, especially when we have common needs to address and common enemies to fight rather than fight each other. Indeed, due to intra-Orthodox and Orthodox/Roman Catholic theological dialogues, the differences are much closer to being reconciled depending on whom you listen to, again, except for those DDAs for whom the only truth is their own.

### Popes And Patriarchs Are Tired Of Division.

To make my point that it is time to move on, *Pope John Paul II and His Holiness Iwas, Patriarch of Antioch and All the East, stated (Paul & Iwas, 1984):*

First of all, Their Holinesses confess the faith of their two Churches, formulated by the Nicene Council of 325 AD and generally known as "the Nicene Creed." The confusions and schisms that occurred between their Churches in the later centuries, they realize today, in no way affect or touch the substance of their faith, since these arose only because of differences in terminology and culture and in the various formulae adopted by different theological schools to express the same matter.

**Accordingly, we find today no real basis for the sad divisions and schisms that subsequently arose between us concerning the doctrine of Incarnation.**

In words and life, we confess the true doctrine concerning Christ our Lord, notwithstanding the differences in interpretation of such a doctrine which arose at the time of the Council of Chalcedon. Hence, we wish to reaffirm solemnly our profession of common faith in the Incarnation of our Lord Jesus Christ, as Pope Paul VI and Patriarch Moran Mar Ignatius Jacoub III did in 1971. (emphasis added).

More relevant to my Roadmap is the arrival of Orthodoxy to America and the formation of what I call the **American Orthosphere**. Russian Orthodox claim the first arrival through Alaska, and others refer to the first of the immigrants from their homeland to America. Again, reconciling that history is of no importance to me, nor is it necessary for the confirmation of OIC. It is enough for our purposes to say that immigrants to America came from many different Orthodox countries at various times and to many parts of our country.

Equally true is the reality that when those immigrants arrived (like my grandparents and parents), they immediately and quite naturally congregated together with those who spoke a common language, ate common foods, celebrated common traditions, and dealt with common prejudiced behaviors directed at them by others. As a result, these immigrants formed the earliest American Orthosphere churches that continued the language and traditions of their foreign homeland.

These pioneers sought to recruit clergy from “the old country” to come to America to conduct church services. These forefathers built countless churches in every part of their new American homeland. Because they carried forward their traditional teachings, they naturally also generally continued their allegiance to the respective Patriarch of their previous homeland. Thus, the Greeks held their ultimate allegiance to the Ecumenical Patriarch (EP) in Constantinople (Istanbul), while the various branches of the Russian churches-maintained allegiance to the Patriarch of Moscow, the Lebanese immigrants to the Patriarch of Antioch, the Serbian immigrants to the Patriarch in Serbia and so on.

As a result of this approach, certain linguistic, cultural, and other ethnic traditions differed from one American Orthosphere jurisdiction to another. Yet, regardless of to which ultimate heir to the Apostles they reported, the commonality of the Orthodox faith and worship practices remained largely the same. Indeed, as we exist today, the 12 Eastern Orthodox Jurisdictions in America all remain “in communion” with each other such that I can equally attend any of those parishes and participate in the same liturgical and sacramental practice. Indeed, my wife and I are stewards of three different Greek Orthodox parishes and one Antiochian parish. As I work with parishes of every Orthodox Jurisdiction, I attend and preach in their parishes. Most importantly, the sacramental celebration of the Eucharist (body and blood of Christ) is identical so that I can partake in this most high sacrament at any Eastern Orthodox parish.

Nevertheless, language differences remain the largest distinctions. Parishes with high concentrations of PIPs from one ethnic heritage will see the language of the homeland being used significantly, even though they have been in America for over a century. The language issue is the “third rail” issue I briefly addressed in Chapter 14 of my Roadmap, and I will not reengage in that discussion here.

### [What Is The Current State Of Orthodoxy “Εἰς μίαν, ἁγίαν, καθολικὴν καὶ ἀποστολικὴν Ἐκκλησίαν” One, Holy, Catholic, and Apostolic Church.](#)

The current Orthodox Christian Church in the United States remains divided into the following 18 different, unequal, sub-optimally resourced, and operationally challenged and struggling fragments. Each of these individual church units is referred to as a “**Jurisdiction**” within the American Orthosphere.

The list below includes the 12 “**Eastern Orthodox Jurisdictions**” present in the United States and the mother church and Patriarchate under whose “ὠμοφόριον” (O-more-fore-ion) they belong. (The ὠμοφόριον translates to “something borne of the shoulder” and refers to the pastoral vestment worn by the Bishop under whose jurisdiction they remain.)

**A. Under The Ecumenical Patriarchate:**

1. Greek Orthodox Archdiocese of America
2. American Carpatho-Russian Orthodox Diocese of the USA
3. Ukrainian Orthodox Church of the USA
4. Albanian Orthodox Diocese

**B. Under The Patriarchate of Antioch**

5. Antiochian Orthodox Christian Archdiocese of North America

**C. Under The Patriarchate of Moscow**

6. The Moscow Patriarchal Parishes in the USA
7. Russian Orthodox Church Outside of Russia

**D. Under The Patriarchate of Serbia**

8. Serbian Orthodox Church in North, Central and South America

**E. Under The Patriarchate of Romania**

9. Romanian Orthodox Metropolia of the Americas

**F. Under The Patriarchate of Bulgaria**

10. Bulgarian Eastern Orthodox Diocese of the USA, Canada, and Australia

**G. Under The Patriarchate of Georgia**

11. Georgian Apostolic Orthodox Church in North America

**H. Claiming Autocephaly from the Moscow Patriarchate**

12. Orthodox Church in America

The Eastern Orthodox Jurisdictions in the United States do not include the "Oriental Orthodox Churches," which were united with the other Eastern Orthodox churches until the Council of Chalcedon in 451 AD when a division occurred over differences in Christology. They are comprised of the following six autocephalous churches:

1. Coptic Orthodox Church of Alexandria
2. Syriac Orthodox Church of Antioch
3. Armenian Apostolic Church
4. Malankara Orthodox Syrian Church
5. Ethiopian Orthodox Church
6. Eritrean Orthodox Church

The above division is far from the righteous Nicene Creed Unity Vision of “ONE, holy, catholic, and apostolic church.” It also does not model the melting pot vision of the United States of America and the culture of unconditional and sacrificial love in Christ’s new commandment (John 13:34-35). Thus, the American Orthosphere in this land of religious freedom remains largely splintered along historic foreign ethnic lines with all the inefficiencies, challenges, and difficulties one would expect in a divided house.

The seminal question is: Does Christ want His Orthodox Churches in America to be a “**House Divided**” or a “**House United**” in keeping with the Nicene Creed Unity Vision? I want to explore the Unity Vision cast in the Nicene Creed by asking this seminal question in 4 parts and looking at answers from the perspective of:

Part 1. Christ and Holy Scripture,

Part 2. The presiding Patriarchs and Hierarchs of the Orthodox Mother Churches,

Part 3. The Hierarchs of the Eastern Orthodox Jurisdictions in the United States,

Part 4. Best leadership and operational practices.

If the above four perspectives support a “House Divided,” then the status quo should continue. If the answer demands a “House United,” then my Roadmap must lead to a unified American Orthodox Church (“**AOC**”), which I will present as my high-level Unity Vision. Ultimately, the Holy Spirit must provide a definitive answer and plan.

## **Part 1. Do Christ And Holy Scripture Call For A “House Divided” Or A “House United”?**

This is an easy question to answer. I could find no Biblical authority arguing for a “House Divided.” However, it was easy to read endless authority mandating a “House United.” For example (emphasis added in each quote):

- (a) *“Now I plead with you, brethren, by the name of our Lord Jesus Christ, that **you all speak the same thing, and that there be no divisions among you, but that you be perfectly joined together in the same mind and in the same judgment**” (I Corinthians 1:10).*
- (b) *“In God’s House we walked in **UNITY**” (Psalms 54:15).*
- (c) *“The **UNITY** of the Church is shown by new communities being under the authority of and in communion with the Church of Jerusalem.” (Orthodox Study Bible, 2008, footnote to Acts 8:14, p. 1482).*
- (d) *“For as many of you as were baptized into Christ have put on Christ. There is neither Jew nor Greek, there is neither slave nor free, there is neither male nor female; for **you are all ONE in Christ Jesus**” (Galatians 3:27-28).*
- (e) *“Here for the first time Paul rebukes the Corinthians, pleading with them in the name of the Lord to put away divisions and maintain **UNITY** in the church” (Orthodox Study Bible, 2008, Footnote to I Corinthians 1:10, p. 1552).*

- (f) “**The church is an organic whole... One who would break this unity would desecrate a sacred place**” (Orthodox Study Bible. Footnote to I Corinthians 3-17 (p. 1554).
- (g) “*Now I say this, that each of you says, ‘I am of Paul,’ or ‘I am of Apollos,’ ... or ‘I am of Christ.’* **Is Christ divided**” (I Corinthians 1:12)?
- (h) “*For I fear lest, when I come, I shall not find you such as I wish...lest there be contentions, jealousies, outbursts of wrath, selfish ambitions, backbiting whisperings, conceits, tumults.*” “*Paul is more impressed with **the miracle of unity and harmony than with physical miracle***” (Orthodox Study Bible, 2008, footnote to II Corinthians 12:20, p.1586).
- (i) “*For He Himself (Christ) is our peace, who **has made one, and has broken down the middle wall of separation...***” (Ephesians 2:14).
- (j) “*...even when we were dead in trespass, **made us together with Christ... and raised us up together, and made us sit together in the heavenly places in Christ Jesus...***” (Ephesians 2:5-6).
- (k) “*I do not pray for these alone...that they **all may be one, as You Father are in Me, and I in You; that they also may be one in Us...***” (John 17:20-23).
- (l) “*Now therefore, you are no longer strangers and foreigners, but **fellow citizens with the saints and members of the household of God***” (Ephesians 2:19).
- (m) “*...having been built on the foundation of the apostles and prophets, Jesus Christ Himself being the Chief cornerstone, in whom the whole building being fitted together, grows into a holy temple in the Lord, **in whom you are also being built together for a dwelling place of God in the Spirit***” (Ephesians 2:20-22).
- (n) “**Pursue peace with all people and holiness, without which no one will see the Lord**” (Hebrews 12:14).
- (o) “*...for you were slain, and have **redeemed us to God by your blood out of every tribe and tongue and people and nation...***” (Revelation 5:9).

I could go on, but the answer to the seminal question from our Lord and Holy Scripture is an unqualified YES to a “House United” American Orthodox Church!

## **Part 2. Do The Presiding Patriarchs Of The Mother Country Orthodox Jurisdictions Call For A House Divided Or A “House United”?**

This question is also easy to answer. The **Assembly of Canonical Orthodox Bishops of the United States of America (“ACOBUSA”)** was formed to end “Canonical anomalies” and bring about an Orthodox “House United” in America (the **“ACOBUSA’s Charge”**). The ACOBUSA was established by the **“Chambésy Decision”** of the Patriarchs and Heads of the Autocephalous Orthodox Churches at



The Fourth Pre-Conciliar Pan-Orthodox Conference held in Chambésy, Switzerland, June 6-13, 2009.

The Chambésy Decision can be found here:

<https://www.assemblyofbishops.org/about/governance/chambesy/decision>.

The Chambésy Communique can be found here: <https://www.assemblyofbishops.org/about/governance/chambesy/chambesy-communique>).

**Article 2** of the Rules of Operation of the ACOBUSA, as outlined in the Chambésy Decision, provides explicitly (emphasis added):

The purpose of the Episcopal Assembly is to manifest the **unity of the Orthodox Church**, to promote collaboration between the churches in all areas of pastoral ministry, and to maintain, preserve, and develop the interests of the communities that belong to the canonical Orthodox Bishops of the Region.

**Article 5 - Section 1** of the Chambésy Decision provides the ACOBUSA is:

- (a) to safeguard and contribute to the **unity of the Orthodox Church of the Region** in its theological, ecclesiological, canonical, spiritual, philanthropic, educational, and missionary obligations...
- (e) The preparation of a plan to **organize the Orthodox of the Region on a Canonical basis**.

This later reference to organize on a Canonical basis refers to the Holy Canons of the Orthodox Church, which are binding on the faithful. For example, Canon 8 of the 1st Ecumenical Council prohibits “two bishops in the (same) city.” (Orthodox Metropolitanate of Singapore and Southeast Asia, n.d.) Even St Cyprian, in a letter to Cornelius in 251 AD, confirmed the One Bishop Rule as follows: “For we are not ignorant that there is one God; that there is one Christ the Lord whom we have confessed, and one Holy Spirit; and that in the Catholic Church there ought to be one bishop” (Cyprian, 251).

Thus, the Chambésy Decision and ACOBUSA's Charge point toward a “House United” American Orthodox Church. Currently, several cities in the United States have more than one Bishop (of different Orthodox Jurisdictions) presiding in violation of this Canon (e.g., New York, Chicago, Pittsburgh, and San Francisco.)

### **Part 3. Do The Current Bishops Of The ACOBUSA Call For A “House Divided” Or A “House United”?**

The ACOBUSA 's Charge arising from the Chambésy Decision is to end the Canonical anomalies and create a “House United.” Indeed, a critical observation is that ACOBUSA is intended to disappear once an Orthodox Unity Vision is achieved in America. Additional proof that the ACOBUSA Bishops have accepted this “House United”

American Orthodox Church Unity Vision can be found in the Statement of WHY (Purpose), Mission Statement, and Vision Statement adopted unanimously by the Bishops of the ACOBUSA in 2020. They read as follows:

### **ACOBUSA's Statement of WHY (Purpose)**

“To bring people (the clergy, monastics, and laity) closer to Christ and each other.”

### **ACOBUSA's Mission Statement**

“To preserve and contribute to the unity of the Orthodox Church in the United States of America by furthering her spiritual, theological, ecclesiological, canonical, educational, missionary, and philanthropic aims.”

### **ACOBUSA's Vision Statement**

“Within the next three years, the ACOBUSA will measurably enhance (a) Orthodox Christian Unity & Outreach; (b) Common Orthodox Witness; (c) Ministries & Initiatives; and (d) Organizational Excellence.”

The Bishops of the ACOBUSA made it unequivocally clear that their objective of “bringing people closer to Christ and each other” is through a “House United” American Orthodox Church.

## **Part 4. Do Best Leadership And Operational Practices Call For A “House Divided” Or A “House United”?**

Previously cited empirical data demonstrated that the Orthodox Church in the U.S. has (a) lost 47% of its cradle Orthodox adults, (b) a 64% youth dropout rate, (c) at least 39% of youth repudiating their faith, (d) only a 26% regular church attendance rate with parishioner minds wandering about 75% of the time, (e) experienced a 16.7% decline in parishioners in just the last decade, and (f) 99% of the parishes dependent on festivals, rentals, and outsiders to fund their churches. The fragmented approach of separate Jurisdictions is not the cause of all these challenges. Still, the Unity Vision of a unified **American Orthodox Church (“AOC”)** can develop best-in-class synergistic strategies and solutions to address most of the root causes creating these unacceptable results.

One unified organization is inevitably more robust and efficient than 12 divided and sub-optimally resourced fragments. Even leaving aside the 6 Oriental Orthodox Jurisdictions, each of the 12 Eastern Orthodox Jurisdictions has its own separate and redundant offices, governing bodies, rules, ministries, administrative functions, personnel, technologies, insurance, financial operations, etc.

None of the separate Orthodox Jurisdictions' offices or ministries are fully staffed as their needs require, and many smaller ones have virtually no staff. The technology and systems are severely lacking in most Orthodox Jurisdictions, and there is often little consistency or accountability between and among the Jurisdictions and their parishes. Best practices or metrics to determine optimum success are also usually lacking.

It is grossly inefficient to “recreate the wheel” 12 (or 18) times, with each Orthodox Jurisdiction attempting to offer the same things. The mere act of consolidating Jurisdictions will produce significant savings and economies of scale efficiencies that can be reinvested into collective ministries, staff, and services that bring people “closer to Christ and each other.” More importantly, a “House United” AOC could identify and implement best practices in ministries, services, leadership, parishioner engagement, stewardship, finance, and operational excellence across and within all Jurisdictions with greater effectiveness and efficiency.

For example, there are at least 8 Eastern Orthodox Seminaries among the ACOBUSA Jurisdictions:

1. Saint Vladimir's Orthodox Theological Seminary (Crestwood, NY),
2. Holy Cross Greek Orthodox School of Theology (Brookline, MA),
3. Saint Tikhon's Orthodox Theological Seminary (South Canaan, PA),
4. St. Stephen's Course in Orthodox Theology / Antiochian House of Studies (Distance/Boliver, PA),
5. Holy Trinity Orthodox Seminary (Jordanville, NY),
6. Saint Herman's Orthodox Theological Seminary (Kodiak, AL),
7. St. Sophia Ukrainian Orthodox Theological Seminary (South Bound Brook, NJ),
8. Christ the Saviour Carpatho-Russian Seminary (Johnstown, PA).

There are at least four more Oriental Orthodox Seminaries;

1. St. Nersess Armenian Seminary (New Rochelle, New York),
2. & 3. Pope Shenouda III Coptic Orthodox Theological Seminary (New Jersey and Los Angeles),
4. St. Athanasius Theological Seminary (San Antonio, Texas).

None of these Seminaries have enough seminarians to fully support all operating and capital expenses of the Seminary and fill all the current church clergy vacancies, let alone the significant number of imminent “Baby Boomer” clergy retirements. I recently heard one estimate suggesting as many as 20%-30% of clergy are within five years of retirement.

While some of the Seminaries are land-rich, they are often cash-flow-poor. They also frequently lack faculty with extensive publications and scholarly works, sufficient seminarian scholarships and financial aid, and other resources to be top educational theological institutions that properly prepare clergy to excel in today’s challenging times and environments. Some seminary consolidation could be extremely beneficial, as discussed in my strategic foresight future smart analysis for Orthodox seminaries previously addressed in Chapter 12 of my Roadmap. In this way, a “House United” can inevitably improve resource allocation and many measurable aspects of clergy and laity spiritual education.

A "House United" Unity Vision provides many other substantial operational synergies. Due to various surveying inadequacies, the current number of faithful in each ACOBUSA Jurisdiction is impossible to identify accurately. However, the last attempt to do so resulted in the "2020 Orthodox Census" based on research conducted for the 2020 Faith Communities Today survey (Krindatch, 2020).

Leaving aside the Oriental Orthodox parishes for now, this 2020 Orthodox Census of the Eastern Orthodox within the ACOBUSA showed the parishioners are most significantly consolidated in the "Big 4" Jurisdictions, which account for over 86% of the total number of all ACOBUSA parishioners:

- (a) Greek Orthodox Archdiocese (GOA) has approximately 55.7% of the faithful,
- (b) The Orthodox Church in America (OCA) has approximately 11% of the faithful,
- (c) Antiochian Orthodox Christian Archdiocese (AOCA) has approximately 10.6% of the faithful,
- (d) The Serbian Orthodox Church in North America (SOCNA) has approximately 8.9% of the faithful.

The other 8 ACOBUSA Jurisdictions combined comprise only about 13.9% of the faithful. This concentration of faithful should make unity easier in one sense. However, the degree to which parts of three of the Big 4 Jurisdictions are strongly tied to a foreign homeland ethnic identity presents some practical challenges that must be addressed.

What is more telling is the size of the parishes in each Jurisdiction. The 2020 Orthodox Census found that the median number of adherents across all ACOBUSA parishes is 130 per parish (whereas it is approximately 292 in the Oriental Orthodox parishes) (Krindatch, 2020). However, the number of adherents varies widely by Jurisdiction. For example, there is a median of approximately 350 and 300 adherents in the GOA and SOCNA, respectively, versus only 150 and 95, respectively, in the AOCA and OCA (Krindatch, 2020).

Obviously, the smaller the parish, the harder it is to have the staffing, critical mass, support, ministries, volunteers, financial stewardship, and many other resources that some of the larger parishes have available. The FACT 2020 analysis concluded that the larger the parish, the faster it grows (Thumma, 2021).

In addition, most Bishops identified parishes in their Jurisdiction without clergy or sufficient parishioners or resources that will likely need to be closed or consolidated. The massive shortage of clergy both now and projected into the future portends another adverse trend for the American Orthosphere parishes (Namee, 2023). Thus, inevitable parish closures and consolidations must occur. By strategically consolidating parishes without clergy or sufficient critical mass or resources, we create more robust and effective parishes to bring people closer to Christ and each other.

## The Failure Of The Existing American Orthosphere Jurisdictions To Provide Proven And Practical Solutions To Address Their Parishes Most Critical S<sup>3</sup> Challenges - Change Is Needed.

By the grace of God through my Stewardship Calling ministry, I have now completed free strategic plans for Orthodox Jurisdictions, Metropolises/Diocese, and parishes that, taken together, include 26% of Eastern Orthodox Christians in America. In addition, this extensive statistically significant data plus the additional empirical results from the greater than 50 American Orthosphere parishes that have completed my **Effective Parish Assessment (EPA)** (discussed in Chapter 7 of my Roadmap) have demonstrated that given the relatively small size and insufficient resources in most parishes, Dioceses, and Jurisdictions, shared solutions to address identical or similar problems are not being developed or efficiently disseminated from the national churches.

My Roadmap humbly attempts to address the most significant **S<sup>3</sup>** challenges (**S**ervant Leadership, **S**tewardship & engagement, and **S**piritual formation and religious education) identified from the American Orthosphere data, as confirmed by other empirical data in Christian churches. Here is the most significant indictment of the existing jurisdictions. **None of the American Orthosphere jurisdictions have developed proven, best-in-class, and comprehensive processes, programs, or teams to address the major S<sup>3</sup> challenges their parishes are facing**, as identified in my Roadmap. If the national Jurisdictions had complete and proven programs to address the S<sup>3</sup> challenges, my Roadmap would be unnecessary.

Thus, if the proven solutions in my Roadmap or other tested and validated solutions to the major parish S<sup>3</sup> challenges were developed and delivered by the national American Orthosphere Jurisdictions, the parishes' most significant root cause problems would be addressed. My Stewardship Calling ministry, on its own, and a few others, have done what they can to address these S<sup>3</sup> issues when parishes have requested assistance.

However, the continued failure (regardless of reasons) of the national American Orthosphere Jurisdictions to provide bona fide best-in-class solutions their parishes can successfully implement to address their biggest challenges is proven by the declines previously noted in the data. Overall, as previously presented, Orthodoxy in America has declined from 0.5% of the U.S. in 1922 to 0.3% in 2022. This failure, plus the identified continued struggles of so many of our parishes, demonstrate the status quo cannot continue. Again, all this makes me and others feel bad; however, facts do not care about our feelings.

By consolidating into an AOC that re-organizes around the best practices identified in my Roadmap or other sources and with a team trained and competent to assist the parishes in their implementation, the health and effectiveness of ALL parishes can be materially addressed. As it is, the parishes are left to fend for themselves. With inadequate resources to do the research and provide effective solutions, all American Orthosphere Jurisdictions and parishes are not thriving.

This massive and repetitive failure alone merits developing a “House United” approach with best practices, proven solutions, and trained teams achieving measurable results using my Roadmap or other best practices. As happens in the most effective mergers, an organized and unified AOC could aggregate all the talent, time, and resources necessary to develop best practices and programs to be delivered to strengthen the health and operational excellence of all Orthodox parishes.

There is much more I can say about the Orthodox Church’s operational assessment. However, after reading the above issues, it is easy to see that the Unity Vision of a “House United” American Orthodox Church can better address the challenges, reverse the dangerous parish health trends, and help bring people closer to Christ and each other!

### **“Woe To You Teachers Of The Faith!” - The Wake-Up Call.**

Dr. Cyril Hovorun, in his outstanding book Scaffolds of the Church Towards Poststructural Ecclesiology, noted that in the mid-nineteenth century, Metropolitan Filaret or Moscow stated: **“I dare not to call as false any church which believes Jesus is Christ”** (Hovorun, 2017). I submit for your consideration what I believe is the un-Christian inhumanity of criticizing those who similarly believe in the divinity of Jesus Christ, God, and the Holy Spirit but whose faith traditions and practices are different. Such an approach strikes me as arrogant, lacking in humility and love, and thus un-Christlike.

I sincerely find it reprehensible to criticize a person just because they think differently than me, or worse yet, condemn someone who, for whatever reason, does not know what I know. Note I am not suggesting any of our fellow Christian brothers and sisters are ignorant or less intelligent merely because they may be at a different place on their spiritual journey toward theosis. Just as we are called to love and help everyone, I find it personally abhorrent when we write or speak deprecating criticism of other Christians. Thus, I intentionally choose a different path.

I know the previous sentences may be taken poorly by those who have self-righteously criticized or belittled other Christians. However, I ask you to check your humility coefficient and challenge you to understand why you feel the need to put others down, call them names, or declare them to be wrong for you to feel more justified or right. I know just reading these words sounds wrong even to you. So please prayerfully consider why any of us feels it so important to proclaim our faith practices as “The Only Truth” and everyone else as an apostate or sinner and unworthy of the grace of God and Christ. The very history we love to cling to clearly shows how many (not all) expressions of our faith have been changed over time, even within each of our Jurisdictions. Please let us be humble and honest.

For those who must be right (regardless of the reason you use to justify it), perhaps you can help me understand your thinking by providing examples of where Christ criticized those sincerely on the journey to find Him. For most of those who did not fully understand His words or teachings, He was patient-loving and encouraged them to

continue their spiritual journey to a greater understanding of Oneness in Christ (OIC). There is a big “but” coming, though!

I have, however, found numerous examples where Christ very aggressively chastised the Pharisees and Sadducees for attempting to enforce a rigid adherence to their man-made rules and practices as they justified them as divinely provided and the only proper belief and practice. To those self-proclaimed “defenders” of their version of true faith, Our Lord had a harsh rebuke for their unloving and un-Christ-like care for their brothers and sisters.

I am always struck by Matthew 23, where the Lord repeatedly says “**WOE**” to you scribes (i.e., teachers of the faith) and Pharisees (the “separated ones” with their own beliefs surrounding Biblical Judaism). I confess that I wish we would rebuke people with the word “WOE” more than the many other words we use in modernity. However, particularly in Matthew 23:23, the Lord chastises those “spiritual leaders/teachers/clergy” by accusing them of focusing on certain important worldly things (“paying the tithe of mint and anise and cummin”) but neglecting “the weightier matters of the law: justice, mercy, and faith.”

I humbly request that all Christians irradicate our attitudes of superiority (or “privilege” as it is now frequently called). Instead, we can embrace ALL believers in the divinity of Christ, OIC, and Foundational Christian Truths as brothers and sisters at different places in our spiritual journey to theosis, even as we practice our faith differently or speak in a different language.

### The Convert Conundrum.

While the continued emphasis on religious differences is dissonant to me, please do not take the title of this section wrong. God bless all the converts! They can save the church. Still, in three decades of work throughout the Orthosphere, I have found this DD advocacy more common and vociferous among converts (clergy and laity) to a faith tradition than those born in it. Speaking with a dynamic convert clergyman finally allowed me to understand the reason for this general feeling and conduct. He said it far more articulately than what follows.

Essentially, he and others had believed in another Christian faith and eventually discovered inadequacies or unanswered questions and decided to see if they could find the “original church.” Upon discovering Orthodoxy and enthusiastically studying it in sufficient detail to accept it as “the truth,” when I told these convert sojourners that I thought something (read that, anything) might need to change in their Orthodox parish or church, it caused them to begin to question if they made the right decision to convert. Accordingly, they pushed back against my suggestions for improvement with extreme vigor, hiding behind the concept of a (misperceived) unchanged and unchanging true faith.

I finally understood the dilemma some of our beloved converts were facing that caused them to dig in their heels, resist all change, and announce others as heretics. But it also helped me understand the inadequacy of our catechetical education. I once

asked the most prominent Orthodox scholar and seminary faculty member if the Orthodox church had changed any over the centuries. (I will protect his anonymity even though he is quite public about his answer.)

He laughed vigorously and said the Orthodox church has been changing constantly throughout time. My previous discussion about the truth of history, as reported by Bouteneff (2017) and other accurate Orthodox historians, demonstrates how the Orthodox faith has changed over time as men, Bishops, clergy, disciples, Apostles, politicians, and warlords fight endlessly for “their” version of the truth.

Thus, to argue for rigid absolute consistency without any change whatsoever is not accurate Orthodoxy or historicity. Of course, what has not changed are certain **Foundational Christian Truths** that I attempted to begin to define in the “House of God” metaphor section in Chapter 13 of my Roadmap). There are, and must be, some immutable truths regarding Christ. However, the minute we believe we cannot change any of the operational aspects of our church or the way we practice our belief is the time we destine it to demise.

This is precisely the dispute that occurred in the early church that required the First Ecumenical Council, where the Apostles concluded the Jews could practice Christ’s teaching consistent with their traditions and practices (e.g., circumcision). At the same time, the Apostles concluded that the Gentiles could practice different rituals (e.g., non-circumcision, etc.) and still be considered disciples of Jesus Christ. It is easy to see that in the beginning, Christ’s church was defining itself, its practices, and even its traditions.

## [The Gospel According To Whom?](#)

Eventually, with the writing of Holy Scripture, there was a document to which one could refer. While scholars disagree on the dates, the early church existed for approximately 35 years before St. Mark wrote his Gospel, approximately 55 years until Sts. Matthew and Luke wrote their respective Gospels, and perhaps 65 or more years until St. John completed his Gospel. The time for St. Luke's Acts of the Apostles and St. Paul’s many letters to be compiled and the length of time before the New Testament (as we know it) was prepared meant Christ’s early Church must have operated in quite a dynamic and everchanging environment without a clear and definitive roadmap.

Add to that the inevitable iterations and dynamism experienced as St. Andrew tended his Greek flock, St. Thomas to his flock in India, St. Matthew to the Ethiopians, St. Jude in Antioch, St. Matthias in Cappadocia and wherever else the Apostles or their Disciples ventured. This was not the one-size-fits-church we imagine today. Nor was there a common playbook with everything spelled out. When you research when the first full New Testament was created, the plethora of answers is interesting (and often denominationally different).

Try researching it. I found mentions of the Bible’s origin date among the early Christian church fathers St. Irenaeus (c. 180 AD), St. Clement of Alexandria (c. 150-215 AD), Muratorian Fragment (c. 170 AD), the Paschal Letter of St. Athanasios (367 AD), St. Jerome (around 400 AD), the Councils of Laodicea (c. 363 AD), Rome (381 AD),



Hippo (393 AD), Carthage (397 AD and 419 AD), Trent (1546 AD) and too many more with contradictory dates to cite or list, including scholars who take issue with dates chosen by other scholars.

This lack of clarity or academic rigor in the preceding sentence can be used to either indict this sentence in my Roadmap or the belief that there exists only one, consistently agreed-upon, exact date for the compilation of the inspired word of God we know today as the New Testament. Imagine what it would mean to American jurisprudence if there was that much confusion about the dates of the U.S. Declaration of Independence or the U.S. Constitution.

The Orthodox Greek translation of the Old Testament Hebrew Bibles referred to as the Septuagint, was translated in the third century BC. The Council of Carthage in 397 AD is often credited with the finalization of the New Testament Books; however, one of my favorite quotes about the early church is found in the Preface to the Orthodox Study Bible (Maximos et al., 2008, p xxi) which succinctly concluded:

The Church was a dynamic organism, the living Body of Jesus Christ. She made an indelible impact on the world, and those who lived in her life and faith were personally transformed. But we also discover in the New Testament itself that the Church had her share of problems. **All was not perfection.** (emphasis added)

Wait, what? **“ALL WAS NOT PERFECTION?”**

Now, fast forward through history and consider our current arguments that split Christ’s church repeatedly. There was one loosely affiliated and ever-changing evolving church until the “un-“Great Schism of 1054 AD (I again refuse to call a church division “great”). However, the Oriental Orthodox schism of 451 AD preceded that big historical divide. The massive number of schisms from the Roman Catholic church that followed through the creation of literally thousands of Protestant and progeny churches is mind-numbing to someone looking at Christ’s one church throughout history.

Before I reveal what I believe is a workable roadmap for the organization of a fully unified **American Orthodox Church** (the “**AOC Roadmap**”), there are several books I read thoroughly that detailed some of the tortured history of Christ’s church. I highly recommend them all, in no particular order,

- (a) The Orthodox Study Bible (with extensive commentaries and footnotes) (Maximos et al., 2008),
- (b) Scaffolds of the Church Towards Poststructural Ecclesiology (Hovorun, 2017);
- (c) Catholicism and Orthodox Christianity (Brown & Anatolios, 2006);
- (d) A Church at the Crossroads: The Crisis in American Orthodoxy and the Decisions Needed for Renewal (Bakalis, 2014);
- (e) Better Together: Making Church Mergers Work (Tomberlin & Bird, 2020), and
- (f) The Kingdom Divided: Paul’s Letter to the Romans (Holmes, 2023).

There are many other titles from scholars and theologians focused on similar issues, and many more sources are listed in the References portion of my Roadmap.

I also consulted with countless (but certainly not all) Orthodox Bishops, clergy, lay leaders, theologians, academicians, and even a few clergy outside of the Orthodox ecosystem who offered insightful and challenging ideas for my evolving solutions. Perhaps most importantly, I prayed for guidance and wisdom. I prayed a lot and intently.

I do not suggest my prayers were answered, but I am committed to offering one AOC Roadmap. My Roadmap humbly offered here will assuredly not be the final, or perhaps even the best, roadmap. However, often, a written framework is easier to edit to make it better than to start writing from scratch. Until now, I have not been aware of any other similar, written, fairly comprehensive roadmap, which further prayer and discussions can no doubt inevitably improve.

While I do not have any expectation that my AOC Roadmap will be adopted as is or even with substantial or minor modifications in my lifetime, I acknowledge I am an old man. The miles in the front windshield of my life are far fewer than those in the rear-view mirror of my life. However, my faculty advisor and devout Christian, Dr. Barry Doublestein, reminded me that Lord Belfour's 1917 Declaration for the creation of the country of Israel was not adopted until 1948 with appropriate modifications. Given the old Greek saying that "Great men plant trees in whose shade they will never sit," it is with prayerful humility (recognizing I am Greek but not "great") and a fervent desire to advance OIC during my lap in the relay of life, that I offer this AOC Roadmap.

### [The Evil/Disease Of Ethnophyletism.](#)

One of the recent leaders of Orthodoxy in America and a former Dean at St Vladimir's Seminary, Fr. Alexander Schmemmann, acknowledged that trying to meld together the unique historical and ethnic Orthodox national cultures that created all the American Orthodox churches is difficult but necessary. However, a significant challenge to achieving the ACOBUSA's Charge is the practice of "ethnophyletism" (coming from the Greek words ἔθνος (nation) and φυλετισμός (clannish)). This practice of conflating one's country and church traditions accelerated in the 18th and 19th centuries as mass migration occurred in the United States and Europe.

Recognizing this as a significant problem, the Orthodox Great (Μεῖζων) Local Synod in Constantinople (1872) specifically published a "resolution" that officially condemned ethnophyletism in the Orthodox Church. Yet ethnically oriented Orthodox Churches and Jurisdictions in the United States proliferated. This is another Orthodox Canonical anomaly the ACOBUSA is to address in America as a part of the ACOBUSA's Charge.

At its core, ethnophyletism is the conflation of the church and one's nation that leads to ethnic divisions within a Church. These issues were formally addressed during the Council of Constantinople in 1872, where ethnophyletism was declared a heresy. According to The Very Reverend Dr. Cyril Hovorun, the Council of Constantinople was

convened to specifically deal with the issue of nationalism during the time of the Bulgarian “national awakening” (Hovorun, 2017b).

More recently, in 2016, the Pan-Orthodox Great and Holy Council in Crete (the “**Crete Council**”) reaffirmed the Orthodox Church's position against all forms of nationalism, reiterated the condemnation of ethnic nationalism, and again endorsed the Council of Constantinople of 1872, emphasizing the universal mission of the Orthodox Church.

As an aside, the Pan-Orthodox Great and Holy Council of Crete in 2016 was originally to be an ecumenical council, and at the last minute, the Moscow Patriarch decided not to attend. A few Jurisdictions (e.g., Georgian Church, OCA, and Antiochian Church) followed his lead, thus ruining the full conciliarity of what could have been an ecumenical council within global Orthodoxy. I express my opinion that DD issues, together with the grant of autocephaly of the Ukrainian Orthodox Church, prevented OIC progress at the Crete Council.

Nevertheless, the Crete Council consisted of over 150 Bishops from throughout the world representing the following Mother churches (and various of their eparchies): Church of Constantinople, Church of Alexandria, Church of Jerusalem, Serbian Orthodox Church, Church of Romania, Church of Cyprus, Church of Greece, Church of Poland, Church of Albania, Church of Czech Lands and Slovakia. Several important decisions, joint pronouncements, and encyclicals were agreed upon at this first attempt at an ecumenical council in over a millennium. These decisions include:

1. **Encyclical of the Holy and Great Council of the Orthodox Church**  
(<https://www.holycouncil.org/encyclical-holy-council>)
2. **Message of the Holy and Great Council of the Orthodox Church**  
(<https://www.holycouncil.org/message>)
3. **The Importance of Fasting and Its Observance Today**  
(<https://www.holycouncil.org/fasting>)
4. **Relations of the Orthodox Church with the Rest of the Christian World**  
(<https://www.holycouncil.org/rest-of-christian-world>)

This encyclical specifically stated: “The responsibility of the Orthodox Church for unity as well as her ecumenical mission were articulated by the Ecumenical Councils. These stressed most especially the indissoluble bond between true faith and sacramental communion. The Orthodox Church, which prays unceasingly “for the union of all,” has always cultivated dialogue with those estranged from her, those both far and near.”

5. **Autonomy and the Means by Which it is Proclaimed**  
(<https://www.holycouncil.org/autonomy>)

This pronouncement was notable and is worthy of some discussion, given the subject matter of my Roadmap. This decision concluded that throughout history,

autonomy has been proclaimed or achieved in a variety of different manners, but it is not always consistent.

(As a related aside, while technically not “autonomy,” the Patriarchate of Moscow initially began by a council of Russian Bishops self-elected autocephaly by electing their own Metropolitan (Jonah) on December 15, 1448, without the consent or blessing of the Ecumenical Patriarch or other Orthodox Jurisdictions. Constantinople fell to the Ottoman Turks a few years later, in 1453. As with most such things, there are differences of opinion as to when the Ecumenical Patriarch of Constantinople finally recognized the Patriarchate of Russia, most likely somewhat informally and in the general time frame around 1589-1593.)

However, this 5<sup>th</sup> Decision of the Crete Council regarding Autonomy provided a more formal process, list of criteria, and set of implications for a church that wanted to be autonomous from one of the autocephalous churches. Among the critical distinctions is that under this pronouncement, “The bishops of the autonomous Church are elected, appointed and judged by its appropriate ecclesiastical organ. In the event that the autonomous Church finds this absolutely impossible, it receives assistance from the autocephalous Church to which it refers” (Section 3.d. <https://www.holycouncil.org/autonomy>).

Relevant to my Roadmap and the American Orthosphere are provisions in Section 2.e: “Each autocephalous Church may only grant autonomy within the borders of its canonical geographical region. Autonomous Churches are not established in the region of the Orthodox Diaspora, except by pan-Orthodox consensus, upheld by the Ecumenical Patriarch in accordance with prevailing pan-Orthodox practice.” The upshot of this decision is that since the United States is considered part of the Diaspora, there could not be an autonomous American Orthodox Church without approval by pan-Orthodox consensus that the Ecumenical Patriarch upholds.

## 6. **The Orthodox Diaspora** (<https://www.holycouncil.org/diaspora>)

This decision (among other things) reaffirmed and continued the mission of the Assembly of Canonical Orthodox Bishops of the United States (ACOBUSA) and its objective of addressing the canonical anomaly prohibiting more than one Bishop in any city. It reassessed the Orthodox Diaspora and the Rules of Operation of Episcopal Assemblies in the Diaspora, which were submitted by the Fourth Pre-Conciliar Pan-Orthodox Conference (Chambésy, 2009), and by the Synaxis of Primates of the Autocephalous Orthodox Churches (January 21-28, 2016).

Critically, provision 2.c. reiterates:

**The work and the responsibility of these Episcopal Assemblies will be the concern for manifesting the unity of Orthodoxy, the development of common action of all the Orthodox of each region to address the pastoral needs of Orthodox living in the region, a common representation of all Orthodox vis-à-vis other faiths and the wider society in the region, the cultivation of theological scholarship and ecclesiastical education, etc.** Decisions on these

subjects will be taken by consensus of the Churches who are represented in the particular assembly. (emphasis added)

Thus, unity and Oneness In Christ remain a central focus of the ACOBUSA. Accordingly, I believe my Roadmap furthers the objectives of this important decision by the Great and Holy Council of Crete.

## **7. The Sacrament of Marriage and its Impediments** (<https://www.holycouncil.org/marriage>)

### **“Inquiring Minds Want To Know”**

While the brokerage house E.F. Hutton or tabloid The National Enquirer first coined the above phrase to promote their products, this saying has come to be used by those who want to know what certain leaders believe about an important topic. Given the critical importance of ethnophyletism and the role it plays in the division of OIC and impediments toward **American Orthosphere Unity (AOU)** and a possible **American Orthodox Church (AOC)**, it is helpful to understand what the current patriarchal leaders of Orthodoxy think about this issue.

### **The Ecumenical Patriarch On Ethnophyletism.**

Current Ecumenical Patriarch Bartholomew has been a consistent and vocal opponent of Ethnophyletism. In a 2008 address to the European Parliament, Patriarch Bartholomew underscored the importance of moving beyond nationalistic divisions, advocating for a Church that embodies universal values and embraces all of humanity.

Furthermore, in a keynote address on September 12, 2019, at a conference titled “The Problem of Ethnophyletism in the Orthodox Church: From the Bulgarian Schism to Today,” Ecumenical Patriarch Bartholomew stated: “Ethnophyletism has led to the weakening of the consciousness of the Church’s eucharistic realization. In the name of nationalistic expediencies, the priority of the Church’s eschatological identity and eucharistic Ecclesiology has been sacrificed.”

In a keynote address on September 12, 2022, at the International Theological Conference titled “Saint Gennadius Scholarius—Between East and West, Patriarch Bartholomew firmly stated: “Ethnophyletism is a permanent thorn in the relations of the Orthodox Churches.”

### **Patriarch of Antioch On Ethnophyletism.**

The Antiochian Orthodox church has a history of being an Arab-Christian Orthodox community with some multi-ethnicity. This Patriarchate has historically emphasized that Orthodox transcends ethnicity and national orientations. Patriarch John X of Antioch has promoted unity among Orthodox Christians and has cautioned that nationalistic divisions are deleterious to the Orthodox Christian faith.

### **Patriarch of Alexandria On Ethnophyletism.**

The Greek Orthodox Patriarchate of Alexandria and All Africa has been a historically strong opponent of ethnophyletism, emphasizing his church's mission as a multi-ethnic Church that serves a diverse Orthodox population in Africa. In maintaining the universality of the Orthodox church, this Patriarchate has rejected a church bound to any particular nationality. In particular, the current Patriarch Theodoros II of Alexandria, has been vocal against ethnophyletism, going so far as to recognize the autocephaly of the Orthodox Church of Ukraine ("OCU") in 2019.

### **Patriarch of Jerusalem On Ethnophyletism.**

The Greek Orthodox Patriarchate of Jerusalem has been more reserved regarding ethnophyletism. Notwithstanding the Patriarchate's strong Greek hierarchical dominance, the majority of its faithful are Palestinian and Arab Christians, which has led to some internal struggles between Greek Hierarchs and some Arab clergy and laity. This Patriarchate has avoided explicitly endorsing ethnophyletism and has been embroiled in a controversy with the Patriarchate of Antioch, who accused the Patriarch of Jerusalem of violating canonical boundaries by appointing a Bishop in Qatar. Some have observed this is an issue of ethnophyletism. However, the Patriarch of Jerusalem defended his actions based on his understanding of its historical jurisdiction.

### **Patriarch of Moscow On Ethnophyletism.**

This one is trickier because of the strong unity that exists between the Patriarch of Moscow and the Russian government and citizens. This Patriarchate, for obvious reasons, has always held a strong pro-Russian position and yet, at times, has tried to walk a line approaching a rejection of Ethnophyletism. The aforementioned 2019 grant of autocephaly to the Ukrainian Orthodox Church by the Ecumenical Patriarch has negatively impacted those relations and reignited certain ethnophyletism positions.

### **"Anybody That Ain't Confused Don't Know What's Going On."**

The above quote attributed to baseball legend Yogi Bera might be used to describe the complex landscape of the global Orthodox church on Ethnophyletism. It is basically accurate to say that most of the global Orthodox church is united against Ethnophyletism, except in Russia or other specific countries where the mix between ethnicity and religion has been blurred for centuries. However, that is not the case in the United States. While all the different Orthodox Jurisdictions celebrate (to differing degrees) their ethnic heritage, the drive for Orthodox unity provides the backdrop that could make an AOC possible in the fullness of time.

Closer to home, Archbishop Elpidophoros of the Greek Orthodox Archdiocese of America, the largest (by far) of Orthodox jurisdictions in the United States, and Chairman of the ACOBUSA specifically condemned ethnophyletism, even calling it a "heresy" that has no place in the church

in America or the modern world. This position aligns with the Ecumenical Patriarch, of which he is the Exarch to America.

Archbishop Elpidophoros has repeatedly celebrated the Greek heritage of his jurisdiction but firmly stated that Orthodoxy in America must be pan-Orthodox and inclusive and that it can move beyond historic ethnic boundaries. While in his capacity as Chairman of the ACOBUSA, he acknowledged the overlapping geographic boundaries, his advocacy for a unified Orthodox church and voice in America in both witness, mission and practice has been consistent and exemplary.

In full disclosure, I must acknowledge that Archbishop Elpidophoros is my Archbishop, and I serve on his Archdiocese Council as well as the Secretariat of the ACOBUSA, which he chairs. However, those positions did not in any way influence my objective reporting of the facts of his position or the expression of my opinions in this Roadmap. There are certain things about which His Eminence and I respectfully disagree, even while the vast majority of our views regarding Orthodoxy in America are aligned. He is aware I am writing my Roadmap and has not attempted to influence my content or conclusions in any way, which I deeply respect and am grateful for.

### [Chambésy And ACOBUSA.](#)

As the various Patriarchs and foreign heads of the American Orthosphere parishes looked at their offspring in America, they obviously noticed the differences in linguistic and some traditional practices. They also saw a more significant issue. Under the Orthodox Canons (think of it as the Constitution and laws of Orthodoxy), a legal anomaly exists that must be addressed. Canon 8 of the First Ecumenical Council precludes there from being more than one Bishop in the same city. Yet, due to the arrival of the Orthodox churches from different foreign countries and the growth of these parishes in America, it was not uncommon in larger cities for there to be a Bishop of the Greek Orthodox Church (under the omophorion (jurisdiction) of the Ecumenical Patriarch) and a Bishop from one of the Russian church under the jurisdiction of the Patriarch of Moscow and a Bishop under the jurisdiction of the Patriarch of Antioch or Serbia, etc.

As the American Orthosphere evolved, the cultural, linguistic, and practices began to diverge, Canonical Anomalies developed in multiple cities, and the foreign Patriarchs gathered in dialogue. This ultimately led to the 4th Pre-Conciliar Pan-Orthodox Conference, convoked in Chambésy, Switzerland, June 6-12, 2009. Representatives from all the universally recognized autocephalous Orthodox churches gathered to address these issues in the exact spirit of the Ecumenical Councils of the early church.

The relevant part of this history is the formation of **The Assembly of Canonical Orthodox Bishops of the United States of America (ACOBUSA)**, which is comprised of ALL Bishops in the American Orthosphere Eastern Orthodox Jurisdictions. Again, in the interest of full disclosure, I am one of a handful of laity who are honored and blessed to serve on the Secretariat of the ACOBUSA, which is responsible for its ongoing administration and work in between the annual gatherings of the Bishops. That role has helped me work on AOU and

allowed me to see its challenges up close, but it has not impacted the objectivity of my recommendations described in my Roadmap.

For background, I quote extensively from the website of ACOBUSA to most efficiently explain some of its background most pertinent to my purposes in my Roadmap. (See full description here: <https://www.assemblyofbishops.org/about/overview>)

The Assembly of Canonical Orthodox Bishops of the United States of America is made up of all the active, canonical Orthodox bishops in the United States of America, of every jurisdiction. The Assembly was established in accordance with the Decision of the 4th Pre-Conciliar Pan-Orthodox Conference, convoked in Chambésy, Switzerland, June 6-12, 2009, at which met representatives from all the universally recognized autocephalous Orthodox churches.

These representatives recognized substantial canonical "anomalies" in the organization and life of the Church in these regions, and realized that, though these anomalies had arisen from specific historical circumstances and pastoral needs, they nonetheless present a number of serious problems for the faithful; moreover, they give an appearance of disunity in the one holy Church. As such, these representatives unanimously agreed to the formation of assemblies of bishops throughout the world to heal, as quickly as possible, these anomalies.

The Bishops in the USA, Canada, and Central America were originally together in one Assembly, called the Assembly of Canonical Orthodox Bishops of North and Central America; in April 2014, it was announced that, in order to best respond to the cultural diversity and pastoral needs in the region, the Canadian and US bishops would form separate assemblies and the Central American bishops would join the Assembly of Canonical Orthodox Bishops of Latin America.

To accomplish its purpose and vision, the Assembly has as its goals:

1. the promotion and accomplishment of Church unity in the United States
2. the strengthening of the common pastoral ministry to all the Orthodox faithful of the region
3. a common witness by the Church to all those outside her
4. the organization of the Church in the United States in accordance with the ecclesiological and the canonical tradition of the Orthodox Church

In this way, the Assembly is both consultative and programmatic. It is consultative insofar as, while it has no administrative authority, it is a forum for the exchange of ideas and creation of templates, best practices, and models for each Bishop to implement as he sees fit in his own diocese. At the same time, the Assembly is to be programmatic in its goal to coordinate and ultimately unite the common ministries and pastoral practices of the various jurisdictions.

The Assembly meets annually and functions by consensus of all its members. At its inception, it established a number of committees with specific tasks to help accomplish its goals. Each committee consists of member bishops who are assisted by clergy and lay advisors. The Assembly understands itself to be the



successor of SCOBA, and as such, has assumed all its agencies, dialogues, and other ministries.

Unlike SCOBA, the Assembly is a transitional body. If it achieves its goal, it will make itself obsolete by developing a proposal for the canonical organization of the Church in the United States of America. This proposal will in turn be presented to the universally recognized autocephalous Churches, gathered in council. Should this proposal be accepted, it is hoped that the Assembly of Bishops will be succeeded by a governing Synod of a united Church in the United States.

I was blessed to lead the strategic planning effort of the ACOBUSA several years ago, which developed the original (short form) WHY Statement that defined its essential purpose “**to bring people closer to Christ and each other**” (which is the default WHY Statement I use throughout my Roadmap because of its impact, simplicity, and universal applicability).

In the same interest of brevity and focus, I summarize the key objective of the ACOBUSA, namely, to bring about **American Orthosphere Unity (AOU)** consistent with the Canons of the Orthodox Church. Of course, that work must address any Canonical anomalies and, much more importantly, transcend the differences in historical practices and language. In that regard, the ACOBUSA is working on the ultimate objective of AOU.

## [Where Is ACOBUSA On Achieving Its Unity Vision And The ACOBUSA’s Charge?](#)

While the Assembly has existed for approximately a dozen years, in 2020, I was blessed to help lead its strategic planning efforts to establish a Vision Statement that was focused on:

“Measurably enhancing:

- (a) Orthodox Christian Unity & Outreach,
- (b) Common Orthodox Witness,
- (c) Ministries & Initiatives, and
- (d) Organizational Excellence.”

ACOBUSA made minor progress on the critical first two goals when we look at the results empirically and honestly. The American Orthosphere Hierarchs (whom, for convenience but with the utmost of respect, I will refer to as “**Bishops**,” which includes those who have the added rank of Metropolitan or Archbishop) gather annually to concelebrate the Divine Liturgy. Beyond the annual gathering, until the nascent **InterOrthodox Parish Association (IPA)** work, not much other “measurable enhancement” in Orthodox Christian Unity & Outreach or Common Orthodox Witness has occurred. Even various ACOBUSA efforts to harmonize common Orthodox prayers and religious practices are incomplete after over a decade.

The new IPA exists to: “

“...promote communication, camaraderie, and cooperation across Orthodox Christian parishes of all jurisdictions in a given geographical area. They are local (i.e., the city/town level) and include both clergy and laity. Their purpose is to break down barriers across Orthodox Christian jurisdictions and, as a unified Orthodox Christian community, witness Christ's love in local society (Assembly of Canonical Orthodox Bishops of the United States of America, n.d.).

ACOBUSA relies exclusively on the work and generosity of the Bishops, clergy, laity, and donors dedicated to the mission of AOU. Even then, the Jurisdictions are not completely supportive of every volunteer initiative. For example, a simple Chaplaincy certification process has met with resistance from some Jurisdictions. After forming a separate and new pan-Orthodox youth entity to address the critical needs of our youth and young adults, some Jurisdictions continue to maintain their own separate individual youth departments, each doing their own activities and programs.

Finally, from time to time, various ACOBUSA Jurisdictions “boycott” (or intentionally absent themselves from) ACOBUSA meetings or activities, usually because of some position of a foreign mother Patriarchate (e.g., the grant of autocephaly in Ukraine) or a decision or statement made by one of the other Jurisdictions. Without taking a side on any of those divisive issues, what the boycotting or threats or actual absence of participation in activities demonstrate is that OIC and AOU are not a top priority of all Jurisdictions because if they were, then such differences of opinion would lead to dialogue and not dissension.

The current part-time ACOBUSA Director of Operations has worked heroically and with great dedication, as have some other volunteers. However, an independent observer would honestly conclude that the ACOBUSA's “measurable improvements” they called for in their Strategic Goals and its 2020 Vision are exceedingly hard to find and quantify.

Indeed, very few Orthodox Christians in the United States know the ACOBUSA exists, let alone what it is supposed to accomplish. To be direct and precise, after over a dozen years of existence, ACOBUSA has a fairly weak brand and track record of visible empirical results for its target stakeholders. The continued division and lack of progress on achieving the ACOBUSA's Charge, or its self-imposed 2020 Vision, requires a fresh look if we are to realize any significant progress toward the Unity Vision of “one, holy, catholic, and apostolic church” and a “House United” American Orthodox Church.

## **What Specifically Has Worked And Not Worked Over The Last Dozen Years?**

As a layperson intimately involved in the ACOBUSA from almost its beginning, I will very briefly summarize my personal opinion of some of the key ACOBUSA actions that have worked and things that have not worked. This is my best-informed personal opinion from an insider but could differ from the list of another insider. I will not outline all the detailed minor successes or failures and merely focus on those I believe are more material and related to the ultimate purpose of ACOBUSA.

## SUCSESSES

### 1. Interpersonal Relationships

Prior to the formation of the ACOBUSA and its regular meetings, many, if not most, of the Bishops of different Jurisdiction did not know each other very well personally and had few interactions. As the first section of my Roadmap underscored repeatedly, Trust is the essential sine qua non of any team effort or organization. If the leaders and key players do not even know each other, trust cannot exist regardless of a common faith tradition. However, after over a decade of annual meetings, plus countless opportunities to pray communally and work together on committees in various ministries and programs, a positive result is that collegiality and interpersonal connection among the Bishops generally have been established.

While I cannot and will not disclose any specific dialogue that happens in ACOBUSA meetings or name names, I find it highly refreshing and rejuvenating that most interactions are extremely professional, collegial, respectful, and enjoyable. Even when differences of opinion are expressed, the respectfulness of the interactions is highly enlightening and rewarding to witness. Indeed, our Bishops have mastered the ability to disagree agreeably.

Earning and granting trust is never over. Nevertheless, more than a decade of meeting together has done wonders to breed familiarity and general foundational trust. AOU will be impossible without this trust. Nonetheless, I occasionally sense or hear about pockets of mistrust on certain issues and impediments to unity, which, in my opinion, are mostly attributable to what will be discussed later below that presumptuously suggests why the current ACOB USA process cannot succeed at its primary goal.

### 2. A Few Committee

Several of the Committees of the ACOBUSA have proven effective and made progress on specific initiatives. For example, ACOBUSA now has a formal Chaplaincy program (although not all Jurisdictions participate), a diligent financial committee (with audited financial statements), and an enhanced (but by no means ideal or comprehensive) communications program. The potentially transformational **IPAs** (referred to previously) are promising developments if successfully implemented.

Additionally, an ACOBUSA committee of Bishops has developed and released some common statements of position on a few contemporary moral issues, with supposedly more in the works. Another committee has systematically reviewed all agencies and affiliates of the ACOBUSA to ensure consistency, fit, and operational excellence.

A powerful and effective mental health ministry with great offerings is another helpful and productive accomplishment. A homeless guidebook has also been created

and released. The ACOBUSA has been instrumental in continuing a wonderful dialogue with the Roman Catholic Church.

Additionally, the Canonical Regional Planning committee worked diligently in the past on creating one roadmap for AOU to address the canonical anomaly of multiple Bishops in the same city. This thoughtful proposal was rejected in the early days of ACOBUSA. Perhaps it was offered before sufficient trust had been established, but its good foundational work facilitated a helpful dialogue.

Some work has been done on common liturgical practices. However, regrettably, recently, a common liturgy and Nicæan Creed for the celebration of the Sunday of Orthodoxy was not finalized at the last ACOBUSA meeting because of a lack of consensus on grammar. Fortunately, it was subsequently finalized and released by the Executive Committee.

Further accomplishments include the ACOBUSA's creation of two new Agencies with promising futures. The Orthodox Volunteer Corps (OVC) (<https://www.orthodoxvolunteercorps.org/>) has several years of successful operations in recruiting young adults to give a year of service. The Orthodox Youth Agency (OYM) (<https://www.theoym.org/>) has begun operations to develop content and programs to focus on youth. While its programs are not yet extensive or well-known, more troubling is that some Jurisdictions continue to "do their own thing." Thus, a common youth ministry focus has not occurred, and any possible benefit of synergy of efforts has been mitigated. A list of other ACOBUSA committees can be found here: <https://www.assemblyofbishops.org/about/committees>.

Out of humility, I saved my favorite for last. I was blessed almost immediately after the ACOBUSA was formed to host in my Atlanta law firm's offices the first gathering of lawyers from nearly all Orthodox Jurisdictions to discuss creating a completely pan-Orthodox group of volunteer lawyers that would work together to assist the ACOBUSA with its own legal needs (e.g., incorporation, 501(c)(3) status, trademarks, legal contract review, etc.) and also begin to share resources and best practices to assist all Orthodox Jurisdictions and parishes with their needs and issues. A few of us have also strongly urged the ACOBUSA to pursue a much more visible and active profile in filing Amicus Curie (friend of the court) briefs before the United States Supreme Court or Supreme Courts of various states on issues of particular importance to American Orthosphere parishes.

For example, our ACOBUSA legal committee, which includes representatives of the various Orthodox Jurisdictions and virtually all major areas of the law, has partnered with other Christian religious denominations (e.g., Roman Catholics, Baptists, Mormons, Presbyterians, Episcopalians, etc.) and other Christian advocacy groups (e.g., Becket Legal Fund, etc.) to file multiple Amicus Briefs. This includes United States Supreme Court Amicus Briefs in connection with the revolutionary abortion case of *Dobbs v. Jackson Women's Health Organization* that overturned *Roe v. Wade* and *Planned Parenthood v. Casey*.

We have also vetted and obtained ACOBUSA approval to file other Amicus Briefs or requests for the United States Supreme Court to consider cases (Writs of Certiorari) always seeking to protect religious freedom, the separation of church and state, the Ecclesiastical Abstention Doctrine, etc. This group of multijurisdictional lawyers also freely share best legal practices from their Jurisdiction and discuss other critical issues. As an item of humorous personal privilege, I find it fascinating that the lawyers (of all people) are, in some respects, leading the way toward AOU. (Please insert your favorite lawyer joke here or recognize that God has a sense of humor.)

### **3. The Hiring Of A Director Of Operations/Executive Director**

Leadership and constant focus are essential. In the early years of the ACOBUSA, without a full-time person devoted to its work, progress could not be material. It is rarely effective when an always busy employee of one Orthodox Jurisdiction is asked to take on additional voluntary work for the ACOBUSA. However, starting several years ago, an extremely talented and dedicated clergyman was hired to assume essentially full-time responsibility for the operation of the ACOBUSA. Given Fr. Nicholas Anton's many talents, substantial progress has been made on many fronts. Most notably, he was able to obtain a \$1.25 million Lilly Foundation grant to facilitate the IPAs, which allowed ACOBUSA to hire some greater talent to support these and related initiatives.

### **4. Modest Greater Visibility**

With part-time assistance, press releases and announcements are distributed, and the more professional ACOBUSA website (<https://www.assemblyofbishops.org/>) and social media sites (<https://www.facebook.com/assemblyofbishops>) are updated. Until a full-time expert communications professional can be hired, this effort will not be fully successful. Indeed, in my travels throughout the American Orthosphere, I rarely find PIPs who know anything about ACOBUSA or have even heard of it.

## **FAILURES**

I acknowledge ab initio that calling something a failure might offend those with greater sensitivity or who always want to be positive. However, as a pragmatist, lawyer, and honest change agent, I mean no offense when I call a spade a spade. I truly celebrate those things that failed as progress and lessons learned we do not have to repeat. I also mourn and regret those ideas and paths that have not been tried, and I am willing to admit failures. Indeed, my Roadmap is not critical of those past failures but rather attempts an honest self-assessment and the presentation of a possible Roadmap to provoke thought for a bright new future.

Following Stephen Covey's admonition to begin with the end in mind, I respectfully submit that ACOBUSA's failure is largely due to the following "Five Truths of Failure":

1. Those not committed to the WHY will ignore or fight it.
2. If something is everyone's job, it is no one's.

3. Busy people asked to work on something unrelated to their core job rarely do.
4. If no deadline exists, it will certainly be met.
5. What gets funded gets done.

## **1. Lack Of Resolution Of The Canonical Anomalies**

There remain multiple Orthodox Bishops in certain major cities (e.g., New York, Chicago, Pittsburgh, etc.), and thus, the main Canonical Anomaly has not been resolved. The ACOBUSA's Canonical Regional Planning Committee presented a proposed solution many years ago that entailed moving some Bishops, which was rejected. There are interesting suggestions in the Canonical Regional Planning Committee proposal that should be revisited by the **AOC Implementation Team** that I call to be created later in this Chapter 16 to refine the final elements of the **AOC Roadmap**. However, after this first attempt by this committee, no further efforts have been made in many years to address this principal reason for the formation of the ACOBUSA.

## **2. Repeated Schisms In American Orthodox Churches Due To Foreign Matters Or Influences**

With no intention to anger or disrespect anyone or engage in what I consider to be unproductive arguments, foreign Patriarchs have had disagreements and misunderstandings that have negatively impacted the ACOBUSA and progress toward an AOC. The most recent significant dispute is between the Ecumenical Patriarch and Patriarch of Moscow over the grant of autocephaly of a branch of the Orthodox Church in Ukraine. Much has been (and will be) written about this dispute, and each side has its arguments that are irrelevant to my Roadmap.

The Ecumenical Patriarch explained the basis for his grant of autocephaly based on the foundational canonical order of the Church, which grants to the Church of Constantinople the responsibility to adjudicate disagreements between Churches. Canon 9 of the Fourth Ecumenical Council, which was held in Chalcedon in 451, states: "If a bishop or cleric has a disagreement with the metropolitan of the province, let him appeal to the Exarch of the Metropolis, or to the throne of the Imperial City of Constantinople, and let him be tried there."

However, once that schism occurred between the two Patriarchs, several of the American Orthodox jurisdictions that reported to (or were affiliated with) the Patriarch of Moscow severed their engagement with ACOBUSA. While hope and prayers remain that this disengagement is temporary, regrettably unresolved foreign issues spill over to affect the American Orthosphere. These foreign issues will continue to do so until some form of AOU is developed that can isolate those foreign differences and prevent them from dividing the faithful in America.

### **3. Lack Of Consensus Roadmap To Achieve Orthodox Unity**

After over a decade of trying, and while acknowledging the previously-mentioned successes, it is fair to say we are essentially no closer to a workable road map for AOU. To put it bluntly, if the objective was the agreed-upon AOU Roadmap, the ACOBUSA has failed. A public acknowledgment of this failure was the inability to meet the deadline of offering such an AOU roadmap at the previously discussed Holy and Great Council of the Orthodox Church that took place in 2016 in Crete.

Being a bottom-line and results-oriented person focused on the critical OIC mission, I must acknowledge when our efforts have failed to achieve a major objective. This is a requirement of having integrity and humility, admitting failure, and then deciding to change course to achieve a righteous goal. As I (constantly) consider my II Corinthians 5:10 Moment when I stand to account for my life to the Lord, I find it unacceptable to leave this critical work undone if there is anything I can do to advance the objective. This is the reason for this part of my Roadmap.

### **4. Lack of Tangible Accomplishments, Visibility, Or Brand Identity**

Notwithstanding the heroic efforts of the part-time ACOBUSA Director of Operations, several dedicated Bishops, and a few other volunteers, an independent observer would honestly conclude that the ACOBUSA's "measurable improvements" in achieving its 2020 Vision are exceedingly hard to quantify. Indeed, very few Orthodox Christians in the United States know the ACOBUSA exists, let alone what it is supposed to accomplish.

As noted previously, after about a dozen years of existence, ACOBUSA has an extremely weak brand and track record of visible empirical results for its target stakeholders. Clearly, the continued division and lack of progress on achieving the ACOBUSA's Charge, or its self-imposed 2020 Vision, requires a fresh look if we are to realize any significant progress toward the Unity Vision of "one, holy, catholic, and apostolic church" and a "House United" American Orthodox Church.

Thus, the ACOBUSA relies exclusively on the work and generosity of the Bishops, clergy, laity, and donors dedicated to the mission of such an independent organization. Even then, the Jurisdictions are not completely supportive. For example, not all the Jurisdictions or Bishops are able to fully fund their required contributions to maintain and operate the ACOBUSA. Furthermore, a failure to completely embrace the Chaplaincy certification process, pan-Orthodox Youth Agency, or support fully functioning committees and the lack of attendance at the annual meeting that makes a quorum always a challenge are signs that the ACOBUSA is not functioning optimally.

### **Why The Current Approach Has Not Worked And Cannot Work.**

In over four decades of mergers/consolidations/outsourcing/acquisitions legal work in the profit and non-profit sectors and over three decades of extensive work with American Orthosphere churches, I acknowledge a merger or unity cannot be achieved if there is no cultural and fundamental overall fit of the organizations. If they do not have

the same WHY and Core Values, the ultimately merged organizations will not survive or thrive. The good news in AOU is the absence of this foundational impediment.

While most American Orthodox churches of all Jurisdictions have never intentionally thought about developing and writing down their WHY Statement or Core Values when I share the WHY Statement I was blessed to help the ACOBUSA create, the parishes and PIPs are in enthusiastic agreement. Thus, I feel comfortable in saying AOU can focus on “bringing people closer to Christ and each other” driven by the OIC desire: *“that they all may be one; as You, Father, are in Me, and I in You, that they also may be one in Us: that the world may believe that You have sent Me”* (John 17:21).

After identifying a cultural fit and a common WHY, Core Values, and Mission, I have discovered that the three biggest impediments to successful mergers (stated bluntly) are control, finances, and lack of commitment. Let me briefly explore all three in connection with the work of ACOBUSA.

### **Control Issues – The “E Gene”**

I wish to be respectful, but for every merger I have seen or negotiated, one of the biggest challenges includes the questions of who will be in “control” of the merged entity and who will have what “title” and authority from among the leaders of the merging entities. Of course, having the right leaders in the right positions is always critical to success. As Jim Collins advised in Good to Great, having the “right people on the bus, the right ones off the bus,” and, of course, having the right people sitting in the right seats on the bus makes a huge difference (Collins, 2001). Thus, leadership concerns in mergers/consolidations are critical.

However, merger/consolidation issues are often disguised as leadership questions and instead focus on the negative human side for which the root cause is characteristic of ἐγώ (ego). This Greek word means “me” and focuses on the concept of self. As with any human attribute, there can be positive and negative applications.

On the positive side, leaders of highly effective merging entities believe their organization has implemented the most effective approach. Thus, they are less willing to consider accepting what they perceive as a less productive approach deployed by the other merging organization. If a process or approach is indeed better, there should be sufficient metrics and evidence to justify their adherence to their strategy, which should objectively persuade the other party seeking to implement best practices.

The negative side of this ἐγώ attribute is the critical ingredients that are missing when Servant Leadership is not the dominant universal leadership approach. In this case, the “E Gene” (as I refer to the negative ἐγώ manifestation) is displayed by a leader who does not want to give up control, title, or perceived influence. My extensive work in this area has demonstrated that there are at least four causes of this negative E Gene characteristic.

1. The desire to maintain control is often rooted in insecurity. Sometimes, such “leaders” need their title or status as a crutch to maintain a positive self-image. This



involves who will lead the merged entity (i.e., who is the Chairman, CEO, COO, CFO, GC, etc.).

2. The absence of great Servant Leadership traits is another unproductive behavior when someone with a title expresses an E Gene arrogance that is not present in the best “Level 5” leaders. Jim Collins identified these best-in-class leaders as those who “build enduring greatness through a paradoxical combination of personal humility plus professional will” (Collins, 2001). This characterization perfectly defines our Lord. However, those “leaders” rooted in the past with arrogance or fear tend to be unwilling to accept that someone might have a better idea or method and should be in charge.

3. Another negative manifestation of E Gene control syndrome occurs when “leaders” resist change. They fear that a change might fail or suggest that either they were not doing things optimally or leave them with no title or position of power or influence. Their fear causes them to be more comfortable with the status quo, where they remain in charge of whatever they have, even if their organization is not going in the right direction.

4. A fourth control E Gene symptom rears its ugly head when someone wishes to have a perceived legacy maintained. For example, in all mergers of professional service organizations (e.g., law, accounting, engineering, consulting, etc.), one of the most difficult decisions involves the new entity’s name (i.e., will my name survive in the newly merged firm’s name). This often implicates any currently alive name partners or their families, which can have emotional attachments. I know of law firm mergers that should have occurred but foolishly were prevented primarily because the “leaders” could not agree on the name of the new firm and which of the dead partners’ names from the two firms would be dropped or re-ordered. If a Goliath swallows a David, the big dog usually wins, and its name is used (e.g., Vodafone adopted the bigger Verizon name, and Warner-Lambert adopted Pfizer’s name).

### **What’s In A Name?**

In the case of AOU, this would present an emotional and ego problem. All the Jurisdictions (except one) bear the name of the original foreign homeland from which their immigrant forefathers/mothers came. Nationalistic pride (ethnophyletism), contemporary issues, and other ego factors would make it hard for, hypothetically, the current Russian Orthodox Church Outside of Russia (ROCOR) to lose its name and be required to take the name of the Ukrainian Orthodox Church of the United States (i.e., something that would never happen).

The typical merger solution of just adding all the names of the merging entities (ExxonMobil, Bristol-Myers Squibb, J.P. Morgan Chase, ConocoPhillips, RJR Nabisco, etc.) would not work given twelve different Orthodox Jurisdictions, each with their own individual identity and name. When the Goliath approach or name-mashing does not work, the usual merger protocol is to invent a new name that none of the merging entities previously used. Thus, when pharmaceutical giants Ciba Geigy and Sandoz merged, they chose the name Novartis. Bell Atlantic Corp. and GTE Corp merged and became

Verizon. This seems like the best overall solution for AOU and avoids ethnophyletism challenges.

However, complicating this matter is the previously mentioned branch of Orthodoxy in America that was granted autocephaly (independence) from the Russian Orthodox Church in 1970 with the hopes that it would be the church that unified all Orthodox in the United States. Accordingly, it took the new and descriptive name Orthodox Church in America (**OCA**). For all the previously mentioned ego reasons, it is unlikely any of the other ethnically named churches would submit to the name given to the Russian independent church. This leaves us with the dilemma of creating yet another new name that is true to Orthodoxy but generic enough that it would not inhibit the other Jurisdictions from adopting it.

### **American Orthodox Church (AOC).**

Accordingly, I propose that the **American Orthodox Unity (AOU)** be achieved by the formation of the **AMERICAN ORTHODOX CHURCH (AOC)**. It would be a newly formed legal entity into which all the existing Jurisdictions would merge by operation of law. Using this mechanism would be the most efficient way to start from scratch and create a new umbrella universal Orthodox church in the United States with no prior legal baggage.

If the process I will describe later for achieving the merger identifies certain operations or subunits that should be separated out and not part of my AOU Roadmap (whether due to potential liabilities, independence reasons, etc.), they could be stripped out before either the merger is consummated. This is the kind of thing M&A lawyers do all the time and, thus, does not reinvent any wheel. For the rest of my AOU Roadmap, I will use the abbreviated **AOC (American Orthodox Church)** to refer to the newly formed entity into which the other Orthodox Jurisdictions operating in the United States are merged.

Other E Gene issues complicate mergers; however, I submit that all four of the above are currently major impediments to **AOU**. Some leaders fear they may not survive in leadership in a combined entity where there may be better leaders in the merging entities. Similarly, the ethnic origins of the Orthosphere organizations play a prominent role in many of them. Proof of this is the continual dissension around the language in the church services and whether the respective ethnic festivals or foreign language programs will continue. There are some leaders of larger Orthodox organizations who feel that because of their size, they should have control or outsize influence. And the fear of the unknown and change is always present to some degree.

There are other impediments to AOU, to be sure. However, at the core, there is an absence of a commitment to Oneness in Christ and the very purpose for which ACOBUSA was created. The AOU opponents will certainly attempt to cloak their opposition with other more noble justifications, such as maintaining the purity of their practice or understanding of the faith or loyalty to a foreign Patriarch or ancient tradition. I do not suggest they are insincere, but perhaps they have merely prioritized those justifications over the very OIC and AOU for which the ACOBUSA exists. This is difficult

to admit, and I expect some serious pushback for my calling this out. Yet, integrity demands nothing less.

### **The Dreaded Oxford Comma and Other Unity-Destroying Linguistic Debates.**

For example, I have witnessed several theologians from multiple Orthodox Jurisdictions work for over a year on creating conformity of a particular church service common to all Orthodox Jurisdictions, including a common translation of the well-established Nicene Creed. Instead of reaching consensus conclusions, a spirited debate arose about punctuation for over thirty minutes. Each side argued for the linguistic and historical integrity of their position. The discussion was collegial but never reached a consensus resolution. Footnotes and end notes were invented for those who want to expand on linguistic conventions. But I fervently maintain that comma placement should never impede AOU or OIC.

During that theoretical discussion, all I could think of was that the PIPs were the ones who were not considered. The PIPs merely want a common service and prayer and do not care about comma placement or grammar, particularly when it would make no difference in the humble opinion of this professional wordsmith who spent 40 years as a lawyer arguing over words.

With the utmost respect, I attribute no bad faith to anyone participating in such dialogues. Let me be absolutely clear that I have substantial respect for all the Bishops I have met and worked with. I find them to be wonderful people and dedicated men of God. However, endless dialogues are frustrating and lead participants to increasingly deem them to be a waste of valuable time, often leading to dissension rather than unity. Regrettably, there is a growing number of Bishops who privately share frustration with the lack of significant progress, which causes them to increasingly not wish to participate in ACOBUSA meetings or events.

Nevertheless, unity is impeded by the need to be right rather than focusing on what is best for the faithful PIPs. I expect criticism (or worse) from those who want to argue that comma placements and grammar are significant. I have experienced this in parishes I work with on strategic plans and who wish to have endless debates about the Oxford comma. However, I submit that leaders must always put first things first. The PIPs who seek to worship together will accept any comma placement but find it disconcerting when something as essential as the Nicene Creed, Lord's Prayer, or other supposedly common prayers or hymns are different from one Orthodox church to another.

We should not care if we refer to the devil in the Lord's prayer as "evil" or "the "evil one" when the meaning is the same. Nevertheless, the words are different in various Orthodox Jurisdictions. Leaders, on behalf of all laity, we urge you to quickly please pick one version and tell us. If leaders cannot reach a consensus on simple words, how can they be expected to do the much weightier task of leading lay people closer to Christ and each other? While we argue about grammar, the data are clear that the number of Orthodox Christians in the United States and globally is declining.

Achieving a successful merger requires reasonable compromise. No compromise should be expected on anything that rises to a Foundational Christian Truth (as defined in Chapter 15 of my Roadmap) or fundamental WHY or Core Values level. But that is not the issue in American Orthodoxy. Minor linguistic differences aside, all American Orthodox Jurisdictions are aligned on the core foundational matters of the faith. And as loyal as I am to my Ecumenical Patriarch (to whom I swore an oath of service), I respectfully believe my loyalty always belongs first to God the Father, God the Son, and God the Holy Spirit. I am sure Patriarch Bartholomew would agree. Thus, I respectfully and humbly submit that all Orthodox Christians must be committed to regaining OIC through AOU while respecting the historical origins of our ancestors and current presiding Bishops.

If a Servant Leader is the servant of those they lead, then it will require a reawakening of the calling of OIC and AOU in such a way that grammar, lowercase “t” traditions and historic countries of ethnic origin are never allowed to be impediments. Our youth love to play basketball with each other and do not care about commas or foreign countries. They are willing to enjoy the foods, dance, songs, and traditions of all other Orthodox Christian youth without prejudice from foreign wars or territorial disputes. If we are serious about preserving and ultimately growing the Orthodox Church in America, then OIC and AOU must be imperatives.

As mentioned previously, Orthodox Christians in the US have declined to 0.3% of the population in 2022, down from 0.5% in 1922. Thus, notwithstanding our efforts, **we have not only failed to make disciples of ALL nations, but we have actually lost disciples in OUR nation.** This is not a success, nor is it what I want to share with Christ in my II Corinthians 5:10 Moment when I stand before his awesome judgment seat. Do you?

## **B. Financial issues – The “\$ Gene.”**

This merger impediment is easier to understand and diagnose. Merging entities want to be in a better financial situation together than they could otherwise be. This is what synergy is all about when the whole is greater than the sum of the parts. It can happen when one merging entity excels in one thing or area while the other merging partner has different or complementary strengths. However, financial resources and ongoing success are essential.

As a result, all leaders who are imbued with the E Gene also have a dominant “\$ Gene” focused on financial well-being. This includes personally being in a better financial position after the merger as well as the entity being stronger. In the case of AOU, it is more complicated since the foreign Patriarchates are understandably also financially dependent on their “rich American supporters.”

The Orthodox Patriarchs are currently in economically challenged or war-torn areas (Istanbul, Turkey; Moscow, Russia; Damascus, Syria; Jerusalem, Israel; Belgrade, Serbia; Sofia, Bulgaria; and Tbilisi, Georgia). With the possible exception of the Moscow Patriarch, who allegedly is funded by the Russian government, the United States faithful provide essential funding for their mother churches. Thus, while the Patriarchs wish there

to be unity, they cannot afford that result if the financial resources they depend on from America end up being compromised by AOU.

Thus, for example, the Order of St. Andrew, Archons of the Ecumenical Patriarch (which I am blessed to be a part of) not only provide regular funding for our Ecumenical Patriarch but also established and are funding the “Bartholomew Foundation” to secure the financial foundation of the Ecumenical Patriarch in perpetuity. While new \$100,000 pledges are being contributed regularly, the endowment currently has \$26.4 million pledged. In addition, over the last 24 years, the Archons have contributed \$52.28 million to fund the needs of the Ecumenical Patriarch. In this way, the financial security of at least one of the foundational Patriarchates is assured. I will visit this topic again when I propose my AOU AOC roadmap.

However, the local American National Orthodox Jurisdictions tell different stories. Some are financially solvent and able to fund greater ministries to help its parishes increasingly; however, most are only funded at a relatively subsistence level to keep the national office and Bishops funded. It is not a matter of capacity, as the U.S. Census reports consistently show that Americans who trace any ethnic identity to historically Orthodox countries are in the top quartile to top third on annual income.

However, as the earlier chapters in my Roadmap on financial stewardship show, the Orthodox faithful remain in the bottom quartile of contributing to their parishes in the form of their direct stewardship. Accordingly, the local parishes (that provide most of the funding of the national churches) are unable to share sufficient financial resources to ensure the most robust offering of services and ministries.

Indeed, in many instances, local Bishops feel there is often competition for financial donations from PIPs at the regional, national, and international levels. Of course, if the parishes solved their financial stewardship problems using the methodology identified in my Roadmap Chapters 10 and 11 (or some other successful stewardship strategy), this sense of financial scarcity would be replaced by the assurance of abundance that actually exists. Nevertheless, the current financial shortcomings and competition form a second major impediment to AOU.

Those Orthodox Jurisdictions or Dioceses doing well financially are less enthused about feeling like they will need to subsidize other Dioceses or even other Orthodox Jurisdictions. Again, replacing the false sense of scarcity with the truth of the abundance available would ameliorate these concerns.

However, proof of the reality of scarcity is the fact that none of the current Orthodox Jurisdictions have fully functioning best in class stewardship ministries helping their parishes with comprehensive best practices resources and teams to help parishes implement them. One part-time employee does not an effective stewardship department make. Even within my largest Orthodox Jurisdiction, for several decades, I have been trying to elevate stewardship to top of mind and ensure the necessary solutions and training are provided to the parishes, largely to no avail.

Indeed, the reason I created my Stewardship Calling ministry was to research, develop, and teach stewardship best practices throughout the Orthosphere in the

absence of other alternatives. Perhaps this accounts for the popularity of my Igniting The Flame stewardship retreats offered throughout the country since they are one of the only such offerings. Nevertheless, just like part-time clergy are not enough, a one-man band is a grossly insufficient offering. We must have a fully functioning, best-in-class, and full-time leadership and extensive teams researching and teaching stewardship throughout the American Orthosphere. The failure to address the financial needs of American Orthodox parishes, Dioceses, and National Jurisdictions remains a difficult challenge that must be overcome if AOU is ever to be successful.

### **C. The Big Kahuna! “Lack Of Commitment” And The “LOC Gene.”**

Before being engaged in any merger/consolidation/outsourcing, I would ask the leaders of the organizations who were in charge of making it happen: “Whose full-time job is it to ensure the merger/consolidation takes place as effectively, efficiently, and promptly as possible?” If they either say no one person is in charge or name people who have other responsibilities or duties, I tell them the merger/consolidation will fail, and they should save their breath for cooling soup. This often gets the reaction I suspect some of you reading this have now.

Plain and simple, undertaking a merger/consolidation is extremely difficult, demanding, and time-consuming work. It requires handling thousands of issues and making hundreds of decisions each day. It is full-time work to get the combination accomplished, followed by more full-time work to ensure the consolidation is implemented successfully. It requires marshaling large and diverse teams of professionals from both within and outside the organization. It demands the full-time creativity and dedication of several key individuals in the organization with experienced leaders, and a lot of other requirements space does not allow me to outline herein.

I repeat my previously stated Five Truths of Failure in mergers/consolidation:

1. Those not committed to the WHY will ignore or fight it.
2. If something is everyone’s job, it is no one’s.
3. Busy people asked to work on something unrelated to their core job rarely do.
4. If no deadline exists, it will certainly be met.
5. What gets funded gets done.

**THE BOTTOM LINE IS THAT AMERICAN ORTHODOX UNITY WILL NOT OCCUR UNLESS THIS LACK OF COMMITMENT ISSUE IS ADDRESSED!**

**Προσεχώμεν!** (“Let us be attentive” as used in the Orthodox Divine Liturgy to signal the importance of focusing on what follows)

**In short, if it is everybody’s job, it is nobody’s job, and it will not be done.** For over a decade, there has been no full-time dedicated Episcopal leadership driving

AOU and an AOC. The Director of Operations can only do so much. This is not a criticism of the few Bishops who have dedicated countless hours to the ACOBUSA on top of their regular duties), whether serving on the Executive Committee, the Secretariat, or the other functioning committees. These Bishops are devoting time away from their Diocese to serve this greater purpose and are to be sincerely admired and thanked. However, the fact that they have other significant jurisdictional duties is evidence of the root cause of the problem with AOU.

For over a decade, the challenge has remained the same. **No one Bishop (or small group of Bishops) has AOU and AOC as their full-time and sole duty. Therefore, AOU and AOC will not occur (and cannot happen) until this fundamental leadership issue is addressed.**

Remember my first pronouncement at the beginning of my Roadmap that every church problem is a leadership problem? This one is not a problem per se with who the current leaders are, but rather, **if ACOBUSA wants to achieve AOU and AOC, someone must have this leadership challenge as their only job.**

Indeed, while it is not for me to say, I can think of several current, retired, or underutilized Bishops who probably have the skills and time. If one or two Bishops with the right skills and full-time to devote (supported by the appropriate, lay professional assistance) were delegated the specific and sole responsibility for finalizing a unity plan and working to convince the ACOBUSA Bishops to implement it, progress might occur.

**However, absent a dedicated and focused team working full time on Orthodox unity addressing the Canonical anomaly, then AOU and an AOC will not happen.** I hate to be so direct, but someone who has objectively examined the current process and who knows how to get mergers and consolidations done has to “call the code” on a dead process that cannot resuscitate the patient. Again, facts are facts.

To be sure, as a previous survey of the ACOBUSA Bishops proved, not all current Bishops are in favor of unity/consolidation or an AOC. Some prefer separation, perhaps for some of the other reasons previously stated or possibly other personal ideas. Until the dedicated Bishop and support team leading the AOU movement meet with them and understand their fears or concerns, they will likely never agree and cooperate. That is unless their Patriarch has such a discussion with them. Bringing about this consensus is another task of the designated AOU leader.

If I were advising the Patriarchs on how to achieve AOU and an AOC, I would tell them to designate one (or possibly two) Bishops (with the necessary leadership skills and gravitas) and lay professionals to commit to work full-time until AOU is achieved. I would also advise them to impose a reasonable but aggressive deadline for AOU and AOC.

Extremely occasional efforts of busy people and annual two-day meetings will never accomplish the goal. Until leadership is committed to an objective with a deadline, it cannot be achieved by humans. (However, the Holy Spirit can do anything!)

We will know the Patriarchs and/or ACOBUSA are serious about a truly unified face of Orthodoxy in America when they recruit and empower full-time dedicated

leadership to achieve this significant task and provide them with a deadline and resources. It is my humble hope that these AOC Roadmap chapters begin such a commitment.

### Solving The Canonical Anomaly Reassignment of Bishops (without incumbents having to move).

As mentioned previously, one of the reasons the Patriarchs formed the ACOBUSA is because of the Canonical Anomaly, where there were multiple Bishops from different Orthodox Jurisdictions living in the same city. The previous proposal by the ACOBUSA's Canonical Regional Planning Committee to get Bishops who lived in the same city to move did not meet with great success. Some younger Bishops are fine moving, and some are not. So, when the logical solution does not work, creativity is called for in merger work. Thus, as part of my W.W.J.D Roadmap, I propose an extraordinarily simple solution to the Canonical Anomaly.

Currently, all Orthodox Bishops in America have parishes over which they are the shepherd in states and cities different from where they live. Indeed, new Orthodox Bishops are often given "sees" (Jurisdictions) in ancient places in church history until they might get a Jurisdiction in modernity. For example, the Metropolitan I served loyally as General Counsel for over 25 years and was first appointed Bishop of Troas before he became the first Bishop and later Metropolitan of Atlanta.

Troas was the ancient land of Troy on the Aegean Sea in the northwest corner of Asia Minor, which is now one of the most western parts of Turkey. I discovered this on one of my many visits to have an audience with Ecumenical Patriarch Bartholomew in Constantinople (Istanbul) when I saw the drawing of Troas on the wall. During the entire time, Bishop Alexios was the Bishop of Troas, he lived in New York. When he was elevated to be Bishop of the then Diocese (now Metropolis) of Atlanta, he became the Bishop of Atlanta, where he lived. However, he had jurisdiction over the Greek Orthodox parishes in the eight Southeastern States.

That being the case, every current Orthodox Bishop can live where they are or want to live and just be placed in charge of parishes in whatever "Diocese" they would lead. (Again, for ease of reference, I will consistently refer to all American Orthosphere Bishops as "Bishops," which includes those who have the added rank of Metropolitan or Archbishop.)

Of course, when the AOC map is finally drawn, some Bishops may want to move their domicile and thus reduce geographic overlap. For others unwilling or unable to move, they can stay where they are and merely tend to the flock to which they have been assigned. In this way, there will never be two Bishops who have jurisdiction over the same city, and the real Canonical Anomaly can be addressed temporarily until new Bishops are elected and assigned to live in different cities. I can imagine some theologians identifying countless theoretical issues with the above AOC Roadmap solution for AOU, so I will leave it to them to argue their theoretical concerns while we get on with the business of bringing people closer to Christ and each other in unity.



## The Challenges of Autonomy and Autocephaly.

So, what is this new AOC, and how does it relate to the ancient and historical Patriarchates? To answer this, I must first generally describe the two current forms of differentiation: Autonomy and Autocephaly.

**Autonomy** (literally, "self-ruled") is when the presiding Hierarchy within an Orthodox jurisdiction must be confirmed by one of the autocephalous Orthodox Churches. Otherwise, these autonomous churches are self-governing. Six current autonomous Orthodox churches include the Churches of Sinai, Finland, Japan, Ukraine, Estonia, and China (although, as usual, not every Patriarchate recognizes each of the above list of autonomous churches) (OrthodoxWiki, 2010).

**Autocephaly** (literally "self-headed") is when the presiding Hierarchy of a local Orthodox church does not report to any higher-ranking bishop or Patriarch. Autocephaly has been typically granted within the global Orthosphere by an Ecumenical Council or a Patriarch/Primate releasing a church under their jurisdiction in a different area from its material obligations to that higher authority while maintaining the full communion with the bishops of that area (OrthodoxWiki, 2022b).

The Roman Empire and history have acknowledged the original autocephalous Patriarchates of Rome, Constantinople, Alexandria, and Antioch. Additional Autocephalous churches have been granted since then (e.g., Patriarchate of Moscow, Patriarchate of Serbia, Patriarchate of Romania, Patriarchate of Bulgaria, Patriarchate of Georgia, Church of Cyprus, Church of Greece, Church of Poland, Church of Albania, Church of the Czech Lands and Slovakia, Orthodox Church in America (autocephaly recognized by only by Moscow, Bulgaria, Georgia, Poland, and the Czech Lands and Slovakia), Orthodox Church of Ukraine (autocephaly recognized by Constantinople, Alexandria, Cyprus and Greece)(OrthodoxWiki, 2022b).

As you can see from the growing above list, throughout history, Ecumenical Councils have granted autocephaly, such as the Church of Cyprus (Third Ecumenical Council – 431AD), the Church of Jerusalem at the Quinisext Council (the council "in Trullo", in 692 AD) that established the Sixth Ecumenical Council Canons.

Additionally, autocephaly has been granted by a "mother" Church to a "daughter" Church such as (a) the Church of Antioch granting autocephaly to the Church of Georgia, (b) the Church of Russia granting autocephaly to the Orthodox Church in America (OCA) (although technically this grant of autocephaly is not formally recognized by many other autocephalous Churches), (c) the Church of Constantinople granting autocephaly to the Church of Ukraine (although this grant of autocephaly is not formally recognized by some of the other autocephalous Orthodox jurisdictions).

To make matters more complicated, some jurisdictions simply declared themselves autocephalous and were eventually recognized by others. This includes:

- (a) the Russian Orthodox Church, which declared itself autocephalous from Constantinople in 1448 and was eventually recognized by the four Patriarchs

existing at that time, proclaiming the Metropolitan of Moscow as the fifth in-rank Patriarch,

(b) the Church of Greece, which declared its autocephaly from the Church of Constantinople in 1833 following the Greek Revolution against the Ottomans (with the autocephaly not being recognized by the Church of Constantinople until 1850),

(c) the Church of Romania, which declared its autocephaly from the Church of Constantinople in 1865 which was not recognized until 1885,

(d) the Church of Albania, which declared its autocephaly from Constantinople in 1922 which was not recognized until 1937 (OrthodoxWiki, 2022b).

Other examples are even more nuanced (read that confusing) autocephaly stories such as:

(a) the Church of Bulgaria, which received autocephaly from the Church of Constantinople in 927, then was re-incorporated into the Church of Constantinople in the 11th century, then declared autocephaly again in 1186 (recognized in 1235), then lost autocephaly again, then was declared autocephalous by a decree of the Ottoman Sultan in 1872 which was disputed until Bulgarian autocephaly was recognized by Constantinople for the third time in 1945,

(b) the Church of Serbia received autocephaly from the Church of Constantinople in 1219, with the Ottoman Turks preventing the election of a Serbian Patriarch between 1463 and 1557, which led to the abolition of Serbian autocephaly 1766 until it again received autocephaly from the Church of Constantinople in 1879,

(c) the Church of Georgia with autocephaly, originally granted in the 5th century by the Church of Antioch, was abolished by the Russians in 1811, whereafter the Church of Georgia again declared autocephaly 1917 and was recognized by the Church of Russia in 1943 and by the Church of Constantinople in 1989 (OrthodoxWiki, 2022b).

Interestingly, not long after the ACOBUSA was created, a survey of the Orthodox Bishops was conducted, asking them what they saw as the resultant end of the ACOBUSA process. At that time, 52% advocated for full autocephaly, 15% thought an autonomous Church was the answer, 26% were undecided, and 7% did not believe in a united American Orthodox Church. Clearly, no consensus existed. Such a survey has not been repeated, and it would be beneficial to gauge the sentiment of the Bishops now that the ACOBUSA has existed and progressed for over a decade.

At this point, one might feel like this tortured history is why Yogi Berra developed the title to the previous section: "Anybody that ain't confused, don't know what's going on." Moreover, as I re-read this history, I am pained to again and again see what could be considered fractures of OIC within the Orthodox lineage. The big difference is that while autocephaly may be granted the churches stay nonetheless united in the fundamental theological principles. Some might dispute some of the above lineages and

reasons. Still, for purposes hereof, the relevant conclusion is that the granting of autocephaly is not always smooth, linear, permanent, or universally recognized within the global Orthosphere.

Nevertheless, ACOBUSA's goal was to create a universally recognized unified AOC in some form or fashion. Fr. Alexander Schmemmann, of blessed memory, who led St. Vladimir's Orthodox Seminary, expressed a thoughtful recommendation to deal with the unhealthy ethnophyletism. He suggested we "for some time" maintain both the unique national cultures as we work toward the catholicity, canonical operation, and Unity Vision of "one, holy, catholic, and apostolic" church. It is almost 60 years since Fr. Schmemmann wrote his exceptional analysis of American Orthodox Unity. The question is whether the time has finally come in 2025 to achieve the Unity Vision of the Nicene Creed, the teachings of our Lord and Holy Scripture, and the mandates of the ACOBUSA's Charge, its Why, Mission, and Vision, as well as best operational efficiency practices.

The above-tortured history of autocephaly and autonomy is what leads me to want to avoid either of those paths, which seem to be fraught with disputes and less likelihood of universal acceptance or consensus. I thus set out to discover a new AOC Roadmap. Indeed, in my many decades of mergers, acquisitions, and outsourcing transactions, when one form of combination proved problematic, we had to think creatively (and outside the box) to create another path forward.

## [My AOC Unity Roadmap - The New Concept Of "Affiliated Independence."](#)

Up to this point, I have identified many challenges the Orthodox church is facing and the failures along the path to unity in America. However, a critic who offers no solution is not a leader anyone should follow. The advancement of either Autocephaly or Autonomy has proven difficult and potentially unacceptable to one or more parties for different reasons. The best M&A lawyers know that one failure opens up other new creative opportunities and alternatives to overcome a deadlock. With the utmost humility, allow me to offer my AOC Roadmap using a new concept I call "**Affiliated Independence.**"

All of us with historical ties, emotional feelings, or oaths of allegiance to the original or subsequent Patriarchates of Orthodoxy and homelands cannot easily turn our backs on our history and those Bishops who have shepherded us to this point. At the same time, America today is different in many material respects from every other country of Orthodox lineage. I could move to Russia, but I would never be a Russian. In contrast, a Russian can move to the United States and become an American. It is one of the unique realities of our young country made up of more recent immigrants.

The challenges our PIPs face are, in many cases, the same or similar. While the soundness of the unchanged theology and sacramental life throughout the centuries remains as life-affirming as it did when Christ and His Apostles began them, the needs

of contemporary Americans require some fresh thinking and perspectives on the “operational” side of the parish house.

Note I am NOT changing the essential and fundamental theology or sacramental character of the Orthodox Church. However, we live in a different time and places. The ancient church did not have the internet, social media, many competing religious and non-religious theories, heating, air conditioning, sound systems, electricity, pews, carpeting, choir lofts, organs and instruments, and countless other creature comforts an American Christian church requires.

None of these improvements or the other operational changes over time, including expansive ministries, online services, and websites, changed the fundamental truth taught in the Orthodox church. If we are to achieve the dream of our beloved Patriarchs to have matured to the position where we can have our own church in America that retains its historic ties, then like any great merger/consolidation, the best of both worlds must be fostered, and a new age for Orthodoxy must be revealed in a country starving for the truth that Christ brings.

So, what does my **Affiliated Independence** look like? It has the best elements of association, autonomy, and autocephaly and continues to honor the ancient traditions, relationships, and practices of all Orthodox churches. The new AOC based on the model of Affiliated Independence will be described in greater detail below but is based on the foundational understanding of:

1. a truly common Orthodox theology, practice, and witness built on the timeless and accepted theology,
2. self-selection of its Bishops and other leaders who operate in a conciliar and consensus style,
3. a respectful, supportive affiliation and communications with the historical Patriarchates while no longer being subject to every aspect of their decision-making,
4. a commitment to measurable excellence and best practices in all its operations, and committed to ensuring the highest levels of the **S<sup>3</sup>** acute parish needs of Servant leadership, Stewardship and engagement, and Spiritual formation and religious education,
5. a conscious celebration of the rich traditions and histories of all countries of origin of Orthodoxy with a special focus on also celebrating the reality of the new American Orthodoxy,
6. the mechanism and commitment for continuous improvement to adapt to the changing realities while remaining true to the timeless teachings of Christ.

Obviously, the nuances of Affiliated Independence will continue to be refined over time. Indeed, the hallmark of any great organizational model is experimentation with creative attempts to do things more efficiently and effectively. To be sure, as with every new human endeavor, good faith mistakes will be made, and lessons will be learned. Change, trial and error, and improvement are the only ways organisms grow and mature.

This includes churches, as history shows us so clearly. Since we will not tinker with the **Foundational Christian Truths** previously identified in Chapter 15 of my Roadmap or any fundamental and foundational unchanging Orthodox theology, the fear of trying new things that will not all succeed should be ameliorated.

I offer one additional major consideration before presenting a high-level example of what Affiliated Independence could look like. As theologians and laity who do not do major mergers, acquisitions, consolidations, or outsourcing transactions read the description below, it will be easy to become overwhelmed and imagine it to be impossible. With all due respect, it may seem that way because you have never been a part of a team accomplishing it. Those of us who have been blessed to work on far more complicated multi-billion-dollar global mergers/consolidations/outourcing transactions that might make this AOC seem simple are neither daunted nor concerned about impossibility.

Indeed, we have processes and systems we use routinely in such complex transactions to facilitate each step with excellence and as much ease as is legally possible. Thus, if while reading the AOC Roadmap elements below you become overwhelmed and believe it to be impossible, I urge you to apply the Biblical principles of “*fear not*” and “*all things are possible to him that believeth*” (Mark 9:23). Transactions more complicated than forming the AOC happen every day.

Nevertheless, to begin the dialogue, I submit **Affiliated Independence AOC Roadmap** could have the following elements:

**Affiliation.** The new AOC will maintain affiliation with all historic Orthodox Churches and Patriarchates. In this way, the AOC gets the best of all worlds by having continued relationships with all its historic predicates and elements of autonomy are incorporated.

**Independence.** The new AOC will be independently governed through its own selection of presiding Bishops and lay organizational leadership. In this way, elements of autocephaly will be incorporated. While it will determine its leadership, it will maintain its affiliation by informing all historic Patriarchates and Churches of its decisions. While they will have no veto power or control, the AOC can incorporate a mechanism by which advice can be sought from the Patriarchs with respect but which the AOC is free to consider or ignore.

**Self-Governance.** This element of the new AOC allows for its Synod of all AOC Bishops (“**AOC Synod**”) to collectively govern as if they were an Ecumenical Council when important matters are to be considered. The Synod will select its leadership and officers (that satisfy legal requirements) to include a Chairman, one or more Vice Chairmen (each with assigned responsibilities), a Treasurer, a Communications Secretary, and such other temporary or permanent senior leadership positions as the AOC Synod deems productive (“**AOC Synod Executive Officers**”). This could include separate Bishops who oversee major functions such as all seminaries, religious education, youth/young adults, evangelization, engagement and stewardship, servant leadership ecumenical activities, and selected significant national and/or international ministries of the AOC.

**Organization.** A new non-profit corporation will be formed in the State with the laws most favorable for churches. All current national Jurisdictions will be merged into the new AOC corporation unless, for legal or operational reasons, it is more productive to maintain a separate entity as a subsidiary or integrated auxiliary affiliate of the AOC. The ultimate determination of legal structure, form of merger/consolidation, and appropriate subsidiaries or affiliates will ultimately be determined by the properly trained professionals that form the **AOC Implementation Team** (described below). All current Orthodox parishes will automatically become parishes under the AOC.

**AOC Implementation Team.** Many decisions in such a merger and consolidation will need to be led by appropriately trained teams of lawyers, financial, accounting, tax, labor and employment, real estate, environmental, business, non-profit, strategic planning, consultants, and operational experts with the requisite skills and experience. Specific attention will need to be devoted to teams of professionals committed to AOU and AOC to address all real estate matters, some of which have been unaddressed for too long.

Working teams with professional expertise will be formed on a pan-Orthodox basis where the best and brightest minds are sought regardless of Jurisdictional background. This is not a Noah's Ark process where we need two from each species of Orthodox. We need the best and brightest faithful professionals willing to use their God-given skills regardless of any differentiating characteristics. This AOC Implementation Team will also include the consultants necessary to help the AOC develop all its strategic plan elements and implement the Strategic Goals. Professionals will come in and out of this AOC Implementation Team as their needs, skills, expertise, and time dictate.

**Strategic Plan** – While some parts of the American Orthosphere have strategic plans that I have been blessed to facilitate, the majority do not. Moreover, once the new AOC is established, it would be essential for a new AOC-centric strategic plan to be developed with representative diversity from throughout the AOC American Orthosphere.

**Branding** – While this sounds like a secular term used by businesses, every organization has an identifiable brand that includes its logo, designs, colors, and other elements. A cross-denominational group of experts from the AOC Implementation Team will design and create all such elements subject to the approval of the AOC Synod Executive Officers. All these branding elements (including consistent logos, designs, website, and related items) will be shared with and ultimately implemented by all AOC parishes.

**Calendar.** While this is not an issue for many Christian denominations, Orthodoxy has been divided between what is referred to as the "old" (Julian) and "new" (Revised Julian) calendars. The AOC Synod will agree to adopt one that will be uniform for all AOC parishes. Indeed, this will be the first of many likely decisions the new AOC Synod will need to address and resolve in keeping with the rich traditions of the earliest Ecumenical Councils.

**Offices.** In today's America, the notion of one central office where every function and team member are located may be less necessary than previously. The parishes are distributed throughout the country, and with current technology, talented professionals

are very comfortable working remotely and traveling to the parishes as necessary. While I travel all over the country, I can easily have five or more ZOOM sessions a day with parishes anywhere, including globally, that are very productive.

Moreover, since the Chairmanship or other executive leaders of the AOC may change from time to time, a Bishop doesn't have to be in one central location. As with every national organization, the AOC should expect to have regional offices in multiple major cities throughout the country where the Bishop from that city will be located and where there will be additional meeting facilities. Many such locations already exist in the current Jurisdictions that can become the AOC Regional Offices.

**Finances.** As with the legal and real estate matters, the appropriately trained financial, banking, tax, and accounting expert **AOC Implementation Team** members will need to sort out over time and consolidate all financial accounts and matters. This area, like others, should provide great economies of scale. However, given the current inconsistent state of financial affairs in many branches of the American Orthosphere, the AOC Implementation Team experts will need to establish a consistent Chart of Accounts and a methodical and systematic approach to the consolidation. At the same time, it must maintain the operational effectiveness of the organizations being affected.

**Location, Location Location.** – The foregoing trinity is often repeated as the most important decision in a successful operation. The initial challenge is that while most Bishops do not reside in the same city, some cities do have multiple Orthodox Bishops, which creates the Canonical Anomaly that was one reason the ACOBUSA was formed. Many times, Bishops are willing to move to another city, and some of those overlapping Bishops could do that. For the older ones or those with other reasons, they would not be required to move and would be assigned a smaller geographic region as close to where they are as possible.

I am aware that at least one jurisdiction (OCA) requires Bishops to live within their Diocese. That rule can be abrogated in the Charter of the new AOC. If necessary, the large city housing multiple Bishops can be carved up with additional contiguous cities and states to form its own Diocese. In pursuit of OIC and a truly united AOC, a minor detail of where one resides should not be impossible to transcend. Christ and the Apostles never worried about this, and indeed, these first Bishops traveled constantly, often without spare tunics, staffs, bread, money, etc. (Mark 6:7-13; Luke 9:3, 10:1).

At all times, the AOC must focus on the PIPs (Parishioners in Pews), APIPS (Absent PIPs), and FPIPs (Future PIPs) and what THEY need to get closer to Christ and each other. Candidly, a slavish adherence to an old practice (that is not part of Christ's theological foundational teachings) must make way when the circumstances of a new territory demand it.

**New Territory Of Bishops.** The current ACOBUSA reality is that most Bishops have geographic territories significantly larger than their ability to serve fully. In most such cases, the Bishop can't visit every parish and meet with his flock on a meaningful basis. Typically, the Bishops are invited for special occasions and then whisked through an aggressive schedule of activities, "rubber chicken lunches/dinners," and photo ops,

leaving them little to no time to meaningfully interact with their local clergy, the parish leadership, or PIPs. That is not how a shepherd tends his flock best.

If the current array of Bishops in the ACOBUSA are reallocated across the United States (with their consent), their territories can be significantly smaller. Thus, they can establish a much greater intimacy with their clergy and faithful. It will also be significantly less taxing on the Bishops and allow them more time to pray, write, teach, and do the other things for which they have been uniquely called. They must also find the time to care for themselves physically, mentally as well as spiritually.

It will be necessary for Bishops to have a very intimate and highly personal relationship with all their clergy, deacons, and monastics in their newly assigned smaller territory. The assignment by territory must consider the number of parishes and Orthodox Christians by territory so there is a reasonably consistent allocation of parishes and faithful to each Bishop. Moreover, Bishops must be encouraged to plan joint and cooperative activities with their neighboring Bishops. For example, one more centralized retreat center for youth summer camps and adult retreats can be jointly undertaken by the neighboring Diocese. Cooperation and not competition must be one of the Core Values and hallmarks of the new AOC.

The AOC Synod Executive Officers must be freed of extensive parish and clergy responsibilities, allowing them to focus more intently on the executive area of their primary responsibility. Moreover, as many functions as can be efficiently centralized should be accomplished so as to maintain universal best practices and extreme economies of scale.

If major global corporations can have one Human Resources operation serving the entire world, the AOC can also have highly efficient and centralized functions and operations for greatest efficiency and cost-saving (e.g., IT, record-keeping, financial accounting, banking, legal, real estate, communications, training, new program development, and other traditional functions of large organizations).

**Focused Role of Bishops.** One of the primary benefits of any merger or consolidation is the synergies created. Instead of having every administrative function recreated in every Orthodox Jurisdiction or Diocese (with widely varying competencies), the roles and responsibilities for all AOC functions can be assigned to specially hired and expert staff capable of executing the administrative responsibilities much more effectively and efficiently. The reality is that very few of the Bishops have had training or experience in the operations and administrative functions the current Diocese and Jurisdictions perform.

A unified AOC can hire subject matter experts for most operational functions and even ministries, thus freeing up the Bishops to do what God has called them to do, namely be shepherds of their flock and strong supporters of their clergy. All clergy need to have a deep and trusting relationship with their Bishop under whose omophorion (jurisdiction) they have authority to minister to the faithful. Bishops (and clergy) can return to their primary ecclesial and spiritual formation roles and delegate operational and administrative functions to the laity better trained to perform those functions.



**How Will This Be Funded?** The creation of the AOC is a massive undertaking, although it seems far less daunting than twelve mostly uneducated peasants being told to “*make disciples of all nations.*” Much greater and more difficult things have been undertaken, and with far fewer consequences hanging in the balance if it was not successful. Many of the current American Orthosphere Jurisdictions have financial foundations, resources and endless numbers of talented volunteers to help complete this work. As consolidation activities take place and properties are sold and efficiently combined, more capital will become available. And yes, clergy and other employee pension matters must be addressed and reconciled, as always happens in every merger. But the financial secret weapon key is what I describe next.

**Venture Philanthropy.** The American Orthosphere is blessed with a large number of Billionaires and Millionaires who can be approached to invest in the new concept form of venture philanthropy. Many of these blessed individuals became successful through venture capital, where wealthy people pool their money to buy, consolidate, build, and then sell companies, which earns them a healthy return on their investment.

A modified version of that model is where successful individuals contribute to a fund not for an earthly return but to fund transformational activities for Christ’s Church. The return they receive is seeing the transformational results from their investments and their greater confidence that they are using their gifts in pursuit of a good account before the awesome judgments seat of Christ.

Most major colleges and universities have mastered the technique of raising transformational dollars to be invested in endowments to accomplish targeted educational goals. The same is true of hospitals and other institutions. For faithful disciples of Jesus Christ who have been blessed financially, there is no better investment they can make. If you identify the American Orthosphere “Chuck Feeney’s” (see story in Chapter 10 of my Roadmap), there is no limit to the financial support available.

## **Patriarchal And Historic Church Foundations.**

Another unique element of my Affiliated Independence model is that the AOC will replicate the enormous success of the Archons of the Ecumenical Patriarchate’s “Bartholomew Foundation” (see previous discussion) that establishes a sizeable permanent endowment to ensure the Ecumenical Patriarch has sufficient financial capital to support its survival and success.

A similar endowment will be established for each historical See of Orthodoxy and Patriarchate to ensure their survival even though the AOC is independent. There are those American Orthosphere donors to which the continued protection and safety of their “mother church” is of paramount importance. In this way, the AOC, while independent, maintains an affiliation with its point of origin. This affiliation extends to inviting all foreign Patriarchs to America for all major celebrations, events, educational sessions, and other spectacular events to celebrate a unified Orthodox Church that has not existed since the first and second centuries AD.

**“The key to abundance is meeting limited circumstances with unlimited thoughts”  
(Marianne Williamson)**

You might feel overwhelmed by what you have read. Yet, as the title of this section suggests, there are many more significant and less important elements of my Affiliated Independence AOC approach to be conceived, presented, developed, refined, and implemented. I merely wanted to present an extremely high-level outline Roadmap of an entirely new concept that thus can be defined however those faithful to OIC and AOU can propose. I am happy to be a part of these conversations and share the many additional details I have sketched out, and I can also accept others taking these raw ideas around the track and improving on them without me. AOU is the key, not me!

Before considering this preliminary Affiliated Independence OIC AOC model further, I believe it is imperative to identify the motivation as the furtherance of the **Transformational Leadership (TL)** example of the Lord. Scholars of TL focus on being successful change agents by:

1. inspiring followers to pursue excellence,
2. a righteous new Vision,
3. for an exciting future,
4. aligned with fundamental Core Values and a central and inspiring Why,
5. in the face of constantly changing circumstances.

(Bass & Steidlmeier, 1999; Burns, 1978; Dixon, 2021; Northouse, 2022; Sosik & Jung, 2018).

It should be clear that the Unity Vision of a “House United” AOC is a better option than the status quo. It addresses the teachings of our Lord and Holy Scripture, implements the Chambésy Decision, ACOBUSA’s Charge, ACOBUSA Why, Mission, and Vision, and effectively and efficiently addresses the root cause challenges affecting parishes and Jurisdictions. Now, we can briefly explore more detailed elements of the AOC Path forward.

### [An Old Idea Whose Time Has Come.](#)

The challenge of charting a path for American Orthosphere unity is not new. Orthodox theologian and scholar Fr. Alexander Schmemmann, of blessed memory, wrote a prescient and thoughtful analysis entitled *The Problems of Orthodoxy in America* (Schmemmann, 1964). Among the many critical conclusions, he noted that historically, Orthodoxy was the predominant faith, if not official or semi-official religion, in every other country where Orthodoxy was present.

Thus, there was an essential integration of national culture with the local Orthodox Church. When the immigrants from predominantly Orthodox countries emigrated to the United States, they brought their own integrated national culture and church practices. However, Orthodoxy in America represents an exceedingly small minority of the

population in a country with a distinctly secular orientation and where a unique and diverse “melting pot” culture predominates.

## Why Do Consolidations, Combinations, Or Mergers Not Succeed?

As I propose a major consolidation, it is worth briefly exploring why particular consolidations/combinations/mergers fail. While those in the field have many war stories and theories, I submit that the top 8 reasons for failure include:

1. No real reason and sense of urgency to combine,
2. Absence of a formal deadline,
3. The timing is not optimal,
4. Lack of commitment by the required stakeholders,
5. “Friendly Fire” usually in the form of internal people trying to protect their turf, positions, identity, authority, agendas, financial situations, etc.,
6. External forces fear the impact of the consolidation,
7. Lack of the requisite resources and experienced and dedicated leaders and teams charged with accomplishing the consolidation,
8. It is demanding work.

People of faith also know that any work must be blessed by the Lord and assisted by the Holy Spirit. I will briefly assess the above items in relation to the ACOBUSA’s Charge.

**Challenges 1, 2, & 3:** The data of the decline in Orthodoxy presented throughout my Roadmap should be motivation enough to pursue this Unity Vision work diligently. However, the Chambésy Decision never set an actual deadline to achieve the ACOBUSA’s Charge, and thus, there is no internal or external ACOBUSA accountability. Unless the ACOBUSA Bishops and supporting teams adopt a sense of urgency and a deadline to reverse the negative church trends in pursuit of a “*good account before the awesome judgment seat of Christ,*” we will not achieve the ACOBUSA’s Charge or AOU in our lifetimes. Put simply, **deadlines drive decisions and direction!**

**Challenges 4 & 5:** These two items are the most difficult to assess and discuss and may be the “elephant in the room.” Since the parishioners have little visibility into the ACOBUSA, they are not pushing for anything from it. All parishes need trained clergy, effective ministries, programs, processes, and support to address their many parish S<sup>3</sup> and other challenges; however, they never think of the ACOBUSA or their national Jurisdiction as the solution to those challenges. Indeed, and regrettably, they likely never think of the ACOBUSA at all.

While the Orthodox Church is far from a typical non-profit or a business, it might help to examine a very successful paradigm and proven strategy. If you are the kind of smaller thinker who gets triggered when business analogies are used in church discussions, by all means, skip this next section. I am not trying to be offensive but acknowledging that some people have greater difficulty applying analogies and

paradigms in different environments and may not understand that all successful “business” principles always have a Biblical foundation.

## How To Take Something Great And Scale It Nationwide – A National Solutions Organizational Model.

A **National Solutions Organizational Model** (“**NSOM**”) adopts and adapts great concepts and causes them to multiply on a large scale efficiently and effectively. An NSOM is a type of organization that has a national orientation focused on developing the best practices, programs, products, and services and then optimizes and distributes them regionally and locally to organizations closest to the beneficiary of the product or service for training and delivery to that end user.

By inventing best practices once and delivering them often through a distributed process, a national organization can most efficiently provide best-in-class results at scale. This model has been tested and proven repeatedly throughout time and in varied environments. Examples in the non-profit and business world include a “franchise” like model (e.g., American Cancer Society, United Way, Northpoint Church, Chick-fil-A, etc.) It is helpful to look at how this proven NSOM motivates human behavior, efficiently solves large-scale challenges, and how the NSOM applies to the infinitely more worthy work of the church.

A unified AOC NSOM could efficiently develop the best **S<sup>3</sup>** (**S**ervant leadership, **S**tewardship and engagement, **S**piritual formation, and religious education) and other ministries, resources, processes, systems, programs, tools, training, products, and best practices solutions to effectively meet the needs of the parishes and PIPs/parishioners (“stakeholders”). National delivery can be easier or more complex depending on how it is designed and distributed. However, having Dioceses regionally available and geographically closer to the parishes and parishioners can allow for any appropriate regional variations to be iterated.

After some inevitable consolidation of unviable parishes unable to survive on their own (or those too close to each other to make sense to maintain independently), Orthodox parishes can be all optimized to better serve the needs of the faithful with proven and effective ministry solutions and approaches. This NSOM model is one of the most effective for achieving goals and exceeding people’s needs nationally with local delivery. This approach can help us bring people closer to Christ and each other with appropriate adaptation.

## Selected NSMO Headwinds For The AOC

Decades of research into human nature identify how difficult it is for some leaders to give up any perceived autonomy, authority, or financial resources. And yet those same decades of research prove that the “Servant Leaders” who subordinate titles, positions, and economic and personal concerns to achieving a righteous vision are the most effective ones, achieve outstanding results, and change the world. Indeed, these humble servant leaders emulate the behaviors of our Lord and Savior, Jesus Christ. True Servant

Leaders enhance their influence the more they focus on developing people's God-given gifts to work together to achieve a righteous and inspiring vision.

I repeat the exemplary leadership teaching from St. John Chrysostom:

The most basic task of the Church leader is to discern the spiritual gifts of all those under his authority, and to encourage those gifts to be used to the full for the benefit of all. Only a person who can discern the gifts of others and can humbly re-joice at the flowering of those gifts is fit to lead the Church (Chrysostom, 1964, p. 44; Kostakis, 2018).

St. John directly identified those who he believed were "fit" to lead the church. It is just such Servant Leaders not focused on autonomy, personal authority, or financial resources that can create a "House United" AOC.

Finally, ethnophyletism is still alive and well in some parishioners and parishes. Any vision for a "House United" AOC must allow people to continue to have outlets to celebrate and share their ethnic heritage. While this problem was very prevalent 60 years ago when Fr. Schmemmann envisioned unity (Schmemmann, 1964), it is less of an issue today.

Many Orthodox parishes have effectively integrated parishioners of different ethnicities into their parishes by celebrating all their ethnic diversity. This includes reciting the Lord's Prayer in multiple languages and celebrating each other's national days, foods, and dances to build better pan-Orthodox fellowship without detracting from the centrality and universality of our shared Orthodox liturgical worship and sacraments. Thus, continued sensitivity to historic ethnic pride and traditions held by some is easily possible and not incompatible with a "House United" AOC.

**Challenge 6:** There are no apparent external adversaries other than the secular antagonists to all religions in America and the constant forces of the evil one seeking to divide Christ's church. It is possible that a mother country Patriarch may not bless a Jurisdiction under their Omophorion to participate in a "House United" AOC. However, the objections of one (or even a few) can no longer impede the needed progress of the majority, who will substantially benefit from the Unity Vision of "one, holy, catholic, and apostolic church."

If a prompt solution is not found to remove the obstacles created by a particular foreign mother church, then that Jurisdiction will choose to be left out of the "House United" AOC until the Holy Spirit deems their engagement appropriate. The needs of the vast majority can no longer be held hostage by the objections of a few or a distant foreign mother church leader, as has been the case at times for the ACOBUSA.

**Challenges 7 & 8:** Never before in the recorded history of the Orthodox churches in America has there been such an abundance of talent, leadership, accomplishment, and financial resources. Putting together exceptional, diverse teams of the laity from all Jurisdictions to tackle each critical aspect of a unification implementation and strategy is now much easier by God's grace.

One positive consequence of the last decade has been the time to recruit ACOBUSA committees of talented and diverse laity in many functional and operational areas necessary for successful consolidation. The ACOBUSA's Secretariat and Committees have already identified and formed good working relationships among many professionals with expertise in joint ventures, consolidations, mergers, finance, operations, technology, law, youth, ministries, stewardship, leadership, training, capital campaigns, real estate, human resources, risk management, and other required disciplines necessary to achieve the Unity Vision of a "House United" AOC. This last reality makes me confident that this is the time to complete the ACOBUSA's Charge.

In addition, the establishment of IPAs (InterOrthodox Parish Associations) in various parts of the country is extremely helpful in progressing the AOC vision. As faithful from throughout the American Orthosphere pray, worship, socialize, and work on philanthropic projects together, the artificial divides of ethnic origins will diminish. The advancement of a unified American Orthodox ethos and purpose will allow us to help bring people closer to Christ and each other. The fact that the Lilly Endowment saw so much value in this idea it provided a \$1.25 million grant for the IPA project underscores how transformational and valuable this program can be.

### [We Must All Be In This Together - The Wisdom Of Two Respected Theologians with Strategic Foresight, Historic Hindsight And Present Insight.](#)

I will never forget the time I first met Orthodox Metropolitan Kallistos Ware of Diokleia, of blessed memory, on his visit to Atlanta for a profound theological talk. His relaxed manner and distinctive British accent made him a joy to listen to and learn from. Just a few months before his passing, I was blessed to work with him to secure rights to some of his writings for the Greek Orthodox Archdiocese to use for an APP of all the church services for the parishioners. He graciously offered his unconditional consent for the Archdiocese to use his works for the enlightenment of the faithful.

Metropolitan Kallistos was mildly amused that this American church lawyer was calling him for a rights consent when he always wrote for others to use what God had given him and not for him to protect. Without knowing it, he reaffirmed my previously formed intent to ensure my Roadmap was available for free for all of Christ's parishes who could benefit from it.

Paradoxically, this also runs afoul of my many decades of protecting the intellectual property rights of my media and celebrity clients. But that esteemed man of God, like this humble and unworthy servant, was richly blessed and saw the need to share what he had with others. He is sorely missed, and the world is darker because of the absence of his light.

Metropolitan Kallistos delivered a talk about the Orthodox Divine Liturgy (Ware, 2011, 2012) where he shared the definition of λειτουργία (Liturgeon or liturgy), which translates as δουλειά του λαού or "work of the people." He humorously declared it to be "dubious etymology but good theology." These critical words essential to an Orthodox

practice of the faith mean “a shared corporate action done by many people in common action and something we can only do together.” This beloved Metropolitan said that in the Orthodox Divine Liturgy, there must be no passive spectators but only active participators (Ware, 2011, 2012).

Metropolitan Kallistos explained that to be a person is to be in a relationship. (“I need you in order to be myself”). He explained that in the Divine Liturgy, we express our human nature in relation to another. This reinforces that a priest cannot do the Divine Liturgy alone and can only do it in cooperation with another. Metropolitan Kallistos pointed out that in the Divine Liturgy, we rarely say “I” and mostly say “we” as in the prayers “We offer you this spiritual worship without the shedding of blood” “send down your Holy Spirit upon us” (Ware 2011, 2012).

He noted further that in the English text of the Lord’s Prayer, we use the words “us” 5 times, “our” 3 times, and “we” once, but we never say me, mine, or I. The anomaly rests in the modern Nicene Creed since, in the original version from the Ecumenical Council, it began, “We believe.” However, as happens when humans are involved, Metropolitan Kallistos noted that when it was transferred for use in the Sacrament of Baptism, it made sense for the person being baptized to make a personal affirmation of faith (Ware 2011, 2012).

When Baptism was later reintegrated with the Divine Liturgy, the Baptismal form of the Nicene Creed was retained with the first person. However, the correct liturgical expression is “we,” not “me.” In this brief exegesis, we again see how man changed rituals and why. Once again, men made changes for convenience. But for this to be a source of separation from Christ in each other seems an anathema to me.

Metropolitan Kallistos also noted that we also pray, “Let us love one another with one mind so that we may confess.” He concluded his remarks by saying there is no true confession of faith in God the Trinity and no true celebration of the Divine Liturgy without mutual love. This well-regarded Orthodox theologian provided us with a wealth of understanding about how things change over time for human reasons, which should not divide Christ’s church or family.

In the 4th Century AD, St. John Chrysostom discussed how everything in the Eucharistic celebration is shared in common. The priest does not offer thanksgiving alone, but the whole people give thanks to them. This underscores the corporate dimension of the liturgy that the priest cannot celebrate alone, and this critical religious service must be celebrated in union. The priest even asks for the consent of the people.

Metropolitan Kallistos previously discussed the repeated use of the word “Amen” (even in the Eucharistic prayer where the priest says, “This is my body...” and the people should proclaim “amen.”) It is the Amen that sanctifies the prayers and actions that is the expression of the laity to make the prayer or action or divine offer their own. (Can I get an Amen?) Metropolitan Kallistos teaches us that the “Amen” expresses the corporate shared aspect of the Divine Liturgy and is a natural expression of faith and an embracing of the message as the truth.

Thus, “Amen,” Metropolitan Kallistos advises, is a personal commitment that means “I make the action and words my own.” In this way, as well as so many others, the Divine Liturgy can actually become the δουλειά του λαού (work of the people). As a footnote, I note that to amplify further the work of the “people” concept in the Divine Liturgy, Metropolitan Kallistos strongly advocated for congregational singing. I know this may anger some of the choir ministry participants but ask yourself if your concern is the pride in your performance vs the engagement of the people.

The point of this journey down the rabbit hole with distinguished Orthodox Theologians of the 21<sup>st</sup> and 4<sup>th</sup> Centuries is to underscore the critical importance of not just bringing people closer to Christ, which is a central goal. But the journey we are on is also to bring people closer to each other so we can share in “δουλειά του λαού or “work of the people. Both liturgically but also in ministry. This is why, in my Roadmap, I so often repeat the ACOBUSA WHY Statement I was so blessed to help develop. We are called to bring people closer to Christ and each other. A unified American Orthodox Church is a giant and transformational step on that journey.

### Can This Be Done Now?

With the utmost humility and gratitude to God for His many blessings bestowed on this sinful and unworthy servant, for over 40 years as a lawyer and over 30 years in service to His church, I believe I understand some of the significant challenges and opportunities of integration and optimization when combining disparate entities and teams. I also appreciate the critical need for comprehensive visioning and strategic planning for a consolidated entity. It is essential to carefully plan and execute with excellence the integration of similar functional areas, processes, teams, cultures, assets, systems, technologies, properties, and finances.

This is no easy task, which is why some estimates suggest that between 70%-90% of mergers fail. However, the many decades of meeting Christ’s disciples throughout the United States, both clergy and laity, give me the confidence to conclude that the Unity Vision of a “House United” AOC is now imminently possible if we follow a thoughtful Roadmap and address the three significant challenges reiterated in the final section of this Chapter.

### One Possible AOC Roadmap To Create A “House United” American Orthodox Church.

Any complicated consolidation, joint venture, merger, or unification project requires a systematic approach with dedicated specialists and best project management practices. Outlining all such elements is far too involved for my Roadmap. However, once the ACOBUSA prioritizes this, a high-level summary includes the following 5-step process.

**Step 1. Form The AOC Implementation Team** - A diversified AOC Implementation Team of experienced lay professionals with joint ventures, mergers, project management, relevant substantive skills, and strategic planning experience must be recruited and agree



to work as hard as necessary on creating the AOC. In addition, a Bishop (or two) must agree to work full-time to support the AOC Implementation Team concerning theological and other issues requiring Episcopal assistance. This AOC Implementation Team will include the current ACOBUSA Director of Operations and staff.

**Step 2. Complete Due Diligence Assessment Of Critical Issues And Creation Of The AOC Roadmap** - The AOC Implementation Team will complete a full due diligence analysis of all required actions, in sequence, that must be completed. They will also use project management tools to scope out all work streams and dependencies fully, assign them to the appropriate individuals and teams, and establish the timeline for each step. They will also present a comprehensive “**AOC Roadmap**” that outlines the necessary steps and timeline. This AOC Roadmap will address how the AOC is optimally organized synodically and in such a way as to resolve the Canonical anomalies, including by allocating all the Bishops to their own manageable Diocese geographies (regardless of where they may have a residence).

An expanded organizational model will inevitably need to include more Dioceses in the aggregate than currently exist in any current American Orthodox Jurisdiction. This restructuring allows all Bishops to cover smaller geographies and thus be more visible and accessible to their faithful. Therefore, the Canonical anomalies can be resolved (without having any Bishop move) in such a way as to make their jobs less personally taxing and allow them to be more effective and personally engaged shepherds with their faithful. In addition, during this phase, we will identify the funding needed to achieve the AOC Roadmap and possible donors who are excited to complete this long-held vision of a united AOC.

**Step 3. Obtain Necessary Approvals** - The AOC Implementation Team and supporting Bishop(s) will present the AOC Roadmap to the ACOBUSA and any other required individuals/entities to obtain all necessary approvals. This will be the time for all the Bishops to, by consensus, raise their voices to the heavens as one to proclaim a Unity Vision to fulfill their calling and create “one, holy, catholic, and apostolic Orthodox church” in America. Once the necessary approvals are obtained domestically, any required Patriarchal approval processes can begin since it is critical to have a local consensus before obtaining international approvals.

I am not minimizing the separate and essential Patriarchal approvals or how long they will take; however, I merely do not want to distract from the summary five steps to engage in that protracted dialogue. Suffice it to say, those Patriarchs whose approval will be necessary should be informed fully and constantly at every step of the process so that ideas can be socialized and well-accepted before it is presented for approval. The more one is informed and engaged, the easier consent is to obtain. Finally, the separate and essential venture philanthropy donors can be solicited and will be asked to contribute the funds to complete the AOC Roadmap work streams.

**Step 4. Execution of the AOC Roadmap** - The AOC Roadmap will follow the outlined steps. The progress will be publicly shared with all stakeholders. Indeed, the AOC Roadmap must include a focused professional communications strategy and plan. If ever there was time to provide hope and a vision for a brighter future, this is that time. And the AOC Roadmap is such a vision. During this phase, it is likely that some planned steps

may prove impossible to complete or finish on the schedule established. In such cases, an appropriate workaround or contingency plan will be established to deal with matters requiring more time.

**Step 5. Completion and Celebration** - Upon completion of the AOC Roadmap, before the new conciliar synodical governance and synergistic operations begin, a national AOC celebration should occur to thank God for His patience as we finally worked together to achieve His Unity Vision for His Church.

Many more detailed sub-steps in this process are beyond the scope of this Roadmap. At the same time, even more synergies and shared improvements for our parishes and parishioners will occur along the way as the Holy Spirit guides and blesses this holy work.

## **AOU AOC CONCLUSION.**

By now, dear reader, it should be clear that I am strongly advocating you join me in getting serious about Εἰς μίαν, ἁγίαν, καθολικὴν καὶ ἀποστολικὴν Ἐκκλησίαν” One, holy, catholic, and apostolic church, and the AOC Roadmap.

### **Summary of the Three Biggest ACOBUSA Challenges to Achieve American Orthodox Unity and an American Orthodox Church.**

Perhaps the current tactical biggest challenges to overcome to accomplish the ACOBUSA's Charge and the Unity Vision of a “House United” AOC are:

1. The ACOBUSA has not demonstrated that this work is a priority and does not have a timeline or deadline.
2. No ACOBUSA Bishop(s) is/are assigned to devote all the time necessary on a full-time basis to this task and process.
3. No lay experienced transaction team and project manager(s) are in place and fully committed to doing what is necessary.

First, the Chambésy Decision did not set a completion timeline or deadline for the ACOBUSA's Charge. Similarly, neither have the ACOBUSA Bishops discussed any such deadline or timetable or made this work a priority. Without a timeline and the sense of urgency of a deadline, busy people will not properly prioritize this work.

Second, every Bishop is fully deployed trying to manage their Diocese/Metropolis or other full-time operational responsibility, often without sufficient support staff and necessary resources. Thus, as soon as they leave the annual 2- or 3-day ACOBUSA meeting, all Bishops immediately return their focus exclusively to their primary Diocesan/Jurisdictional duties. They have no time or resources to focus on achieving the ACOBUSA's Charge. Proof of this is how many of the ACOBUSA committees achieve very little due to the inability (or, in some cases, unwillingness) of Bishops to devote the necessary time and effort.

On top of this, every American Orthosphere Jurisdiction is left to reinvent the same wheel and establish countless redundant services, programs, and functions, all without sufficient resources or employees to do the work. A unified AOC can develop the best practices once through an NSOM and implement them in every Diocese and parish, thus making the work of the Bishop more focused and effective.

Third, a Bishop alone cannot complete this monumental and historical task, just as Christ modeled the need to recruit Apostles and disciples. A unified AOC will require many disciples consisting of an experienced team with a deep bench of expertise in various fields, all organized by effective project management. Every consolidation, joint venture, merger, or unification project requires a diverse group of committed individuals with the time, energy, enthusiasm, and focus to achieve the vision and objective. This AOC Unity Vision is no different. Fortunately, such individuals exist within the diversity of the American Orthosphere Jurisdictions.

### The Bottom Line.

Please let me summarize succinctly and clearly. No “House United” AOC will be possible, and we will not achieve the ACOBUSA’s Charge and its Why, Mission, and Vision without:

- (a) a timetable and deadline,
- (b) the ACOBUSA and at least one or two qualified Bishop leaders establishing the Unity Vision as their full-time top priority, and
- (c) a dedicated, diversified, professional transaction team to plan and execute all the necessary activities using classic project management.

Until the ACOBUSA makes American Orthodox Unity (AOU) a top priority by recruiting a committed professional team devoted to achieving a systematic and methodical plan on an agreed-upon timeline, the Unity Vision of “one, holy, catholic, and apostolic American Orthodox Church” will remain nothing more than a dream. I love good dreams. I prefer effective actions that lead to great results.

This AOC Roadmap chapter asks a simple yet critical question: “Does Christ want His AOC to be a “House Divided” or a “House United” in keeping with the Nicene Creed Unity Vision?” If you are not persuaded that this “House United” AOC Vision is the optimal answer, then I thank you for your time reading this far. I urge you to publish an alternative plan to achieve the Unity Vision of “one, holy, catholic, and apostolic Orthodox church” and accomplish the ACOBUSA’s Charge from the Chambésy Decision.

Our Orthodox Study Bible shares many historical stories of people dividing Christ’s church. However, since Christ established His church, there are precious few examples of those who successfully brought it together. Let me say that again. Dividing is always easier than uniting. But today, we can do something very different in this extraordinary land of opportunity into which we have been planted. Something Holy. Something unifying. Something that can help us with a “*good account before the*

*awesome judgment seat of Christ.*” Something that can bring people closer to Christ and each other. Or we can do none of that.

I pray that you agree that it is worth fighting for His will as we praise His name and seek His forgiveness and life eternal in “μία, ἅγια, καθολικὴ καὶ ἀποστολικὴ Ὀρθόδοξη Ἐκκλησία” – “one, holy, catholic, and apostolic Orthodox church.” All glory to God!

### [Bonus Time PostScript If My AOC Roadmap Is Delayed – A Roadmap For the New Greek Orthodox Archdiocese Charter.](#)

What the above discussion convicts me to do is to advocate for OIC and unity. However, it may not be the Holy Spirit’s will to allow that work to begin, as I have outlined in my Roadmap. Thus, I believe I would be remiss if I did not start closer to home and try and answer the same question for my own **Greek Orthodox Archdiocese (“GOA”)** Jurisdiction.

The Ecumenical Patriarch canceled and then suspended the Charter he granted to the GOA. The GOA, through its Archbishop announced it would pursue a reorganization and new Charter to reflect more current realities and then postponed work on its reorganization plan at the request of the Ecumenical Patriarch. Thus, we remain with the old charter still temporarily in force with the assurance it will be replaced at some time sooner rather than later. But how and by what?

I spent so much time studying and crafting a Roadmap for the far more difficult and complicated new unified AOC (American Orthodox Church) that I discovered that the same **National Solutions Organizational Model (NSOM)** model would likely work extremely well for the GOA in the interim. Thus, in the spirit of my Roadmap and after working for three decades with GOA parishes, I humbly offer the following **GOA Roadmap** for consideration with the knowledge that this, too, will likely evoke strong emotions from my brothers and sisters and require adaptation or alternatives.

#### **History First.**

The Greek Orthodox Archdiocese was formed 103 years ago in the United States. For its first fifty to seventy-five years, it focused primarily on delivering the liturgical and sacramental timeless faith as best it could and, most importantly, helping its faithful Greek immigrants assimilate into their new homeland and learn how to be Americans.

This second assimilation objective was challenging given America’s multicultural nature, which maintained an intentional practical and legal separation between the church, government, and the “public square.” Most “cradle Greek Orthodox” parishioners for the first five to seven decades were first or second-generation Greek immigrants. In Greece, over 98% of its citizens are members of the Greek Orthodox Church, which is essentially the state religion and is enshrined in the country’s constitution, where the government pays for the churches and the clergy salaries (Evason, 2019). This

presented a daunting Servant Leadership challenge for the GOA (the first leg of my **S<sup>3</sup>** stool).

For over one hundred years, the GOA has attempted to provide a third area of education about the necessity of financially supporting the local churches since there was no governmental assistance or resources (i.e., the Stewardship and Engagement second leg of my **S<sup>3</sup>** stool). At the same time, the GOA attempted to teach how to practice the disciplined Orthodox faith (i.e., Spiritual formation and religious education, which **is** the third leg of my **S<sup>3</sup>** stool). This objective of spiritual formation had to occur in a foreign land and culture that not only did not understand Orthodoxy but had its own many different religious beliefs and traditions (e.g., sola scriptura, sola fide, sola gratia, etc.) (Barrett, n.d.).

After having worked with over 1,000 American Orthosphere parishes, completing my Financial Stewardship Analysis for over 275 parishes, and strategic plans that cover over 26% of American Orthosphere Christians, by all objective measures, I respectfully conclude that the GOA has not succeeded (a nicer way of saying “failed”) at providing its parishes and cradle Orthodox faithful **S<sup>3</sup>** effective Servant leadership, Stewardship and engagement, or Spiritual formation and religious education training and programs. The proof of that embarrassing and inescapable conclusion is the actual data showing the immense challenges being faced by GOA parishes, which continue to have all the **S<sup>3</sup>** problems notwithstanding over 100 years of good faith efforts.

Interestingly, over the last 15 years, most growth in the American Orthodox Churches has occurred through converts to Orthodoxy from other faith traditions, many of whom already understood, practiced, and engaged in effective Christian stewardship and ministry engagement. These converts completed newly created catechetical educational programs to teach them the Orthodox faith’s fullness properly. However, such SFARE programs for converts were neither consistent nor always demonstrably good or effective. In fact, there were no objective guidelines for success being pursued and thus no metrics to assess effectiveness.

I mean no disrespect to the countless individuals (me included) who, in good faith, pursued programs in one or more of the **S<sup>3</sup>** most critical areas. But honesty, not illusions, is essential in leadership. As the old saying goes, “Facts don’t care about your opinions or feelings.” And the facts are that none of us who have toiled in the American Orthosphere vineyard would be happy defending the overall poor and declining results (with a few exceptions) the GOA and American Orthosphere are experiencing if this were the moment we stood before the “awesome judgment seat of Christ.” I know this for a fact after having presented the empirical data and asked enough Bishops, clergy, and lay leaders if this was the story they wanted to tell in the II Corinthians 5:10 Moment and watched them tear up.

## A.D.P. Trinity Model To Make American Greek Orthodox Church



### Disciples.

Since 33 AD, Jesus Christ has trusted us to be stewards of His Holy Orthodox Christian Church. There are currently approximately 230 Million Orthodox adherents globally. The GOA has over 500,000 parishioners distributed among approximately 550 parishes divided into nine regional Metropolises and one national **Archdiocese** (“**A**”). However, the current **A** offices have, after many decades, not been able to provide comprehensive, proven, best-in-class practical solutions and teams to address the three S<sup>3</sup> challenges parishes face. Accordingly, every GOA parish I have worked with complains about the funds (affectionately called the “allocation”) they send to the Archdiocese for which they expressed concern they were not getting helpful solutions in return.

(I cannot help myself and must add that the entire GOA “allocation” system is completely untethered to and inconsistent with, a proper Orthodox understanding of stewardship and generosity and giving of “first fruits.” Thus, this system of paying for the **A** has earned the privately used, more accurate descriptive title of “tax system.” I acknowledge those involved in the process are triggered by and hate the word tax, as do I. But again, that is how the system has been inappropriately designed, implemented, and is perceived. I repeatedly cite W. Edwards Deming and paraphrase his conclusion that when the majority of people perceive something the same way, your telling them they are wrong is unproductive and causes you to lose credibility. There is a huge difference between compliance due to fear and joyful giving. The “allocation/tax” system must be replaced by proper Orthodox stewardship, or the **A** will continue to lose credibility and be perceived adversarially. But again, I digress.)

## A Roadmap For The GOA - The A.D.P. Trinity Model.

To address the need for a revised Charter from the Ecumenical Patriarch for the GOA and to address its empirically validated most critical big three S<sup>3</sup> challenges, I humbly and respectfully propose it begin a reorganization process over three years using my “**A.D.P. Trinity Model.**”

The **A** currently has no articulated and generally accepted Why, Mission or Vision Statements, Core Values, or Strategic Plan. Thus, during an initial “**Strategic Development Period,**” the **A** and new regional **Dioceses** (“**D**”) (proposed below) should reach a consensus on a Strategic Plan. I believe the Strategic Planning process should be done using the method defined in great detail in Chapter 7 of my Roadmap (or some other effective process) to include a diverse and broad representative cross-section of the GOA Bishops, clergy, and laity from throughout the country in order to reach the broadest consensus. Past efforts have concentrated on a relatively small number of “insiders” designing such processes and elements. Candidly, groupthink and the desire to please the Bishop limited the creativity and consideration of other possibilities and top priorities.

While I strongly advocate for a broad-based and highly participative comprehensive SP process that represents the diverse needs of the GOA, with the utmost humility based on my experience, I can offer the following starting points if no proper SP process is pursued:

**Proposed New WHY Statement** (the fundamental purpose an organization exists)

*Follow Christ to Light the Way to God.*

**Proposed MISSION Statement** (what an organization does)

*Make Disciples of Christ through Education and Engagement.*

**Proposed CORE VALUES** (fundamental organizational beliefs that drive decisions)

*Christ-centered loving, learning, and leading.*

**Proposed VISION Statement** (where the organization will be at a set time in the future)

**Within three years, the Greek Orthodox Archdiocese will research, design, test, and implement best practices solutions that materially and measurably improve parish and parishioner Servant leadership, Stewardship & generosity, and Spiritual formation and religious education as outlined in specific S<sup>3</sup> Strategic S.M.A.R.T. Goals and Action Plans.**

**Current State And Need For Change**

I have previously provided extensive data showing the significant challenges being faced by GOA parishes that I will not fully repeat here. However, it is unequivocally clear that with 47% of cradle Orthodox adults having left the church, the GOA reporting the worst regular attendance in church services of only 21%, and 99% of the GOA parishes being totally dependent on Greek festivals and fundraisers to fund their barely subsistence and not Vision-based budgets, the GOA is in serious need of best in class programs in the three areas (**S<sup>3</sup>**) the data shows are most critical: **Servant Leadership (S1)**, **Stewardship & Engagement (“S2”)**, and **Spiritual Formation and Religious Education (“S3”)**.

**Future State.**

The GOA must reverse all negative trends and, within 25 years, can more than triple in size with at least a 20% increase in **Parishes (“P”)**, all providing transformational **S1**, **S2**, and **S3** solutions. These preliminary metrics need to be further validated, refined, and calibrated. However, I believe this seemingly audacious goal can be substantially exceeded if the above AOC Orthodox Unity Plan succeeds.

**Proposed New American Greek Orthodox Church A.D.P. Trinity Model.**

Under the new “**A.D.P. Trinity Model**,” a reorganized national **Archdiocese (“A”)** will hire the right full-time and qualified leaders to identify best practices to address the empirically identified proven solutions of the root causes of the negative trends in **S1**, **S2** and **S3** areas. The U.S. would be demographically divided into approximately 15

(based on current projections, subject to change) GOA **Dioceses** (“**D**”) regionally distributed based on the demographics of the **P**s in their geography. The **D**s would be primarily responsible for becoming training and support organizations to help the local **P**s implement the **A**-developed best practices **S1**, **S2**, and **S3** solutions for the benefit of the Parishioners In Pews (“**PIPs**”), Absent Parishioners In Pews (“**APIPs**”), and Future Parishioners In Pews (“**FPIPs**”).

While the church is not a business, this **A.D.P Trinity Model** mirrors the highly successful “invent once, share often” **National Solutions Organizational Model** (“**NSOM**”) previously described in this Chapter 16. The National organization (i.e., **A**) should research and develop the best service/products/solutions and pass them on to their regional organizations (i.e., **D**) to be delivered and refined with the local parish (i.e., **P**). Implementation experiences, successes/failures, innovations, unique alternatives, and new experiential best practices are shared by **P**s upward through **D**s to the national **A** so they may be further refined and redistributed back to **D**s for sharing with all **P**s.

### A 3-Phase Roadmap For The Next Quarter Century Of Greek Orthodoxy In America.

**Phase 1 (years 1-3):** Most **P**s are significantly under-resourced to research, develop, and implement **S1**, **S2** and **S3** best practices. Moreover, there is no organizational vehicle or process to share at scale what **S1**, **S2**, and **S3** solutions work or are ineffective. For example, (a) **S1** best practices servant leadership programs can be developed with distributed training regionally, (b) **S2** solutions will include comprehensive welcoming, small group “one-anothering,” in-reach, outreach, evangelism, tithing, and ministry engagement processes and (c) **S3** solutions will include detailed, comprehensive year-round in-person and online adult and youth religious, Biblical, and spiritual Orthodox formation and education, including Catechumens (Orthodox converts) and seekers.

Experience suggests the **A** will need the three-year Strategic Development Period to:

- (a) validate the proposed Why/Mission/Vision Statements and Core Values and complete researching and designing the most effective **S1**, **S2**, and **S3** solutions (including all curriculum and implementation procedures manuals),
- (b) recruit the **S1**, **S2** and **S3** ministry leaders,
- (c) divide the country into the geographic 15 **D**s, and
- (d) recruit and train the necessary **D** trainers and **S1**, **S2**, and **S3** implementation specialists.

**Phase 2 (years 3-4):** The **D**s newly recruited regional **S1**, **S2**, and **S3** trainers and implementation specialists will deliver the new best practices solutions to all **P**s in their geographic region. Given parish leadership and volunteer turnover, and the latest best practices development, this training will be repeated annually or more frequently as needed.



**Phase 3 (years 4-25):** Each **P** will complete a strategic planning process (or update their previous plans) to accept and embrace the **A** Why, Mission, Vision Statements, and Core Values or identify their nuanced alternative versions. In addition, each **P** will implement their **P**-specific **S<sup>3</sup>** S.M.A.R.T. GOALS (updated each 3-5 years) using a version of this template:

**STRATEGIC S<sup>3</sup> S.M.A.R.T. GOALS** (specific strategic goals to achieve the Vision - S.M.A.R.T. Goals are Specific, Measurable, Attainable, Relevant/Realistically written, and Time-bound with interim and ultimate deadlines to create accountability)

**Implement best practices to improve:**

**Servant Leadership by (metrics = X) through (process = Y) within (deadline = Z),**

**Stewardship & Engagement by (metrics = X) through (process = Y) within (deadline = Z).**

**Spiritual Formation and Religious Education by (metrics = X) through (process = Y) within (deadline = Z)**

All Strategic S.M.A.R.T. Goal Action Plans will include:

1. definitions/metrics of what constitutes **S1**, **S2** and **S3** success (insert in **X** above),
2. benchmarking of their current status in relation to researched **S1**, **S2**, and **S3** best practices,
3. comprehensive implementation plans to achieve best practices (insert in **Y** above),
4. deadlines for each action (insert in **Z** above), and 5. qualitative/quantitative measurement of achievement of best practices.

Within the 25-year **A.D.P. Trinity Model** implementation period, the **A**, **D**, and **P** Strategic Plans and **S1**, **S2**, and **S3** success metrics (**X**) and processes (**Y**) will be continuously re-evaluated and updated (every 3-5 years) to achieve the future goal of a minimum tripling the size of the GOA with at least a 20% increase in the number of **P**s (or whatever higher achievable metrics are possible)

## **Pitfalls And Eternal Consequences Of Failure**

Decades of lethargy, less focused and trained leadership, lack of creative and effective solutions, fear of the unknown, unwillingness to research workable alternatives, under-resourced groups, fine people who are not the most effective leaders, and change resistance remain some of the many headwinds for the **A.D.P. Trinity Model**. These challenges are prevalent in the American Orthosphere faith tradition that: (a) immigrated to the U.S. from Orthodox-dominant countries with State-supported religion, (b) remains

virtually unchanged for almost 2,000 years, and (c) is managed in a conciliar fashion by a synod of all Bishops who make major decisions by consensus.

If it is God's will, the **A.D.P. Trinity Model** can succeed and be fully funded and implemented without further taxing the resource-constrained parishes through the use of the Orthodox Venture Philanthropy donors (previously discussed), more efficient reallocating of existing Leadership 100 and Faith Endowment awards, and proper Orthodox parish tithes/offerings.

I fear that presiding over the further decline of Orthodoxy in America into oblivion has the most severe of eternal consequences. The Orthodox Divine Liturgy and Holy Scripture make clear that we will each individually seek "*a good account before the awesome judgment seat of Christ*" based on what we did as stewards of God's gifts. Christ entrusted His church to us. Who among us is prepared to stand before the Lord to confess we were responsible for losing disciples in our own nation rather than "*making disciples of all nations?*"

# CHAPTER 17. The Reunification Of Christ's Original Church.

## A Roadmap For Orthodox-Roman Catholic Unity.

I begin by acknowledging that what I will address next may be disconcerting to **Denominational Disciples** (“**DD**”) whose primary objective is to defend their Denomination and either ignore (in the best case) or vilify (in the worst case) all other denominations and faith traditions. I ask those of you who object to even a discussion of reunifying Christ's original church, which was one for the first over 1,000 years, to please first read (or re-read) Chapter 15 of my Roadmap that discusses the Holy Scripture and Christ-center focus on **Oneness in Christ** (“**OIC**”).

My purpose remains simple. If God, Moses, Christ, the Apostles, St. Paul, the rest of the Holy Scripture, and the Ecumenical Councils all mean what they said, then we must explore how to put aside our differences and reunify Christ's “**ONE** holy catholic and apostolic church.” I start with what should be easiest (not necessarily easy) by exploring a high-level roadmap for **Roman Catholic** (“**RC**”) **Orthodox** (“**O**”) **unity** (“**RCOU**”). Other Denominations can hopefully follow the same (or a similar) Roadmap if OIC is a priority.

## Crosses Only Had One Purpose.

During Christ's time, the cross served only one purpose, namely, to crucify someone until they died. In those days, being a Christian meant the likelihood of death. The cross of those days signified division (of life vs death). Our Holy Apostles and the other disciples were such believers in the truth and divinity of Jesus Christ that they all suffered a martyr's death and experienced division. In contrast, in our free American society, we can advance a view of Oneness In Christ without such a consequence. For a moment, let us celebrate our freedom and rights and ask ourselves if we were willing to die for our beliefs as the early Christians were.

I have trouble imagining a II Corinthians 5:10 Moment of standing before the awesome judgment seat of Christ with my argument being, “I continued to advocate for division and the exclusion of people who said they believed in You but refused to adopt every practice and belief I insisted they adopt, and thus I called them heretics, schismatics, apostates, heterodox, evil, and other divisive names and advocated we purists have nothing to do with them.”

I do not wish to advance that argument in my II Corinthians 5:10 Moment as I believe it runs contrary to Christ's commandment in John 13:34-35 to love one another and the extensive and consistent OIC messages throughout the Holy Gospel (discussed in Chapter 15 of my Roadmap). And for those who want to crucify me (hopefully

figuratively) for advocating for Oneness In Christ and RCOU, I believe this is a Christ-centered hill worth dying on, so do what you feel you need to do.

## One Church And The UN-Great Schism.

Applying Stephen Covey's habit for highly effective people, I will begin with the end in mind (Covey, 1997). Christ's ONE holy catholic and apostolic church was divided officially in 1054 AD. More recently (in my lifetime), the Orthodox and Roman Catholic Churches have used religious dialogue to make decent (albeit extremely slow, in my opinion) strides for greater RCOU or at least acceptance. The leadership of the respective Roman Catholic and Orthodox churches have, for the most part, advocated for eventual unity after continued dialogue and consensus resolution of key differences.

Several theological differences remain, although there has been some unifying/softening of positions. There is a critical difference between **"Unity" (becoming one church)** and **"Acceptance" (respectful acquiescence of the beliefs of another church)**. The former is the preferred path for OIC, and the latter may be an acceptable first step. Until unity OIC is fully achieved, perhaps greater recognition and Acceptance of each other's faithful and sacramental traditions and practices is more readily possible and a reasonable giant first step.

For example, at a recent church conference I attended, Greek Orthodox Archbishop Elpidophoros of America asked why a Roman Catholic spouse who was married in the Orthodox Church could not partake in the sacrament of Holy Communion without conversion. He makes a strong point about internal inconsistency regarding the acceptability of participating in one but not all sacraments.

As an oversimplification of the Roman Catholic and Orthodox divide that continues, aside from the inevitable plethora of hopefully less significant practice and ritual differences, the more significant stumbling blocks remain:

1. the Pope's primacy (he is the singular supreme church authority),
2. the Pope's infallibility (he has the power to speak with singular and full authority on faith and related matters),
3. the Roman Catholic addition of the Filioque to the previously agreed upon Nicene Creed that did not include the phrase (adding that the Holy Spirit also comes from the Son) and
4. how to handle the Uniates/Eastern Catholics (who embrace Orthodox service and rituals yet have loyalty to the Pope).

Some theologians and church scholars, and all DDs, will inevitably take issue with the above brief synopsis of those positions of significant difference and want to insert

endless nuance and justifications. However, for most laity, the above list is both understandable and sufficiently accurate.

True scholars have written much about the early unified church and the UN-Great Schism of 1054 AD. (I have always found the words “Great Schism” to be an oxymoron as to how can a church division ever be great). I will not try and do this horrible event in history justice. Suffice it to say that the previously unified “ONE holy catholic and apostolic church” finally took the fatal blow in 1054 with the excommunications between Rome and Constantinople. Intervening wars, crusades, conquests, and countless man-made differences caused the Roman Catholic and Orthodox churches to pursue separate paths while maintaining the most significant number of common and fundamental beliefs (the Divinity of Jesus Christ, the truth of the Holy Gospel, the seven sacraments, etc.).

Efforts to heal this division have occurred throughout history, including by Gennadius II, Ecumenical Patriarch of Constantinople from 1454 to 1465, who worked with his mentor, Mark of Ephesus, in the Council of Florence which aimed to end the UN-Great Schism (Gennadius Scholarius, 2025). Fast-forwarding to 1965, Pope Paul VI and Ecumenical Patriarch Athenagoras I nullified the respective excommunications (anathemas) and shared a now famous “kiss of peace.” Since then, the question of RCOU has continued to be a topic of discussion and work between the leaders of the respective Orthodox Patriarchs and the Popes of Rome.

To be sure, theological, ecclesiological, and historical issues remain unresolved, but there have been important dialogues, joint statements, and symbolic gestures demonstrating a commitment to RCOU and OIC. Indeed, the Assembly of Canonical Orthodox Bishops of the United States of America (**ACOBUSA**) and Roman Catholic Bishops have been involved in a twice-a-year dialogue that is starting to produce more significant joint statements of understanding.

Ironically, the Roman Catholic and Orthodox lawyers are getting along very well, as my fellow Orthodox attorneys and I, who are involved in the ACOBUSA and other various Orthodox Jurisdictions, have joined with our Roman Catholic attorney brothers and sisters in Christ in filing multiple Amicus Briefs before the United States Supreme Court and other courts to fight for religious freedoms and matters of mutual interest (e.g., sanctity of the unborn, separation of church and state, etc.).

## [Positions Of Orthodox Patriarchs On Roman Catholic Orthodox Unity \(RCOU\).](#)

The Ecumenical Patriarchs, especially in recent decades, have been supporters of dialogue with Rome. As mentioned, in 1965, Patriarch Athenagoras I (1948–1972) and Pope Paul VI mutually lifted the anathemas of 1054 and advocated for greater dialogue and deeper reconciliation. Patriarch Athenagoras famously said: **“We shall meet in love and leave aside our differences for theologians to resolve.”**

More recently, Ecumenical Patriarch Bartholomew I (1991–present) has had multiple meetings and services with multiple Popes (John Paul II, Benedict XVI, Francis) to promote ecumenical efforts. The picture on the right from November 29, 2014, is another example of a blessing and loving kiss delivered from Ecumenical Patriarch Bartholomew to his brother in Christ, Pope Francis. In addition, a historic 2014 Joint Prayer occurred in Jerusalem with Pope Francis and Patriarch Theophilos III of Jerusalem. The Joint International Commission for Theological Dialogue has worked on doctrinal understanding and agreements. The import of Patriarch Bartholomew’s ministry has focused on **“a primacy of love” rather than ‘jurisdictional supremacy.’** Certainly, this righteous and positive position for OIC should be inspiring to my fellow Orthodox adherents.



Patriarch Kirill of Moscow (2009–present) has proceeded with greater caution because of historic differences, including the Uniates. Patriarch Kirill met Pope Francis in 2016 in Havana, which was the first time a Russian Orthodox Patriarch met with a Roman Catholic Pope. These two Hierarchs issued the Joint Declaration of Havana focusing on common Christian witness and the need to defend traditional Christian values. The Ukrainian conflict has strained the relationship due to the Vatican’s stance on Russia’s aggression.

Patriarchate of Alexandria, Theodoros II, has supported Roman Catholic dialogue and also met with Pope Francis. This dialogue has included peaceful relations and cooperation in Africa despite the tension caused by the Russian Orthodox Church establishing its own African jurisdiction. Patriarchate of Antioch, John X, has also been historically supportive of dialogue with Rome. The Patriarch of Antioch has called for unity and focused on the model of the early Church. Patriarch Theophilos III of Jerusalem has met and prayed with various Popes but remains more focused on defending Orthodox interests in the Holy Land.

## **Positions Of Roman Catholic Popes On RCOU.**

Increasingly, the Popes of modernity have emphasized ecumenism and Orthodox reconciliation and unity as significant goals. As mentioned previously, Pope Paul VI (1963–1978) took the bold step to lift the mutual excommunications of 1054 and, in 1967, was the first Pope to visit the Ecumenical Patriarchate. Pope Paul VI officially stated: **“The Church must breathe with her two lungs, East and West.”** What a powerful metaphor.

In turn, Pope John Paul II (1978–2005) was a strong proponent of reconciliation and healing the schism. He visited Greece, Ukraine, and other Orthodox countries and issued an apology for the sacking of Constantinople (1204) during the Crusades. Pope John Paul famously called for a **“shared vision of primacy”** that respects Orthodox concerns about papal authority. This is in keeping with the early church’s recognition of

the primacy (but not infallibility) of Rome, by which the Pope could be declared “the first among equals.” (This is roughly analogous to how the Chairman of a Board of Directors has certain additional responsibilities while being the equal of other Board members for all other purposes. This role is currently served within Orthodoxy by the Ecumenical Patriarch.)

Of great significance was the 2004 delivery by Pope John Paul II of the relics of St. John Chrysostom and St. Gregory the Theologian to the Ecumenical Patriarch. This historic and highly theologically significant act of love was a great stride toward RCOU. Pope Benedict XVI (2005–2013) continued the ecumenical dialogue and frequently met with Orthodox leaders. He focused on specific theological issues, such as the role of the Pope in the first millennium.

Most recently, Pope Francis (2013–present) has met with multiple Orthodox Patriarchs, including Patriarch Bartholomew, Patriarch Kirill, and Patriarch Theophilos. Pope Francis signed joint declarations focused on emphasizing unity and significantly advocated for synodality. This synodical concept is foundationally important within Orthodoxy. Pope Francis specifically referred to the Patriarchs as “**brothers in Christ**” and stated: “**Unity will not be the result of human projects but of the Holy Spirit.**”

### **Now What?**

Of course, I will always humbly defer to the Holy Spirit, as suggested above. To that end, there have been numerous visits, exchanges of kisses of peace, joint statements, actions with respect to returns of relics, forgiveness for past issues, and wonderful agreements in principle between Orthodox Patriarchs and Popes regarding the need for greater unity. All of that said, it is my fervent belief that the laity has a role to play in advancing unity or at least using their God-giving skills and gifts to offer frameworks or Roadmaps such as this humble offering.

At the core of this effort are incredible foundational sentiments such as those noted by Dr. Cyril Hovorun in his outstanding book Scaffolds of the Church Towards Poststructural Ecclesiology (Hovorun, 2017). For example, Metropolitan Filaret of Moscow (1782-1867) stated: “My justified respect for the teachings of the Eastern Church does not mean that I judge or accuse Western Christians and the Western Church.” You may recall the previous quote I cited in Chapter 16 of my Roadmap for Orthodox Unity, where Metropolitan Filaret said: “**I dare not to call as false any church which believes Jesus is Christ.**” I provide emphasis on this thoughtful and powerful sentiment about OIC. However, Metropolitan Filaret did not stop there and went on to add: “**An Orthodox Christian is supposed, in the spirit of love, joyfully to find a preserved grace outside the Orthodox Church.**” (again, emphasis added).

It is critical to remember there was essentially one Christian church for more than the first century after Christ’s resurrection. Thus, the concept of Roman Catholic and Orthodox unity is not a creation of something new but rather a return to the original state of the church. As such, a model of early consensus and conciliarity, properly updated to reflect changing times and circumstances, remains a useful approach. It is always more difficult to create something out of whole cloth than to dust off an old model and adapt it

to the present. This is why my Roadmap critically focuses on the past that is re-aligned with the present to reach a desired future destination.

A professor of theology at the University of Kyiv, Archpriest Pavel Svetlov (1861-1945), could find no proper and meaningful support for the separation of the Christian church (Hovorun, 2017). Furthermore, Dr. Hovorun specifically acknowledged Metropolitan Damaskinos Papandreou (1936-2011), who went on to urge Roman Catholic and Orthodox to recognize other Christian communities which would ultimately comprise the Church Christ formed in the fullest sense of the ONE holy catholic and apostolic church (Hovorun, 2017).

Theologian Gregory Baum concluded:

The time will come, and is already coming, when **all who are faithful to the gracious will of God shall transcend the divisions and enter into one community**. We believe that this community of Saints, established in glory on the last day, will be in continuity with the Catholic church...But this reunion will not be like the victory of one group over another; it will be the fulfillment of the hopes of us all (Baum, 1962, pp. 70-71). (emphasis added)

Pay attention to the words of Metropolitan Platon Gorodetsky of Kyiv (1803-1891), who famously proclaimed: **“Our earthly walls do not reach the sky”** in reference to Genesis 11:4. Perhaps there is no clearer, simpler, and more profound criticism of our human failings of division and animosity than this clear teaching. Based on the words of our Lord, we can be assured that OIC is achieved in His presence. How wonderfully righteous it would be if we could use our free will and prepare ourselves for OIC here on earth.

Following the original “kiss of peace” in 1964 between Orthodox Ecumenical Patriarch Athenagoras I and Pope Paul VI, repeated by Ecumenical Patriarch Bartholomew and Pope Francis in 2014, the seminaries and theologians of the future should make more significant efforts to reunite Christ’s fragmented church. This is more in focus because 2025 will be the 1,700th anniversary of the Council of Nicaea that gave Christians the Nicene Creed (Wooden, 2024).

**“Christian faith is always just one generation away from extinction.”**

RCOU presents the opportunity for Christians to address together the departure of the “NONES” (who now claim no religious affiliation) that comprise approximately 30% of American adults (Michel et al., 2024). This includes an increasing number of millennials and Gen Zers who abandoned the church of their youth (Michel et al., 2024). In addition, approximately 22% of Americans form a new fraternity of **“SBNRs”** or **“Spiritually But Not Religious,”** with varying definitions of what that means (Alper et al., 2023). The children of “NONES” now claiming no religion, unlike their parents, have lost a church connection, which will inevitably make reaching them more complicated.

Lord Carey, former Archbishop of Canterbury, provided the title for this section by warning: **“Christian faith is always just one generation away from extinction”** (Bingham, 2013). I refuse to be a part of that generation. Returning to my House metaphor in Chapter 15 of my Roadmap, I submit true Orthodox Christians can also



accept the style of house that has many attributes in common and yet shares some different traditions and practices. Yes, the issue of primacy and infallibility must be reconciled, likely back to the pre-UNGreat Schism role of the primacy of Rome and the conciliarity and consensus decision-making of the synod of all Bishops (Pope and Patriarchs, etc.).

For those who can accept the **Foundational Christian Truths** (as preliminarily outlined in Chapter 15 of my Roadmap), plus any additional or revised elements agreed to by consensus, we must declare our discipleship of Christ to be paramount and more critical than the denominational differences that have served to divide us. So, what Roadmap might take us there?

## One OIC RCOU Roadmap To Return To Christ's Original Church In America.

I acknowledge ab initio that unique global differences may make OIC more challenging in different parts of the world. However, as with Orthodox unity, if the Roman Catholic and Orthodox church leaders can allow the United States to lead the way, a more palatable and proven Roadmap may be devised that can eventually be exported elsewhere. This approach continues the “you eat a massive beast one bite at a time” approach. Space does not permit the entire roadmap and plan I have devised for creating what I will call an **American Christian Church (“ACC”)** that includes in its title the obvious aspiration for even greater OIC in the fullness of time with the guidance of the Holy Spirit.

In any complex combination, it is important to think creatively as to what an ACC could look like. Of course, ideally, it is one fully unified church with a completely common set of practices, beliefs, and services that is led and managed under a common structure and model. If the Mother Churches blessed such a merger under an autocephalous structure, this would accelerate ACC achievement and OIC in America. As with our version of a Constitutional Republic, this American model of autocephaly could be useful and adapted, exported, and applied in other geographic areas and be a catalyst for global OIC.

However, this is only one possible ACC reality. Creative and committed dealmakers never let the impossible achievement of perfection interfere with the consideration of alternatives to achieve the next best result. The earlier discussion of the substantial commitment to OIC from all the recent Popes and most Orthodox Patriarchs provided a nuanced alternative. **“Acceptance,”** in the fullest sense, is a viable giant first step toward OIC. The ways in which Acceptance can be defined and applied are quite varied. Let us return to my House United metaphor (as discussed in Chapter 15 of my Roadmap).

Can you accept that your house, with a strong foundation similar to my concrete foundation but with a different structure on top and even more diverse internal configurations and appearance, is still a house? If so, we ought to agree that different

appearances do not prevent something from being a house. Moreover, you ought to be able to acknowledge that the traditions, activities, and rituals practiced in your house, while different from mine, do not make them any less valued and do not convert your or my house into something that is not a house. You can accept our similar foundational desires, respect the wide variation of interiors and traditions, and still acknowledge we both have a valid house.

The above is a foundational precept of Acceptance that does not have you forcing me to adopt your house configuration. Indeed, if you carefully visited and inspected my house, you will likely find elements of my house you like better that perhaps you will introduce into your house. My wife and I celebrate when a neighbor or friend asks for her Greek recipes they tried at our house for use at a dinner party that they are planning at their house. In this way, our diversity makes us both stronger and appreciative of the differences we can experience but still live in a house. And I can feel comfortable visiting (and even staying for a time ) in your house and vice reverse. This is exactly what families do and what I imagine Christ expected of the family of believers He created.

Acceptance, therefore, should be considered an equally agreeable outcome and perhaps a critical first step toward unity. To be sure, unity is the representation of OIC to which humanity should ascribe. However, Acceptance may be the condition precedent to overcome another century of Denominational Discipleship and continuous divisions that created animosity toward OIC. In short, as any good negotiator will tell you, we must keep all options on the table to see what we can do to achieve OIC.

Below, I briefly summarize my proposed five-step process that has proven successful in other extremely large and complex combinations I have been blessed to lead.

### **STEP 1 –OICD Transformational Leader Alignment (the “Relational Phase”).**

Until U.S. Christian Denominational Transformational Leaders who embrace OIC (“**OICD Leaders**”) agree on the need for an ACC, unity will be difficult unless a grassroots parishioner-led effort motivates them. Committed followers oftentimes can help guide leaders to a better result the leaders themselves cannot or will not achieve for a variety of human reasons. (See the Unified Servant Leader/ Follower discussion in Chapter 5 of my Roadmap).

Christian leaders (whether clergy or laity) need not reinvent the wheel and can use the example of the Apostles who resolved early church differences/schisms. The Jerusalem Council and subsequent Ecumenical Councils provide examples of how today’s OICD Leaders can cooperate to achieve OIC. Since people always perform and respond better when a deadline is identified, a critical requirement is for the OICD Leaders to determine/announce a target date the new ACC will begin (i.e., the “**ACC OIC Unity Day**”).

The OICD Leaders would ideally be a mix of both laity and what I call **Practical Applied Theology** (“**PAT**”) clergy (including Bishops) without insisting that the group be composed of only Bishops, for reasons to be explained later. OICD Leaders are individuals who are sufficiently grounded in the Holy Gospel and their faith traditions but who are primarily focused on how their theology applies to the daily lives of the parishioners. With no disrespect intended, religious historians, theologians, and academic scholars can often argue extensively and wisely about ancient intent and theoretical principles that may not be tethered to the practical lives of the faithful in America. Thus, the focus must be on how people today can fulfill their calling to be disciples of Christ. I have met clergy and laity in the American Orthosphere and laity in the American Roman Catholic church (“**American RCsphere**”) who meet the PAT standard. I am confident there are sufficient numbers of PAT Roman Catholic clergy who can be identified and embrace their Pope’s push for OIC unity.

This combined group of PAT OICD Leaders from both jurisdictions need to gather together over a series of “**ACC Retreats**” to get to know each other more intimately and collegially and establish my Stewardship Calling Servant Leadership three foundational elements of trust, love, and humility. These ACC Retreats would be both facilitated using proven methods to accomplish interactive engagement and problem-solving, as well as establish rapport. The ACC Retreats must include planned times for communal worship followed by communal fellowship.

Ideally there would be at least quarterly ACC Retreats with a detailed agenda and course of study and engagement over one year. Importantly, however, all OICD Leaders would be invited to the annual larger Denominational gatherings of their counterpart Denominations to participate fully. Thus, for example, the Roman Catholic OICD Leaders would be invited not just to attend but actively participate and present at the National and Diocese Clergy Laity Gatherings (by whatever name they are called) of their Orthodox counterparts. The same would be true of the Orthodox OICD Leaders attending the National and Diocesan gatherings of their Roman Catholic brothers and sisters.

At these national and Diocese gatherings, the visiting OICD Leader counterparts will be given the opportunity to participate in everything fully and be featured in live and interactive ACC sessions. This is not just a token appearance and acknowledgment, but rather, a whole-hearted welcoming of brothers, sisters, cousins, aunts, uncles, etc., as you would your own family. And the real “secret sauce” always takes place at the local level, where people live and work and pray every day.

Thus, the OICD Leaders from cities or reasonably close geographies (e.g., Counties) should regularly (preferably no less frequently than monthly) gather together in prayer, worship, common community service, and fellowship. For example, a local InterOrthodox Parish Association (**IPA**) (previously discussed in Chapter 16 of my Roadmap) in a city or area would regularly intentionally welcome and engage their Roman Catholic local OICD Leader brothers and sisters every chance they can. Such activities have already begun in various places. Pre-Covid, the Patterson Family Foundation funded such joint Orthodox/Roman Catholic gatherings in the Atlanta metro

area that alternated between churches and included the choirs, chanters, devotionals, and speakers from both “East and West lungs” of Christ’s church to use Pope Paul VI’s wonderful metaphor.

A small national PAT OICD Leader joint steering committee can coordinate such activities and ensure that diocesan, regional, and parish leaders are apprised of creative and successful ideas being utilized in other areas. Best practices must be coordinated and shared for those in local areas to adapt to their unique circumstances.

In a complex merger or consolidation, there is always a small group from both sides who are committed to the combination and work on it as a priority and not an afterthought or at the end of the week. This must be the specific and primary responsibility of those executing the plan, or it will not be realized as the “tyranny of the urgent” daily pressures distract from bigger objectives. Hopefully what you see from Step One is a coordinated, calculated, and family-oriented process to build trust, love, and humility to establish a solid foundation plan for the team that will bring about the ACC process.

At this point I am confident the question of how this will be funded has come to mind. If this is an important objective as we each prepare for our own II Corinthians 5:10 Moment before Christ, then the national churches, Dioceses, and even local parishes and participants will make this wise investment. For example, I am already aware of billionaires/millionaires, family offices, trusts, and significant endowments who agree with the OIC concept. With assurances of a workable plan, I am confident they would be willing to invest the needed funds not provided by the OICD Leaders or their churches.

This is not a mere matter of faith but an absolute certainty that these people exist. I am equally confident (and faithfully trusting) that even greater numbers of such individuals and families whom I do not know are similarly committed to OIC and are willing to use Venture Philanthropy concepts (previously discussed in Chapter 16 of my Roadmap) to invest in an ACC. Moreover, as the OICD Leaders work toward the ACC, there will undoubtedly be many additional committed faithful who will gladly invest in such efforts. Finally, I am extremely confident that if this work is the will of the Lord, the Holy Spirit will intervene, as always, to ensure this effort is properly funded.

## **STEP 2 – Determine OIC ACC WHY and Core Values (the “Foundation Phase”).**

Lack of patience is a common impediment for imperative people and deal-making negotiators like me. Yet, in church work I have come to understand that things happen on God’s time and schedule and not the human scale we call time. Thus, it is impossible to predict how long Step 1 will take before the Servant Leadership foundational sense of familial trust, love, and humility is established. If Step 1 is well coordinated and the serious objective of key OICD Leadership on both sides, it should be achievable within two to three years (and hopefully sooner).

Once the OICD Leadership Team feels called by God to take the next step, the focus shifts to the Foundation Phase. The work of previously identified Transformational Leadership scholars, along with Kouzes & Posner (2017) and Sinek (2011), underscore the criticality of understanding an organization's WHY and Core Values. For a successful ACC foundation to be established, a consensus agreement on the ACC's WHY is critical.

Throughout my Roadmap, I have used the proxy WHY Statement I helped the ACCOBUSA adopt, which is "to bring people closer to Christ and each other." This WHY Statement, or something better, could be suitable for the ACC. However, what is most critical is that the OICD Leadership reaches a consensus on the WHY that will point to the true north of the ACC and establish the fundamental purpose focused on OIC that the faithful can embrace.

Successful change efforts are often driven by the cultural Core Value of collaboration (clan culture) while at the same time encouraging autonomous and creative alternatives (adhocracy culture) (Cameron & Quinn, 2011). However, for the ACC to become a reality, the clan differences must be subordinated to the OIC focus on those critical Core Values Christ taught that all His disciples must embrace. A focused and facilitated effort to lead the OICD Leaders through a strategic planning process should be able to, in short order, help them reach a consensus on the foundational Core Values of any ACC.

The OICD Leaders should reach this consensus of WHY and Core Values on a mutually agreed upon schedule which should not take more than six months and several joint sessions (or ZOOMs). What is interesting is that Step 2 does not need to wait until all agree that Step 1 is fulfilled. Once enough progress has been made in the Relational Phase that the three Stewardship Calling Servant Leadership foundational basics of trust, love, and humility are sufficiently in place, work on developing the WHY and Core Values can begin. Regardless of the timeline, it remains essential that the OICD Leadership reach a consensus commitment to the new ACC WHY and Core Values.

### **STEP 3 – Differentiate Sacred Beliefs/Practices from Mere Traditional Rituals (the "Theological Accommodation Phase").**

Different Denominational fundamental and sacred practices/beliefs cannot be reconciled quickly. However, tactical and operational practices and comfortable rituals can be harmonized more readily. Similarly, mostly aligned common beliefs and practices can also be reconciled easily. Examples of sacred beliefs would include the questions of infallibility and primacy of the Bishop of Rome, the Filioque addition to the Nicene Creed, the Uniates, and the loyalty and support of the Mother Churches to which the Denominations are aligned (e.g., Rome, Constantinople, Alexandria, Antioch, Jerusalem, Moscow, etc.).

Also included in the fundamental elements to be reconciled would be the sacred sacraments practiced. However, in the Roman Catholic and Orthodox cases, they share

the same basic sacraments, with nuances of difference. These foundational sacraments include Baptism, Confirmation, Eucharist (Holy Communion), Confession (Penance or reconciliation), Anointing of the Sick, Ordination (for clergy and Bishops), and, of course, Marriage. Variances exist as to when Confirmation takes place (right after infant baptism in the Orthodox tradition and between ages 7 - 16 for the Roman Catholics), the use of unleavened bread in communion in the Roman Catholic church, the celibacy of all clergy in the Roman Catholic Church versus the ability of clergy to be married in the Orthodox Church (except for Bishops), etc.

More nuanced distinctions might apply as to the objective of Holy Confessions and the penance given afterward, the process for divorce and remarrying, the timing of Holy Unction, etc. Interestingly the Roman Catholic Church has generally allowed Orthodox to partake of the Eucharist, something for which no reciprocity exists in the Orthodox church. Additionally, while the Roman Catholic Mass and hymns differ from the Orthodox Divine Liturgy, their directional focus on the sacred offering of the Eucharist remains common (even if the laity can administer this sacrament in the Roman Catholic church but not in the Orthodox church).

More adept and well-trained theologians have written extensively about all the nuanced differences and significant commonalities. Of course, the interior appearances of the churches (e.g., the use of statuary versus icons) remain different. However, I submit they are merely the distinct appearance of a house that is still a house. Nevertheless, subcommittees of OICD Leaders can work on harmonization, and where a consensus cannot be reached, Accommodation and Acceptance can be granted. (This resembles the Orthodox principle of οἰκονομία (pronounced ē-con-o-mia), which allows clergy to grant unique and one-off concessions from the desired behavior). Furthermore, subgroups of the OICD Leadership can begin to address and reconcile different Denominational practices that have been adapted over time.

To do this work, OICD Leaders should identify, recruit, and instruct:

- (a) non-DD Transformational Leadership theologians from their Denomination who are more committed to OIC to convene with each other in separate councils to prayerfully invoke the Holy Spirit and work toward a harmonization of the sacred beliefs and practices differences (e.g., within 3-5 years), and
- (b) non-DD tactical operational Denominational change agents to quickly combine the best rituals and practices into a cohesive yet diverse set of practices for the ACC (e.g., within 2 years). The historic Ecumenical Councils worked relatively quickly by convening and remaining together until a consensus could be reached.

To be sure, everything will not be identical or necessarily perfect at first. But neither was perfection achieved in the early church as observed by the commentary to the Orthodox Study Bible referenced previously. After all, humans, with all their

prejudices and human frailties, are involved. Of course, there will be differences of opinion and interpretation. However, all the recent Popes and almost all recent Patriarchs have stressed the primacy of Christ and oneness rather than arguing about whose interpretation is more authentic or righteous.

**OIC means Oneness in Christ, not Oneness in Conceit.** It is the old arrogance we are attempting to overcome. Difficult differences are always reconciled in successful mergers, consolidation, and outsourcing business relationships. However, they might lack the most powerful differentiator that this OIC ACC task has, namely, the power of the Holy Spirit. If the Holy Spirit can cause all the Apostles to immediately speak different languages and be understood by the diverse humanity, the Holy Spirit can guide diverse humanity back to Oneness In Christ.

#### **STEP 4 – OIC Vision, OIC Strategic Goals, and Timelines (the “Vision and Planning Phase”).**

Parallel with Step 3, trained Christian facilitators must lead the OICD Leaders and cross-denominational representatives/diverse teams through the remaining steps of a comprehensive vision and strategic planning process to reach a consensus on an overall Vision for the ACC, the most critical strategic objectives (that take years to achieve and address root cause issues) and “low hanging fruit” matters (that can be addressed in less than a year). A step-by-step action plan to achieve each strategic S.M.A.R.T. (Specific, Measurable, Attainable, Relevant, and Timebound) Goal must be established consisting of four elements: 1. the action to be taken, 2. who is responsible, 3. the deadline, 4. how to determine it is completed? A similar process should be used for low-hanging fruit initiatives.

I firmly believe this Vision and Planning is one of the most critical elements in determining if this ACC OIC effort will be successful or not. The ability of the OICD Leaders to embrace a common Vision and destination 3 to 5 years out can be the human difference between overall success and failure. My belief in its criticality is represented by the extensive materials described in my Vision and Planning process I outlined in excruciating detail in Section 7 of my Roadmap. My belief that without a Vision, people are lost (and can perish) is based on Proverbs 29:18. And my belief that without a Roadmap and plan, Visions are not achieved is based on the centuries of human experience.

#### **STEP 5 – Leave It to the Experts (the “Implementation Phase”).**

This step of trust may prove most difficult for some OICD Leaders. The experts to which I refer are many highly trained and talented, Denominationally diverse, faithful Christian lay professionals (“**ACC Implementation Team**”) who commit to OIC and ACC and are fully charged with implementing and achieving the ACC Strategic Plan. Faithful OICD Leaders who are clergy or Bishops have been called by God and are well-trained

theologically to serve Christ's church and people. However, many OICD Leaders lack sufficient education, training, and experience in leading/managing successful merger/combination/outourcing activities. St. John Chrysostom admonished church leaders to "discern the spiritual gifts" of people and "encourage those gifts to be used to the full for the benefit of all" (Chrysostom, 1964, p. 44; Kostakis, 2018). If ever there was a group to which such instructions are relevant, it is this ACC Implementation Team.

There is much more that could be written about the step-by-step work of the ACC Implementation Team. However, if they are given a thoughtful Vision and Strategic Plan with step-by-step Action Plans for each Strategic Goal, by definition, this group of experts can capably execute the plan. And if they remain faithful to OIC and service to the Lord and their II Corinthians 5:10 Moment, then nothing more needs to be written. Trusting the experts (with proper verification and mediation) under the guidance of the Holy Spirit is all that is necessary to be able to celebrate the ACC OIC Unity Day established by the OICD Leaders. **Once the ACC OIC Unity Day arrives, the dark stain of the "UN-Great Schism" will be finally erased, and "the East and West lungs" will be reunited into the Body of Christ's church to each perform their essential function of bringing people closer to Christ and each other.**



## CHAPTER 18. The End of the Road(map).

Pray though I did; I find it impossible to end my Roadmap. It is difficult to summarize the last 30 years of my 70-year journey, which has been largely focused on service to others and Christ's church. There are so many more lessons learned and data and experiences gathered that might be of benefit to others that I did not include.

My Roadmap is a humble and sincere attempt to begin a dialogue with you to address the three biggest S<sup>3</sup> challenges I see in American Christian churches and some ideas to pursue Oneness In Christ and heal the un-holy division in Christ's churches. I pray that at least one idea, suggestion, or tool is of use to you or your parish or ministry. If you find any value, then all glory to God. If not, please accept my humble apologies, as I tried my best to be helpful.

### St. Paisios's Call To Action.

There is a modern Orthodox Saint, St. Paisios the Athonite (1924-1994), whose inspirational tough love call to action I use in all my Igniting the Flame retreats and live programs. It also inspires me to do everything I do. Here is what this contemporary Orthodox Saint so eloquently said:

The spirit of lukewarmness reigns. We've been spoiled for good.  
How does God still tolerate us?

Today's generation is the generation of indifference. There are no warriors! The majority are fit for parades and feasts only.

Even people who've got something inside have begun to grow cool, saying, "Can I really do anything to change the situation?"

We have to witness our Faith with boldness because if we continue to remain silent, we'll have to answer in the end.

I invite you to join me as a "warrior" in the righteous crusade St. Paisios asks us to undertake to live and witness our Faith with boldness as we prepare for our II Corinthians 5:10 Moments as we account to the Lord.

### Great Wisdom And Insights From Great Leaders For You.

Throughout my life, I surrounded myself with quotes of great wisdom I tried to fulfill. There are too many to include here, but I thought it was fitting to end with some of the ones most critically related to the topics covered in my Roadmap that might be of some value to you.

1. Henry Ford's challenge: **"If you keep doing what you've always done, you'll keep getting what you've always gotten."**
2. Simon Sinek's challenge: **"Words can inspire, but only action creates change. Most of us live our lives by accident - we live life as it happens. Fulfillment comes when we live our lives on purpose."**

3. St. Paul's admonition to **"live worthy of the calling to which you have been called."**
4. Guidance from a religious stewardship cartoon that said: **"If anyone asks you what Jesus would do, remind them that flipping over tables and chasing people with a whip is within the realm of possibilities."**
5. Socrates's wisdom: **"You cannot teach adults new things. You can merely create the environment where they discover the truth for themselves."**
6. Wise council from South African evangelist and business leader Vusi Thembekwayo: **"I genuinely get worried when people like me because I am almost sure that I am doing something God doesn't want me to do. Because if it is something God wants me to do, many people are probably not going to like me. But I would prefer to be loved by God rather than loved by men. When you have the courage to speak the truth, you must expect to be misunderstood and sometimes hated."**
7. Anonymous wisdom: **"God doesn't call the qualified. He qualifies the called."**
8. Mark Twainism: **"The two most important days of your life are first the day you were born, and second the day you figure out why."**
9. Strategic foresight wisdom of Zayn Malik: **"There comes a day when you realize turning the page is the best feeling in the world. Because you realize there's so much more to the book than the page you are stuck on."**
10. Sir Winston Churchill's great commentary: **"We make a living by what we get. We make a life by what we give."**
11. Ancient Greek wisdom: **"Great men plant trees in whose shade they will never sit."**
12. The wise Chinese proverb: **"The best time to plant a tree was 20 years ago. The second best time is today."**
13. Albert Einstein's contribution: **"Logic will get you from A to B. Imagination will take you everywhere."**
14. Thomas Jefferson's inspiration: **"Wisdom is knowing what to do next. Skill is knowing how to do it. Virtue is doing it."**

15. The repeated advice of Ted Turner, General Patton, Lee Iacocca, Thomas Paine, (and me): **“Either lead, follow, or get out of the way.”**
16. Business visionary Steve Jobs’s personal advice: **“If you live each day as if it were your last, some day you will most certainly be right. Every morning, I look in the mirror and ask myself: ‘If today were the last day of my life, would I want to do what I am about to do today?’ And whenever the answer has been no for too many days in a row, I know I need to change something.”**
17. My inspiration from President Theodore Roosevelt: **“It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better.**

**The credit belongs to the man who is actually in the arena, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; who spends himself in a worthy cause; who at the best knows, in the end, the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, so that his place shall never be with those cold and timid souls who neither knows victory nor defeat.”**

18. My life motto from James Michener and others: **“The master in the art of living makes little distinction between his work and his play, his labor and his leisure, his mind and his body, his information and his recreation, his love, and his religion. He hardly knows which is which. He simply pursues his vision of excellence at whatever he does, leaving others to decide whether he is working or playing. To him, he’s always doing both.”**
19. Our Lord’s Commandment: **“By this they will know you are my disciple, that you have love for one another.”**
20. What I hope to say at the end of my life: **“I have fought the good fight, I have finished the race, I have kept the Faith. Finally, there is laid up for me the crown of righteousness, which the Lord, the righteous Judge, will give to me on that day.”**

21. My Daily Prayer: **“That the end of life may be Christian, without pain, blameless and peaceful, and for a good account before the awesome judgment seat of Christ.”**
22. What I hope to hear when I stand before the “awesome judgment seat of Christ” in my II Corinthians 5:10 Moment: **“Well done, good and faithful servant; you have been faithful over a few things, I will set you over many things. Enter into the joy of your Master.”**
23. What I expect my mother to say to me when, hopefully, I first see her in the Kingdom Eternal: **“I’m glad you are finally a doctor (even though you’re not a medical doctor), but couldn’t you have cut your hair before you stood before the Lord?”** (I love you, mom.)

**ALL GLORY TO GOD!**

## Author's Biography

My WHY is 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.” As a lawyer, my WHY is to “be a problem solver and dream facilitator.” That, too, remains my life’s calling. I have been blessed to live the American dream and help others pursue their dreams and callings.

God directed my life and experiences from birth into a poor Greek immigrant family that prioritized Faith, Family, Friends, and life-long learning while growing up in an impoverished steel mill town to become an international lawyer representing many significant clients. Throughout college and graduate school, I worked at least 40 hours per week to pay my way and to honor my family’s commitment to hard work and lifelong learning.

I was blessed to be an equity partner and serve in management in two global law firms, the 1,600-lawyer Troutman Pepper Locke (TPL) and the 1,100-lawyer McGuire Woods (MW). While always engaged in the full-time practice of law for over 36 years, I served as Atlanta Managing Partner (MW), Strategic Plan Leadership Initiative Team Lead (MW), Executive Committee (TPL), Founding Chair of the Technology and Intellectual Property Practice Group (TPL), Co-leader of Strategic Planning subsidiary (TPL), Hiring Chair (TPL).

My blessings continued in being able to regularly counsel public and private companies and non-profits on all their operations with a focus on mergers & acquisitions, outsourcing, and corporate law. It is comforting to look back and realize my teams, and I closed many tens of billions of dollars of mergers, acquisitions, and outsourcing transactions and thus helped so many people realize their dreams.

I had unbelievable opportunities to help start CNN Headline News® Georgia Lottery, North Carolina Lottery, and Verizon Wireless® Southeast operations. I grew in knowledge by being able to represent AT&T Global Information Solutions®, Raymond James®, McDonalds® Chick-fil-A® Shoney’s® SAIC®, Randstad®, Manpower®, New York Times Best Selling authors Tom Stanley (Millionaire Next Door, Millionaire Mind) and Jim Huling (Four Disciplines of Execution), several of Ted Turner’s broadcasting and sports businesses, and music industry pioneer Taylor Swift, among many other clients.

During almost four decades of closing challenging and sophisticated transactions, my life was richly blessed to lead and work on countless multi-disciplinary teams that were hyper-focused on providing the best problem-solving and opportunity-pursing guidance and legal solutions to help clients achieve their desired results. Every engagement began by clearly understanding the client’s WHY, situation, and desired end state.

While always maintaining the highest rating for lawyers (“AV”) and annually being named a “Super Lawyer” by my peers, perhaps my most significant accolade was serving

as “consigliere” (trusted advisor) for the clients named above and many other who called on me to provide my best business consulting judgment and guidance, in addition to excellent legal advice. I received seven appointments as a Special Assistant Attorney General, two of which provided me the awesome responsibility to help start the multi-billion-dollar-a-year North Carolina and Georgia Lotteries from scratch in four months.

God did not rescue me from poverty and provide incredible experiences merely to achieve financial success. The Lord called me to retire early and “refire” to work full time for free as Chief Evangelist Officer (CEO) of my Stewardship Calling ministry ([www.stewardshipcalling.com](http://www.stewardshipcalling.com)), helping people and parishes discover and live their stewardship callings so they “may have a good account before the awesome judgment seat of Christ” (II Corinthians 5:10). Through my Stewardship Calling ministry, I now counsel clergy and laity on embracing operational change by excelling at Vision & Strategic Planning; Stewardship, Generosity and Engagement; WHY discovery; Servant Leadership & Team Development; and other elements of Operational Excellence.

After 1.3 million airline miles working with law clients, I have logged over 450,000 more airline miles consulting with Orthodox Christian National Churches, Dioceses, and working with over 1,000 Parishes. I have been honored to host a long-running Stewardship Calling live call-in program and podcast on Ancient Faith Radio and deliver live and pre-recorded consulting programs and podcasts on my own and various church YouTube channels.

Unbelievably, I was given the privilege of developing strategic plans covering over 26% of all U.S. Orthodox Christians while also delivering hundreds of keynote addresses and homilies in churches. I was also blessed to lead the development and implementation of (a) the empirically validated Effective Parish Assessment tool (EPA) to assess church health and effectiveness on the 30 Building Blocks in the 6 Pillars of operational excellence and (b) the Financial Stewardship Analysis tool used by hundreds of churches to understand the symptoms and root causes of their financial health and parishioner engagement challenges.

My blessings continue through my service on the Secretariat of the Assembly of Canonical Orthodox Bishops of the United States of America (and its Legal and Finance committees), the Archdiocesan Council of the Greek Orthodox Archdiocese of America (and its Legal and Stewardship committees), the Metropolis Council of the Greek Orthodox Metropolis of Atlanta (where I serve as Metropolis General Counsel), and as an Archon of the Ecumenical Patriarch – Order of St. Andrew. While not being worthy, I have been honored with the St. Christopher’s medal from the Greek Orthodox Archdiocese; the medal of the Order of Sts. Borris and Hlib from the Ukrainian Orthodox Church of the USA; and the Archangel Michael medal from the Metropolis of Atlanta.

I received a B.A. in Psychology from Northwestern University, an M.B.A. from the Goizueta Graduate School of Business Administration at Emory University, and a J.D. from Emory University School of Law, all with honors. I also received a Graduate Certificate in Leadership from the Kellogg School of Management at Northwestern University. In keeping with my passion for lifelong learning, I completed a Doctorate in Strategic Leadership at Regent University with honors right before my 70th birthday. This Roadmap is the final project for that DSL program.

Most importantly, I am eternally grateful to my Greek immigrant parents and grandparents, who instilled in me the three critical Fs of Faith, Family, and Friends. I honor my father, who survived the Nazi occupation in Greece, where he grew up, and who instilled in me the value of hard work, education, and life-long learning. My life would have been nothing without the incredible influence of six of the strongest women I have ever known.

These female role models include three women of blessed memory: my grandmother (Yiayia) Bessie Marianes, who overcame unimaginable adversity as a war survivor and immigrant; my own “force of nature mother,” Bess Vambakas Marianes, who shaped who I am today; and my inspirational sister Connie Marianes Kratky who overcame polio, a near-death car wreck, and so many other adversities to improve the lives of thousands of “differently abled” children for decades. Blessed to still be teaching me every day are my amazingly patient and loving wife of 44 years, Audrey (May) Marianes, and my two equally exemplary change agent daughters, Dr. Alexis Marianes and Eliana Marianes, all three of whom I will always love fully and unconditionally.

For any questions or further information about any of the Stewardship Calling offerings, I can be reached at [Bill@stewardshipcalling.com](mailto:Bill@stewardshipcalling.com). In everything, I serve my Lord and Saviour, Jesus Christ, and humbly give all glory to God!

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Copyright © 2025 William B. Marianes and Stewardship Calling. Anyone is free to use or improve anything in my Roadmap, provided there is no profit motive involved. Everything I have is a gift from God, and this is my feeble gift in return that will hopefully help His people, churches, and ministries bring people closer to Christ and each other. All glory to God!

# GLOSSARY AND INDEX OF DEFINED TERMS

**II Corinthians 5:10 Moment** - The time you will stand before the Lord and seek “a good account before the awesome judgment seat of Christ” (what I call the “**Big Ask**”) as promised in II Corinthians 5:10. Every time you contemplate that time and the Big Ask you will make is a II Corinthians 5:10 Moment for you

**ACC = American Christian Church** = This term refers to the aspirational initial unity or acceptance of the Roman Catholic and Orthodox churches in America. This can then serve as a catalyst for even greater Oneness In Christ unity with other American Christian denominations in the fullness of time as directed by the Holy Spirit. If an ACC can be worked out in the United States as an incubator of unification, the model can be adapted and exported to other regions of God’s creation until His church is again ONE, holy, catholic, and apostolic church.

**ACC Implementation Team** = A group of highly trained, talented, denominationally diverse, and faithful Christian lay professionals who work cooperatively to create the ACC and achieve OIC.

**ACC Retreats** = Planned extended retreat gatherings of the chosen Practical Applied Theology Oneness In Christ Disciples (**PAT OICD**) leaders who meet with a plan and facilitated agenda to establish rapport and resolve Denominational differences interfering with Oneness In Christ (**OIC**).

**ACC OIC Unity Day** = A target date established by the OICD Leaders to begin a unified American Christian Church.

**AE = Accusation Effect** = Accusers with culpability are evaluated more favorably by pointing out the failures of others.

**ACOBUSA = Assembly of Canonical Orthodox Bishops of the United States of America** = The body consisting of all Bishops in all the Eastern Orthodox Jurisdictions in the United States that was formed Patriarchs and Heads of the Autocephalous Orthodox Churches at The Fourth Pre-Conciliar Pan-Orthodox Conference held in Chambésy, Switzerland, June 6-13, 2009. The ACOBUSA is intended to address a Canonical anomaly and also bring about Orthodox unity in America.

**AI = Artificial Intelligence** = A branch of computer science that uses Large Language Models (LLM) and extensive computing capacity to allow complex and simple tasks typically requiring human intelligence to be performed far more quickly and creatively. These LLMs can simulate human learning with the ability to efficiently and creatively comprehend massive amounts of data and autonomously solve problems or perform tasks.

**AL = Authentic Leadership**” = a leader who acts with self-discipline and clear values focused on connected relationships in the passionate pursuit of an inspiring purpose.



**Ambassadors** = those parish leaders and members of the Stewardship ministry who will contact every parishioner to obtain their stewardship pledge.

**ACC = American Christian Church** = Some form of a unified Christian Church in the United States

**American Orthosphere** = This is the phrase I use to describe all the various Eastern and Oriental Orthodox Jurisdictions and over 2,500 Orthodox parishes throughout the United States. As the context will sometimes indicate, it may only refer to the Eastern Orthodox Jurisdictions or may also include the Oriental Orthodox Jurisdictions.

**AOC = American Orthodox Church** = the newly formed merger of all Orthodox churches in the United States, starting with the 12 Eastern Orthodox Jurisdictions and eventually including the 6 Oriental Orthodox Jurisdictions

**AOC = Implementation Team** = A highly trained, talented, faithful, dedicated full-time, Denominationally-diverse group of Christian lay professionals from the different needed disciplines from among the current Orthodox Jurisdictions who would commit to OIC and AOC and are charged with organizing the AOC and ultimately implementing its new AOC Strategic Plan.

**AOC Roadmap** = the specific and comprehensive plan to achieve AOU and create the AOC that includes all the steps necessary to accomplish the initial merger/consolidation and expanding to include the strategic plan for the AOC

**AOC Synod** = The Synod consisting of all new American Orthodox Church (AOC) Bishops (regardless of title or prior Jurisdiction)

**AOC Synod Executive Officers** = The Chairman, Vice Chairmen, Treasurer, Secretary, and other officers that govern the AOC Synod as selected by the members of such Synod.

**AOU = American Orthosphere Unity** = The unification of the various Jurisdictions within the American Orthosphere

**APIPs = “Absent Parishioners in Pews)** - parishioners who were PIPs (Parishioners In Pews) and for some reason have either stopped coming or reduced their frequency/participation or attend another church in the area of the parish

**Autonomy (literally, “self-ruled”)** = is when the presiding Hierarch within an Orthodox jurisdiction must be confirmed by one of the autocephalous Orthodox Churches. Otherwise, these autonomous churches are self-governing. There are generally six current autonomous Orthodox churches) including the Churches of Sinai, Finland, Japan, Ukraine, Estonia, China, and Ukraine (although not every Patriarchate recognizes each of the above list of autonomous churches). (OrthodoxWiki, 2010).

**Autocephaly (literally “self-headed”)** = is when the presiding Hierarch of a regional/local Orthodox church does not report to any higher-ranking Bishop or Patriarch. Autocephaly has been typically granted within the global Orthosphere

by an Ecumenical Council or a Patriarch/Primate releasing a church under their Jurisdiction in a different area from its material obligations to that higher authority while maintaining the full communion with the bishops of that area (OrthodoxWiki, 2022b). The Roman Empire and history acknowledged the original autocephalous Patriarchates of Rome, Constantinople, Alexandria, and Antioch. Additional Autocephalous churches have been granted since then (e.g., Patriarchate of Moscow, Patriarchate of Serbia, Patriarchate of Romania, Patriarchate of Bulgaria, Patriarchate of Georgia, Church of Cyprus, Church of Greece, Church of Poland, Church of Albania, Church of the Czech Lands and Slovakia, Orthodox Church in America (autocephaly recognized by only by Moscow, Bulgaria, Georgia, Poland, and the Czech Lands and Slovakia), Orthodox Church of Ukraine (autocephaly recognized by Constantinople, Alexandria, Cyprus and Greece) (OrthodoxWiki, 2022b).

**Big Ask** The time you will stand before the Lord and seek “a good account before the awesome judgment seat of Christ” as promised in II Corinthians 5:10

**Bishop** = A Hierarch in any Denomination, whether they have the title of Patriarch, Pope, Archbishop, Metropolitan, or Bishop.

**Clergy** = Any priest or other clergyman ordained in their Denomination, including all Bishops.

**COM = Council of Ministries** = The organizational body of the leaders of all parish ministries and the clergy and parish council. Its purpose and operation are described in Chapter 11 of this Roadmap.

**Consensus** = A process of seeking the “common mind” through respectful dialogue. Ultimately, you should seek an agreement everyone can “live with” (even if it is not their first choice). Consensus is achieved once everyone agrees that the discussion has been full and fair and everyone can live with the modified proposal.

**Crete Council = The Pan-Orthodox Great and Holy Council in Crete** = The gathering of over 150 Bishops from throughout the world representing the Mother churches (and various of their eparchies) Church of Constantinople; Church of Alexandria; Church of Jerusalem; Serbian Orthodox Church; Church of Romania; Church of Cyprus; Church of Greece; Church of Poland; Church of Albania; Church of Czech Lands and Slovakia. Convened by Ecumenical Patriarch Bartholomew to gather all of Orthodoxy in the form of an Ecumenical Council, this gathering successfully produced several pronouncements. Primarily due to the situation of the Orthodox Church in Ukraine, at the last second, a few Orthodox Jurisdictions chose not to attend the Crete Council (i.e., Moscow Patriarchate, Georgian Church, OCA, and Antiochian Church).

**CT = Core Team** = A group of five to seven parish leaders most dedicated to a successful Strategic Planning process who will help recruit and organize the Strategic Planning Team (SPT) and SP retreats. This CT tends to be leaders of the community who have a good strategic vision of what is going on and what needs to happen and generally know most of the people within the parish. At the same

time, it must be diverse enough to represent or at least know the different significant constituencies within the parish.

**Denomination** = A particular church, parish, Jurisdiction, faith, congregation, religious group, or tradition to which a person has slightly different beliefs from other groups that share the same religion (Cambridge Dictionary, n.d.).

**DD or Denomination Disciples** = individuals focused exclusively on supporting and promoting their religious Denomination or Jurisdiction to the exclusion of others or “Oneness In Christ.”

**DDA = Denominational Disciple Antagonists** = Individuals who are staunch DDs and defend the singular preeminence of their Denomination so vigorously that they object to a discussion of Oneness In Christ as a unifying consideration for all Christians.

**Eastern Orthodox Jurisdictions** = These are the various independent Orthodox Christian Church Jurisdiction entities that are present in the United States as follows:

**A. Under The Ecumenical Patriarchate:**

1. Greek Orthodox Archdiocese of America
2. American Carpatho-Russian Orthodox Diocese of the USA
3. Ukrainian Orthodox Church of the USA
4. Albanian Orthodox Diocese

**B. Under The Patriarchate of Antioch:**

5. Antiochian Orthodox Christian Archdiocese of North America

**C. Under The Patriarchate of Moscow:**

6. The Moscow Patriarchal Parishes in the USA
7. Russian Orthodox Church Outside of Russia

**D. Under The Patriarchate of Serbia:**

8. Serbian Orthodox Church in North, Central and South America

**E. Under The Patriarchate of Romania:**

9. Romanian Orthodox Metropolia of the Americas

**F. Under The Patriarchate of Bulgaria:**

10. Bulgarian Eastern Orthodox Diocese of the USA, Canada, and Australia

**G. Under The Patriarchate of Georgia:**

11. Georgian Apostolic Orthodox Church in North America

## H. Claiming Autocephaly from the Moscow Patriarchate:

### 12. Orthodox Church in America

**Ethnophyletism** = (ἔθνος (i.e., nation) and φυλετικός (i.e., tribal) = the tendency to conflate one's church and one's nation that often leads to ethnic divisions within a Church.

**Fathers of the Church** = refers to Christ's Apostles and earliest Disciples, as well as the learned theologians in history who have provided spiritual guidance.

**FBO = Faith-Based Organization** = any organization with a faith orientation as its principal purpose and focus.

**FS = Future Smart** = a process of anticipating, mapping, and harnessing the unimagined by examining and extrapolating trends to predict the future.

**FSA = Financial Stewardship Analysis** = A comprehensive and analytical process I developed in my Stewardship Calling ministry using best stewardship practices and financial analytics adapted for churches. The FSA provides a parish with a detailed financial analysis focused on the three types of income and three types of expenses that are benchmarked over the last three years against the norms of the other parishes. It also identifies the seven most critical data metrics a parish must study and manage and provides a Parish Data Dashboard that succinctly summarizes a parish's position in those seven metrics.

**FSL = Following Servant Leader** = a Servant Leader who begins following one of their Servant Followers with greater experience or expertise and should lead an initiative.

**FPIPs = Future Parishioners in Pews** = Individuals who might join your parish in the future if properly evangelized and catechized.

**FRLD = Full Range Leadership Development** = A methodology acknowledging that everything is personal in leadership and accepting that we begin as unique individuals, whether as leaders or followers. Individuals move from the personal to being nested in two-person dyads. Those dyads expand and connect into groups that eventually become organizations.

**HL = Hierarchical Leadership** = - A leadership model that assumes that leaders were born, and thus, upon discovering one, we were duty-bound to follow them.

**Holy Trinity** = God the Father, Jesus Christ the Son, and the Holy Spirit.

**Igniting The Flame** = My full live Igniting The Flame multi-dimensional live inspirational retreats. They are tailored to the unique needs of the parish and most frequently include motivational explanations about best practices in discovering your WHY, Vision, and Strategic Planning; Stewardship, Engagement, and generosity; Servant Leadership; parish health and operational excellence.

**IHQ = Implementation Headquarters** = the leadership team responsible for managing the teams implementing a parish strategic plan.

**INYIG = It's Not Yours, It's God's** = Everything you have is a gift from God. You are only a temporary caretaker of everything you have and are called to use those gifts to give glory to God and help others.

**IM = Inspirational Motivation** = a creative, optimistic, encouraging, confident, and transformative environment focused on a clear Vision.

**IS = Intellectual Stimulation** = innovative, creative, and novel ways of doing the conventional.

**IPA = InterOrthodox Parish Associations** = Groups of Orthodox parishes from multiple Orthodox Jurisdictions in a common geographic area that work more closely together on liturgical, ministry, social, and community service activities.

**IT = Implementation Team** = A team responsible for executing all the steps in the Strategic Plan by implementing the comprehensive Action Plan.

**LMX = Leader-Member Exchange Theory** = focuses on the dyadic relationship between leader and follower. In such dyads, some followers were "in," and others were "out" with the leader at any given time.

**LHG = Leadership Holy Grail** = the ultimate leadership processes, activities, methods, or approaches pursued by every seeker of the most effective, secret ingredient best practices that provide the best leadership results.

**LHF = Low-Hanging Fruit** = those tactical issues or challenges discovered through the strategic planning process that a parish or ministry can address within a year or less and do not rise to the level of a longer-term strategic goal.

**LSF = Leading Servant Follower** = a Servant Follower who takes the lead on an initiative because of their greater expertise or experience and leads their traditional Servant Leader in that initiative.

**M<sup>2</sup> = MicroManaging** = where a leader or manager so closely observes, controls, intervenes, instructs, corrects, changes, or excessively supervises a team member's work that their autonomy is negatively impacted, and they become frustrated, unmotivated, and less productive.

**Magic WAP** = These are specific **W**ords we can use, **A**ctions we can take, and **P**hrases to state that will drive people's behavior.

**NSOM = National Solutions Organizational Model** = This type of organization has a national orientation to develop the best products and services and then distribute them regionally and locally to organizations closest to the beneficiary of the product or service for training and delivery to that end user. By inventing best practices once and delivering them often through a distributed process, the national organization can provide best-in-class results most efficiently. An example in the non-profit and business world is a franchise model (e.g., American Cancer Society, United Way, Girl Scouts, Northpoint Church, Chick-fil-A, etc.)

**OIC or Oneness In Christ** = The extraordinary gift of having Christ in each of us and being one with God, Jesus Christ, and the Holy Spirit, as discussed in Genesis

1:26; John 17:21-22; Galatians 3:27-28; the Nicene Creed and other places in Holy Scripture.

**OIC Promise** = The promise that we are all one with God and the Holy Trinity (Genesis 1:16), one in Christ (Galatians 3:28), the oneness of the Holy Trinity with everyone (John 17:21-22), and that Christ lives in everyone (Galatians 2:20).

**OICD Leaders = Oneness In Christ Denominational Leaders** = Christian leaders who are hand-chosen from among U.S. Christian Denominations involved in a unity dialogue to discern a roadmap for Christian unity and Oneness in Christ.

**OICD or Oneness In Christ Disciple** = Christians who practice and teach OIC

**Oriental Orthodox Churches** = Denominations that were united with the other Eastern Orthodox Denominations until the Council of Ephesus in 431 AD, when a division occurred over differences in Christology. The Oriental Orthodox Churches in the United States are comprised of the following six Autocephalous churches:

1. Coptic Orthodox Church of Alexandria,
2. Syriac Orthodox Church of Antioch,
3. Armenian Apostolic Church,
4. Malankara Orthodox Syrian Church,
5. Ethiopian Orthodox Church,
6. Eritrean Orthodox Church

**Orthodox** = all the **Eastern Orthodox** and **Oriental Orthodox** denominations in the United States.

**Parish** = the individual specific church communities and “**parishioners**” to define the participants who attend the parish (as I detest using the term “members,” which smacks of a club, not one of Christ’s parishes).

**PAT or Practical Applied Theology** = Sound theology sufficiently grounded in the Holy Gospel and Christian faith traditions described in the most accessible and helpful manner possible so that ordinary people can apply it daily.

**PDD = Parish Date Dashboard** = The simple data dashboard my Stewardship Calling ministry created to more efficiently report the three-year trends for the seven critical data items that is updated monthly and supplemented by six other quarterly items. This PDD should be shared with the entire parish and serve as the principal Treasurer’s report at every parish council meeting and every parish-wide general assembly.

**Persuasive Transformationalist** = a person who is part visionary, part advocate, part organizer, part team builder, part alchemist, and always persistent at effectively

using proven leadership approaches and change agency techniques to inspire followers to make transformational changes enthusiastically and do things they might otherwise never do regardless of personal risk.

**PIPs** = “**Parishioners In Pews**” – these are the typical parishioners who show up in church with some regularity

**PMH** = **Parish Ministry Handbook** = which includes a summary of all parish ministries and their WHY, ministry co-leaders, contact information, calendar of events, and pictures.

**Preacher** = Preachers take the Teacher’s information and inspire us with it. They are inspirational 100-watt human light bulbs.

**Reacher** = Reachers take the Preacher’s inspirational information and get us to do something with it. Reachers are transformational 1,000-watt floodlights.

**RCOU** = **Roman Catholic Orthodox Unity** = The reunification of Christ’s original One holy catholic and Apostolic Church that became divided in 1054 AD in the Western Roman Catholic Church and Eastern Orthodox Church.

**ROE** = **Rules of Engagement** = These are the inviolate rules that a Strategic Planning Team (or another group) will use throughout the course of a process, such as developing a Strategic Plan.

“**S<sup>3</sup> Challenges**” = **S**ervant Leadership, **S**tewardship & Generosity, and **S**piritual Formation and Religious Education.

**S&E Commitment** =

**S&E** = **Stewardship and Engagement** = Stewardship incorporates all levels of giving back of the time, talents, treasures, and tithes that we have received from our Creator. Engagement is giving one time and talents to serve others liturgically, sacramentally, and in ministry.

**S&EM** = **Stewardship & Engagement Ministry** = The parish ministry responsible for the annual stewardship tithe campaign, any Emergency Appeals, and the Planned Giving Campaign.

**SAF** = **Strategic Areas of Focus** = the two or three most critical strategic root cause challenges that, if addressed in a Strategic Plan, can help address a parish’s most significant Weaknesses and transform the parish to achieve its Vision for the future.

**SAF Teams** = **Strategic Area of Focus Teams** = the separate teams of SPT members that are formed after the first strategic planning retreat to create a S.M.A.R.T. Goal and comprehensive Action Plan to address the most critical root cause issues in the SAF

**SBNRs** = **Spiritual But Not religious** = the 22% of Americans with varying definitions of what that means, but who say they have a spirituality that informs them even though they are not attached to a particular denomination or parish.

**SDI = Strategic Dialogue Initiative** = a comprehensive and coordinated communications strategy that engages your parishioner more regularly and intimately with effective strategies and best practices.

**S&E Commitment** = whatever document or electronic record a parish uses to capture a parishioner's annual tithers and engagement commitment.

**Sermily** = Any sermon, homily, talk, lesson, or presentation about a spiritual topic, including any commentary generally following and explaining a reading of Holy Scripture.

**SF = Servant Follower** = a servant who joins the quest of a Servant leader.

**SGM = Small Group Ministry** = weekly or bi-weekly gatherings of about 10-12 people from a parish to explore spiritual topics in greater depth, and "one-anothering" where people get to know each other and learn how to serve each other better.

**SL = Servant Leaders or Servant Leadership** = Leading through serving others to achieve a vision. Various articulations of the elements of SL include (1) listening, empathizing, healing and humility, awareness of environment/impacts, persuasion, conceptualization of Vision, foresight, stewardship, commitment to people's growth, and building communities (Greenleaf, 1970, 1977; Spears, 2010); (2) love, humility, altruism, Vision, trust, empowerment, and service (Patterson, 2003), (3) love, trust, humility, courage, team, Vision (Marianes, n.d.).

**S.M.A.R.T. Goals** – Goals developed as part of a strategic plan that are **S**pecific, **M**easurable, **A**ttainable, **R**elevant, and realistically written and **T**imebound.

**SM = Succession Management** = identifying, recruiting, and training successors to current key individuals and leaders and ensuring the full development of the right talent when needed.

**SOP = Stewardship Operating Principles" (SOP)** = The Stewardship Calling key principles needed to be applied in any parish stewardship program.

**SP = Strategic Planning or Vision and Strategic Positioning** = A comprehensive process by which your parish answers 1. Why it exists, 2. Where it is now, 3. Where it wants to be in the future, and 4. How it will get there. This process entails reaching a community-wide consensus on the WHY, Core Values, Mission, Vision, Strategic Goals, and Action Plans to achieve the goals. The entire process is described in detail in Chapter 7 of this Roadmap.

**SPing** = Strategic Planning or Strategic Positioning or Strategic Vision and Planning.

**SPT = Strategic Planning Team** = the dedicated relatively large group of parishioners (30-50) that represents the significant diversity of the parish and will be responsible for developing the Strategic Plan.



**Steward** = Should be synonymous with a Parishioner; however, not every parishioner contributes their time, talent, treasures, and tithes. Thus, many parishes call those who make such contributions “**Stewards**.”

**SWOT = Analysis of Strengths, Weaknesses, Opportunities, and Threats** = A survey assessment by the parishioners identifying the parish’s internal Strengths (things it does well), internal Weaknesses (things it does poorly or that need improvement, the external things happening outside of the parish that could be an Opportunity it could exploit, and the external things happening outside the parish that could be a Threat.

**Teacher** = Teachers share information and are informational 10-watt bulbs

**Theosis** = the spiritual pilgrimage every Christian takes to become more perfect, holy, and ultimately ever more united with God.

**TL = Transformational Leadership** = In TL, the leader concentrates on helping followers achieve their full potential in pursuit of the motivational realignment of the organization. These leaders inspire others to pursue a new Vision of an exciting future aligned with their WHY and Core Values in the face of constantly changing circumstances.

**USLF = Unified Servant Leader/Follower Model** = This Stewardship Calling theory I developed extrapolates the transition of followers to Servant Followers (SF) to, at times, serving as Servant Leaders (SL) in a continuous circle of development. Thus, at any given time, the same person could be an SF following an SL in one context while simultaneously serving as a SL of another SF or SL. This circularity inspires everyone to consider themselves first and foremost always as a servant, whether they act as an SL or SF, as their context and situation require. In the proper circumstance or environment, the SL may need to follow his or her SF, who becomes the SL for one purpose or another. Thus, a SL becomes a Following Servant Leader (“**FSL**”) who will follow the leadership and instructions of the Leading Servant Follower (“**LSF**”).

**VUCAD** = A world that is Volatile, Uncertain, Complex, Ambiguous, and Disrupted.

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