



# SAINT SOPHIA

## UKRAINIAN ORTHODOX SEMINARY

### Strategic Plan Update and Lilly Foundation Grant Preparation

Bill Marianes





WHY? STEWARDSHIP **STRATEGIC PLANNING** INTERNET RADIO & PODCASTS KEYNOTES & LEADERSHIP RESOURCES

**Strategic Planning Tab**

PERSONAL

**ST. SOPHIA UKRAINIAN SEMINARY**

**St. Sophia Page**

**QR Code for St. Sophia Page**



BOSTON METROPOLIS –  
THRIVING CONGREGATIONS  
TRAINING PROGRAMS ON  
PARISH STRATEGIC PLANNING

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

METROPOLIS OF BOSTON –  
FOUR PARISH STRATEGIC PLAN

ST. SOPHIA JEFFERSON, PA  
STRATEGIC PLAN

WARREN, OH – ST DEMETRIOS  
STRATEGIC PLAN

SAINTS RAPHAEL, NICHOLAS &  
IRENE – CUMMING, GA

ST. RAPHAEL – IOWA CITY

CHRIST THE SAVIOUR –



St. Sophia Ukrainian

This is the working  
Grant efforts unde  
Theophan Mackey,

Presentation mate

St. Sophia Ukrainian Seminary Strategic Planning and Lilly  
Metropolitan Antony, Archbishop Daniel, Fr.  
Faculty, and Leadership of St. Sophia.

Planning Retreat April 22-24, 2025





# SAINT SOPHIA



STEWARDSHIP  
CALLING

<u>Time</u>	<u>Activity</u>	<u>Who</u>
8:00	Divine Liturgy at Saint Andrews Church	Metropolitan/ Archbishop
10:00	Brunch at the Sisterhood Hall	Everyone
11:00	Registration	Everyone
11:30	Presentation about dual objectives of Strategic Plan Refinement and Lilly Grant Proposal	Fr. Theophan
11:45	Seminary strategic foresight presentation and discussion and presentation of Strategic Plan elements and review	Bill Marianes
1:00	Why Discovery and Existing Core Values review and revision discussion	Everyone - Facilitated by Bill Marianes
2:00	Break	Everyone
2:15	Existing Mission Statement review and revisions	Everyone - Facilitated by Bill Marianes
2:45	Needs of community and modified S.W.O.T. brainstorming and consensus	Everyone - Facilitated by Bill Marianes
4:15	Break	Everyone
4:30	Strategic Area of Focus discussion and determine 3-4 Critical Strategic Goals (CSG) and preliminary Vision discussion and consensus	Everyone - Facilitated by Bill Marianes
5:30	Discussion of How to Gain Alignment of 3-4 CSG with Parish and Parishioner Needs	Everyone - Facilitated by Bill Marianes
6:00	Review, Discussion and Commitment to WHY, Core Values, Mission, SWOT, 3-4 Critical Strategic Goals and Vision	Everyone - Facilitated by Bill Marianes
6:30	Dinner	Everyone





# SAINT SOPHIA



STEWARDSHIP  
CALLING

8:00	Breakfast	Everyone
9:00	Final review and Commitment to WHY, Core Values, Mission, SWOT, 3-4 Critical Strategic Goals and Preliminary Vision	Everyone - Facilitated by Bill Marianes
9:30	Group Divides into 3-4 CSG groups to develop S.M.A.R.T. Goal and high-level Action Plan	3-4 CSG Small Groups Present to Everyone
11:00	CSG Small Groups present S.M.A.R.T. Goal and high-level Action Plan discussion and consensus	3-4 CSG Small Groups
12:15	Lunch	Everyone
1:00	Presentation of Lilly Grant - 3 Guiding Questions and Previous Grant Recipient Offerings Lilly Grant - 6 Criteria to receive Grants	Fr. Theophan
1:15	Presentation of Lilly Grant 8 Proposal Elements	Fr. Theophan
1:30	Facilitated Discussion about 4 key questions from Proposal Elements 1 & 2	Everyone facilitated by Fr. Theophan and Bill
3:00	Break	Everyone
3:15	Three Separate Small Groups outline their proposed answers to Proposal Elements sections of the grant proposal, focusing on how their initiatives will address the identified challenges and opportunities	Small Groups #3, #4 and #5
5:00	Each Small Group presents their conclusions and rationale to the entire group.	Everyone
6:00	Dinner	Everyone
7:00	Group discussion about proposed Answers to Elements 3, 4 and 5	Everyone facilitated by Fr. Theophan and Bill



# SAINT SOPHIA



STEWARDSHIP  
CALLING

8:00	Breakfast	Everyone
9:00	Follow-up comments, thoughts, or proposed changes to Elements 1-5	Everyone facilitated by Fr. Theophan and Bill
10:00	Facilitated discussion about Elements 6, 7, & 8 (part 1)	Everyone facilitated by Fr. Theophan and Bill
11:00	Break	Everyone
11:15	Finish facilitated discussion about Elements 6, 7, & 8 (part 2)	Everyone facilitated by Fr. Theophan and Bill
12:30	Lunch	Everyone
1:15	Finalizing the Grant Proposal Outline - Final edits focusing on coherence and clarity to enhance the proposal's strength (and any remaining items)	Fr. Theophan
2:30	Closing remarks and next steps and closing prayer	Metropolitan/ Archbishop
3:00	Departures	Everyone

# My “Big 3” Questions You Must Answer

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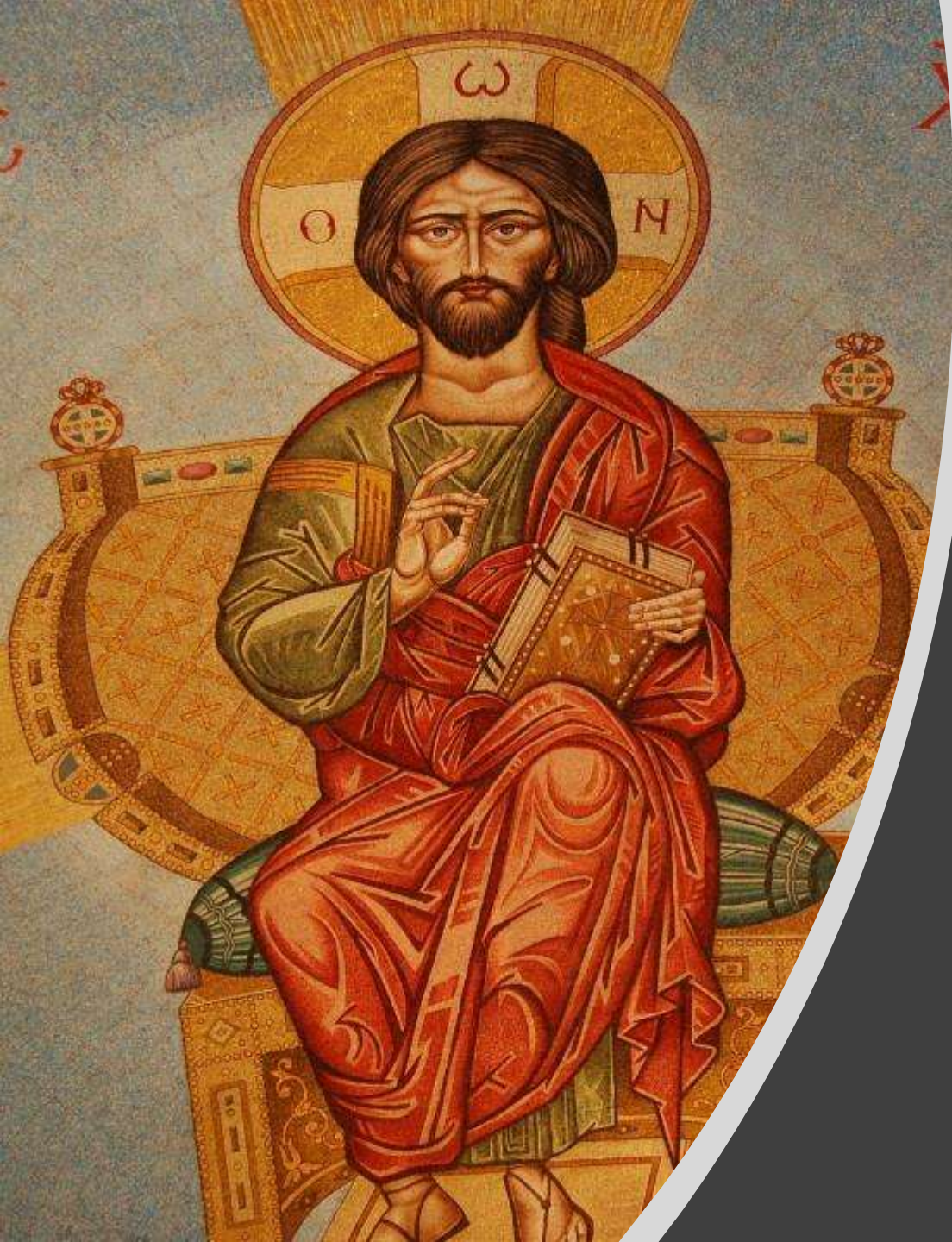
**Is Jesus Christ who  
He says He is?**

THE RESURRECTION









What will you say  
to Christ when  
you seek your?

good account  
before the  
awesome  
judgment seat  
of Christ.

II Corinthians 5:10  
Divine Liturgy





**Christ's  
possible  
very  
difficult  
question**

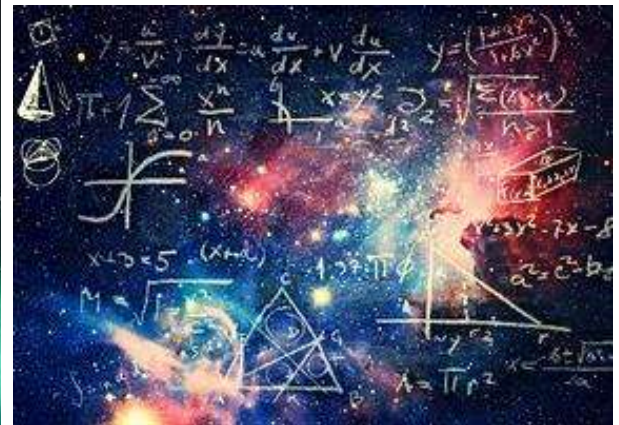


What did you do,  
for My church  
and My people  
under your  
watch...

... given all  
the gifts I  
gave you?







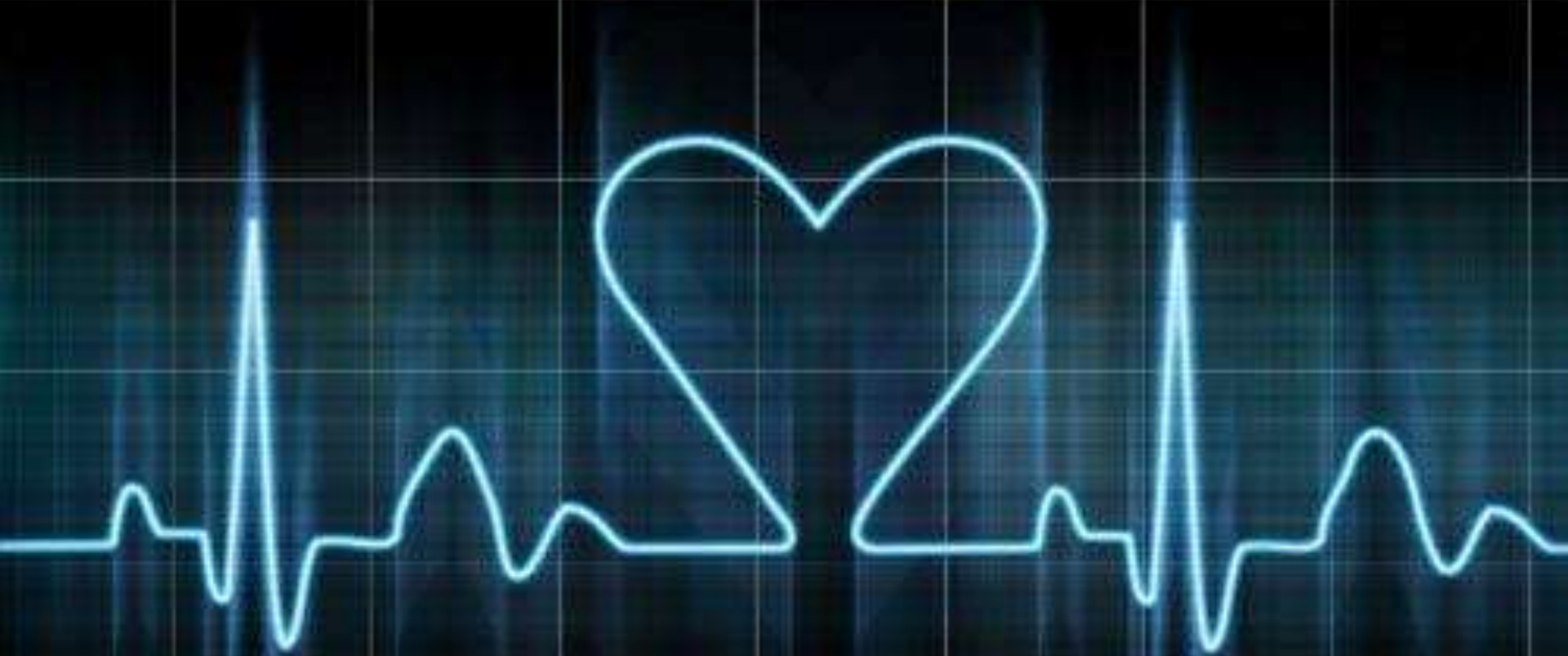
# Are you living too

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small

# Μετάνοια

# Metanoia



“a transformative change of heart”



**“Christianity, if  
false, is of no  
importance,**

**and if true, of  
infinite  
importance.**

**The only thing  
it cannot be is  
moderately  
important.”**



**C.S. Lewis**

A  
Critical  
4<sup>th</sup>  
Question

WHO ARE YOUR  
CUSTOMER(S)?  
WHO ARE YOUR  
CONSTITUENCIES?



SAINT SOPHIA  
UKRAINIAN ORTHODOX SEMINARY



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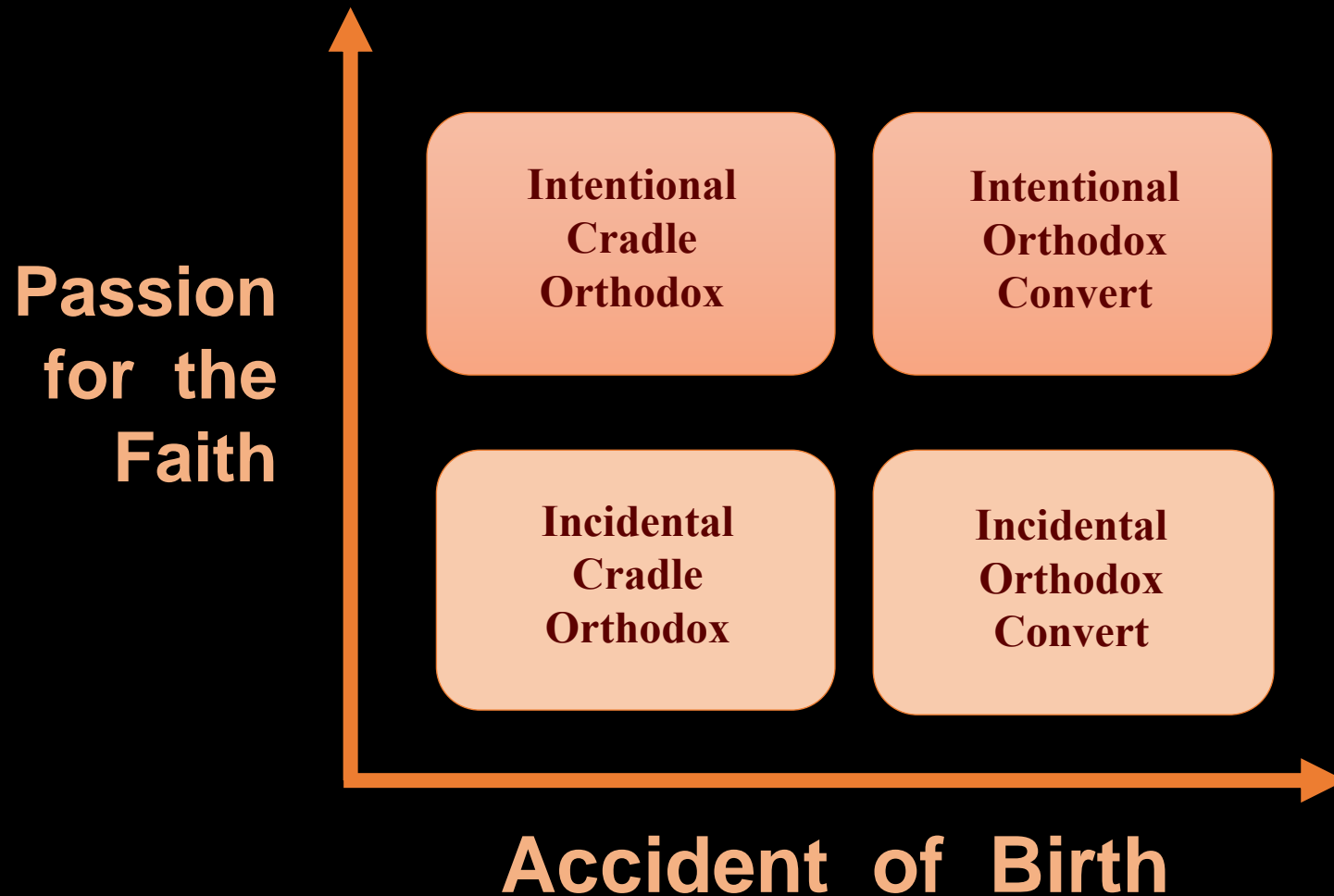
# The Orthodox Church Demographic Makeup Has Changed Significantly Over The Last 15 Years

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# 4 Kinds of U.S. Orthodox Christians



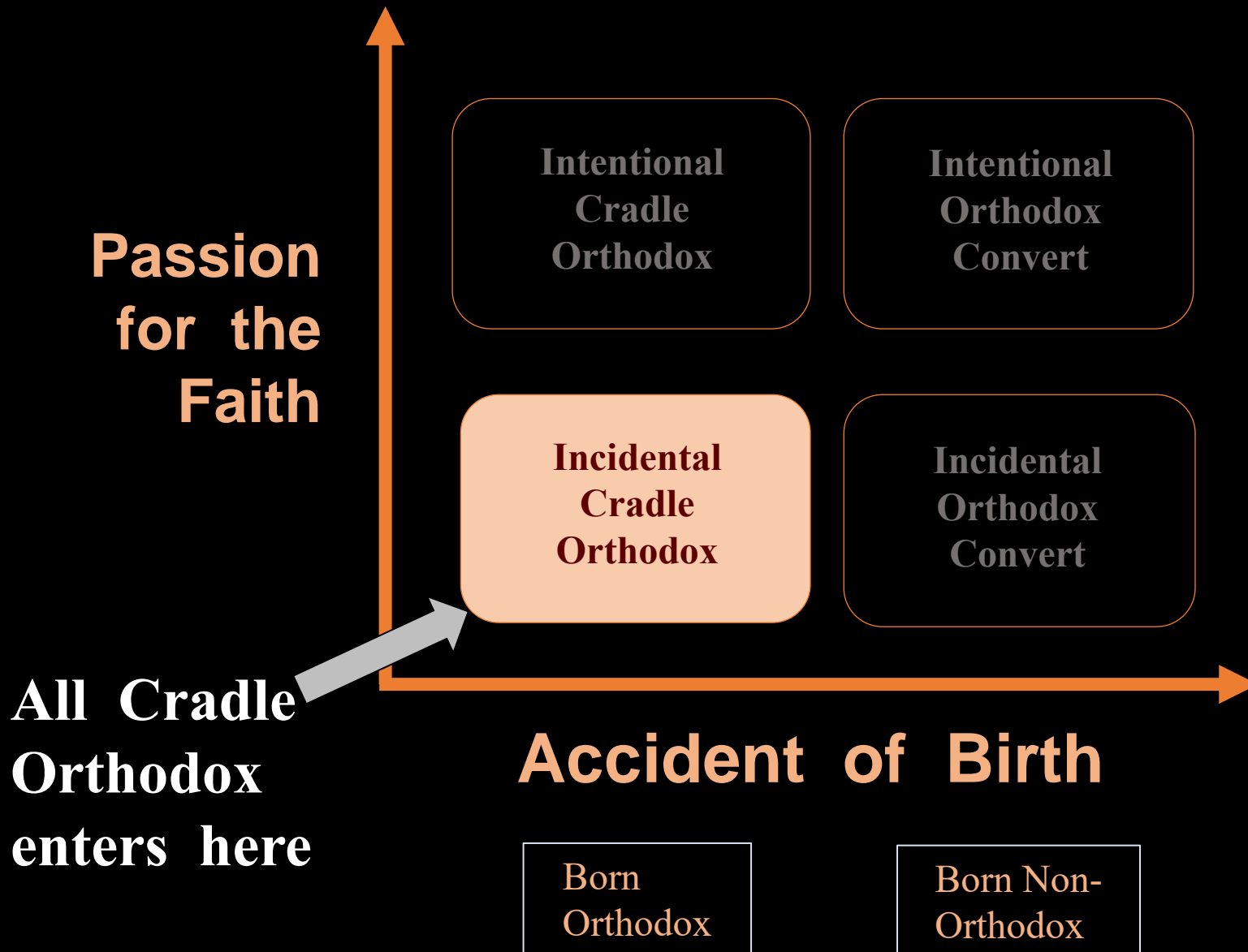
Born  
Orthodox

Born Non-  
Orthodox



STEWARDSHIP  
CALLING

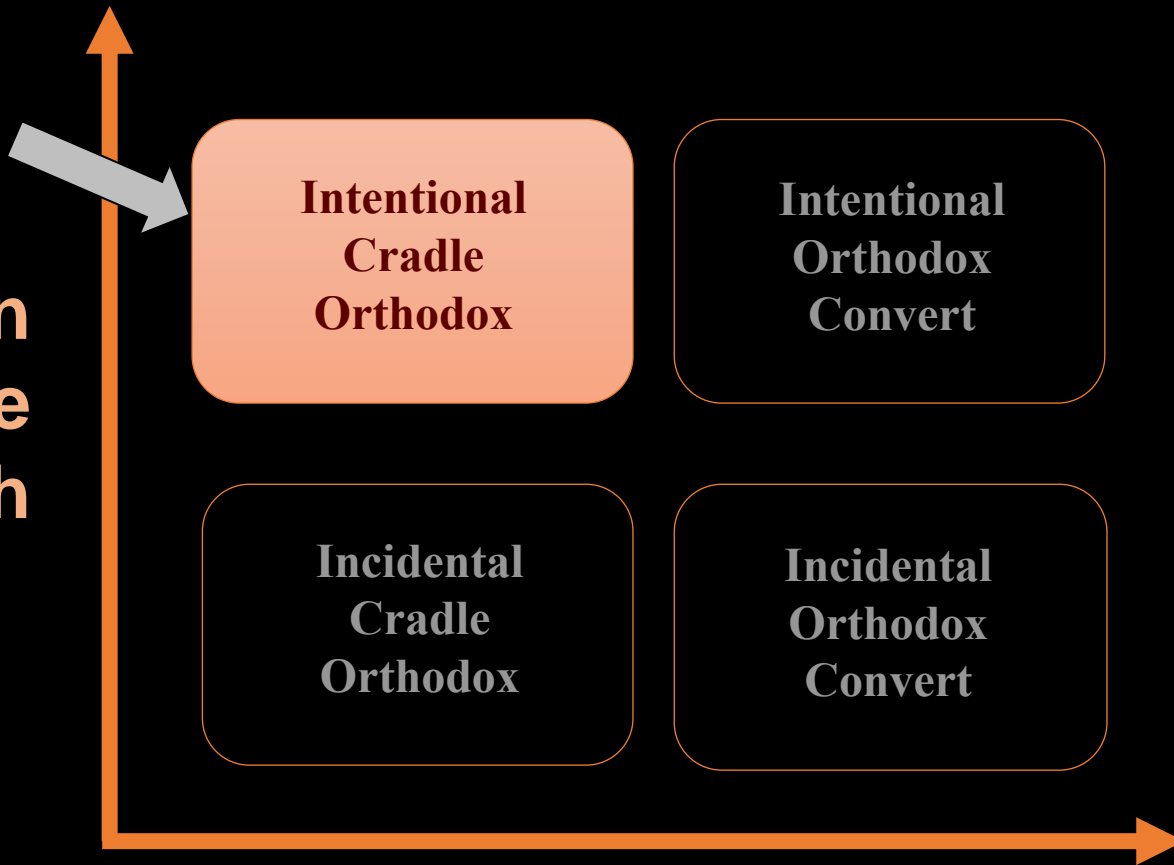
# 4 Kinds of U.S. Orthodox Christians



# 4 Kinds of U.S. Orthodox Christians

Kids of  
converts &  
few Cradle  
Orthodox

**Passion  
for the  
Faith**



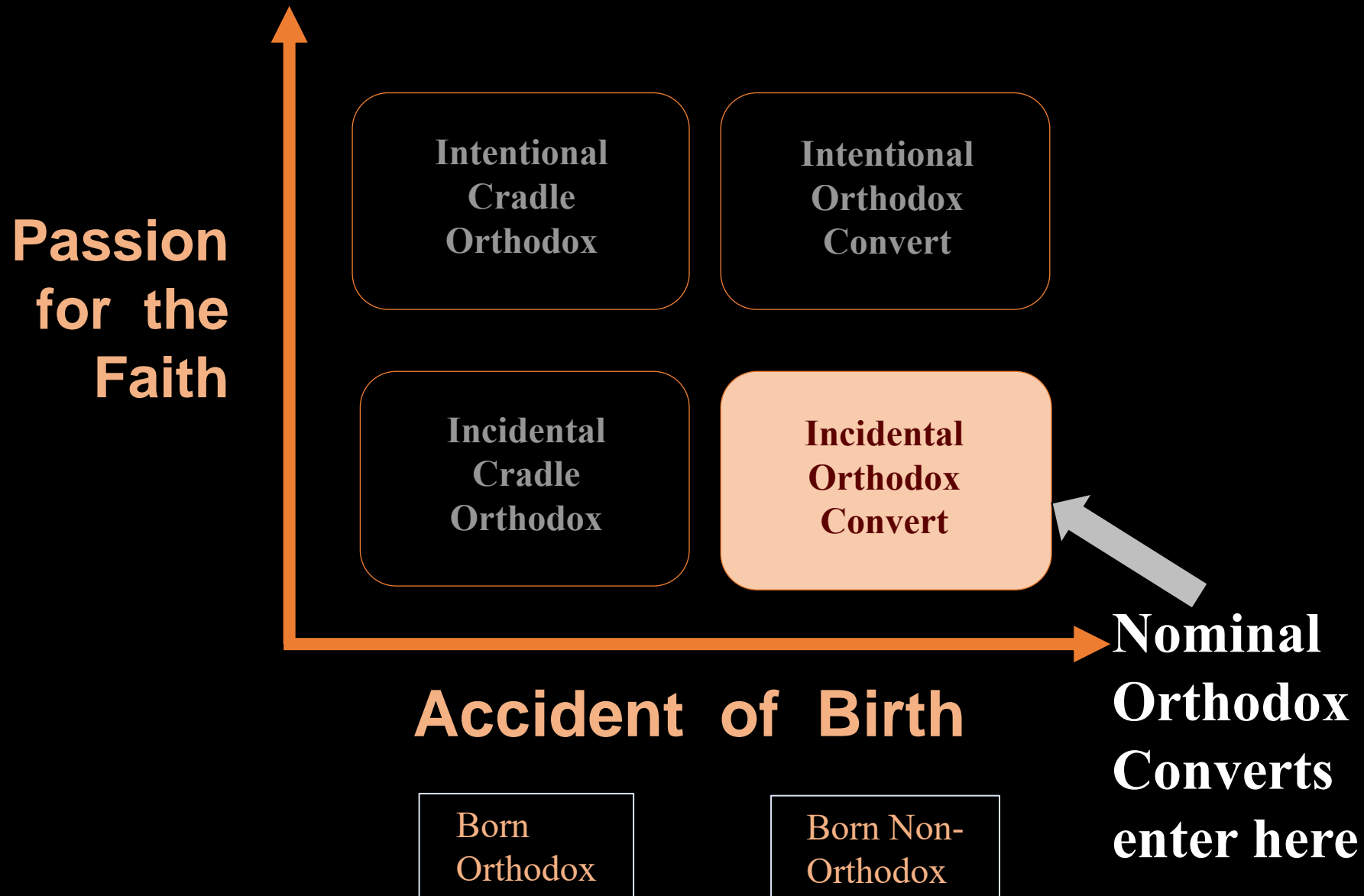
**Accident of Birth**

Born  
Orthodox

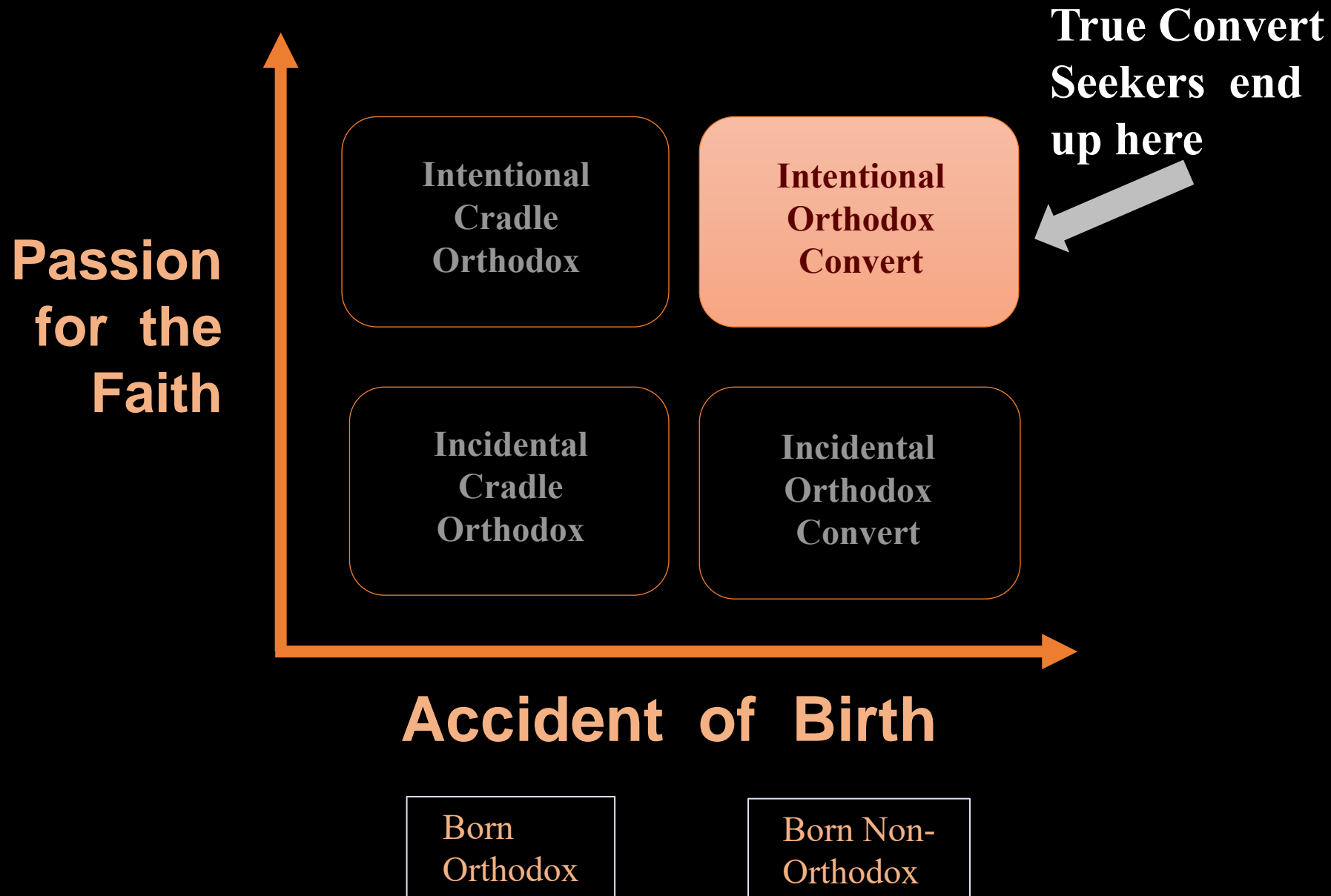
Born Non-  
Orthodox



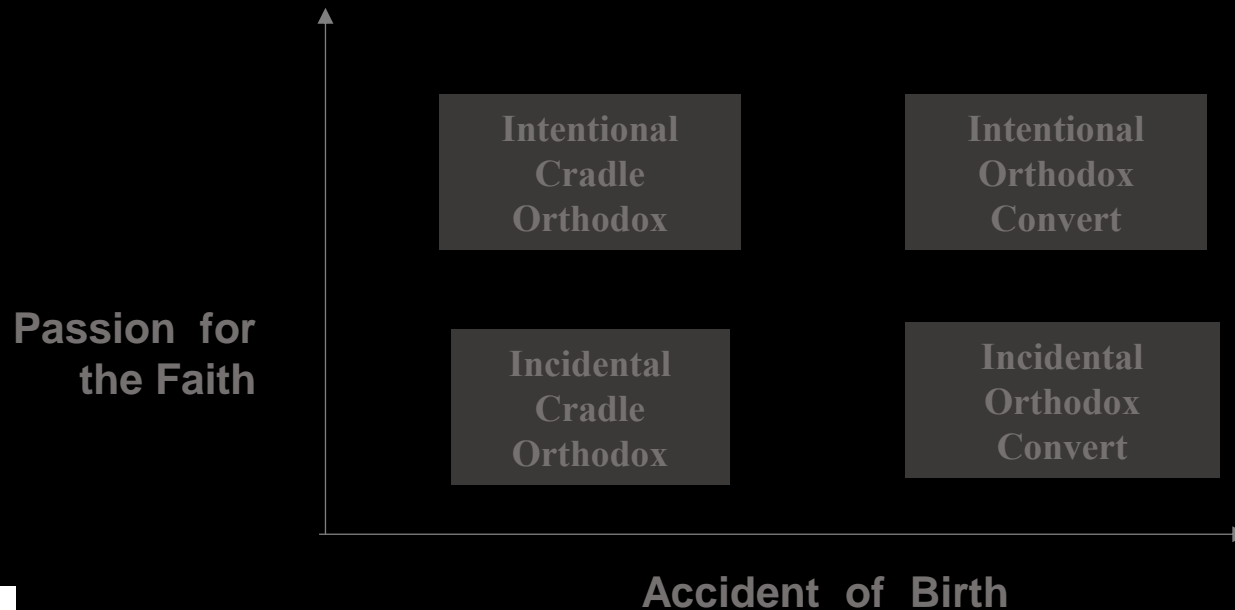
# 4 Kinds of U.S. Orthodox Christians



# 4 Kinds of U.S. Orthodox Christians



**We now need 4 different strategies to effectively reach all of our different parishioners**





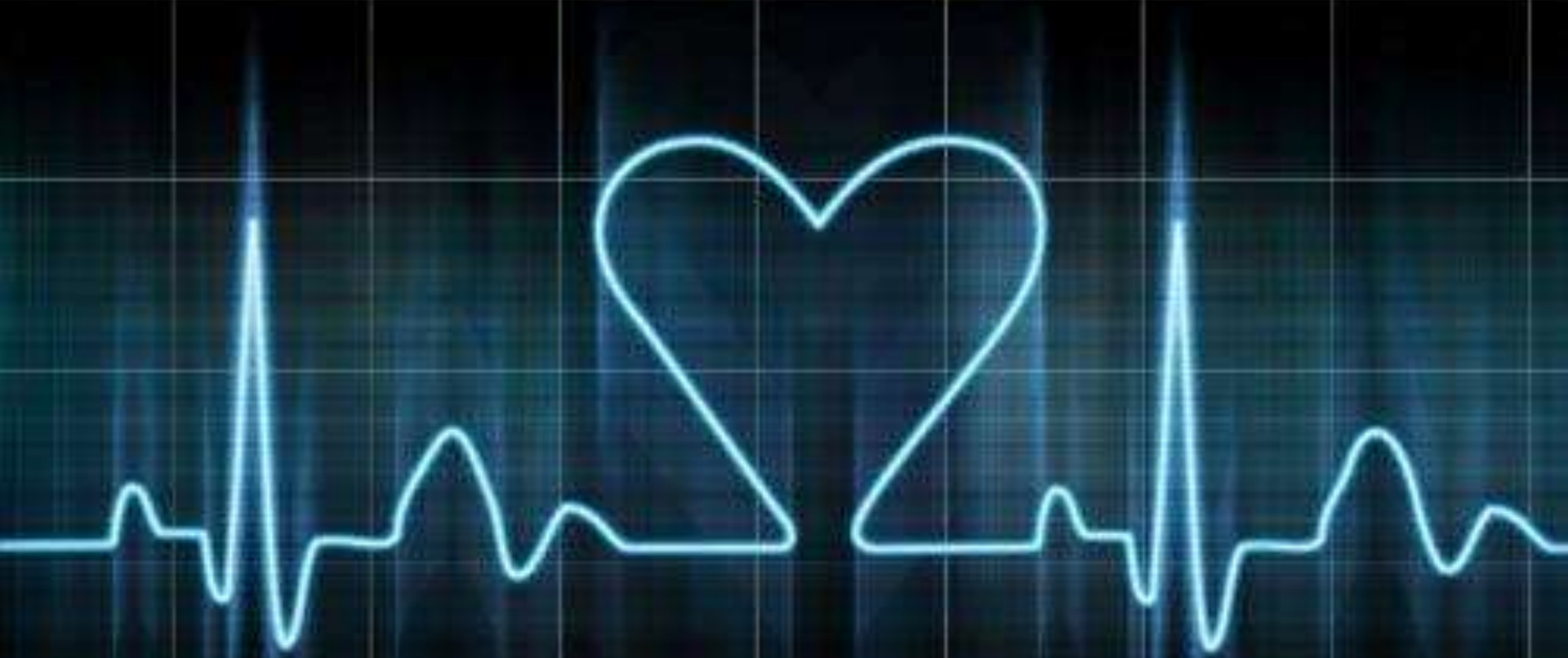
If we keep  
doing what  
we've always  
done, we'll  
keep getting  
what we've  
always gotten.



Henry Ford

# Μετάνοια

# Metanoia



“a transformative change of heart”



# Thinking too small

*Not making disciples in our  
nation let alone  
all nations.*

The case for Orthodox  
Christian Seminaries Ver. 2.0.

Bill Marianes





~ 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.

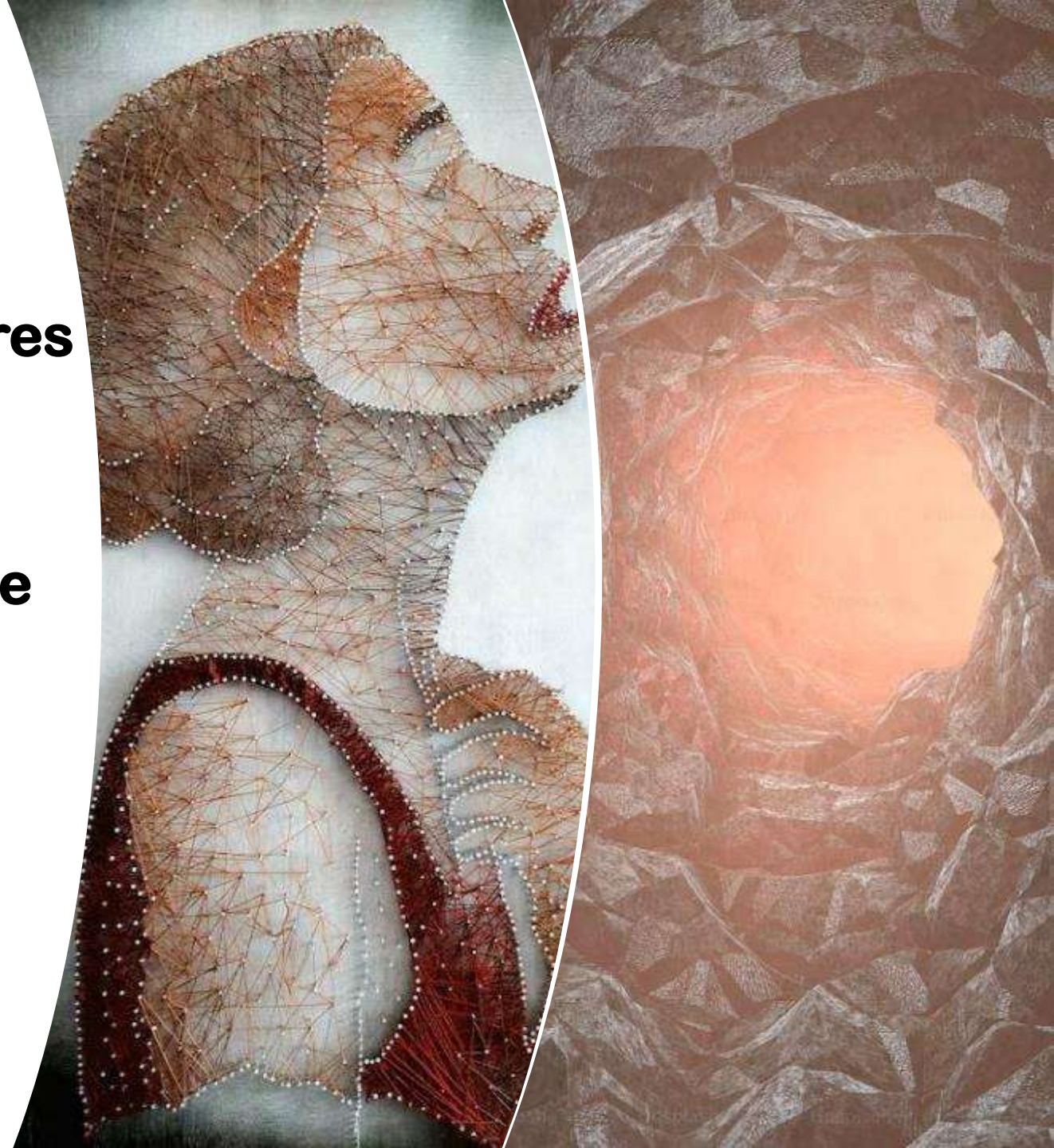


(Sources: Canton, J. (2015). Future smart: Managing the game-changing trends that will transform your world.; Drucker, P. F. (2004). The daily Drucker: 366 days of insight and motivation for getting the right things done.; Hines, A. (2006). Strategic foresight: The state of the art.; Kouzes, J. & Posner, B. (2017). The leadership challenge: How to make extraordinary things happen in organizations.; Slaughter, R. A. (1993). Futures concepts.)



**~ Being future  
smart explores  
today's  
potential to  
imagine an  
unpredictable  
future.**

(Sources: Miller, R. (2007). Futures literacy: A hybrid strategic scenario method.; Benavides-Rincón, G., & Díaz-Domínguez, A. (2022). Assessing futures literacy as an academic competence for the deployment of foresight competencies.; Slaughter, R. A. (1993). Futures concepts.)



# Horizon Scanning

- ~ systematically research trends, threats, and opportunities on the horizon that might shape the future
- ~ look to the future to identify events and results that could occur to serve as an early step in creating strategies





**~ What is the Vision of St. Sophia?**  
**~ What will it look like, 3-4 years from today?**



A full-page background image showing a sunset or sunrise over a calm body of water. The sky is filled with dark, dramatic clouds, with a bright orange and yellow glow from the sun just below the horizon. A small, dark silhouette of a boat is visible on the water's surface in the distance. The overall mood is contemplative and inspiring.

**“The best way to  
predict the future is  
to create it.”**

Peter Drucker



- ~ Orthodox Christians need trained theologians to help them properly understand God's and Christ's words and deeds.
- ~ Declining church engagement makes religious education more critical than ever.

## The case for Orthodox Seminaries 2.0



(Sources: Faithlife Corporation. (2023). Logos Seminary Guide.; Fearon, D., & Strothers, Z. (2023). Priest shortage leaves over 3,500 churches without resident priest.; The Association of Theological Schools. (2024). Member schools.; Vassiliades, P. (2017). The word of God and the church from an Orthodox perspective.; Wenner, E. (2023). Scholars chart religious changes.)



**IN GOD  
WE TRUST  
ALL OTHERS  
MUST BRING  
DATA**

Setting  
the Stage  
With The  
Facts

# DON'T SHOOT THE MESSENGER





## Current state of religion in America summary:

“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).

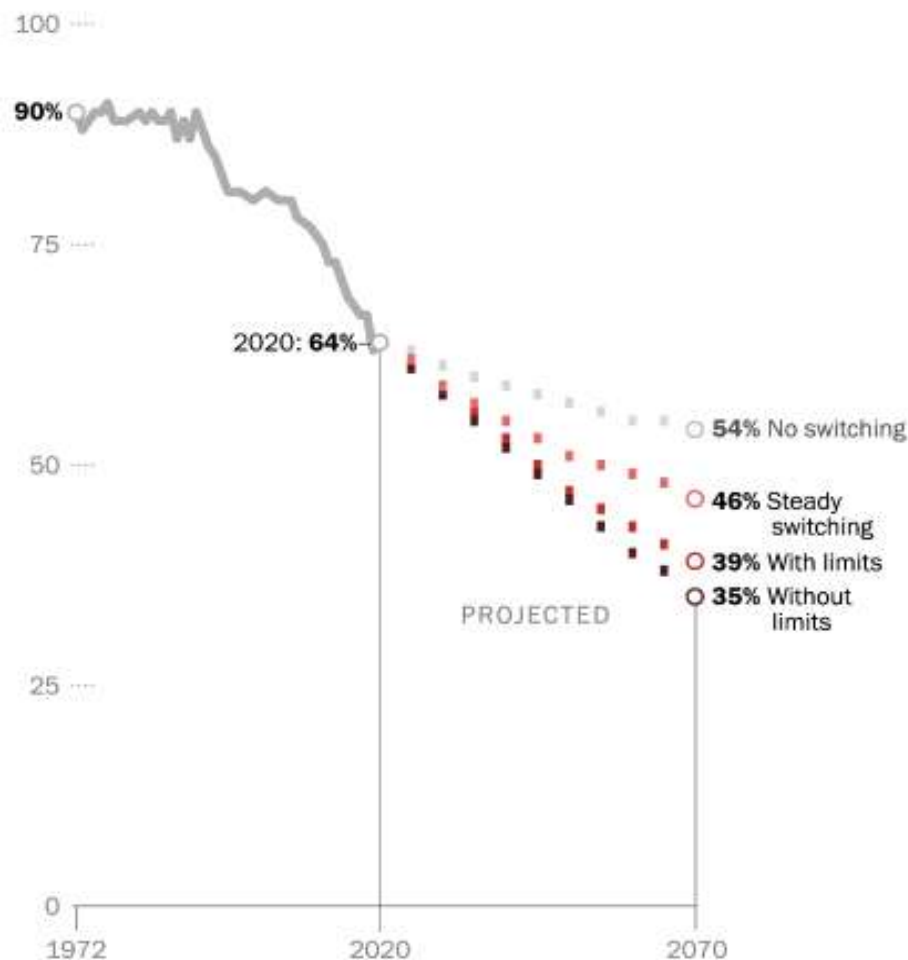
- ~ The acute shortage of clergy partly results from **insufficient institutions** forming the next generation of heirs to the Apostles (Fearon & Strothers, 2023).
- ~ Center of Applied Science in the Apostolate identified **60% fewer priests over the last 50 years**, many parish vacancies and **significant retirements on the horizon** for baby boomer clergy (Fearon & Strothers, 2023).



# By 2065, 52% of the US population will be “NONES” (no religious affiliation) with 35% identifying as Christians

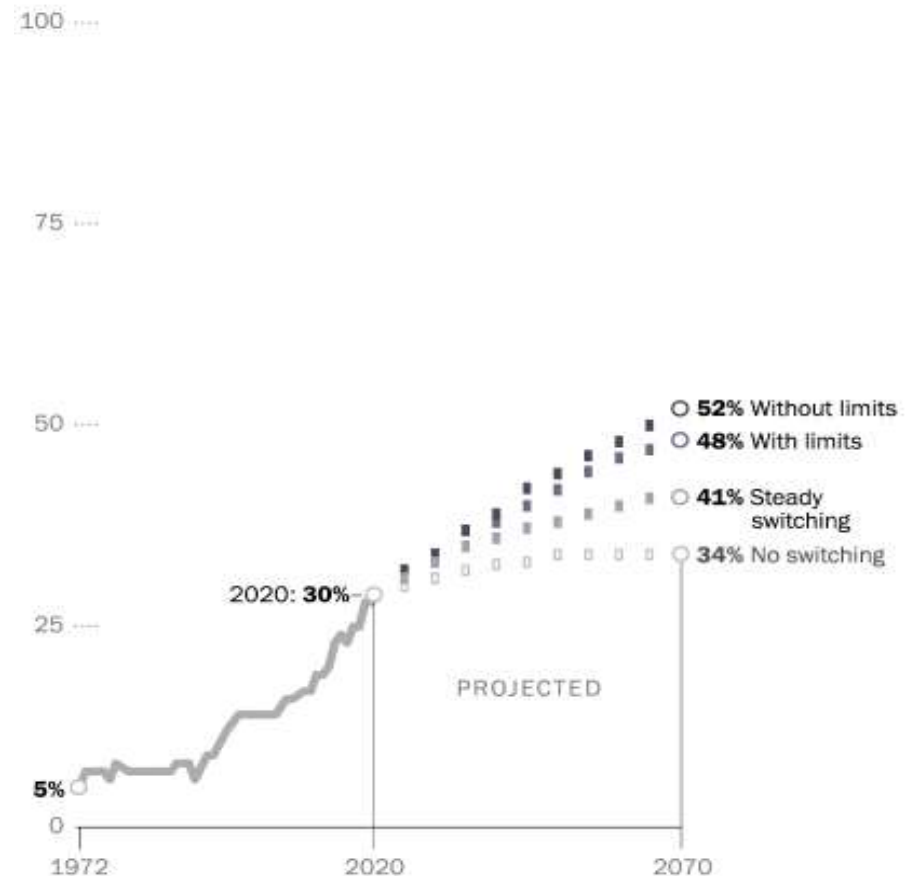
## U.S. Christians projected to fall below 50% of population

% of Americans who are Christian

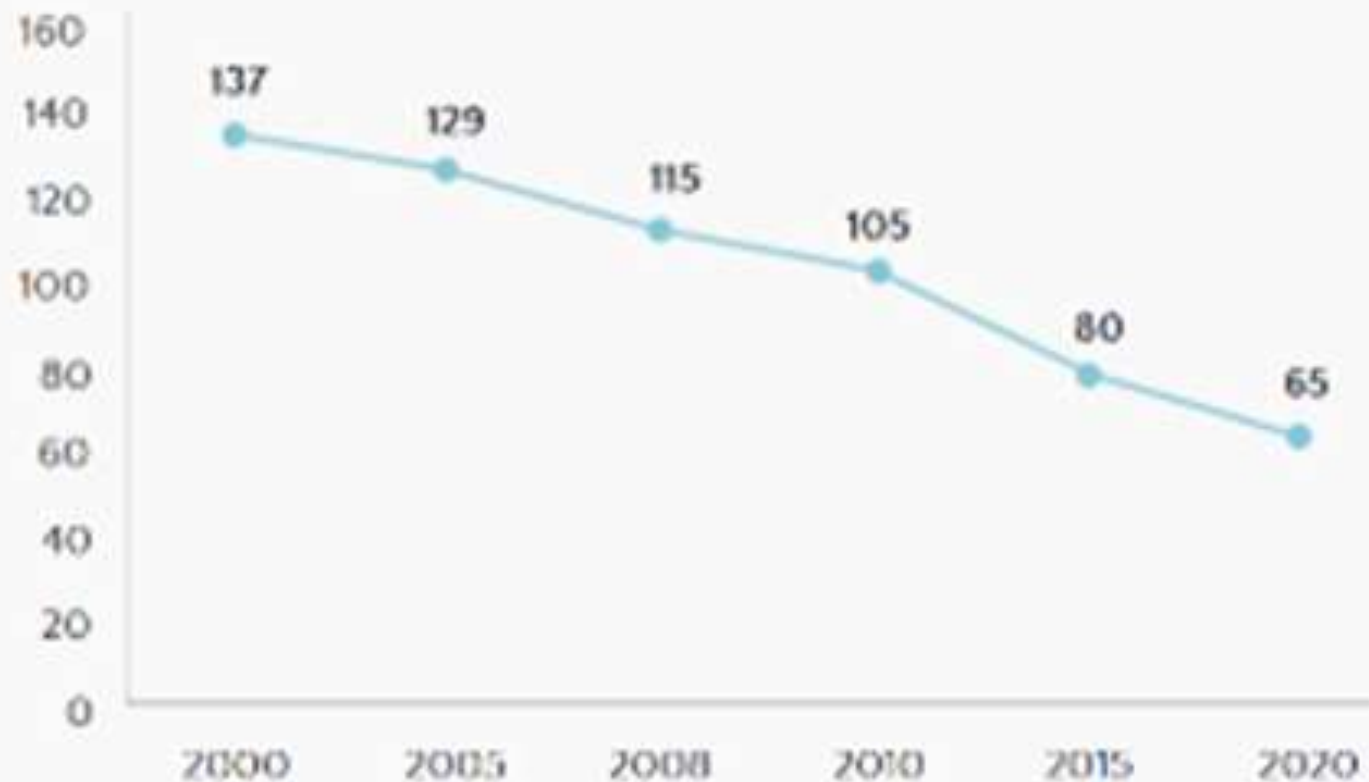


## U.S. 'nones' will approach majority by 2070 if recent switch

% of Americans who are religiously unaffiliated

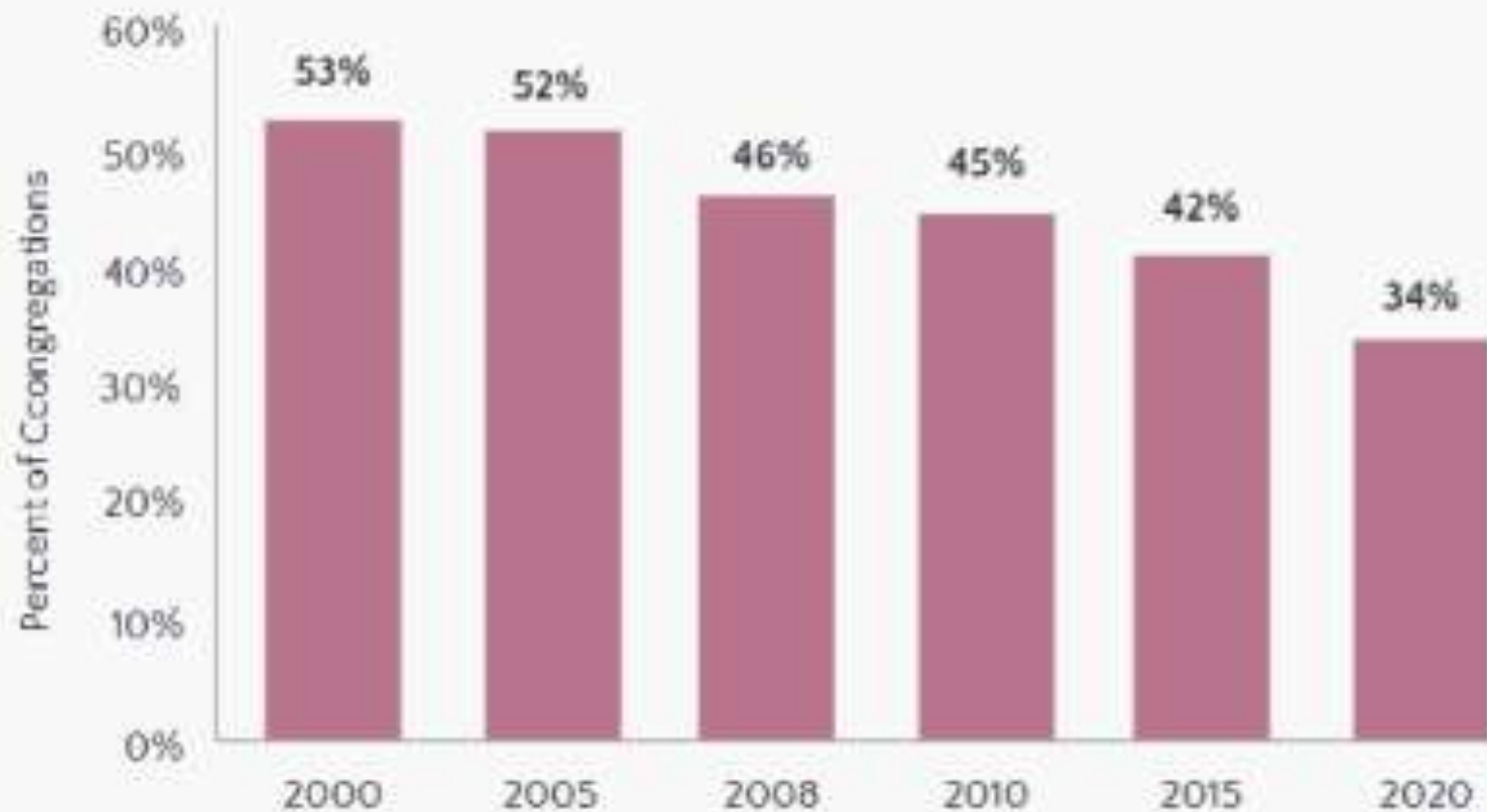


# Declining Median Worship Attendance Among U.S. Congregations



Source: 2002 North American Church Survey, Hartford Institute for Religion Research

## Fewer Congregations Are Growing (growth of 5% or more in the past 5 years)



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

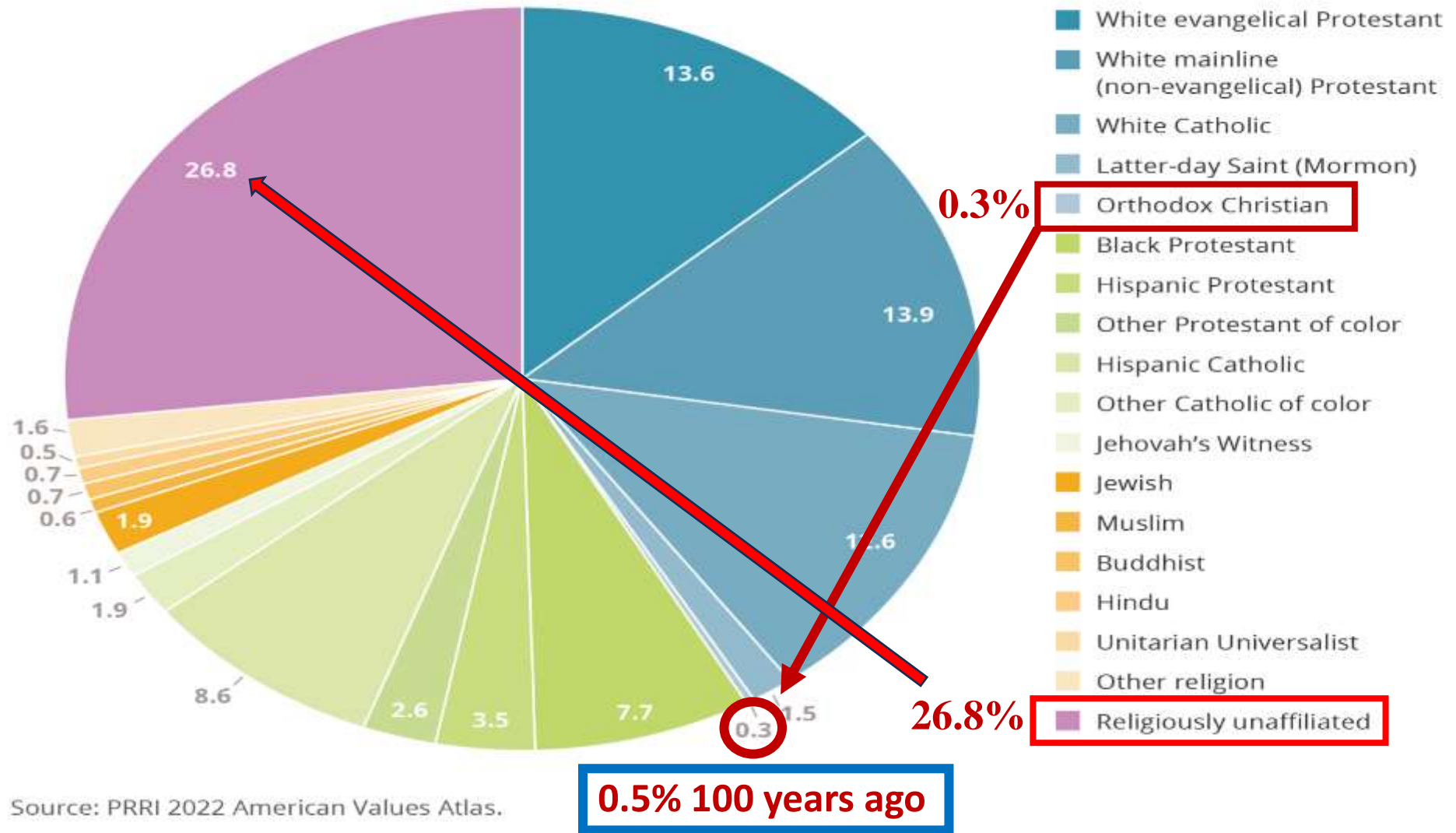
Figure 8



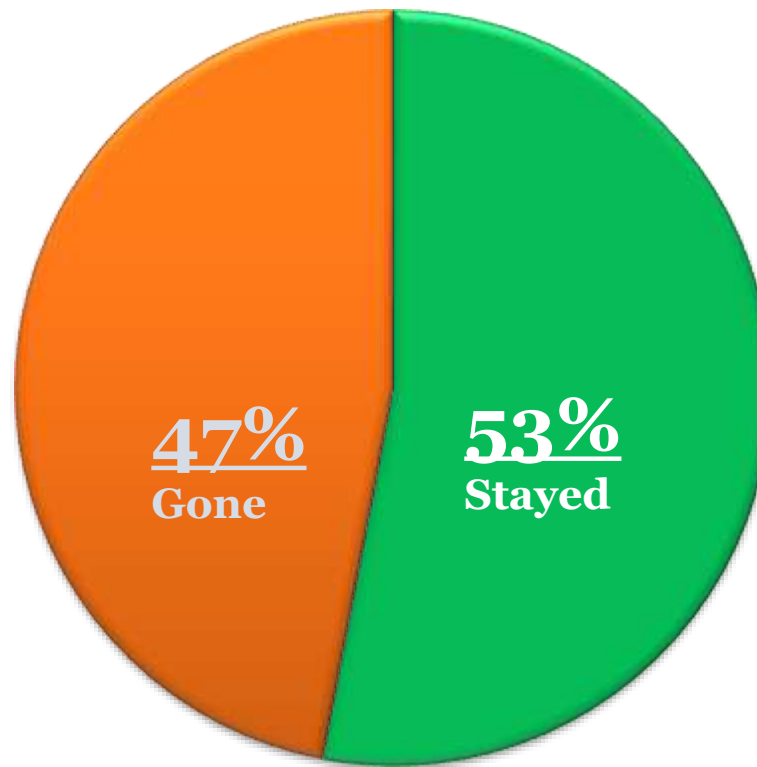
# Orthodoxy – A Rounding Error In The American Christian Landscape

FIGURE 1. The American Religious Landscape in 2022

Percent who identify as:



# 47% of cradle Orthodox adults have left the Church



■ YES ■ NO

# Between 2010 - 2020

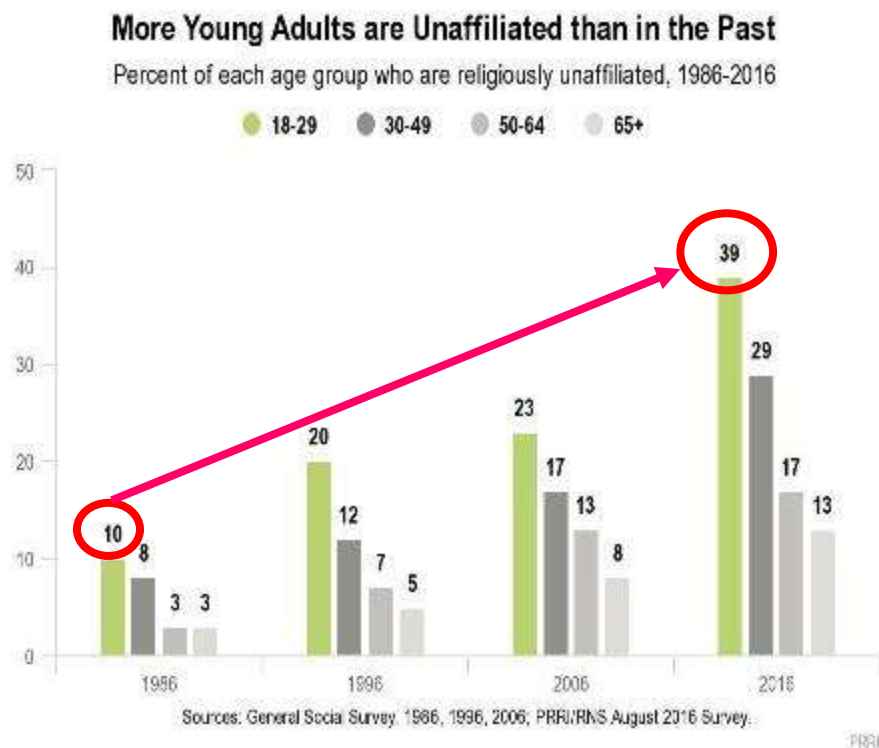
U.S. Eastern Orthodox Churches (675,765 total) saw a **-17%** (decrease) in adherents and a **-14%** (decrease) in regular attendees



(In contrast, U.S. Oriental Orthodox Churches saw a **+67%** (increase) in adherents and a **+59%** (increase) in regular attendees)



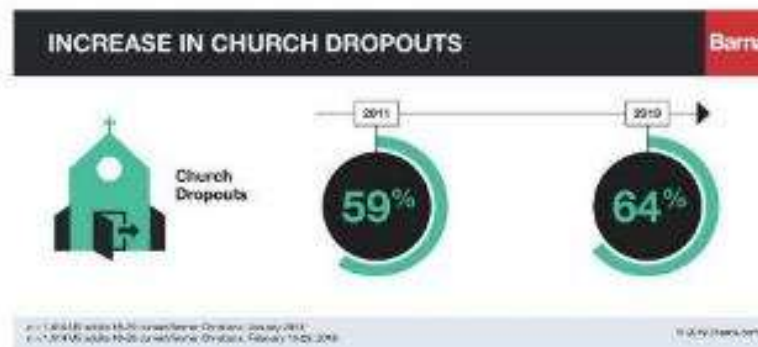
# **39% of Millennials (1981-1996) are “NONES” and claim NO religion**



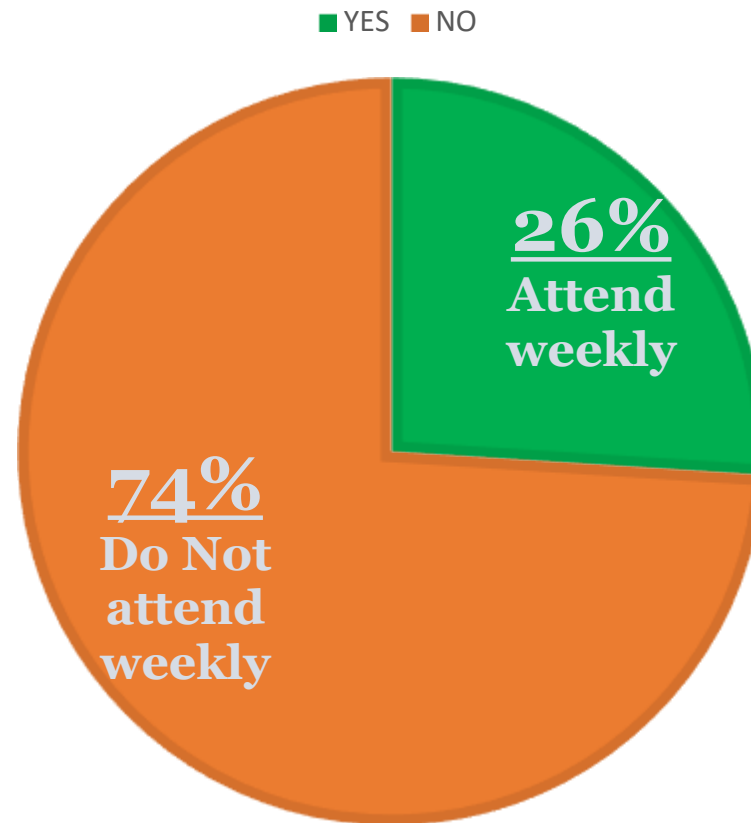
# 64% of youth drop out of church in their 20s

When Barna president David Kinnaman published his 2011 book *You Lost Me*, we heard from many people (especially church leaders) who were shocked to learn that 59 percent of young adults with a Christian background had dropped out of church at some point during their 20s—many for just a time, but some for good.

Eight years later, research for Kinnaman's new book *Faith for Exiles: 5 Ways for a New Generation to Follow Jesus in Digital Babylon* reveals that the church dropout problem is still a problem. In fact, the percentage of young-adult dropouts has increased from 59 to 64 percent. Nearly two-thirds of U.S. 18–29-year-olds who grew up in church tell Barna they have withdrawn from church involvement as an adult after having been active as a child or teen.

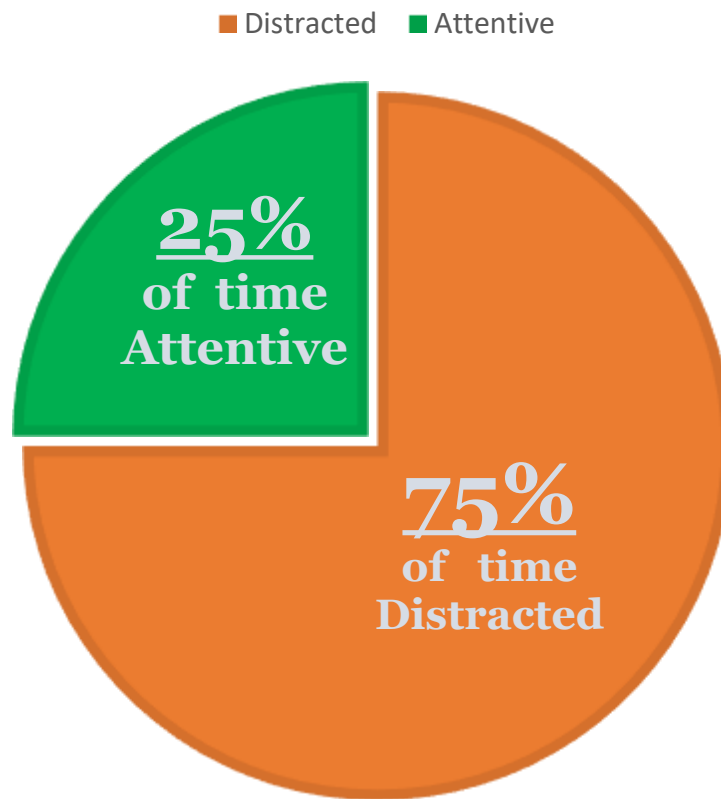


**26% of Orthodox Christians adherents  
regularly attend church services.**





**Parishioners' minds wander  $\approx$  75% of the time during church services.**



# PRE-COVID Giving Facts<sup>1</sup>

U.S. Orthodox Christians are in:

~ top 1/3 in annual income

~ bottom 1/3 in church stewardship

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<sup>1</sup> Pew Forum income data compared against Financial Stewardship Analysis of over 275 U.S. Orthodox Parishes conducted by Stewardship Calling ministry

# Who Owns The Problem?

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

**As a leader, you own responsibility for the system.**

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

---

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





# Thinking too small

*Not making disciples in our  
nation let alone  
all nations.*

The case for Orthodox  
Christian Seminaries Ver. 2.0.

Bill Marianes



# Of the 353 U.S. Theological Seminaries the 8 Major North American Orthodox Seminaries by Enrollment (2021 Fall)

Seminary	<u>Students</u>	<u>FTE</u>	<u>Professors</u> (FTE)	<u>Jurisdiction (dominant)</u>
<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.)



Orthodox seminaries,  
designed centuries  
ago by monastics and  
theologians, focus  
more on  
understanding the  
past rather than the  
present/future or how  
to apply Scripture.



The windows with the two  
crosses are  
in my room  
I like it  
out there  
real well.  
How do you  
like your  
school? Will  
real soon  
tell me all  
about it.  
Sincerely  
Beatrice

IMMACULATE SEMINARY, WASHINGTON, D.C. Wisconsin Avenue.



(Sources: Espinoza, B. D. (2017). The history of theological education.; Gonzalez, J. L. (2015). The history of theological education.; Viola, F. & Barna, G. (2012). Pagan Christianity?: Exploring the roots of church practices.)



# Five “A” Trends Affecting Orthodox (and other Christian) Seminaries

## 1. ANTIQUATED

(Sources: Gryboski, M. (2024). Seminary lists 7 trends impacting church leadership in 2024. The Christian Post.; Muller, J. C. (2023). Practical theology: A story of doubt and imagination.)

## 2. AGING

Sources:(McDowell, S. (2023). Hemorrhaging from the faith.; Orthodox Observer (2023). Holy Cross Hellenic College diaconate program success.; Smith, G. (2023). Worshippers are aging too fast.)

## 3. ANTAGONISM

(Sources Ibrahim, R. (2023). They hate us! The Muslim persecution of Christians.; Wooden, C. (2023). Listen to, trust the lay faithful, Pope tells synod members.)

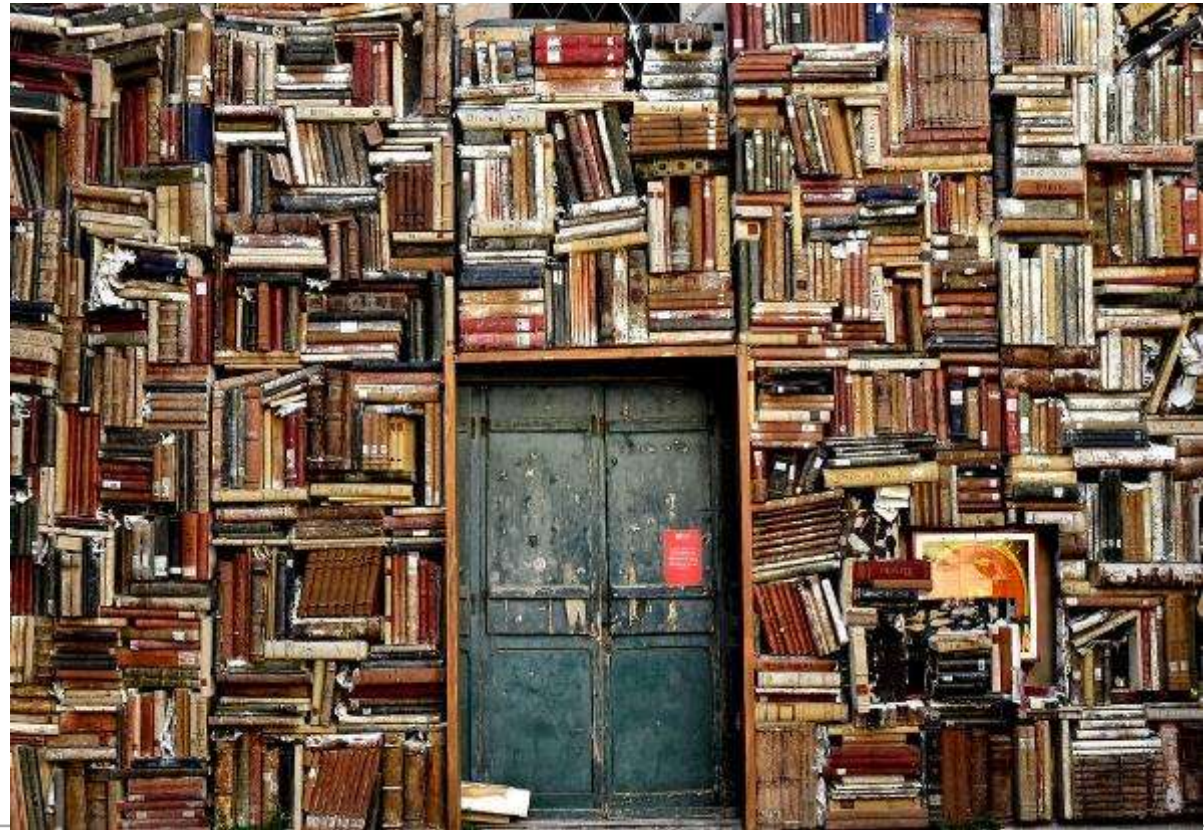
## 4. APATHY

(Sources: Alper, B. A., Rotolo, M., Tevington, P. Nortey, J., & Kallo, A. (2023). Spirituality among Americans.; Michel, A. A., Powe, D., & Anschutz, J. L. (2024). 7 trends impacting church leadership for 2024.)

## 5. ANSWERS

(Sources: Moreno-Riaño, G., Leach, T. B., Green, D. & Metaxas, E. (2023). Christianity in America: Declining toward insignificance or resurging toward revival?; Winfield, N. (2023). After approving blessings for same-sex couples, Pope asks Vatican staff to avoid rigid ideologies.)

# Antiquated



**The basic model  
of Orthodox  
clergy formation  
in seminaries  
has not  
materially  
changed over  
time, or with the  
times.**

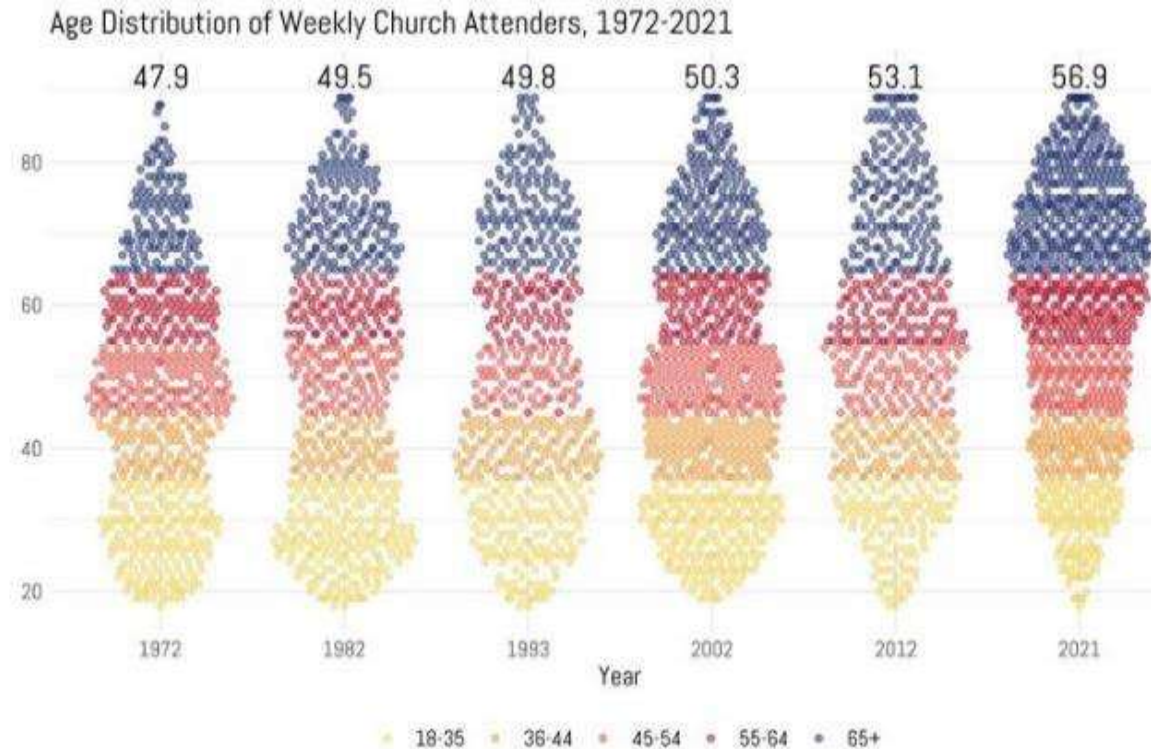
(Sources: Gryboski, M. (2024). Seminary lists 7 trends impacting church leadership in 2024.; Lindbeck, G. A. (1984). The nature of doctrine. Religion and theology in a postliberal age.; Muller, J. C. (2023). Practical theology: A story of doubt and imagination. )



# Aging



**Average age of “PIPs”,  
clergy near retirement,  
and seminarians are  
materially increasing.  
(PIPs 56.9 up from  
47.9 in 1975  
and 12% decline in  
seminarians in their  
20s)**



<https://twitter.com/ryanburge/status/1728435878786367956> Data: GSS 1972-2021 @ryanburge

(Sources: McDowell, S. (2023). Hemorrhaging from the faith.; New King James Version, (2018); Orthodox Observer (2023). Holy Cross Hellenic College diaconate program success.; Pinetops Foundation. (2018). The great opportunity: The American church in 2050.; St. Phoebe Center for the Deaconess. (2023). Proposed guidelines for the revival of ordained female diaconate in the Orthodox Church today.; Tanner, T. (2017). Four trends that may portend the future for ATS enrollment: What the last decade says about the next decade.)



# Antagonism

**Orthodox Christianity in America is declining and under attack from secularism, governmental interference, other faith traditions, and internal missteps.**



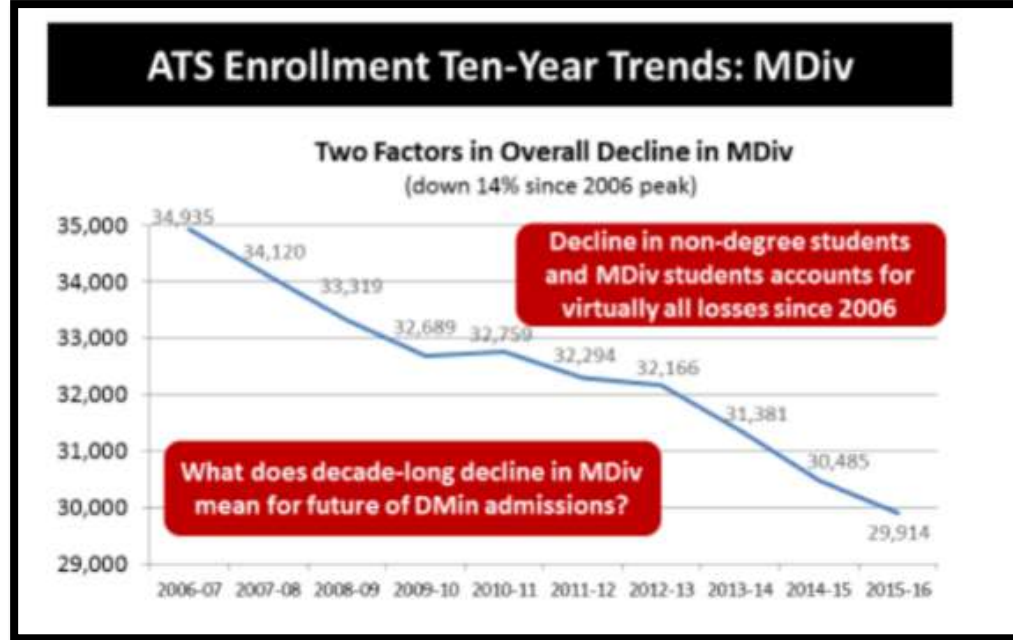
**Over the next 40 years, Muslims are expected to achieve **45.7% population growth** compared to only a **21.4% population growth** for Christians**



(Sources: Byrd, D. J. (2017). Islam in a post-secular society: Religion, secularity and the antagonism of recalcitrant faith.; Dyvik, E. H. (2023). Estimated percent change in world population size from 2022 to 2060 by religion.; Ibrahim, R. (2023). They hate us! The Muslim persecution of Christians.; Iwuchukwu, M. C., & Stiltner, B. (2012). Can Muslims and Christians resolve their religious and social conflicts?; Wooden, C. (2024). Week of prayer for Christian unity: Celebrating gifts while focused on goal.)

# Apathy

- ~ 47% cradle Orthodox left
- ~ 22% of Americans are  
“Spiritual But Not Religious”
- ~ MDiv enrollment is declining.



*“The Christian faith is  
always just one  
generation away from  
extinction.”*

(Lord Carey, former Archbishop of Canterbury)

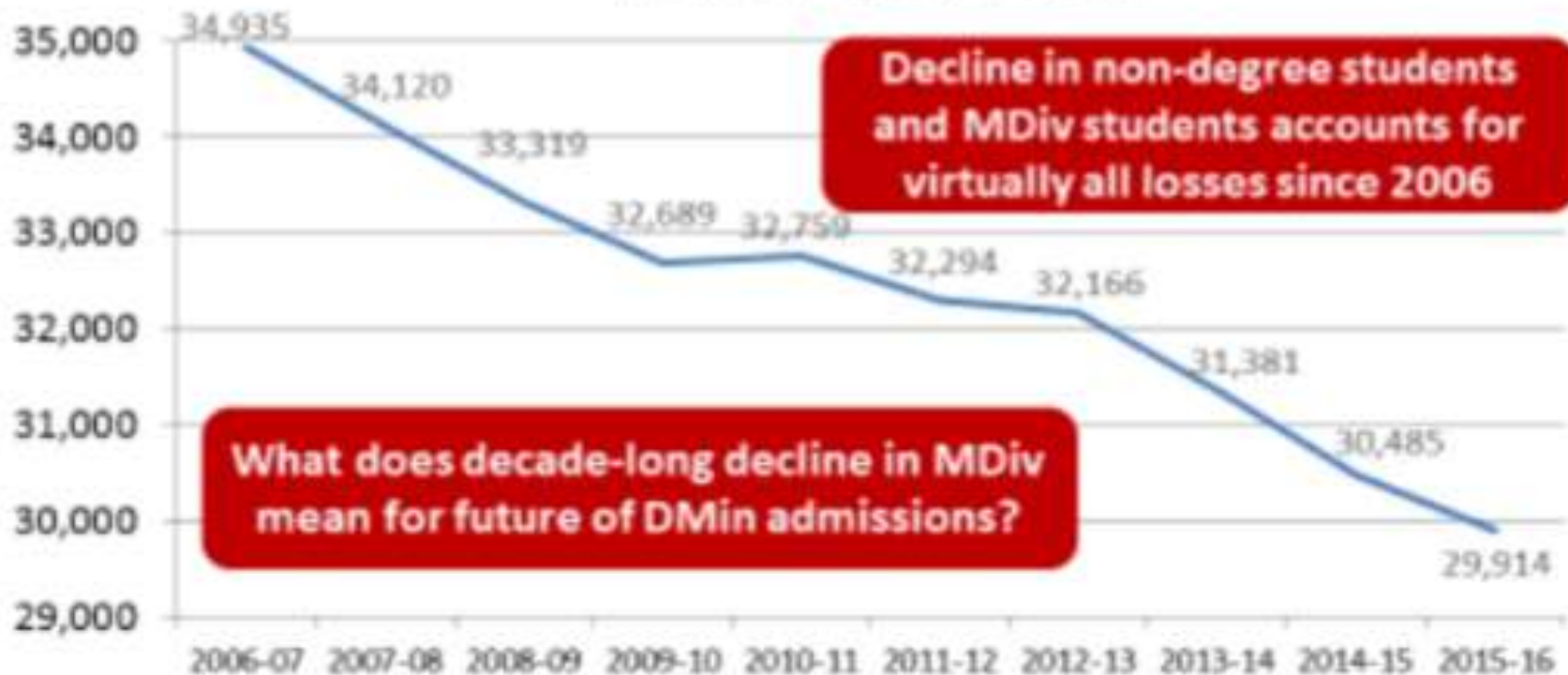
(Sources: Alper, B. A., Rotolo, M., Tevington, P. Nortey, J., & Kallo, A. (2023). Spirituality among Americans.; Bingham, J. (2013). Christianity at risk of dying out in a generation, warns Lord Carey.; Michel, A. A., Powe, D., & Anschutz, J. L. (2024). 7 trends impacting church leadership for 2024.; Pew Research Center. (2015). America's changing religious landscape.; Tanner, T. (2017). Four trends that may portend the future for ATS enrollment: What the last decade says about the next decade.)

# Apathy



## ATS Enrollment Ten-Year Trends: MDiv

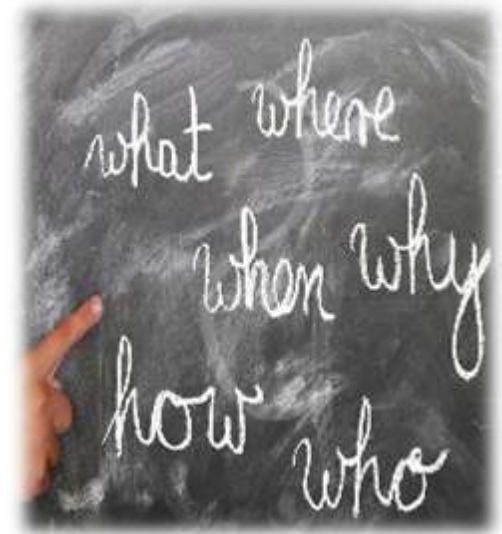
**Two Factors in Overall Decline in MDiv**  
(down 14% since 2006 peak)





# Answers

**Christians seek answers to their faith questions from clergy and all available technologies and resources.**



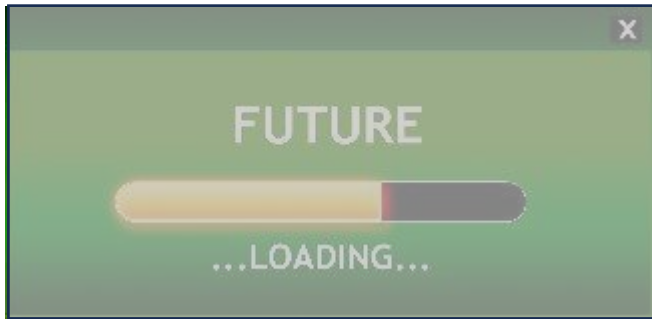
(Sources: Gryboski, M. (2024). Seminary lists 7 trends impacting church leadership in 2024.; Moreno-Riaño, G., Leach, T. B., Green, D. & Metaxas, E. (2023). Christianity in America: Declining toward insignificance or resurging toward revival?; Spadaro, A. (2013). A Big Heart Open to God: An interview with Pope Francis.; Winfield, N. (2023). After approving blessings for same-sex couples, Pope asks Vatican staff to avoid rigid ideologies.)

## Answers



- ~ **Pew Forum data concluded: American Christians want their church to answer their questions, especially on cultural and contemporary issues.**
- ~ **This helps parents (who feel unequipped) to provide Biblical answers to their children's questions**
- ~ **Christians seek to understand their faith's beliefs about deep, critical, cultural, social, and moral questions (Moreno-Riaño et al., 2023).**

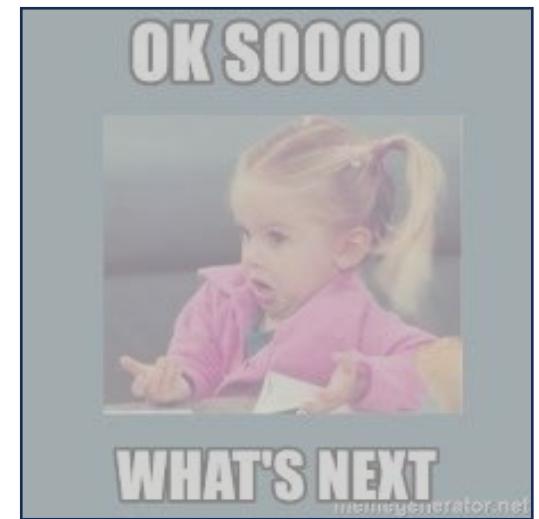
## 8 Strategic Implications



**2. Seminaries must use every available tool, technology, and technique to reach the current faithful and future converts.**

THERE'S ONLY  
2 OPTIONS:  
MAKE PROGRESS OR  
MAKE EXCUSES

**1. Seminaries must stop thinking too small – their mission has changed.**



**3. The seminary model must evolve to embrace new types of “students.”**

**4. Seminaries must tackle the tough questions and teach a way of life.**



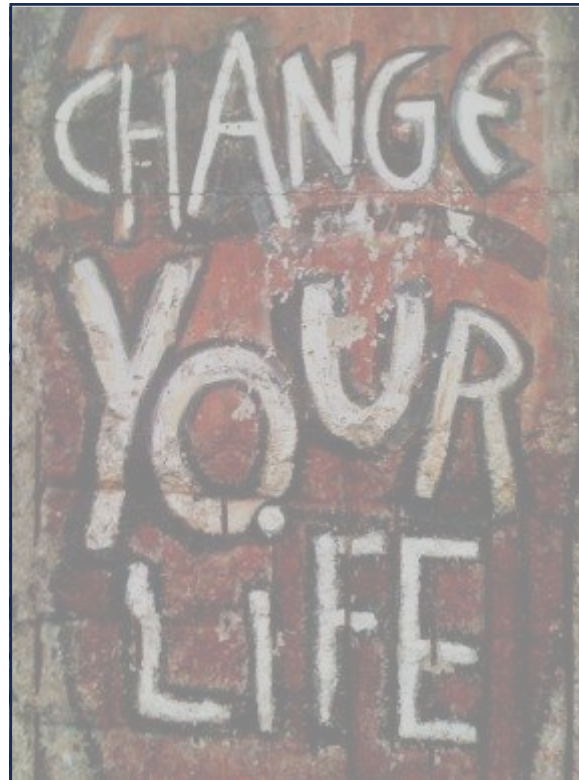
## 8 Strategic Implications



So What Now?

6. The disparate, fragmented, and under-resourced Orthodox seminaries must partner and consolidate to form a few fully effective theological centers of excellence.

5. Seminaries must expand their donor base and who they consider “stakeholders / customers.”



CHANGE  
YOUR  
LIFE



7. Orthodox seminaries must offer programs of excellence and impact.

8. Orthodox seminaries must lead the way in evangelism.

# Strategic Implications: A Seminary-led Path from Antiquity, Aging, Antagonism & Apathy to Answers

**“Train up a child in the way he should go,  
And when he is old he will not depart from  
it.”** (Proverbs 22:6)

**“I was hungry, and you gave me food, I  
was thirsty, and you gave me drink, I was  
a stranger and you welcomed me...”** (Matthew  
25:31-40)

**“A new commandment I give unto you,  
That you love one another; as I have  
loved you.... By this they shall know that  
you are my disciples, that you have love  
for one another.”** (John 13:34-35)

**“Go forth and make disciples of all  
nations...”** (Matthew 28:19-20)





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

Chapters 3-5 & 8: Leadership Best Practices

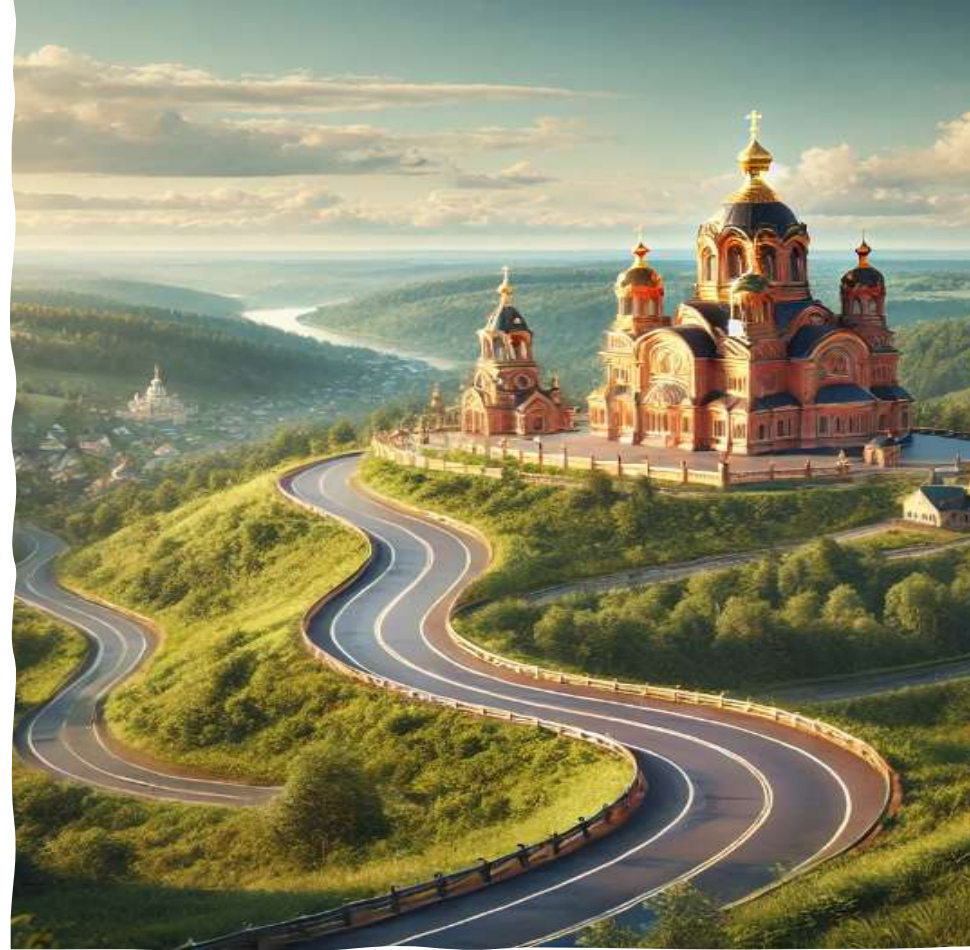
Chapter 7: Strategic Planning

Chapters 9-11: Stewardship & Engagement Best Practices

Chapters 12 & 14: Spiritual Formation & Religious Education Best Practices

Chapter 13: Seminary Strategic Foresight

Chapters 15-17: Christian Unity



<https://stewardshipcalling.com/a-roadmap-for-american-churches-and-people-of-faith-w-w-j-d-what-would-jesus-do/>





# A Few Relevant Data Points from Your St. Sophia Seminary September 2023 Survey

# ≈ 48.3% of St. Sophia Seminarians Identified Some Areas in Which the Seminary Did NOT Adequately Prepare Them

Overall, how well did your theological education at St. Sophia Seminary prepare you for your current work?

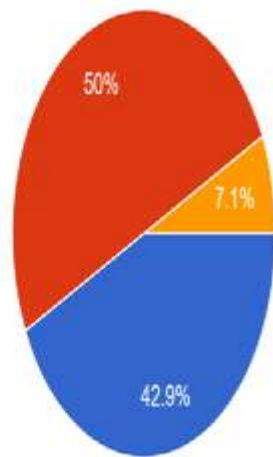
29 responses



**Only  $\approx 42.9\%$  of St. Sophia Faculty:**  
(a) Believe the Seminary is Very Effective  
at achieving its educational goals, and  
(b) rate their overall experience as faculty  
as Excellent

How would you rate the effectiveness of the seminary's curriculum in achieving its educational goals?

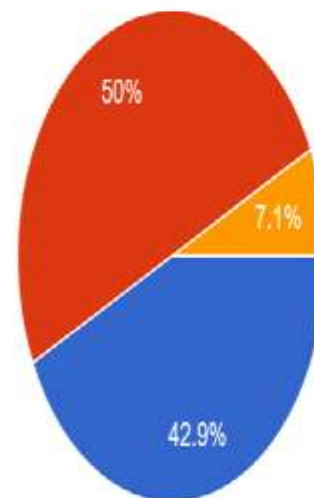
14 responses



● Very Effective  
● Effective  
● Neutral  
● Ineffective  
● Very Ineffective

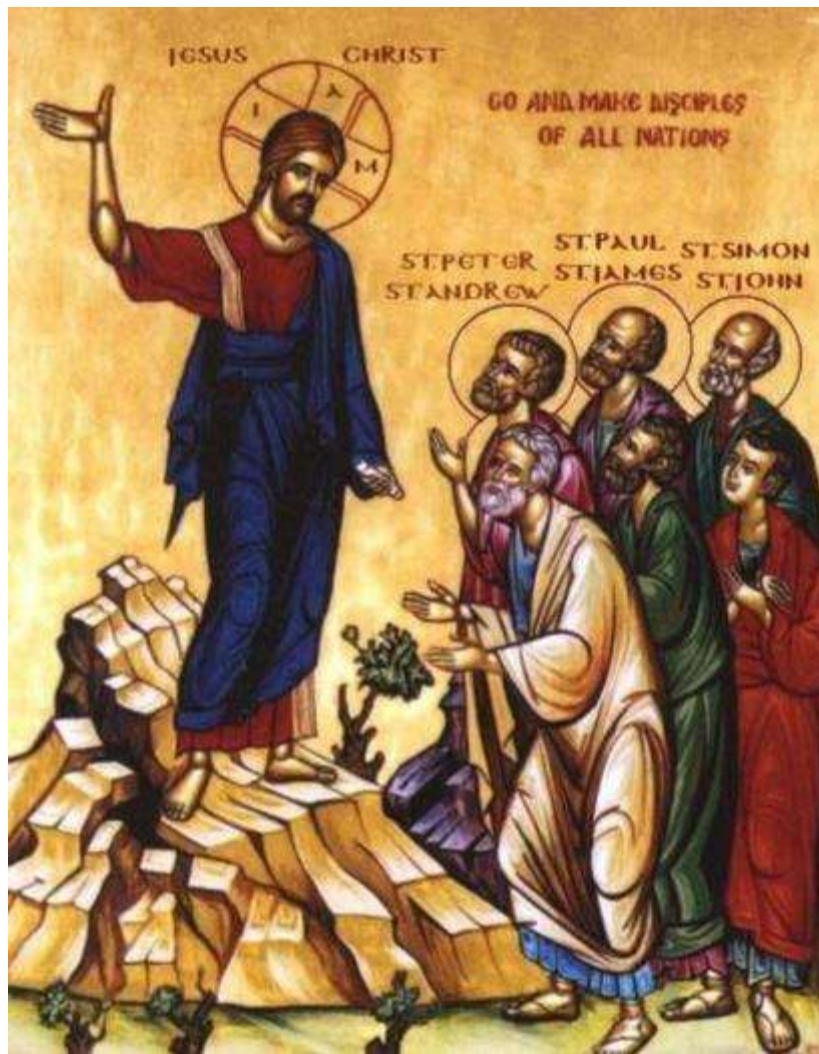
Please rate your overall experience as a faculty member at the seminary.

14 responses



● Excellent  
● Good  
● Fair  
● Poor





Today begins the  
journey of making



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UKRAINIAN ORTHODOX SEMINARY

future smart to  
become the



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CALLING**

Now, Lord,  
look on their  
threats, and  
grant to Your  
servants that  
with all  
boldness they  
may speak  
Your word!

Acts 4:29

Fortune Favors The Bold...





# SAINT SOPHIA

1:00	Why Discovery and Existing Core Values review and revision discussion	Everyone - Facilitated by Bill Marianes
2:00	Break	Everyone



STEWARDSHIP  
CALLING



# Strategic Planning is Biblical





Where there is  
no vision, the  
people perish.

Proverbs 29:18



**“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.”**



## WHY Statement

Answers strategic planning question #1:

*Why are we here?*

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



# A Statement of Why is Biblical

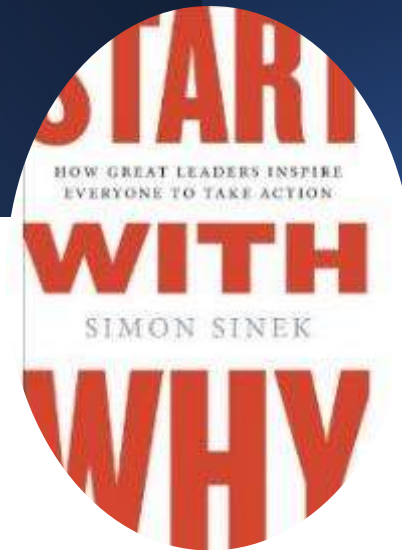
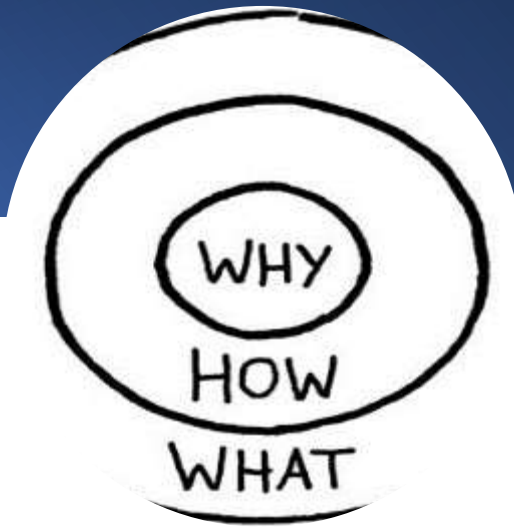


***“Friends, WHY  
are you doing  
these things?”***

Acts 14:15



# Start With Why - How Great Leaders Inspire Everyone To Take Action



Over 67,699,100 plays

[http://www.ted.com/talks/simon\\_sinek\\_how\\_great\\_leaders\\_inspire  
action.html](http://www.ted.com/talks/simon_sinek_how_great_leaders_inspire_action.html)

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**“People don’t  
buy-in to what  
you do. They  
buy-in to why  
you do it.”**

---

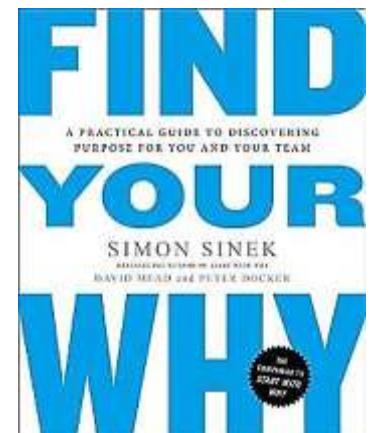
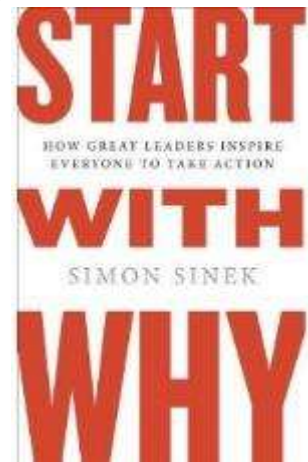
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**“But if you  
don’t know why  
you do what  
you do, how  
will you inspire  
anyone else to  
follow you?”**

---



Simon Sinek





**“The goal is not to attract people who need what you have. The goal is to attract people who believe what you believe.”**



## Joey Asher's book Even A Geek Can Speak, included my 1981 WHY Statement as a lawyer



### Elevator Pitch to Prospects

What is a sales prospect interested in? Solutions to problems. With that in mind, your elevator pitch to a sales prospect should highlight how your product serves or solves your client's problems.

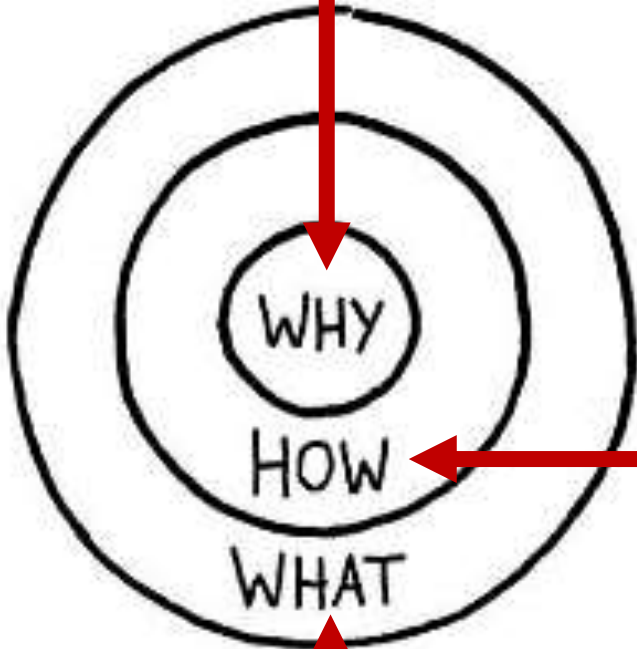
Bill Marianes is a transactional attorney with the law firm Troutman Sanders in Atlanta. When people ask him what he does for a living, he says **"I'm a problem solver and dream facilitator."** That's appropriate, because when people come to see a lawyer, he says, they either have a problem or something they want to accomplish. After hearing the Marianes elevator pitch, prospective clients are always lured into asking him more detail about what he does.

He never responds to the question, "What do you do?" with "I'm an attorney." That kind of response, he says, means, "I'm stuck with whatever box they put all the attorneys and lawyers in. I don't have a chance to distinguish myself."

*"I'm a problem solver  
and dream facilitator"*

## WHY

Why do we exist and do what we do?



## Mission

What do we do?

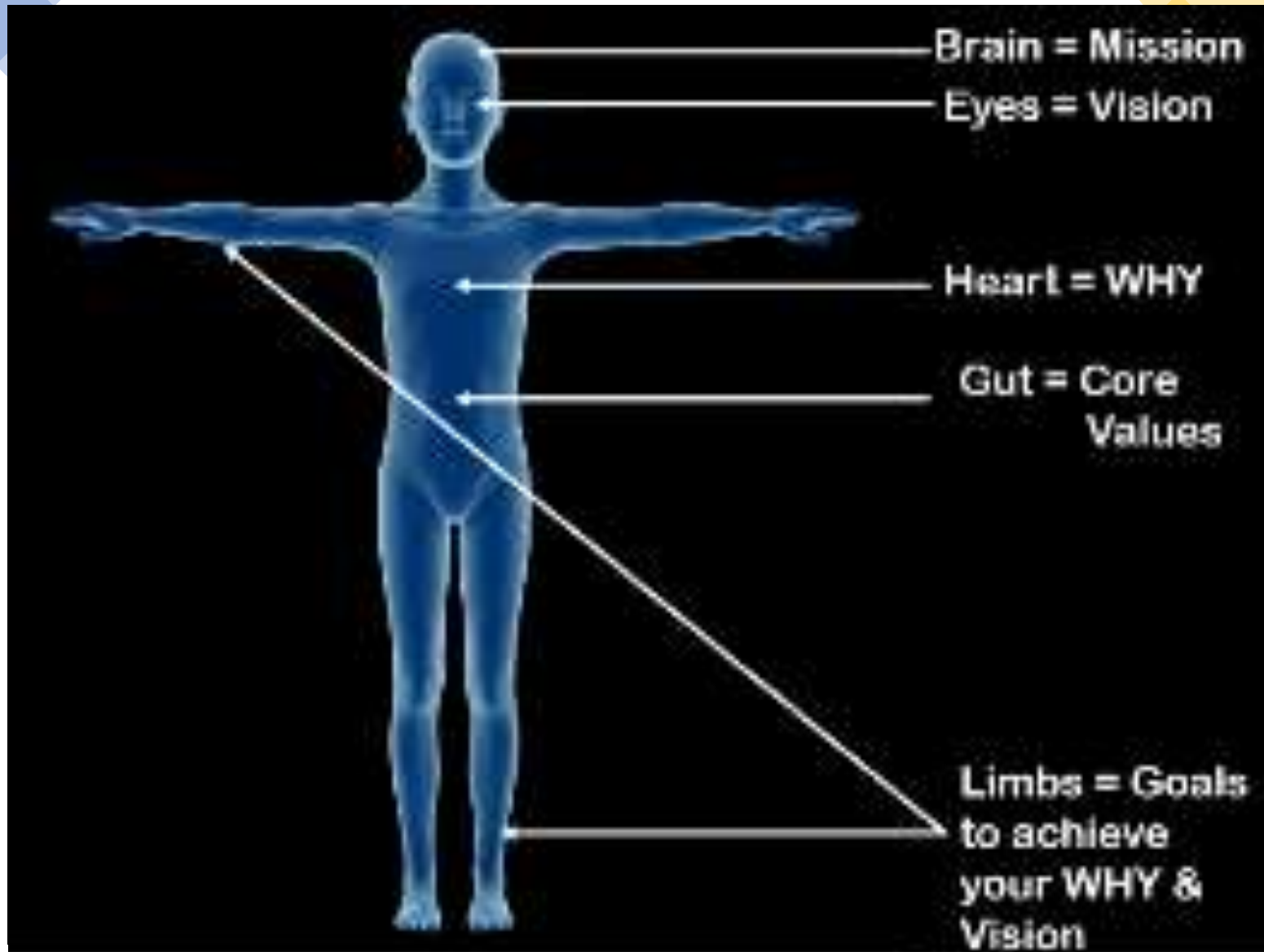
# The intersection of WHY with Strategic Planning

## Vision / SAFs

Where are we going and how will we get there?



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CALLING



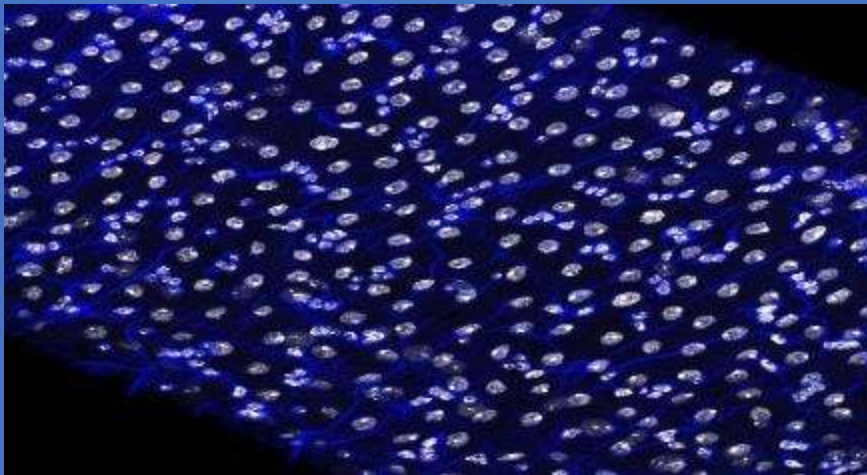


# Your Second Brain”<sup>1</sup>

*“The 2nd brain informs our state of mind...”*

The enteric nervous system  
 (“second brain”) in our gut has  
 100+ million neurons

*“A big part of our emotions are  
 probably influenced by the  
 nerves in our gut...”*



<sup>1</sup> The Second Brain (HarperCollins) Dr. Michael Gershon, Chairman Department of Anatomy and Cell Biology at New York–Presbyterian Hospital/**Columbia University Medical Center**

<sup>2</sup> Pictures of midgut enteric neuron system taken from PhD dissertation of Dr. Alexis Marianes –“*How to bust a gut: physiological and stem cell compartmentalization in the Drosophila midgut*” - Johns Hopkins University (2013)

# 2 Parts to a Why Statement

---

**TO = the contribution**

**SO THAT = the impact**

---



**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.**



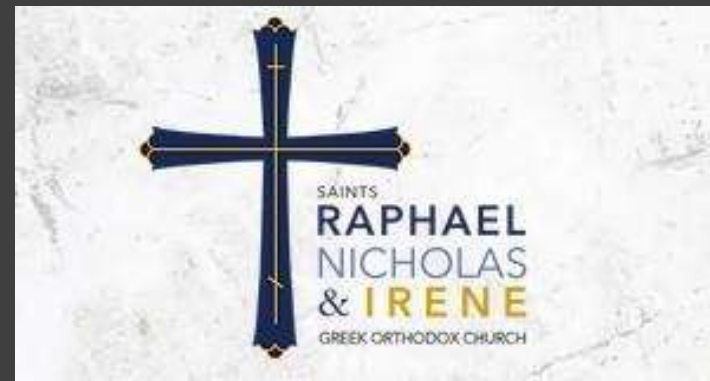


**To share love,  
spread joy, instill  
hope, and live  
with purpose.**

The logo for St. Nicholas Greek Orthodox Church is a rectangular banner with a blurred background of warm, golden light. The text "ST. NICHOLAS GREEK ORTHODOX CHURCH" is written in a white, serif, all-caps font, centered within the banner.

**ST. NICHOLAS GREEK  
ORTHODOX CHURCH**

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



**To receive and  
share unconditional  
love, mercy,  
healing and peace,  
so that life has  
greater meaning  
and purpose.**

GREEK ORTHODOX  
METROPOLIS OF CHICAGO



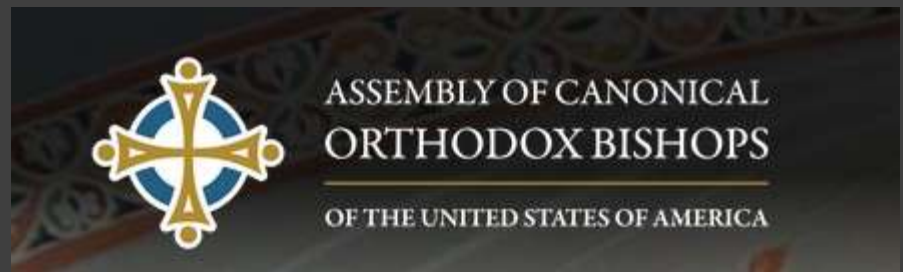


**To seek and  
share Christ's  
love so that all  
will find eternal  
life in Him.**



St. Nicholas  
Orthodox Church

**To bring people  
closer to Christ  
and each other.**





## **WHY Statement**

**To love one another  
through Christ and inspire  
a joyous life with purpose.**



In the next 7 minutes alone  
or with 1 partner draft a St.  
Sophia WHY Statement

---

The clock is  
ticking, and as  
of now we are  
keeping score

---



**Sample Parish  
WHY  
Statements  
Can Be Found  
Here**

**<https://stewardshipcalling.com/st-sophia-ukrainian-seminary/>**



- ~ To share love, spread joy, instill hope, and live with purpose.*
- ~ 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 reflect the image and likeness of God.*
- ~ 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 welcome all people seeking Love, Peace, Salvation, and Truth, so that we may bring ourselves and others closer to Christ.*
- 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 bring together all who want to serve and inspire others so that we can all be ready to enter a life with Christ.*

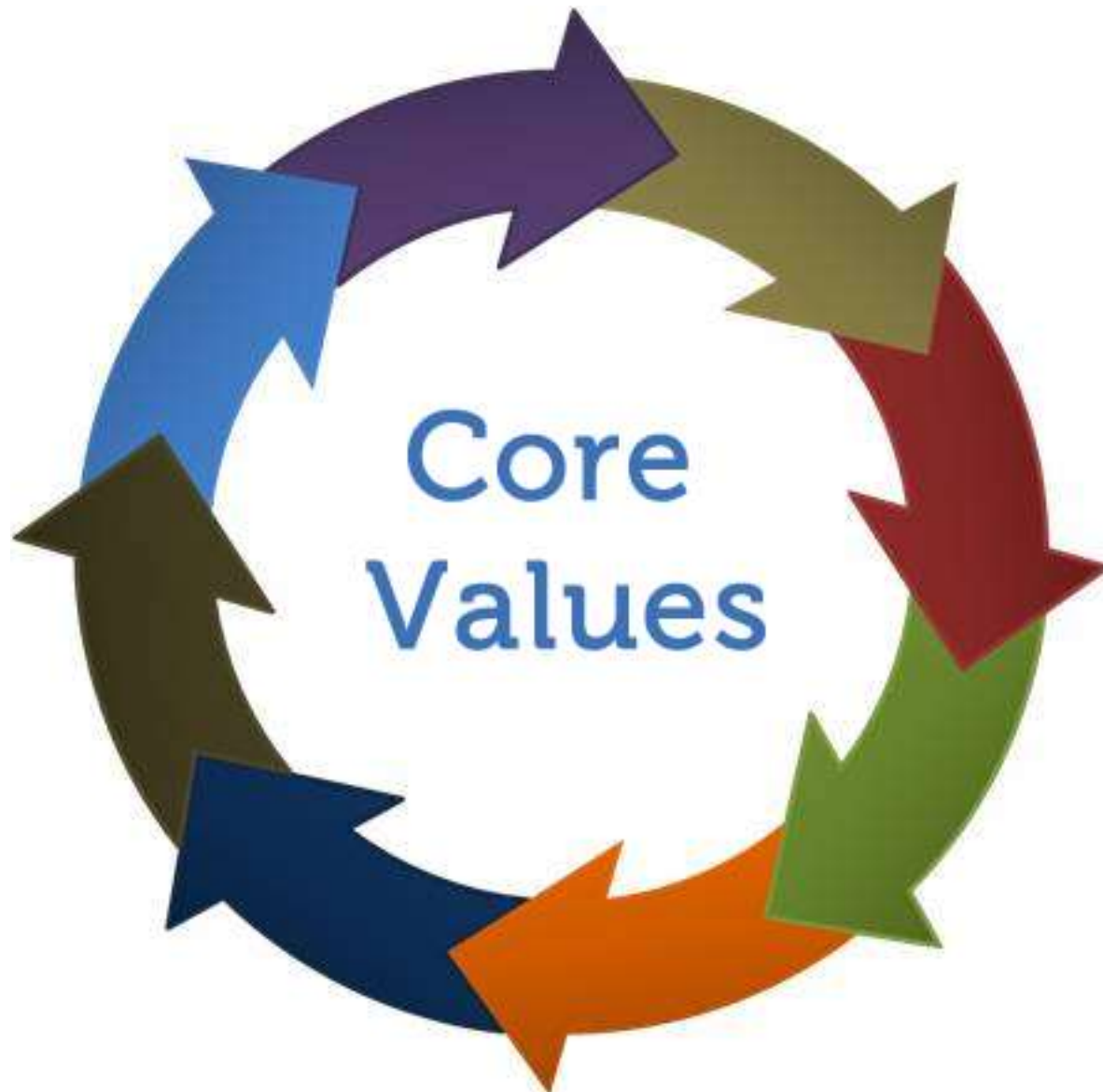




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UKRAINIAN ORTHODOX SEMINARY

## WHY Statement

■





**1. Beliefs shared by the stakeholders**

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

**3. Provide a framework for decisions**

**4. As few words or simple phrases  
as possible**

# Core Values Are Biblical







# GOD'S Core Values

## THE BEATITUDES

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

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

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

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

Blessed are the merciful  
for they shall obtain mercy.

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

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

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

Matthew 5:3-10

# CHRIST'S Core Values



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## **Core Values**

- 1. Virtue** (alignment with Christ's truths and highest relationship goodness with others)
- 2. Scholarship** (academic rigor and intellectual discipline dealing with contemporary issues)
- 3. Service** (serving the larger Christian community)
- 4. Tradition** (grounded in the faith of the Apostles, Ecumenical Councils, and Church Fathers)



## **Core Values**

- 1. Virtue**
- 2. Scholarship**
- 3. Service**
- 4. Tradition**





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## **Core Values**

**1.**

**2.**

**3.**

**4.**



# SAINT SOPHIA



STEWARDSHIP  
CALLING

2:00	Break	Everyone
2:15	Existing Mission Statement review and revisions	Everyone - Facilitated by Bill Marianes
2:45	Needs of community and modified S.W.O.T. brainstorming and consensus	Everyone - Facilitated by Bill Marianes
4:15	Break	Everyone

A photograph showing four hands holding a white rectangular card against a black background. The card has the words "Mission" and "Statement" written in a black, handwritten-style font. The hands are positioned at the corners of the card, with fingers visible gripping the edges. The card is slightly tilted, and the lighting is even, highlighting the texture of the paper and the skin of the hands.

Mission

Statement

# Mission Statement

Answers strategic planning question #3:

What do we do?

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





# A Mission Statement Is Biblical



# The Great Commission

## Mission Part 2 (Matthew 28:18-20)

---

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





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**UKRAINIAN ORTHODOX SEMINARY**

**Saint Sophia Ukrainian Orthodox  
Theological Seminary's mission is:**

**To form, train, and educate the future  
clergy and faithful parishioners of the  
UOC of the USA and the greater  
Eastern Orthodox Church.**



**SAINT SOPHIA**  
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Eastern Orthodox Church.**





**SAINT SOPHIA**  
UKRAINIAN ORTHODOX SEMINARY

## **Proposed Mission Statement**

**Saint Sophia Ukrainian Orthodox  
Theological Seminary's mission is to  
make Christian Disciples and  
Disciple Makers.**



# SAINT SOPHIA



STEWARDSHIP  
CALLING

2:00	Break	Everyone
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4:15	Break	Everyone

# A SWOT Analysis is Biblical



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

***Test yourselves!”***

$$\begin{aligned} & \frac{1}{5}y - \frac{2}{3}x - \frac{2}{3}y + \frac{1}{2}x \\ &= \frac{\cancel{3} \cdot 1}{\cancel{3} \cdot 5}y - \frac{\cancel{5} \cdot 2}{\cancel{5} \cdot 3}y - \frac{\cancel{2} \cdot 2}{\cancel{2} \cdot 3}x + \frac{\cancel{3} \cdot 1}{\cancel{3} \cdot 2}x \\ &= \frac{3}{15}y - \frac{10}{15}y - \frac{4}{6}x + \frac{3}{6}x \\ &= \frac{-7}{15}y - \frac{1}{6}x \quad \checkmark \end{aligned}$$



# **What Do Our Parishes & PIPs, APIPs and FPIPs Need From St. Sophia**

- 1. More ordained clergy**
- 2.**
- 3.**
- 4.**
- 5.**
- 6.**

# **What Do Our Parishes & PIPs, APIPs and FPIPs Need From St. Sophia**

**7.**

**8.**

**9.**

**10.**

**11.**

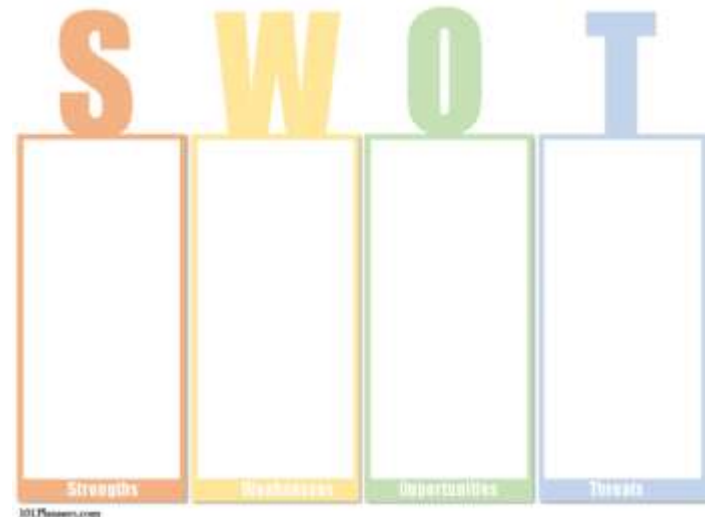
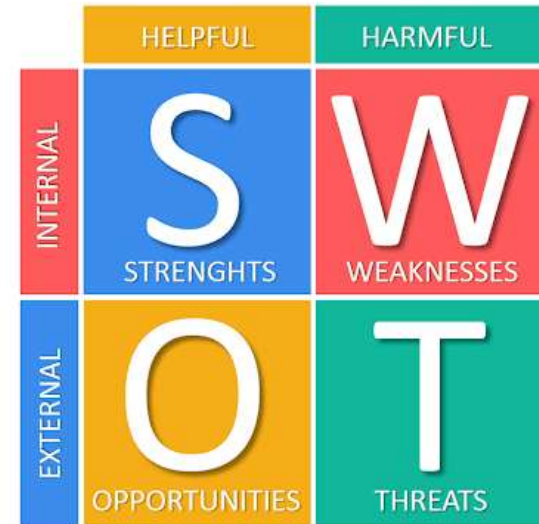
**12.**

# Answers strategic planning question #2: Where are we now?

---

First focus:  
INTERNALLY

Second focus:  
EXTERNALLY



# INTERNAL Strengths & Weaknesses

---

Strengths things we do well and characteristics that give us advantages

Weaknesses things we do poorly or internal challenges that place us at a disadvantage





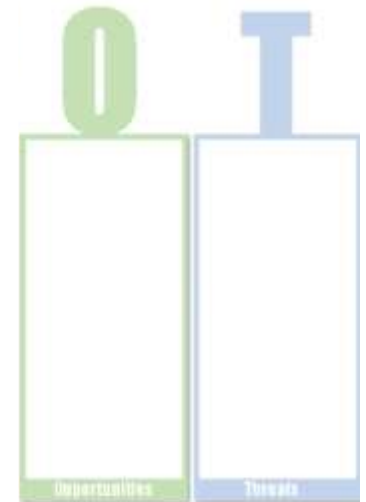
# EXTERNAL Opportunities & Threats

---

**Opportunities** include external things outside of our control that could help us

**Threats** include external things outside of our control that could cause trouble for us

HELPFUL HARMFUL





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## Internal Strengths

~



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## Internal Strengths

~



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## Internal Weaknesses

~





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## Internal Weaknesses

~



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## **Suggested External Opportunities**

- ~ Lilly or other grants**
- ~ Partnerships or collaborations with other seminaries**
- ~ Growing Americanization**
- ~ Enhanced Ukrainian immigration**
- ~ New technologies**



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## **Suggested External Threats**

- ~ Technology/AI**
- ~ Growing secularism**
- ~ Transitions in Eccumenical Patriarch**

## Low Hanging Fruit

The Seminary Board can address our Weaknesses not making final Strategic Plan list







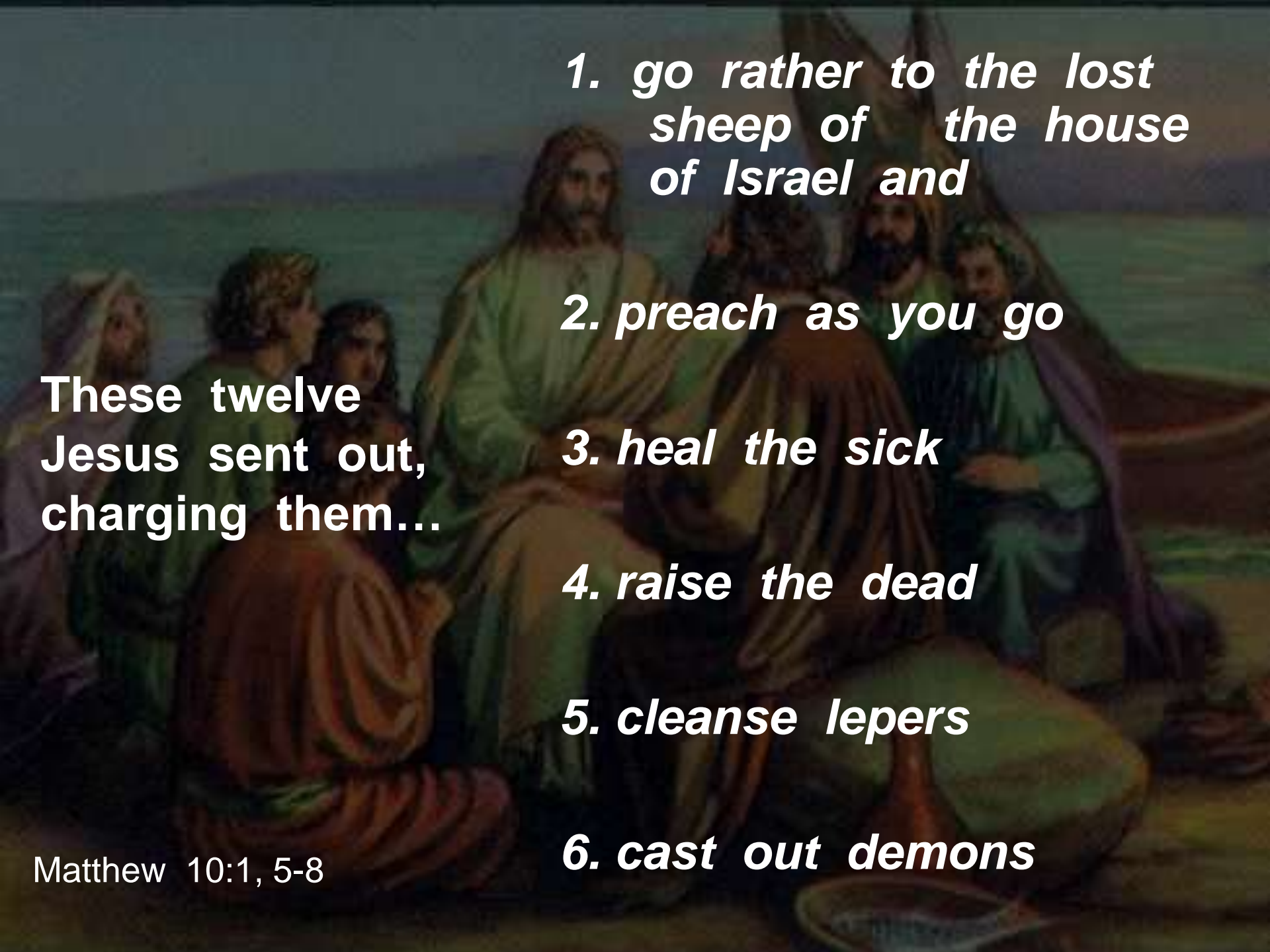
# SAINT SOPHIA



4:15	Break	Everyone
4:30	Strategic Area of Focus discussion and determine 3-4 Critical Strategic Goals (CSG) and preliminary Vision discussion and consensus	Everyone - Facilitated by Bill Marianes
5:30	Discussion of How to Gain Alignment of 3-4 CSG with Parish and Parishioner Needs	Everyone - Facilitated by Bill Marianes
6:00	Review, Discussion and Commitment to WHY, Core Values, Mission, SWOT, 3-4 Critical Strategic Goals and Vision	Everyone - Facilitated by Bill Marianes
6:30	Dinner	Everyone

# Strategic Goals Are Biblical





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

***2. preach as you go***

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

***3. heal the sick***

***4. raise the dead***

***5. cleanse lepers***

***6. cast out demons***

**Matthew 10:1, 5-8**

ACHIEVING YOUR WILDLY  
IMPORTANT GOALS

# The 4 Disciplines of Execution

#1  
Business  
Bestseller  
*The Wall Street  
Journal*



CHRIS McCHESNEY

SEAN COVEY

THE NEW YORK TIMES BESTSELLING AUTHOR

JIM HULING

FOREWORD BY CLAYTON CHRISTENSEN

***“In the  
moment,  
urgency  
always trumps  
importance”***



Chris McChesney

Franklin Covey 4DX



ACHIEVING YOUR WILDLY  
IMPORTANT GOALS

# The 4 Disciplines of Execution



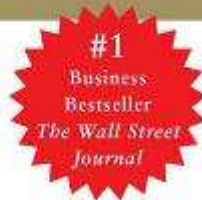
CHRIS McCHESNEY

SEAN COVEY

THE NEW YORK TIMES BESTSELLING AUTHOR

JIM HULING

FOREWORD BY CLAYTON CHRISTENSEN



1. Determine your **WIGs** (Wildly Iimportant Goals)
2. Act on Lead Measures
3. Create a Compelling Scoreboard
4. Create a Cadence of Accountability

**Steve Jobs hired  
Tim Cook to  
improve the Apple  
Supply Chain**



**The Apple Supply Chain  
is now one of the best  
in the world.**

**Tim Cook went from Apple's  
Chief Procurement Officer  
to being Apple's CEO.**



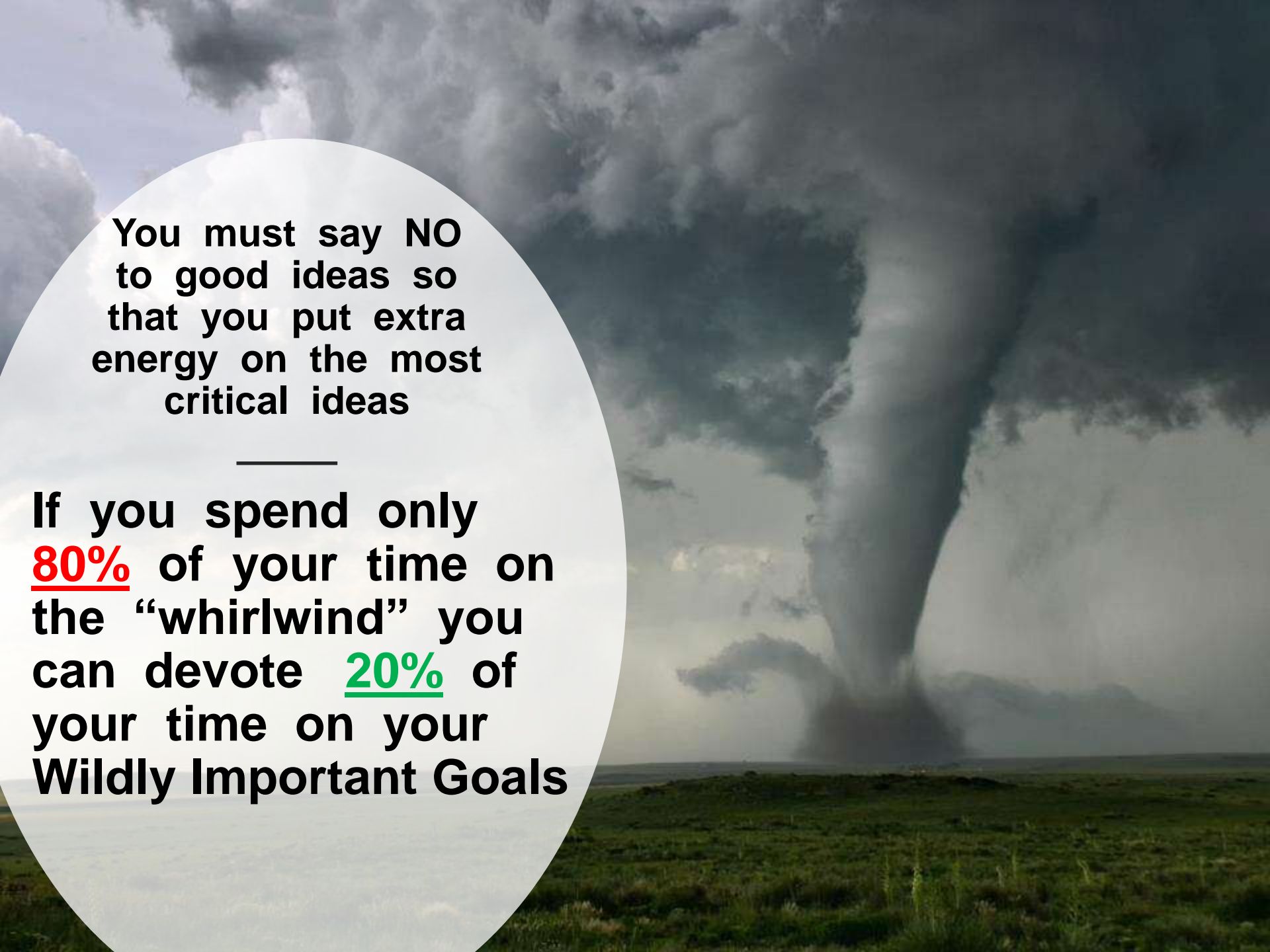
**“We are the most focused company that I know of or have read of or have any knowledge of. We say no to good ideas every day.**

**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.”**



**Tim Cook**



**You must say NO  
to good ideas so  
that you put extra  
energy on the most  
critical ideas**

---

**If you spend only  
80% of your time on  
the “whirlwind” you  
can devote 20% of  
your time on your  
Wildly Important Goals**



# Wildly Important Goals

- ~ Human beings are genetically hardwired to do a very small number of things at a time with excellence<sup>1</sup>
- ~ Focus on the most important things that largest scale impacts

---

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



~The most important objectives that can only be achieved with special attention

~ Focus on “*the few things that can change everything*”

~ Define:

1. Starting Line (where you are now)

2. Finish Line (where you want to go)

3. Deadline (by when)



# SAINT SOPHIA

## UKRAINIAN ORTHODOX SEMINARY



- 1. Provide high-quality Orthodox religious education.**
- 2. Develop a promotional plan to increase awareness of St. Sophia Seminary within the UOC of the USA as well as other Orthodox jurisdictions.**
- 3. Increase applications and admissions.**
- 4. Review and adjust the financial structure to ensure stability, longevity, and comparability with similar institutions.**
- 5. Onboard new staff and enrich the student experience**
- 6. Improve the liturgical training received by the graduates**



SAINT SOPHIA  
UKRAINIAN ORTHODOX SEMINARY

# **Bill's Questions About Current Strategic Goals**

- ① Provide **high-quality** (?) Orthodox religious education.
- ② Develop a promotional plan to increase awareness of St. Sophia Seminary within the UOC of the USA as well as other Orthodox jurisdictions.
- ③ Increase applications and admissions.
4. Review and adjust the **financial structure** (?) to ensure stability, longevity, and **comparability with similar institutions.** (?)
- ⑤ Onboard new staff and enrich the student experience
- ⑥ Improve the liturgical training received by the graduates

1. Redundancy and absence of focus on excellence
2. No S.M.A.R.T. Goals with any accountability metrics
3. Nothing addressing the “faithful parishioners” mentioned in the Mission





**SAINT SOPHIA**  
**UKRAINIAN ORTHODOX SEMINARY**



# **Proposed Critical Strategic Goals**

- 1. Academic Excellence**
- 2. Stakeholder<sup>1</sup> Engagement**
- 3. Innovation & Outreach**
- 4. Thriving & Transfiguring**

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<sup>1</sup>Stakeholders include PIPs, APIPs, FPIPs, other Orthodox faithful, clergy, deacons, and seekers



# SAINT SOPHIA



STEWARDSHIP  
CALLING

8:00	Breakfast	Everyone
9:00	Final review and Commitment to WHY, Core Values, Mission, SWOT, 3-4 Critical Strategic Goals and Preliminary Vision	Everyone - Facilitated by Bill Marianes
9:30	Group Divides into 3-4 CSG groups to develop S.M.A.R.T. Goal and high-level Action Plan	3-4 CSG Small Groups Present to Everyone
11:00	CSG Small Groups present S.M.A.R.T. Goal and high-level Action Plan discussion and consensus	3-4 CSG Small Groups
12:15	Lunch	Everyone
1:00	Presentation of Lilly Grant - 3 Guiding Questions and Previous Grant Recipient Offerings Lilly Grant - 6 Criteria to receive Grants	Fr. Theophan
1:15	Presentation of Lilly Grant 8 Proposal Elements	Fr. Theophan
1:30	Facilitated Discussion about 4 key questions from Proposal Elements 1 & 2	Everyone facilitated by Fr. Theophan and Bill
3:00	Break	Everyone
3:15	Three Separate Small Groups outline their proposed answers to Proposal Elements sections of the grant proposal, focusing on how their initiatives will address the identified challenges and opportunities	Small Groups #3, #4 and #5
5:00	Each Small Group presents their conclusions and rationale to the entire group.	Everyone
6:00	Dinner	Everyone
7:00	Group discussion about proposed Answers to Elements 3, 4 and 5	Everyone facilitated by Fr. Theophan and Bill



# SAINT SOPHIA



8:00	Breakfast	Everyone
9:00	Final review and Commitment to WHY, Core Values, Mission, SWOT, 3-4 Critical Strategic Goals and Preliminary Vision	Everyone - Facilitated by Bill Marianes
9:30	Group Divides into 3-4 CSG groups to develop S.M.A.R.T. Goal and high-level Action Plan	3-4 CSG Small Groups Present to Everyone
11:00	CSG Small Groups present S.M.A.R.T. Goal and high-level Action Plan discussion and consensus	3-4 CSG Small Groups
12:15	Lunch	Everyone

# SMART Goals

The “SMART” goal process helps ensure our Strategic Wildly Important Goals can be realistically achieved

S



**SPECIFIC**

M



**MEASURABLE**

A



**ATTAINABLE**

R



**RELEVANT**

T



**TIME-BOUND**



# SMART Goals



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

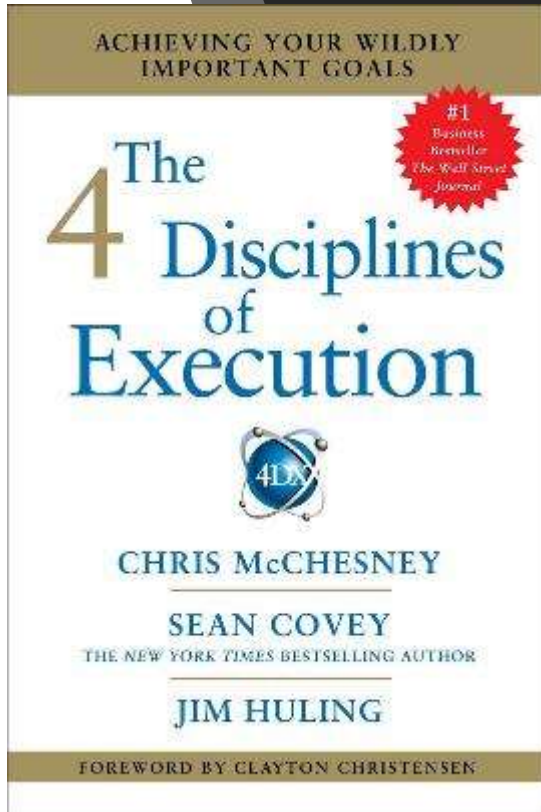
**Measurable**: Can you measure the success of the goal?

**Attainable**: Is the goal attainable within a reasonable time?

**Relevant**: Is the goal most relevant to us and is it "Realistically written"?

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

1. Determine your WIGs  
(Wildly Important Goals)



2. Act on Lead Measures

3. Create a compelling  
scoreboard

4. Create a cadence of  
accountability

The image is a composite. The top half shows a close-up of a speedometer with a needle pointing to 220. The bottom half shows a circular diagram with eight icons representing different business goals, with the text 'CRITICAL STRATEGIC GOALS' in the center.

# Act On Lead Measures

- ~ Lag Measures track the success of the CSG
- ~ Lead Measures track the specific activities that drive a Lag measure
- ~ By the time you see Lag Measures, you can't do anything to fix them
- ~ Lead Measures predict the success of the Lag Measure and can be influenced directly by the team
- ~ Lead Measures must be predictive and influenceable)

# Act On Lead Measures



**I have been losing  
the same 30  
pounds for 30  
years.**

**Very unsuccessfully!**



# Act On Lead Measures



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

---

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

---



**THE RITZ-CARLTON**



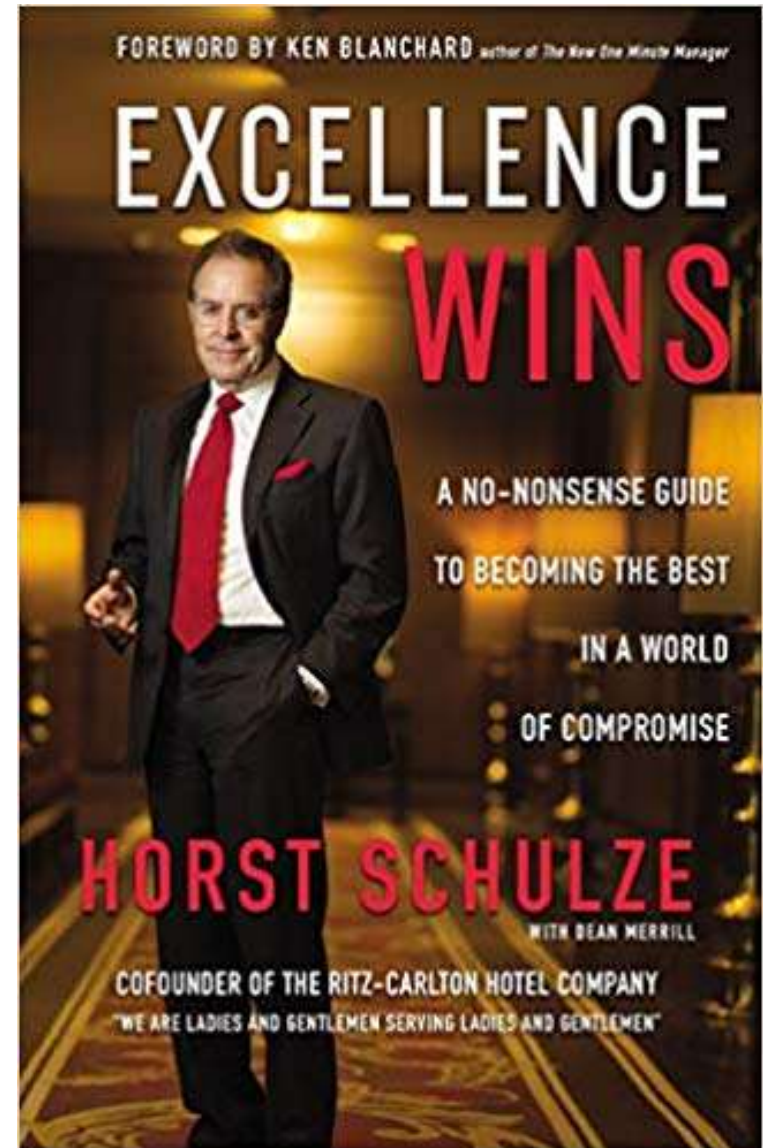
# How did Horst Schulze focus on Lead Measures to create the most premier hotel chain?

Andy Stanley Leadership Podcast  
Part 1 with Horst Schulze:

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

Andy Stanley Leadership Podcast  
Part 2 with Horst Schulze:

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

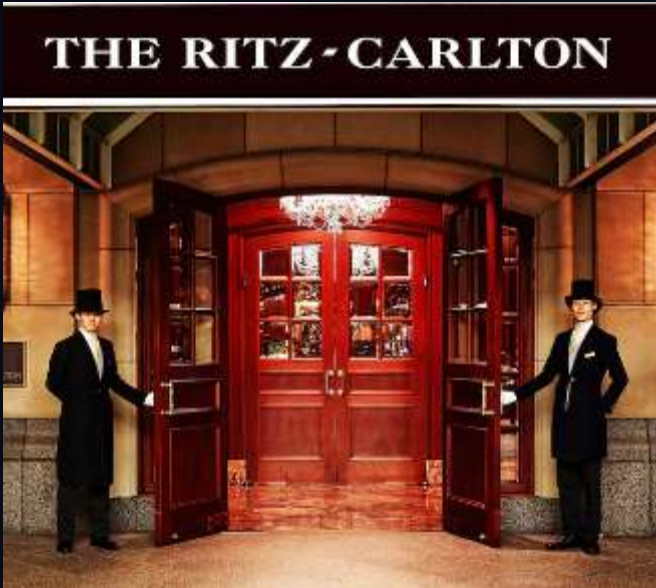




# **Act on Lead Measures Using Empirical Data**

**~ What are some important  
Lag Measures for the Ritz?**

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





# Act on Lead Measures Using Empirical Data

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



**EMPLOYEE  
SATISFACTION**



# Action Plan

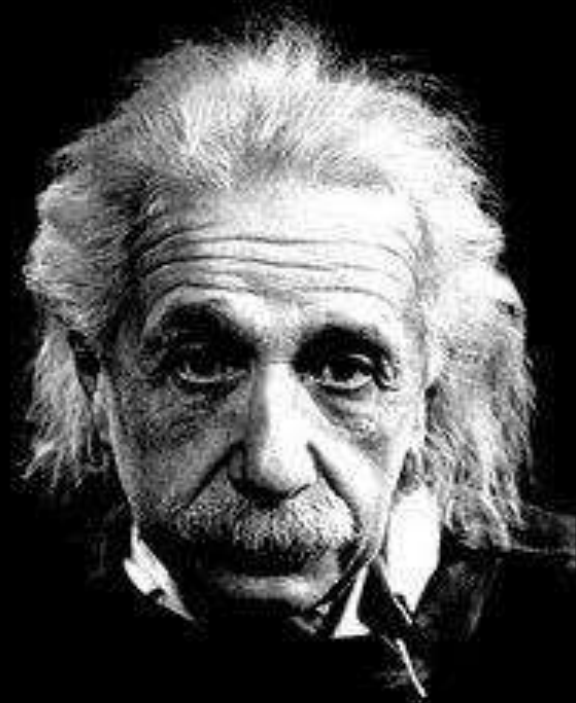
~ Answers strategic planning question #4:

## How will we get there?

- ~ The "rubber hits the road" with specific activities outlined in step-by-step detail
- ~ For each step to you identify:
  1. the specific detailed actions
  2. who does it
  3. the deadline for completion
  4. how we know it is completed



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



**“Strategy without tactics is the slowest route to victory.**

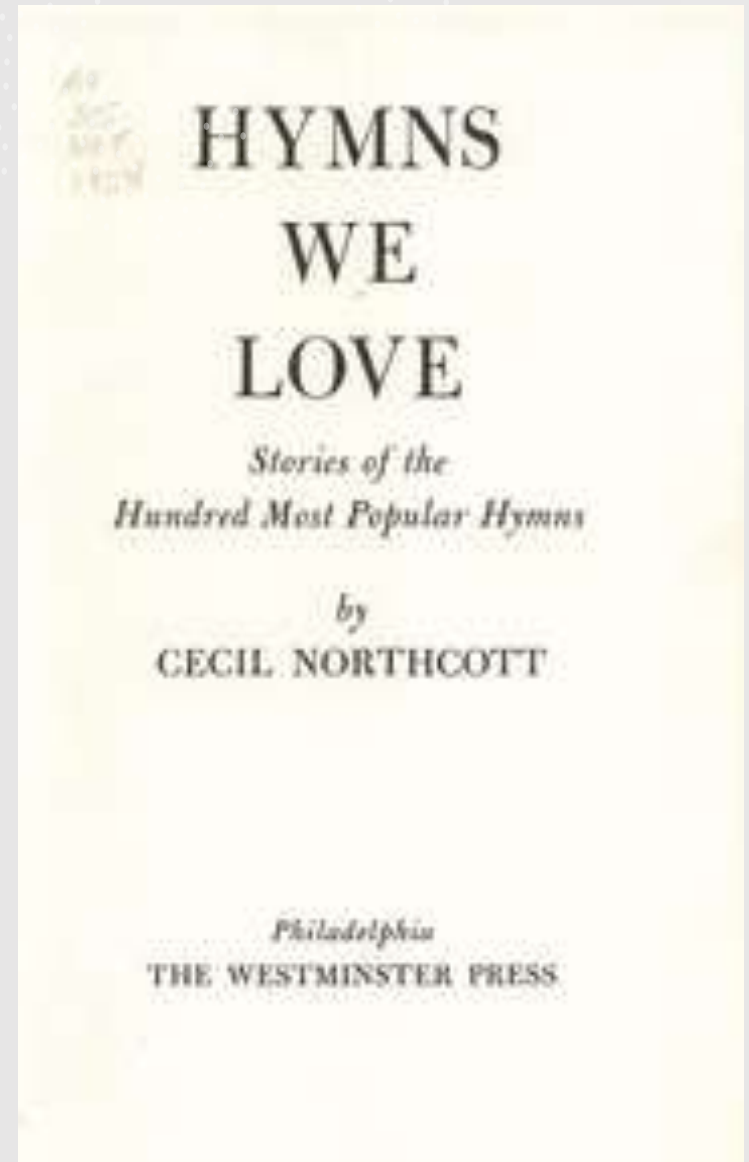
**Tactics without strategy is the noise before defeat.”**



**Sun Tzu**



Please  
Open Your  
Hymnals



# **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;**
- (b) Increase the adult and youth ministry engagement so that at least 70% of parishioners 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;**
- (c) Cover at least 70% of parish operating expenses solely through financial stewardship contributions; and**
- (d) Implement a planned giving campaign in which at least 15% of parishioners participate.**

# Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 4 months</u></b>			
<b>1. Form Stewardship &amp; Engagement Ministry Team (S&amp;EMT). (June 1 Start Date)</b>	SPT and S&EMT Goal Co-Captains	7-1-24	<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	8-1-24	<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	10-1-24	<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>

# Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 2: Develop the most effective Stewardship, Ministry Engagement &amp; Planned Giving Ministry within 3 months</u></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	11-1-24	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	1-1-25	SMEPG Ministry is finalized, and monthly performance benchmarks are determined
<b><u>Interim Goal 3: Recruit and train Ambassadors within 3 months</u></b>			
<b>7. Identify and recruit stewardship personal visitation (“Ambassadors”) who can implement the SMEPG Ministry.</b>	S&EMT	2-1-25	Ambassadors are recruited
<b>8. Train Ambassadors to implement all aspects of the SMEPG Ministry.</b>	S&EMT	4-1-25	Ambassadors are trained



# Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 4: Implement the Stewardship, Engagement &amp; Tithing Ministry to achieve the Stewardship &amp; Engagement Targets within 24 months</u></b>			
<b>9. Fully implement the SMEPG Ministry to achieve the Stewardship &amp; Engagement Targets.</b>	Ambassadors	4-1-27	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><u>Interim Goal 5: Compile and assess the results of the Stewardship, Engagement &amp; Tithing Ministry and make necessary improvements within 2 months</u></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	5-1-27	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	6-1-27	Analysis is completed, and SMEPG Ministry is refined accordingly

# Stewardship & Engagement Action Plan

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Stewardship, Engagement & Planned Giving Ministry Team	7-1-24	
2. Develop definitions and effectiveness metrics	8-1-24	
3. Analyze parish baselines and engagement success impediments	10-1-24	
4. Research Stewardship, Engagement & Planned Giving Ministry	Simultaneous with steps 2 & 3	
5. Evaluate Stewardship, Engagement & Planned Giving Ministry	11-1-24	
6. Finalize Stewardship, Engagement & Planned Giving Ministry	1-1-25	
7. Identify and recruit Stewardship Ambassadors	2-1-25	
8. Train Stewardship Ambassadors	4-1-25	
9. Implement Stewardship, Engagement & Planned Giving Ministry and manage to interim monthly targets	4-1-27	
10. Track performance Data from Stewardship, Engagement & Planned Giving Ministry Implementation	Contemporaneous with step 9	
11. Obtain qualitative and quantitative assessment data from Stewardship, Engagement & Planned Giving	5-1-27	
12. Improve Stewardship, Engagement & Planned Giving Ministry based lessons learned in step 11	6-1-27	

# **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.

# Religious Education Action Plan – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 1: Research the most effective Religious Education Ministries within 4 months</b>			
<b>1. Form Religious Education Ministries Team (REMT). (June 1 Start Date)</b>	SPT and REMT Co-Captains	7-1-24	REMT members agree to serve
<b>2. Determine religious education key definitions and effectiveness metrics for adults and youth for each of the six SMART Goal religious education and spiritual growth objectives (collectively the “Religious Education Ministries”).</b>	REMT	9-1-24	Religious Education Ministries key definitions and metrics determined for all six elements
<b>3. Analyze the parish baseline on those key religious education effectiveness metrics and survey parishioners to determine what religious education content they need and what delivery modalities they will use regularly.</b>	REMT	10-1-24	Parish baselines, and content delivery vehicle and frequency of religious education content is finalized
<b>4. Identify at 2-3 of each of adult religious education, youth religious education, small group ministry, Bible study, media ministry, and congregational singing programs to consider from both inside and outside the Orthodox ecosystem.</b>	REMT	Simultaneous with steps 2 & 3	At least 2-3 alternatives of each of the six elements of the Religious Education Ministry are examined



# Religious Education Action Plan – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 2: Develop the most effective Religious Education Ministries within 4 months</u></b>			
<b>5. Evaluate all the researched Religious Education Ministries items from step 4 for effectiveness against key performance metrics and parish baselines based and criteria of effectiveness determined in step 2 and determine religious education topics, programs, and modalities.</b>	REMT	12-1-24	Evaluation of alternative Religious Education Ministries is completed
<b>6. Develop new Youth Sunday School Ministry, Parish Life Ministry, Small Group Ministry, Bible Study Ministry, Religious Education Media Center, and Congregational Singing Ministry, (collectively, the “Religious Education Ministries”) and establish monthly performance benchmarks to achieve each of the Religious Education Targets.</b>	REMT	2-1-25	Religious Education Ministries are finalized, and monthly performance benchmarks are determined
<b><u>Interim Goal 3: Recruit and train Religious Educators Leaders within 2 months</u></b>			
<b>7. Identify and recruit Religious Education Ministries “Educators” who can teach and implement each of the Religious Education Ministries</b>	REMT	3-1-25	Educators are recruited
<b>8. Train Educators to implement the Religious Education Ministries.</b>	REMT	4-1-25	Educators are trained

# Religious Education Action Plan – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 4: Implement the Religious Education Ministry to achieve the Religious Education Targets within 24 months</u></b>			
<b>9. Implement Religious Education Ministries to achieve the Religious Education Targets.</b>	Educators	4-1-27	Religious Education Ministries are fully launched
<b>10. Track and report on monthly performance benchmarks determined in step 6 and continue Educators follow-up with parishioners until Religious Education Targets are achieved.</b>	Educators	Contemporaneous with step 9	Established monthly Religious Education Targets are achieved

# Religious Education Action Plan – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 5: Compile and assess the results of the Religious Education Ministry and make necessary improvements within 2 months</u></b>			
<b>11. Obtain and compile qualitative and quantitative data from Religious Education Ministries and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.</b>	Educators and REMT	5-1-27	Religious Education Ministry assessments are completed
<b>12. Finalize and deliver Religious Education Ministries assessment analysis report, and make all refinements necessary to make the Religious Education Ministries more effective based on information identified in step 11.</b>	Educators and REMT	6-1-27	Analysis is completed, and Religious Education Ministry is refined accordingly

# **Parish Culture Ministries S.M.A.R.T. Goal (Part 1)**

Within 23 months we will research, develop, and implement best practices and effective adult and youth Parish Leadership Ministry, Comprehensive Welcoming Ministry, and Outreach & Inreach Ministry (the **“Parish Culture Ministries”**) with a comprehensive communications plan that will achieve the following **“Parish Culture Targets”**:

- (a) Our new “Parish Leadership Development Ministry” will be developed and implemented within 9 months such that the new development program will be completed by:**
  - (i) 100% of current Parish Council members, adult and youth ministry leaders, and parish staff within 1 month of program implementation, and**
  - (ii) all new PC members, adult and youth Ministry leaders and parish staff thereafter prior to assuming their roles;**
- (b) a new “Comprehensive Welcoming Ministry” will be developed and implemented within 9 months that will actively engage 100% of adult, youth, and young adult visitors and invite them to participate in a new comprehensive welcoming process;**
- (c) a new “Outreach and Inreach Ministry” will be developed and implemented within 9 months that will ensure that within the next 12 months at least:**
  - (i) 100% of St Demetrios former parishioners will be personally contacted to discuss and address their needs and what the parish can do to serve them better (“Former Parishioner Inreach”);**
  - (ii) at least 20 individuals living in the Warren area who are unaffiliated with any Orthodox parish will begin a specific catechumen program to help them become Orthodox and engage with the parish and its ministries and activities (“Evangelism”);**
  - (iii) 100% of elderly and other special needs parishioners will be personally contacted within 2 months of their being identified (or as soon thereafter as possible), to determine what additional support and services they need to help them engage with the parish and its ministries and activities (“Special Needs Inreach”); and**
  - (iv) at least 100 non-Orthodox individuals will be personally contacted each calendar year and be offered the opportunity to join the parish family and participate in its ministries and activities (“Outreach”).**



# Parochial School Action Plan – Part 2

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 1: Research interest in Parochial School and alternatives within 9 months</b>			
<b>1. Form Parochial School Team (PST). (June 1 Start Date)</b>	SPT and PST Co-Captains	1 month after Start Date	PST members agree to serve
<b>2. Determine Parochial School (PS) desired outcomes and effectiveness metrics.</b>	PST	2 months after step 1	PS metrics determined
<b>3. Survey and analyze parish interest in developing some form of PS solution and optimum alternative approaches.</b>	PST	2 months after step 2	Parish interest in PS and alternatives are determined
<b>4. Assuming sufficient interest in step 3, identify at least 3-5 existing parochial schools to examine, including Holy Trinity Academy in Warren, Ohio, and St. Constantine School in Houston, TX. Conduct site visits and interviews with all such schools, their administration and Boards and conduct due diligence. Research specific action plan to develop a parish PS strategy.</b>	PST	4 months after step 3	Several alternative PS models are diligenced along with the necessary steps to develop the parish's PS strategy.

# Parochial School Action Plan – Part 2

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 2: Develop the most effective PS alternative within 9 months</u></b>			
<b>5. Evaluate all the researched parochial school alternatives and develop a specific proposal and submit it to the parish for approval.</b>	PST	3 months after step 4	Evaluation of alternative PS alternatives and proposal submitted to the parish for approval
<b>6. If a separate PS is approved by the parish, select initial Board of Directors (Board) and Headmaster and crate a strategic, operational and financial plan for the preferred PS alternative.</b>	PST	6 months after step 5	PS Board and Headmaster selected, and strategic, operational and financial plan developed
<b><u>Interim Goal 3: Implement Plan to be prepared for opening within 6 months</u></b>			
<b>7. Implement strategic, operational, and financial plan to prepare for opening of preferred PS alternative in time for the next available academic year opportunity.</b>	Board and Headmaster	6 months after step 6	PS alternative opened
<b>8. Track and report on monthly performance benchmarks determined in strategic, operational, and financial plan.</b>	Board and Headmaster	Each month during PS operation	Monthly reports of progress released
<b><u>Interim Goal 4: Compile and assess the results of the PS and make necessary improvements within 2 months</u></b>			
<b>9. Obtain and compile qualitative and quantitative data of PS effectiveness, identify areas for improvement, and make all refinements necessary.</b>	Board and Headmaster	At least annually	Assessment and remediation plans created and implemented

# Religious Education Action Plan

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete - Date</u>
1. Form Religious Education Ministry Team	7-1-24	
2. Develop definitions and effectiveness metrics	9-1-24	
3. Analyze parish baselines and engagement success impediments	10-1-24	
4. Research Religious Education Ministries	Simultaneous with steps 2 & 3	
5. Evaluate Religious Education Ministries	12-1-24	
6. Finalize Religious Education Ministries	2-1-25	
7. Identify and recruit Educators	3-1-25	
8. Train Educators	4-1-25	
9. Implement Religious Education Ministries and manage to interim monthly targets	4-1-27	
10. Track performance Data from Religious Education Ministries Implementation	Contemporaneous with step 9	
11. Obtain qualitative and quantitative assessment data from Religious Education Ministries	5-1-27	
12. Improve Religious Education Ministries based lessons learned	6-1-27	

# Parish Culture Ministries – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 1: Research the most effective Parish Culture Ministries within 3 months</u></b>			
<b>1. Form Parish Culture Ministry Team (PCMT). (June 1 Start Date)</b>	SPT and Goal Co-Captains	1 month after Start Date	PCMT members agree to serve
<b>2. Determine key definitions, success strategies, effectiveness metrics for all “Parish Culture Ministries” in the areas of leadership, comprehensive welcoming, outreach and inreach, and identify welcoming, hospitality and engagement barriers and areas for improvement.</b>	PCMT	2 months after step 1	Key Parish Culture Ministries metrics for success and definitions are developed
<b>3. Research and identify at least 2-3 of each of Parish Leadership programs, Welcoming Ministry, and Outreach and Inreach Ministry programs to consider from both inside and outside the Orthodox ecosystem.</b>	PCMT	Simultaneous with steps 3	At least 2-3 effective programs are identified in each of the areas of parish leadership, welcoming and inreach & outreach



# Parish Culture Ministries – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 2: Develop the most effective Parish Culture Ministries within 4 months</b>			
<b>4. Compile and evaluate research and data from steps 2 and 3, existing processes, best practices research and visitor's experiences and review and analyze results and data and identify the elements of a best practices Parish Leadership Ministry, Comprehensive Welcoming Ministry, and Outreach and Inreach Ministry to be implemented.</b>	PCMT	2 months after step 3	A report and analysis of all data and research is compiled to inform judgement of most effective Parish Culture Ministries
<b>5. Develop effective Leadership Ministry, Comprehensive Welcoming Ministry, and Outreach and Inreach Ministry (collectively, the "Parish Culture Ministries") and identify monthly "Parish Culture Ministry Targets" performance benchmarks for each of such Parish Culture Ministries.</b>	PCMT	2 months after step 4	Effective Parish Culture Ministries are developed and monthly performance benchmarks are identified

# Parish Culture Ministries

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Parish Culture Ministries Team		
2. Develop definitions and effectiveness metrics		
3. Research Parish Culture Ministries		
4. Compile and evaluate research and Parish Culture success impediments		
5. Finalize Parish Culture Ministries		
6. Identify and recruit Ambassadors		
7. Train Ambassadors		
8. Implement Parish Culture Ministries and manage to interim monthly targets and track performance data from Parish Culture Ministries Implementation		
9. Obtain qualitative and quantitative assessment data from Parish Culture Ministries and improve Parish Culture Ministries		

# Parish Culture Ministries – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 3: Recruit and train Ambassadors to implement the Parish Culture Ministries</u></b>			
<b>6. Identify and recruit parishioners (“Ambassadors”) to implement each element of Parish Leadership Ministry, Comprehensive Welcoming Ministry, and Outreach and Inreach Ministry to achieve the Parish Culture Ministry Targets.</b>	PCMT	1 month after step 5	Ambassadors are recruited
<b>7. Train Ambassadors to implement all Parish Culture Ministries.</b>	PCMT	1 month after step 6	Ambassadors are trained
<b><u>Interim Goal 4: Implement the most effective Parish Culture Ministries</u></b>			
<b>8. Implement all Parish Culture Ministries for a period of 12 months to achieve the Parish Culture Ministry Targets and track and report on monthly performance benchmarks determined previously in step 5 and continue Ambassadors follow-up with parishioners until Parish Culture Ministry Targets are achieved.</b>	Ambassadors and PCMT	beginning immediately after step 7 and continuing for 12 months	Parish Culture Ministries are implemented, and monthly achievement of Parish Culture Ministry Targets are reported and tracked

# Parish Culture Ministries – Part 1

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 5: Assess and improve all Parish Culture Ministries within 2 months</u></b>			
<b>9. Obtain and compile qualitative and quantitative data from Parish Leadership, Comprehensive Welcoming Ministry, Outreach and Inreach Ministry, and Building &amp; Capital Campaign Ministries and compile as to the effectiveness and success based on established criteria, Parish Culture Ministry Targets, and identify areas for improvement. Finalize and deliver improvements to all continuing Parish Culture Ministries to make them more effective.</b>	Ambassadors and PCMT	2 month after step 8	Parish Culture Ministries assessment completed, and improvements implemented for the next year.



# **Parish Facilities Ministry S.M.A.R.T. Goal (Part 2)**

Within 39 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”**:

**(d) A new and comprehensive “Parish and Facilities Ministry” will:**

**(i) Within 4 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**

- A. facilities improvements and additions priorities list,**
- B. plans for sales of superfluous property, and**
- C. creation of development budget (including use of the Endowment) for the Consensus Parish Facilities Plan;**

**(ii) within 5 months after (d)(i),**

- A. obtain all necessary parish approvals for the Consensus Parish Facilities Plan;**
- B. obtain Metropolis and other governmental approvals for the Consensus Parish Facilities Plan approved by the parish;**

**(iii) within 6 months after (d)(ii),**

- A. identify and contract with architects, general contractors. and other service providers necessary to execute the Consensus Parish Facilities Plan;**
- B. 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”);**
- C. obtain funding commitments for a construction loan and, if necessary, mortgage loan and repayment plan (the “Borrowed Portion”) for the Consensus Facilities Plan; and**

**(iv) within 24 months after (d)(iii) complete the Consensus Parish Facilities Plan, including completion of the Capital Campaign by raising at least the Contributed Portion.**

# Parish Facilities Ministry – Part 2

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 1: Research parish buildings and facilities options to determine optimum solution within 4 months</u></b>			
<b>1. Form Parish Facilities Ministry Team (PFMT). (June 1 Start Date)</b>	SPT and Goal Co-Captains	7-1-24	PFMT members agree to serve
<b>2. Comprehensively research the alternative options and analyze optimal alternative(s) for a proposal for Goal items D (i) (A), (B), (C) and (D) (the “Consensus Parish Facilities Plan”).</b>	PFMT	10-1-24	Comprehensive research of optimal building and facilities options is completed
<b><u>Interim Goal 2: Obtain consensus consents and approvals from parishioners and Metropolis in support of the Consensus Facilities Plan within 5 months</u></b>			
<b>3. Finish development of Consensus Parish Facilities Plan and obtain all necessary parish and Metropolis approvals to whatever final version of the Consensus Parish Facilities Plan is approved by the parish general assembly.</b>	PFMT	2-1-25	Obtain parishioner and Metropolis approval of Consensus Parish Facilities Plan

# Parish Facilities Ministry – Part 2

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 3: Obtain all necessary professionals and capital campaign program and debt borrowings to implement Consensus Parish Facilities Plan and Capital Campaign within 6 months</b>			
<b>4. Implement steps (d) (iii) to achieve Consensus Parish Facilities Plan by: (A) identifying architects, general contractors, and other service providers; (B) identify how much of the Endowment will be used as part of the Consensus Parish Facilities Plan and receive approval from the parish general assembly; (C) develop and begin executing a “Capital Campaign” to obtain at least the Contributed Portion of the Consensus Parish Facilities Plan; and (D) obtain funding commitments for the “Borrowed Portion”</b>	PFMT	8-1-25	Finalize retention of necessary professionals, any borrowings and capital campaign and debt program to fully implement the Consensus Parish Facilities Plan
<b>5. Develop tracking and reporting monthly performance benchmarks for all activities associated with Consensus Parish Facilities Plan and Capital Campaign (the “Parish Facilities &amp; Capital Campaign Targets”).</b>	PFMT	Simultaneous with step 4	Report on monthly progress of Parish Facilities Building & Capital Campaign Targets

# Parish Facilities Ministry – Part 2

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 5: Implement the Facilities and all other programs to achieve the LPC&amp;F Targets within 24 months</b>			
<b>6. Successfully implement Consensus Parish Facilities Plan and Capital Campaign Ministry.</b>	PFMT	8-1-27	Consensus Parish Facilities Plan and Capital Campaign Ministry are completed
<b>7. Track and report on monthly performance benchmarks determined previously regarding Consensus Parish Facilities Plan, Parish Facilities &amp; Capital Campaign Targets, and Consensus Parish Facilities Ministry.</b>	PFMT	Simultaneous with step 6	Monthly performance benchmark reports are released
<b>8. Identify and fill any gaps in Parish Facilities &amp; Capital Campaign Targets until Consensus Parish Facilities Plan is fully completed and achieved.</b>	PFMT	Simultaneous with step 6	Consensus Parish Facilities Ministry and Capital Campaign are successfully achieved



# Parish Facilities

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Parish Facilities Religious Ministry Team	7-1-24	
2. Research Consensus Parish Facilities Plan options	10-1-24	
3. Develop Consensus Parish Facilities Plan and obtain all necessary parish and Metropolis approvals	2-1-25	
4. Identifying professionals, and obtain approval for use of Endowment, develop and begin executing a Capital Campaign and obtain funding commitments for the Borrowed Portion	8-1-25	
5. Develop tracking and reporting monthly performance benchmarks for all activities associated with Consensus Parish Facilities Plan and Capital Campaign (the “Parish Facilities & Capital Campaign Targets	Simultaneous with step 4	
6. Successfully implement Consensus Parish Facilities Plan and Capital Campaign Ministry	8-1-27	
7. Track and report on Consensus Parish Facilities Ministry monthly performance benchmarks, Capital Campaign Targets.	Simultaneous with step 6	
8. Identify and fill any gaps in Parish Facilities & Capital Campaign Targets until Consensus Parish Facilities Plan is fully completed and achieved.	Simultaneous with step 6	

# S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective \_\_\_\_\_ (the “\_\_\_\_\_ Ministry”) with a comprehensive communications plan that will achieve the following “Targets” within \_\_\_\_ months:

(a) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(b) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(c) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(d) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

# Alpha Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 1: Research the most effective programs within months</b>			
<b>1. Form _____ Ministry Team (Alpha Team).</b>	SPT and Alpha Team Goal Co-Captains	One month after Start Date	<b>Alpha Team members agree to serve</b>
<b>2. Determine _____ _____ _____ (key definitions, data, and effectiveness metrics.)</b>	Alpha Team	_____ month(s) after step ____	_____ _____ _____ <b>(Definitions and metrics determined)</b>
<b>3. Analyze _____ _____ _____ _____ _____.)</b>	Alpha Team	month(s) after step ____	_____ _____ _____ _____
<b>4. Identify at least 2-3 effective and best practices _____ _____ programs to consider from both inside and outside the Orthodox ecosystem.</b>	Alpha Team	Simultaneous with steps 2 & 3	<b>At least 2-3 best practices programs are examined</b>

# Alpha Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 2: Develop the most effective _____ within _____ months</b>			
<b>5. _____</b> <b>Evaluate researched best practices programs for effectiveness against key performance metrics and baselines based on criteria of effectiveness determined in step 2.</b>	Alpha Team	month(s) after step ____	_____ Evaluation of alternative stewardship & ministry engagement, tithing, and planned giving programs is completed
<b>6. Modify or develop new _____</b> <b>programs for utilization at St Sophia (the “Alpha Ministry”) and establish monthly performance benchmarks and comprehensive communications strategy and plan.</b>	Alpha Team	month(s) after step ____	Alpha Ministry is finalized, and monthly performance benchmarks are determined
<b>Interim Goal 3: Recruit and train Ambassadors within _____ months</b>			
<b>7. Identify and recruit Alpha Ministry “Ambassadors” who can implement the Alpha Ministry.</b>	Alpha Team	month(s) after step ____	Ambassadors are recruited
<b>8. Train Ambassadors to implement all aspects of the Alpha Ministry.</b>	Alpha Team	month(s) after step ____	Ambassadors are trained

# Alpha Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 4: Implement the Alpha Ministry to achieve the Targets within months</u></b>			
<b>9. Fully implement the Alpha Team Program to achieve the Targets.</b>	Ambassadors	__ months after step __	Alpha Team Program is fully launched
<b>10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up until Targets are achieved</b>	Ambassadors	Contemporaneous with step 9	Established monthly Targets are achieved
<b><u>Interim Goal 5: Compile and assess the results of the Alpha Ministry and make necessary improvements within 2 months</u></b>			
<b>11. Obtain and compile qualitative and quantitative data from Alpha Team Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.</b>	Ambassadors and Alpha Team	1 month(s) after step 10	Alpha Ministry assessments are completed
<b>12. Finalize and deliver Alpha Team Program assessment analysis report and make all refinements necessary to make the Alpha Team Program more effective.</b>	Ambassadors and Alpha Team	1 month after step 11	Analysis is completed, and Alpha Team Program is refined accordingly



# Alpha Action Plan

[illegible]

# S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective \_\_\_\_\_ (the “\_\_\_\_\_ Ministry”) with a comprehensive communications plan that will achieve the following “Targets” within \_\_\_\_ months:

(a) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(b) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(c) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

(d) \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_;

# Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 1: Research the most effective programs within months</b>			
<b>1. Form _____ Ministry Team (_____ Team).</b>	_____	One month after Start Date	_____ Team members agree to serve
<b>2.</b> _____ _____ _____ _____	_____	_____ month(s) after step ____	_____ _____ _____ _____
<b>3.</b> _____ _____ _____ _____ _____	_____	month(s) after step ____	_____ _____ _____ _____
<b>4.</b> _____ _____ _____ _____	_____	Simultaneous with steps 2 & 3	_____ _____ _____ _____

# Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 2: within months			
5. _____ _____ _____ _____ _____	_____	month(s) after step ____	_____ _____ _____
6. _____ _____ _____ _____	_____	month(s) after step ____	_____ _____ _____
Interim Goal 3: within months			
7. _____ _____ _____ _____	_____	month(s) after step ____	_____ _____ _____
8. _____ _____ _____ _____	_____	month(s) after step ____	_____ _____ _____

# Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 4:</b> within months			
9. _____	_____	__ months after step __	_____
_____			_____
_____			_____
10. _____	_____	__ months after step __	_____
_____			_____
_____			_____
_____			_____
<b>Interim Goal 5:</b> within months			
11. _____	_____	1 month after step 10	_____
_____			_____
_____			_____
_____			_____
12. _____	_____	1 month after step 11	_____
_____			_____
_____			_____
_____			_____



[illegible]



SAINT  
SOPHIA



STEWARDSHIP  
CALLING



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1:00	Presentation of Lilly Grant - 3 Guiding Questions and Previous Grant Recipient Offerings Lilly Grant - 6 Criteria to receive Grants	Fr. Theophan
1:15	Presentation of Lilly Grant 8 Proposal Elements	Fr. Theophan
1:30	Facilitated Discussion about 4 key questions from Proposal Elements 1 & 2	Everyone facilitated by Fr. Theophan and Bill
3:00	Break	Everyone
3:15	Three Separate Small Groups outline their proposed answers to Proposal Elements sections of the grant proposal, focusing on how their initiatives will address the identified challenges and opportunities	Small Groups #3, #4 and #5
5:00	Each Small Group presents their conclusions and rationale to the entire group.	Everyone
6:00	Dinner	Everyone
7:00	Group discussion about proposed Answers to Elements 3, 4 and 5	Everyone facilitated by Fr. Theophan and Bill



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**1:00 Presentation of Lilly Grant - 3 Guiding Questions and Previous Grant Recipient Offerings Lilly Grant - 6 Criteria to receive Grants (Fr. Theophan)**

**1:15 Presentation of Lilly Grant 8 Proposal Elements (Fr. Theophan)**

**1:30 Facilitated Discussion about 4 key questions from Proposal Elements 1 & 2 (Everyone facilitated by Fr. Theophan and Bill)**



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## **4 Key Questions From Proposal Elements 1 & 2**

- 1. What kinds of leaders are needed by Christian congregations in the school's religious constituencies today and will be needed in the future?**
- 2. What is the school's role in preparing and supporting leaders for these churches?**
- 3. What are the most pressing challenges or opportunities to be addressed to strengthen and sustain the school's institutional capacities to prepare and support pastors and congregational lay ministers.**
- 4. Why do these challenges and/or opportunities need to be prioritized and addressed first?**



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**3:15 Three Separate Small Groups outline their proposed answers to Proposal Elements sections of the grant proposal, focusing on how their initiatives will address the identified challenges and opportunities (Small Groups #3, #4 and #5) – Pages 9 & 10 of Lilly**

**5:00 Each Small Group presents their conclusions and rationale to the entire group. (Everyone)**

**6:00 Dinner**

**7:00 Group discussion about proposed Answers to Elements 3, 4 and 5 (Everyone facilitated by Fr. Theophan and Bill)**





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**3. Project Purpose and Goals:** State the central purpose and specific goals of the proposed project. How will the project address the prioritized challenges and/or opportunities described in the rationale above? What is strategic about this purpose and these goals? How will the project strengthen the school's capacities to prepare and support pastors and congregational lay ministers into the future?

**4. Project Design:** Provide a detailed description of the theological school's project. What is the project's overall design, and what are its key activities? How will school and project leaders cultivate buy-in and engagement with advisory or governing board members, faculty, administrators, staff and other potentially key constituencies for the project (pastoral leaders, denominational leaders, alumni, etc.)? The description should include the identification of leaders who will be responsible for implementing project activities. It also should include a list of potential collaborating organizations that will assist with the project's implementation. The roles and responsibilities of collaborating organizations in the overall project should be stated.



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**5. Outcomes and Evaluation**: Describe the project's intended outcomes and how the organization will measure progress toward those outcomes.

**Outcomes**: Describe the desired outcomes the school hopes to achieve through the proposed project. What change does the school hope to see if the project is successful? What are the anticipated outcomes for aspiring and/or current pastoral leaders? For congregations? For the school's enrollment in various programs? For the school's revenues and long-term sustainability? For others?

**Performance Indicators**: Describe the specific performance indicators that will be used to measure the proposed project's progress toward the outcomes stated above. Organizations must include in their proposals a timetable for achieving these indicators.

Performance indicators should include quantitative and qualitative markers to gauge the project's progress toward its outcomes. For example, one of the proposed project's outcomes may be that the "cost per headcount" in the MDiv program decreases by 20 percent (as a result of increasing enrollment, reducing underlying costs, or both). An accompanying performance indicator may be that "cost per headcount" in the MDiv decreases by four percent each year during a five-year grant period.



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**A second example of a project outcome may be that 90 percent of master's level graduates indicate in a survey that their degree program prepared them well for the realities of ministry in their particular contexts. If 60 percent of students currently indicate this level of preparedness, then an accompanying performance indicator may be that this percentage will rise to at least 75 percent after the third year of the project. A third example of a project outcome may be that the school will be able to increase revenues and cut costs in such a way so as to decrease its endowment draw to four percent annually. If the current endowment draw is seven percent annually, then an accompanying performance indicator may be that this percentage will drop to a maximum of five percent by the third year of the project.**

**Evaluation Plan: Provide a plan for how the organization will evaluate the proposed project. How will the organization track the project's performance indicators? What qualitative and quantitative methods will the organization use in the evaluation process (e.g., interviews, focus groups, surveys)? Who is responsible for evaluation?**



# SAINT SOPHIA



STEWARDSHIP  
CALLING

8:00	Breakfast	Everyone
9:00	Follow-up comments, thoughts, or proposed changes to Elements 1-5	Everyone facilitated by Fr. Theophan and Bill
10:00	Facilitated discussion about Elements 6, 7, & 8 (part 1)	Everyone facilitated by Fr. Theophan and Bill
11:00	Break	Everyone
11:15	Finish facilitated discussion about Elements 6, 7, & 8 (part 2)	Everyone facilitated by Fr. Theophan and Bill
12:30	Lunch	Everyone
1:15	Finalizing the Grant Proposal Outline - Final edits focusing on coherence and clarity to enhance the proposal's strength (and any remaining items)	Fr. Theophan
2:30	Closing remarks and next steps and closing prayer	Metropolitan/ Archbishop
3:00	Departures	Everyone



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**9:00 Follow-up comments, thoughts, or proposed changes to Elements 1-5 (Everyone facilitated by Fr. Theophan and Bill)**

**10:00 Facilitated discussion about Elements 6, 7, & 8 (part 1) (Everyone facilitated by Fr. Theophan and Bill)**

**11:00 Break**

**11:15 Finish facilitated discussion about Elements 6, 7, & 8 (part 2) (Everyone facilitated by Fr. Theophan and Bill)**





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## **LILLY PART 6 COMMUNICATIONS**

- ~ Include a communication plan that describes how the theological school intends to communicate, both internally and externally, what is accomplished and learned through the implementation of the project.**
- ~ With whom will the theological school seek to communicate what is learned?**



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## **LILLY PART 7 – ANTICIPATED OBSTACLES**

- ~ Describe any anticipated obstacles in implementing the project.**
- ~What challenges does the theological school anticipate facing?**
- ~What are key strategies for addressing these challenges?**
- ~ What initial or ongoing technical assistance will be needed to address anticipated challenges?**



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## **LILLY PART 8 – SUSTAINABILITY AND CONTINUATION**

- ~ Describe how the project will strengthen the school's financial viability and its capacities to prepare and support pastoral leaders for the long term.**
- ~ To the extent relevant, how will this project become financially sustainable by the end of the grant period?**
- ~ What strategies (fundraising, revenue generation, cost cutting, etc.) will be employed to achieve this?**
- ~ Who will be in charge of these activities?**



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**12:30 Lunch**

**1:15 Finalizing the Grant Proposal Outline - Final edits focusing on coherence and clarity to enhance the proposal's strength (and any remaining items) (Fr. Theophan)**

**2:30 Closing remarks and next steps and closing prayer Metropolitan/Archbishop**

**3:00 Departures**





# SAINT SOPHIA

## UKRAINIAN ORTHODOX SEMINARY

### Strategic Plan Update and Lilly Foundation Grant Preparation

Bill Marianes





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# Thinking too small

*Not making disciples in our  
nation let alone  
all nations.*

The case for Orthodox  
Christian Seminaries Ver. 2.0.

Bill Marianes







# CALL TO ACTION

Part 1

**New**  
**WHY Statement**

**Share Christ**

**New**  
**Mission Statement**

**Making  
Disciples and  
Disciple Makers**



# CALL TO ACTION

## Part 2

**Seminaries should  
conduct a comprehensive:**

**Vision &  
Planning  
Process**

**Strategic Areas of  
Focus should include:**

- 1. Academic Excellence**
- 2. Stakeholder Outreach**
- 3. Innovation**