

# St Raphael Orthodox Church

## Strategic Planning Retreat 2

Bill Marianes



STEWARDSHIP  
CALLING



# **St Raphael Orthodox Church**

## **Final WHY Statement**

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

# **St Raphael Orthodox Church**

## **Core Values**

**Service & Outreach**

**Worship**

**Loving Community in Fellowship**

**Orthodox Faith**

# **St Raphael**

## **Orthodox Church**

### **Mission Statement**

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

# St Raphael Orthodox Church

## Internal Weaknesses

42 - Facilities

30 - Stewardship & Engagement

14 - Divisive - Too Political -  
Unwelcoming

10 - Youth / Young Adult/ College  
Ministry

## Top Strategic Areas of Focus

10 - Stewardship, Generosity  
& Engagement

8 - Church Culture

5 - Facilities

5 - Education / Spiritual  
Growth/ Evangelization

3 - Outreach & Evangelism

3 - Leadership / Staffing

# **St Raphael**

## **Orthodox Church**

### **Strategic Areas of Focus**

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

(NOTE: Each strategic area of focus will focus on both youth and adult needs)

# **St Raphael Orthodox Church Vision Statement**

- A. We will use effective best practices to achieve at least the stated measurable targets in the Strategic Goals to materially improve adult and youth:**
- 1. Welcoming, Interpersonal Engagement, Small Group Ministry and college Orthodox Christian Fellowship engagement within 23 months; and**
  - 2. Growth in stewards, engagement in ministries, and a planned giving program within 36 months; and**
- B. We will develop a comprehensive parish Consensus Facilities Plan and finalize all necessary approvals and contracts within 18 months and thereafter complete an effective capital campaign to fund the Consensus Facilities Plan requirements within 36 months thereafter.**

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

**We will research, develop, and implement best practices and effective adult and youth “Welcoming & Church Culture Ministry” programs that will achieve the following “Welcoming & Culture Targets ” within 23 months:**

- (a) Welcoming and Newcomer Ministry that ensures that 100% of adult and youth visitors, newcomers, and former parishioners in the area are fully welcomed by completing a comprehensive welcoming process;**
- (b) New or Enhanced Interpersonal Engagement Activity Semi-Annual Programs or Community Service Event in which a minimum of 20% of parishioners actively participate;**
- (c) Small Group Education and Engagement Ministry that will include at least 30 people within 12 months;**
- (d) 70% of parishioners after year one and 90% of parishioners after year two report in an evaluation that they feel the parish is a loving and welcoming community;**
- (f) Increase our OCF actively engaged student to at least 25 students within 18 months.**



# Parish Culture Ministries

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b>Interim Goal 1: Research the most effective Parish Culture Ministries within 3 months</b>			
<b>1. Form Parish Culture Ministry Team (PCMT).</b>	SPT and Goal Co-Captains	1 month after Start Date	PCMT members agree to serve
<b>2. Determine key definitions, current baselines and desired effectiveness metrics and strategies for the successful (i) welcoming, (ii) parishioner engagement, (iii) interpersonal special events, (iv) small group ministry, and (v) OCF programs and activities (collectively, the “Parish Culture Ministries”) and identify welcoming, engagement, special event, small group, and OCF 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 effective and empirically proven best practices programs in each of the five Parish Culture Ministries 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 5 Parish Culture Ministry areas

# Parish Culture Ministries

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 2: Develop the most effective Parish Culture Ministries within 4 months</u></b>			
<b>4. Compile and evaluate research and data from steps 2 and 3, existing processes, baselines, best practices research and visitor's experiences and review and analyze results and data and identify the elements of best practices in each of the five Parish Culture Ministries 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 five Parish Culture Ministries
<b>5. Develop effective comprehensive programs for each of the five Parish Culture Ministries and identify monthly "Parish Culture Ministry Targets" performance benchmarks for each of such five Parish Culture Ministries.</b>	PCMT	2 months after step 4	Each of the five Effective Parish Culture Ministries are developed and monthly performance benchmarks are identified

# Parish Culture Ministries

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<b><u>Interim Goal 3: Recruit and train Culture Ministry Leaders to implement the Parish Culture Ministries</u></b>			
<b>6. Identify and recruit parishioners (“Culture Ministry Leaders”) to implement each element of the five Parish Culture Ministries to achieve the Parish Culture Ministry Targets.</b>	PCMT	1 month after step 5	Culture Ministry Leaders are recruited
<b>7. Train all Culture Ministry Leaders to implement each of the five Parish Culture Ministries</b>	PCMT	1 month after step 6	Culture Ministry Leaders 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 Culture Ministry Leaders follow-up with parishioners until Parish Culture Ministry Targets are achieved.</b>	Culture Ministry Leaders 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

<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 each of the five Parish Culture Ministries 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 for the following year.</b>	Culture Ministry Leaders and PW&CCMT	2 month after step 8	Parish Culture Ministries assessment completed, and improvements implemented for the next year.

# 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 Culture Ministry Leaders		
7. Train Culture Ministry Leaders		
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 Facilities Ministry S.M.A.R.T. Goal**

**Within 54 months we will research, develop, and implement best practices and effective Parish Facilities Ministry with a comprehensive communications plan that will achieve the following “Parish Facilities Targets”:**

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

- (A) Within 6 months, finalize developing a detailed plan “Consensus Parish Facilities Plan” that addresses all present and future building and facilities needs and desires of the parish in one campus location, including**
  - 1. facilities improvements and additions priorities list,**
  - 2. plans for sales or repurposing of existing property and purchase of alternative building or property, and**
  - 3. creation of development budget for the Consensus Parish Facilities Plan;**
- (B) within 6 months after (A),**
  - 1. obtain all necessary parish approvals for the Consensus Parish Facilities Plan;**
  - 2. obtain Archdiocese and other governmental approvals for the Consensus Parish Facilities Plan approved by the parish;**
- (C) within 6 months after (B),**
  - 1. identify and contract with architects, general contractors. and other service providers necessary to execute the Consensus Parish Facilities Plan;**
  - 2. develop and begin executing a “Capital Campaign” process plan and methodology that includes using the parish Endowment (to the extent approved by the parish) plus three-year pledges to cover at least 80% of the aggregate budget for the Consensus Parish Facilities Plan (“Contributed Portion”);**
  - 3. obtain funding commitments for a construction loan and, if necessary, mortgage loan and repayment plan (the “Borrowed Portion”) for the Consensus Facilities Plan; and**
- (D) within 36 months after (C) complete the Consensus Parish Facilities Plan, including completion of the Capital Campaign by raising at least the Contributed Portion.**

# Parish Facilities Ministry

<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 6 months</u></b>			
<b>1. Form Parish Facilities Ministry Team (PFMT).</b>	SPT and Goal Co-Captains	1 month after Start Date	PFMT members agree to serve
<b>2. Comprehensively research the alternative options and analyze optimal alternative(s) for a proposal for Goal items (A) (the “Consensus Parish Facilities Plan.”</b>	PFMT	5 months after step 1	Comprehensive research of optimal building and facilities options is competed
<b><u>Interim Goal 2: Obtain consensus consents and approvals from parishioners and Metropolis in support of the Consensus Facilities Plan within 6 months</u></b>			
<b>3. Finish development of Consensus Parish Facilities Plan and obtain all necessary parish and Archdiocese approvals as outlined in (B) to whatever final version of the Consensus Parish Facilities Plan is approved by the parish general assembly.</b>	PFMT	6 months after step 2	Obtain parishioner and Archdiocese approval of Consensus Parish Facilities Plan

# Parish Facilities Ministry

<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 (C) to achieve Consensus Parish Facilities Plan by: (i) identifying architects, general contractors, and other service providers; (ii) develop and begin executing a “Capital Campaign” to obtain at least the Contributed Portion of the Consensus Parish Facilities Plan; and (iii) obtain funding commitments for the “Borrowed Portion.”</b>	PFMT	6 months after step 3	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

<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	36 months after step 5	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 Ministry

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Parish Facilities Religious Ministry Team		
2. Research Consensus Parish Facilities Plan options		
3. Develop Consensus Parish Facilities Plan and obtain all necessary parish and Metropolis approvals		
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		
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		
6. Successfully implement Consensus Parish Facilities Plan and Capital Campaign Ministry		
7. Track and report on Consensus Parish Facilities Ministry monthly performance benchmarks, Capital Campaign Targets.		
8. Identify and fill any gaps in Parish Facilities & Capital Campaign Targets until Consensus Parish Facilities Plan is fully completed and achieved.		



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

**We will research, develop, and implement a best practices and effective adult and youth Stewardship & Engagement Ministry (the “Stewardship & Engagement Ministry”) with a comprehensive communications plan that will achieve the following “Stewardship & Engagement Targets” within 36 months:**

- (a) Transition the adult and youth parishioners to becoming percentage givers on their way to becoming tithers and filling out stewardship cards;**
- (b) The median annual stewardship contribution from adult parishioners increases by at least 50% within 2 years;**
- (c) Net increase of at least 15% adult stewards each year;**
- (d) Implement a youth stewardship and engagement program that includes 100% of our youth within 2 years;**
- (e) Increase the adult and youth ministry engagement so that at least 50% of parishioners within two years are actively engaged in ministry through implementing pathways for parishioners to use their time and talents on our way to becoming a full participation parish;**
- (f) Consistently cover at least 100% of parish operating expenses solely through financial stewardship contributions plus at least an additional 10% of operating expenses to be given to parish-chosen external charities without negatively impacting any capital campaign; and**
- (g) Implement a planned giving campaign in which at least 10% of parishioners participate within two years.**

# 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).</b>	SPT and S&EMT Goal Co-Captains	1 month after Start Date	<b>S&amp;EMT members agree to serve</b>
<b>2. Determine adult and youth stewardship, tithing, ministry engagement, and planned giving key definitions, data, and effectiveness metrics.</b>	S&EMT	1 month after step 1	<b>Definitions and metrics determined</b>
<b>3. Analyze the adult and youth parish baselines on those key stewardship, tithing, ministry engagement, and planned giving metrics, survey/research parish impediments to achieving increased stewardship, tithing, ministry engagement, and planned giving success.</b>	S&EMT	2 months after step 2	<b>Parish baselines and parish impediments determination are finalized</b>
<b>4. Identify at least 2-3 ministry engagement, 2-3 stewardship, percentage giving/tithing, and 2-3 planned giving programs to consider from both inside and outside the Orthodox ecosystem.</b>	S&EMT	Simultaneous with steps 2 & 3	<b>At least 2-3 of each of stewardship, ministry engagement &amp; planned giving programs are examined</b>

# Stewardship & Engagement 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 Stewardship, Ministry Engagement &amp; Planned Giving Ministry within 3 months</b>			
<b>5. Evaluate researched adult and youth stewardship, tithing, ministry engagement, and planned giving programs for effectiveness against key parish performance metrics and baselines based on criteria of effectiveness determined in step 2.</b>	S&EMT	1 month after step 4	Evaluation of alternative stewardship & ministry engagement, tithing, and planned giving programs is completed
<b>6. Modify or develop new adult and youth stewardship, tithing, ministry engagement, and planned giving ministry programs for utilization at the parish (the “SMEPG Ministry”) and establish monthly performance benchmarks and comprehensive communications strategy and plan.</b>	S&EMT	2 months after step 5	SMEPG Ministry is finalized, and monthly performance benchmarks are determined
<b>Interim Goal 3: Recruit and train Ambassadors within 3 months</b>			
<b>7. Identify and recruit stewardship personal visitation (“Ambassadors”) who can implement the SMEPG Ministry.</b>	S&EMT	1 month after step 6	Ambassadors are recruited
<b>8. Train Ambassadors to implement all aspects of the SMEPG Ministry.</b>	S&EMT	2 months after step 7	Ambassadors are trained

# 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	24 months after step 8	SMEPG Ministry is fully launched
<b>10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship &amp; Engagement Targets are achieved</b>	Ambassadors	Contemporaneous with step 9	Established monthly Stewardship & Engagement Targets are achieved
<b><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	1 month after step 10	SMEPG Ministry assessments are completed
<b>12. Finalize and deliver SMEPG Ministry assessment analysis report and make all refinements necessary to make the SMEPG Ministry more effective.</b>	Ambassadors and S&EMT	1 month after step 11	Analysis is completed, and SMEPG Ministry is refined accordingly

# 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		
2. Develop definitions and effectiveness metrics		
3. Analyze parish baselines and engagement success impediments		
4. Research Stewardship, Engagement & Planned Giving Ministry		
5. Evaluate Stewardship, Engagement & Planned Giving Ministry		
6. Finalize Stewardship, Engagement & Planned Giving Ministry		
7. Identify and recruit Stewardship Ambassadors		
8. Train Stewardship Ambassadors		
9. Implement Stewardship, Engagement & Planned Giving Ministry and manage to interim monthly targets		
10. Track performance Data from Stewardship, Engagement & Planned Giving Ministry Implementation		
11. Obtain qualitative and quantitative assessment data from Stewardship, Engagement & Planned Giving		
12. Improve Stewardship, Engagement & Planned Giving Ministry based lessons learned in step 11		