



SAINT SOPHIA

UKRAINIAN ORTHODOX SEMINARY

Final Draft Thriving & Transfiguring Strategic Goal and Action Plan

(7-15-25)

Bill Marianes



STEWARDSHIP
CALLING



SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

WHY Statement

**Inspiring servant leaders equipped
to fulfill Christ's saving mission to a
world in need.**

Thriving & Transfiguring S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective Thriving & Transfiguring (“T&T”) Programs with a comprehensive communications plan that will achieve the following “Thriving & Transfiguring Targets” within 60 months:

- (a) Obtain 501(c)(3) Determination Letter within 1 year;**
- (b) Develop long term financial budgeting plan for all operations and capital improvements within 10 months (including staffing, cap ex, and technology);**
- (c) Hire and at least 2 full time best in class faculty (with appropriate academic credentials, continuing publication, research, writing or speaking credentials) each year for three years, and corresponding fulltime staff to include at least the following staff within three years: 1. development officer, 2. admissions/student affairs, 3. library, 4. financial affairs;**
- (d) Complete plan to lease, build or acquire married student housing within 10 months and complete a capital campaign within 3 years ;**
- (e) Establish parishioner donation portal within 10 months, submit at least three grant requests each year thereafter, and create permanent endowment and establish planned giving program for St Sophia within one year**
- (f) Become fully self-sustaining (including seminarian scholarships, faculty and professional development of clergy, and capital expenditure reserves) within 5 year(s)**
- (g) Develop comprehensive distance learning platform for full and part-time Enrolled Students and Casual Learners within 10 months.**

Thriving & Transfiguring (“T&T”)

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|--------------------------|--------------------------|---|
| Interim Goal 1: Research the most effective TTT Ministries within 4 months | | | |
| 1. Form Thriving and Transfiguring Team (“TTT”). | TTT Co-Captains | 1 month after Start Date | TTT members agree to serve |
| 2. Research from at least 3 different successful seminaries best practices in: (a) obtaining 501(c)(3) status (“Tax Exemption”); (b) operating and capital budgeting practices (“Financial Plans”); (c) recruiting properly credentialed faculty and staff identified in Goal (“Faculty & Staff Plan”); (d) create a sustainable development plan, endowment, and planned giving program (“Development Plan”); (e) comprehensive “Distance Learning Platform.” Research available alternatives to lease, build or acquire married student housing (“Student Housing Expansion”). All the above are called the “First Year T&T Objectives.” | TTT | 2 months after step 1 | Specific research is completed and documented for each of the First Year T&T Objectives |
| 3. Analyze all the research from step 2 regarding the First Year T&T Objectives and identify applicability to St. Sophia Seminary and create at least two alternative options to implement each of the First Year T&T Objectives. | TTT | 1 months after step 2 | Analysis of all step 2 research is complete and at least two alternatives for each First year T&T Objective are developed finalized |

Thriving & Transfiguring (“T&T”)

Actions Steps

Responsible Party

Deadline

Completion Test

Interim Goal 2: Develop the most effective T&T Plans and Programs within 3 months

4. Develop detailed best practices specific programs and steps to achieve goals for each of Financial Plans, Faculty & Staff Plan, Development Officer recruitment, Development Plan and Student Housing Expansion solution (the “T&T Plans and Programs”). File for Tax Exemption. Create St Sophia Endowment and finalize planned giving program. Obtain all necessary approvals for each of the T&T Plans and Programs.

TTT

3 months after step 3

All specifically enumerated T&T Plans and Programs are developed, finalized and all necessary approvals are obtained. Tax Exemption filed.

Interim Goal 3: Begin to Implement T&T Plans and Programs within 3 months

5. Identify and recruit first two full-time faculty, development officer from Faculty & Staff Plan. Obtain Tax Exemption and open parishioner donation portal and submit at least three grant requests.

TTT

3 months after step 4

Year one Faculty & Staff are recruited and trained, Tax Exemption is obtained, and donation portal is open and 3 grant requests submitted.

6. Complete and implement: (a) Casual Learner payment portal, (b) Student Housing Expansion plan, (c) implementation of Distance Learning Platform, (d) long-term operating and capital budget Financial Plans are finalized.

TTT

Simultaneous with step 5

Student Housing Expansion plan and Distance Learning Platform, Casual Learner payment portal, and Financial Plan are finalized and implemented.

Thriving & Transfiguring (“T&T”)

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|--------------------------|-------------------------------|--|
| Interim Goal 4: Execution of multi-year T&T Plans and Programs to achieve the T&T Targets within <u>36 months</u> | | | |
| 7. Hire and train year two full-time faculty, admissions/student affairs, library and financial affairs staff pursuant to the Faculty & Staff Plan. Financial Plan and planned giving program are implemented to become within 3 years of becoming fully self-sustaining with monthly tracking and reporting. Submit at least three grant requests. | TTT | 12 months after steps 5 and 6 | Identified personnel from Faculty & Staff Plan are hired and trained, and Financial Pan is within 3 years of being fully funded and 3 grant requests submitted. |
| 8. Hire and train year final two full-time faculty and any remaining staff necessary to fully implement the Faculty & Staff Plan. Financial Plan and planned giving program are implemented to become within 2 years of becoming fully self-sustaining with monthly tracking and reporting. Submit at least three grant requests. | TTT | 12 months after step 7 | Final Identified personnel from Faculty & Staff Plan are hired and trained and Financial Pan is within 2 years of being fully funded and 3 grant requests submitted. |
| 9. Financial Plan and planned giving program are implemented to become within 1 year of becoming fully self-sustaining with monthly tracking and reporting. Submit at least three grant requests. | TTT | 12 months after step 8 | Financial Pan is within 1 years of being fully funded and 3 grant requests submitted. |

Thriving & Transfiguring (“T&T”)

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|--------------------------|------------------------|--|
| <u>Interim Goal 5: Complete Financial Plan and Compile and assess the results of the T&T Plans and Programs and make necessary improvements within 14 months</u> | | | |
| 9. Financial Plan and planned giving program are implemented so that St. Sophia is fully self-sustaining with monthly tracking and reporting. Three grant requests submitted. | TTT | 12 months after step 8 | Financial Plan is completed, and St Sophia is fully-funded and Financial 3 grant requests submitted. |
| 10. Obtain and compile qualitative and quantitative data and determine effectiveness and success of all T&T Targets and identify areas for improvement and plans for the next three years. Finalize and deliver assessment analysis report, and make all refinements necessary to improve T&T Plans and Programs and next three years goals are established | TTT | 2 months after step 9 | T&T Analysis is completed, all T&T Plans and Programs are refined accordingly, and next three-year goals established.. |

Thriving & Transfiguring (“T&T”)

| <u>Lead Measure Action</u> | <u>Deadline Date</u> | <u>% Complete and Date</u> |
|--|----------------------|----------------------------|
| 1. Form Thriving & Transfiguring Ministry Team | | |
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| 3. | | |
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| 5. | | |
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| 9. | | |
| 10. | | |



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