

# *Vision & Parish Strategic Planning*

# TODAY IS A NEW DAY.

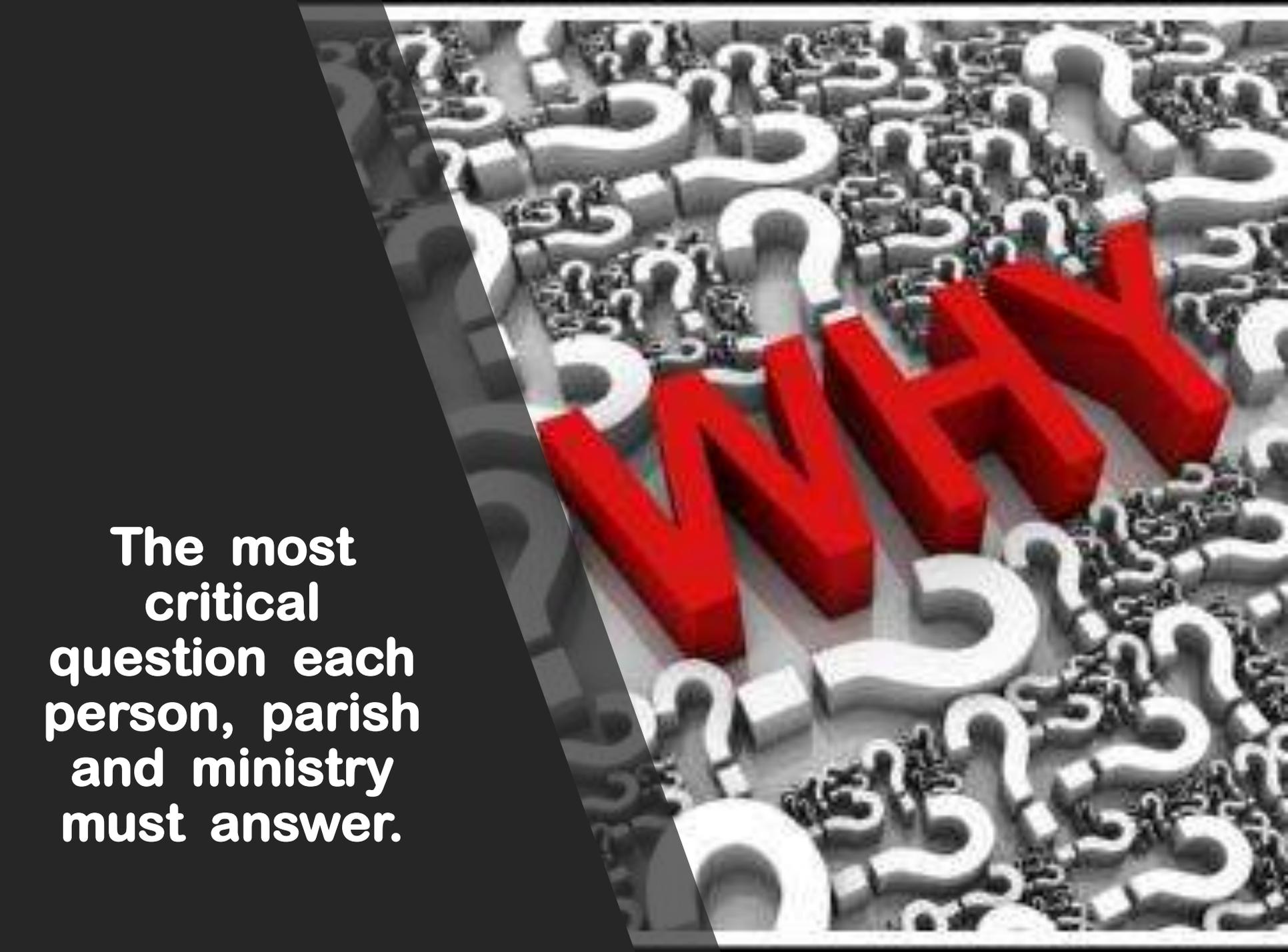
THE HOLY ORTHODOX CHURCH OF UGANDA



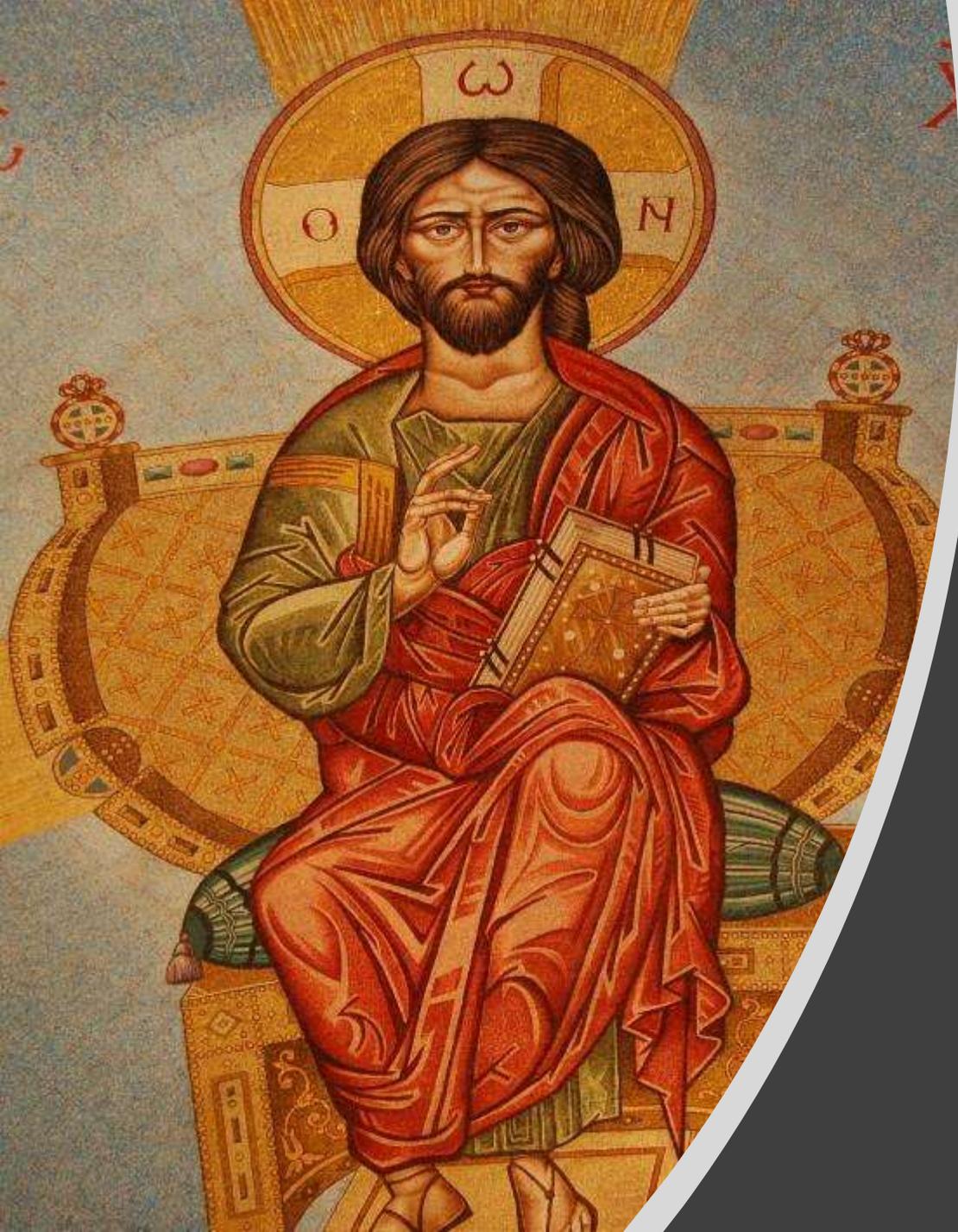
Hiding from your history  
only shackles you to it.  
We can't undo a single thing  
we have ever done,  
but we can make decisions  
today that propel us  
to the life we want &  
towards the healing we need.

-Steve Maraboli

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



**WHY?**

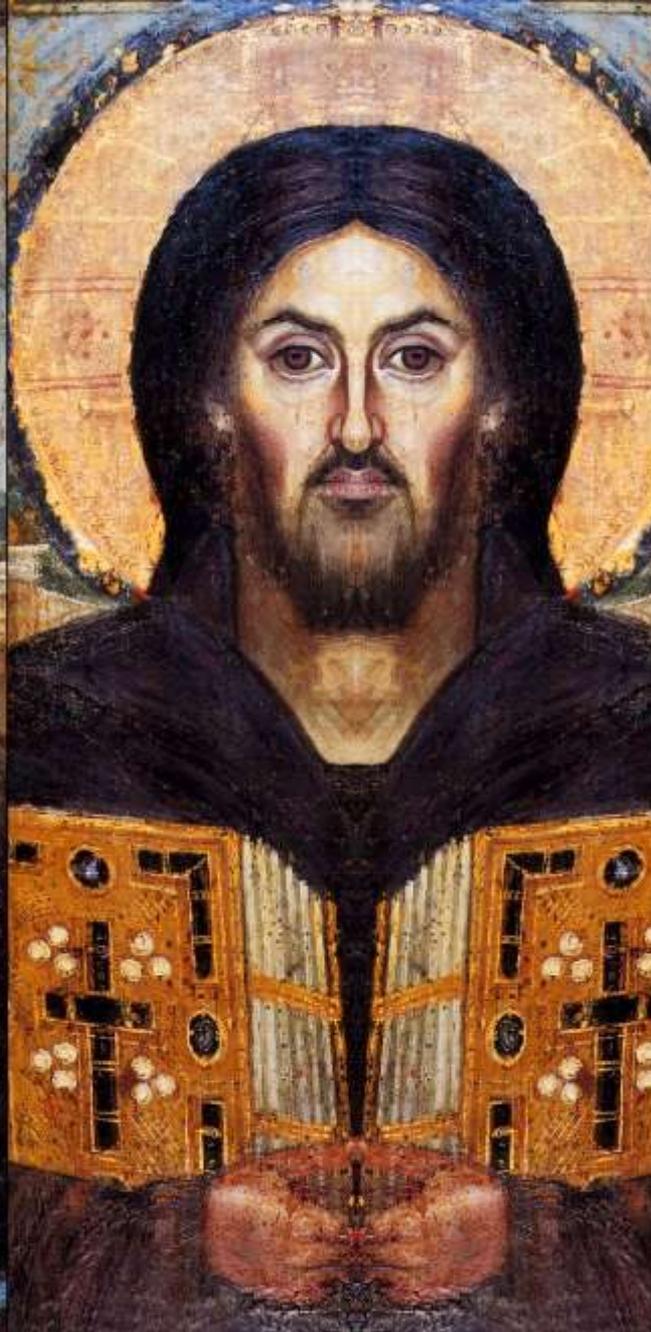
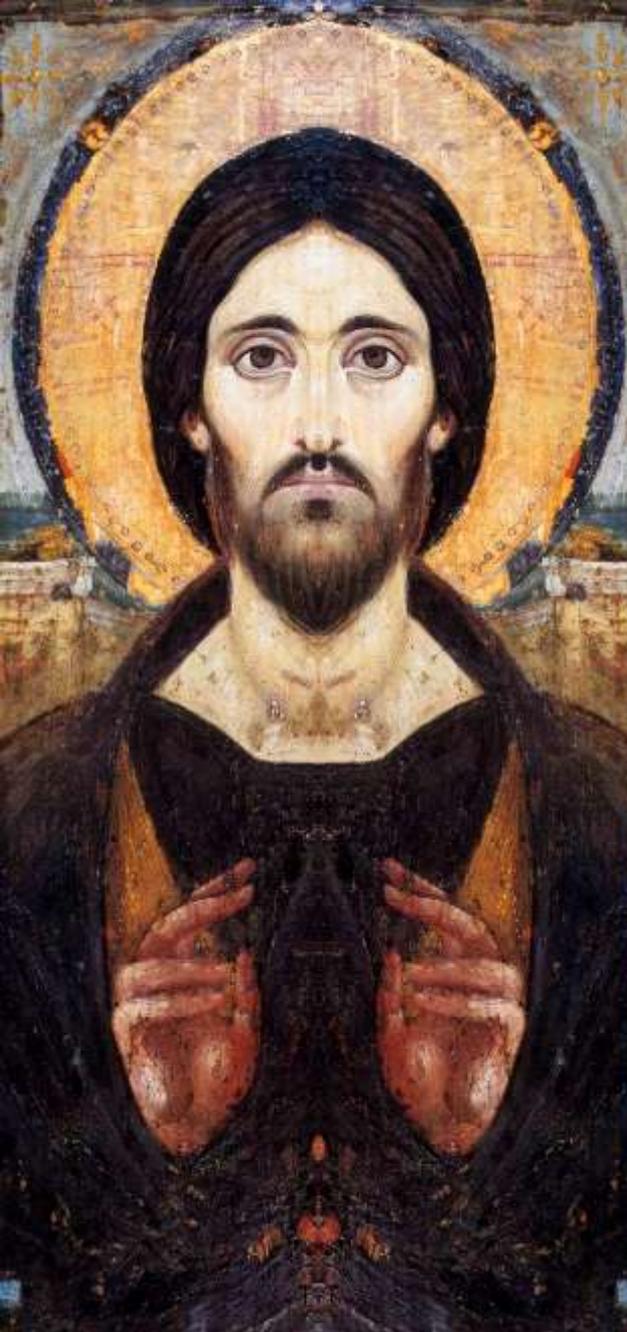


## Why Do This?

“That the end of our lives may be Christian, without pain, blameless and peaceful, and for a

good account  
at the awesome judgment seat of Christ.”

Orthodox Divine Liturgy  
II Corinthians 5:10



**Christ's  
possible  
very  
difficult  
question**



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

—  
“The domain of  
the **Leader** is the



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**The work of the  
leader is change.”**



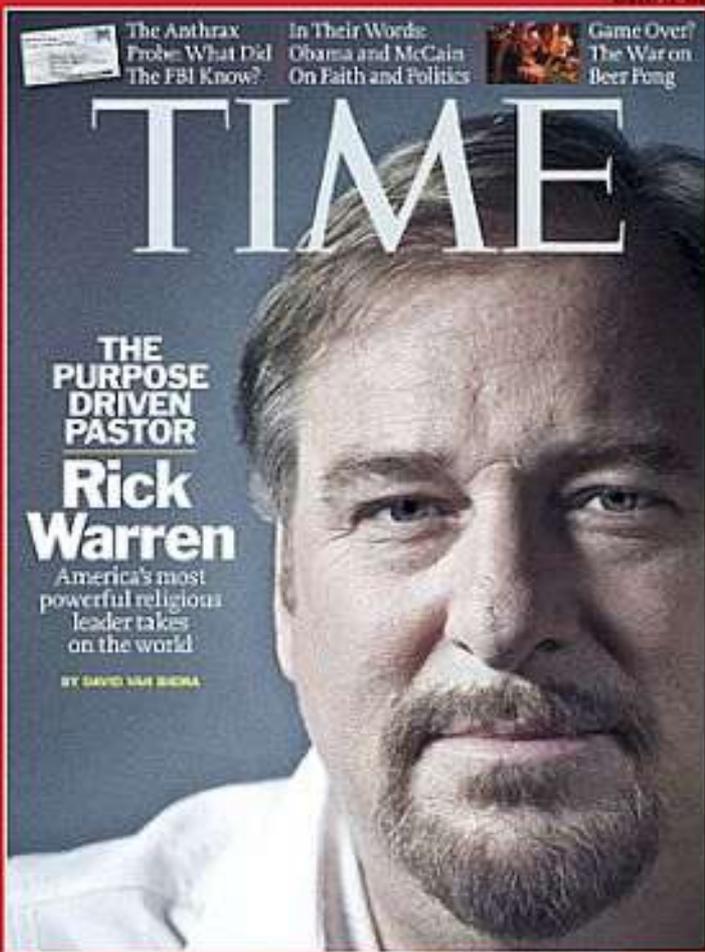
Dr. James Kouzes

# Μετάνοια

# Metanoia



“a transformative change of heart”



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

# Who's trying to help you?



# 44 Years As A Lawyer To Atone For

**troutman  
pepper locke**

1,600 lawyers in 33 global offices



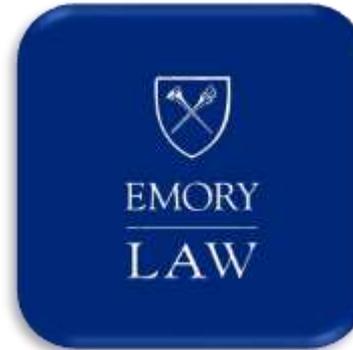
**McGuireWoods**

1,100 lawyers in 23 global offices

## Education



**B.A.  
Psychology**



**Juris  
Doctorate**



**Masters in  
Business  
Administration**



**Doctorate in  
Strategic  
Leadership**

# A journey ...

*... 455,000+ airlines miles over 30 years*

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

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



# Stewardship Calling has completed Strategic Plans for **over 26% of Orthodox Christians**



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

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

(Many more currently in progress)



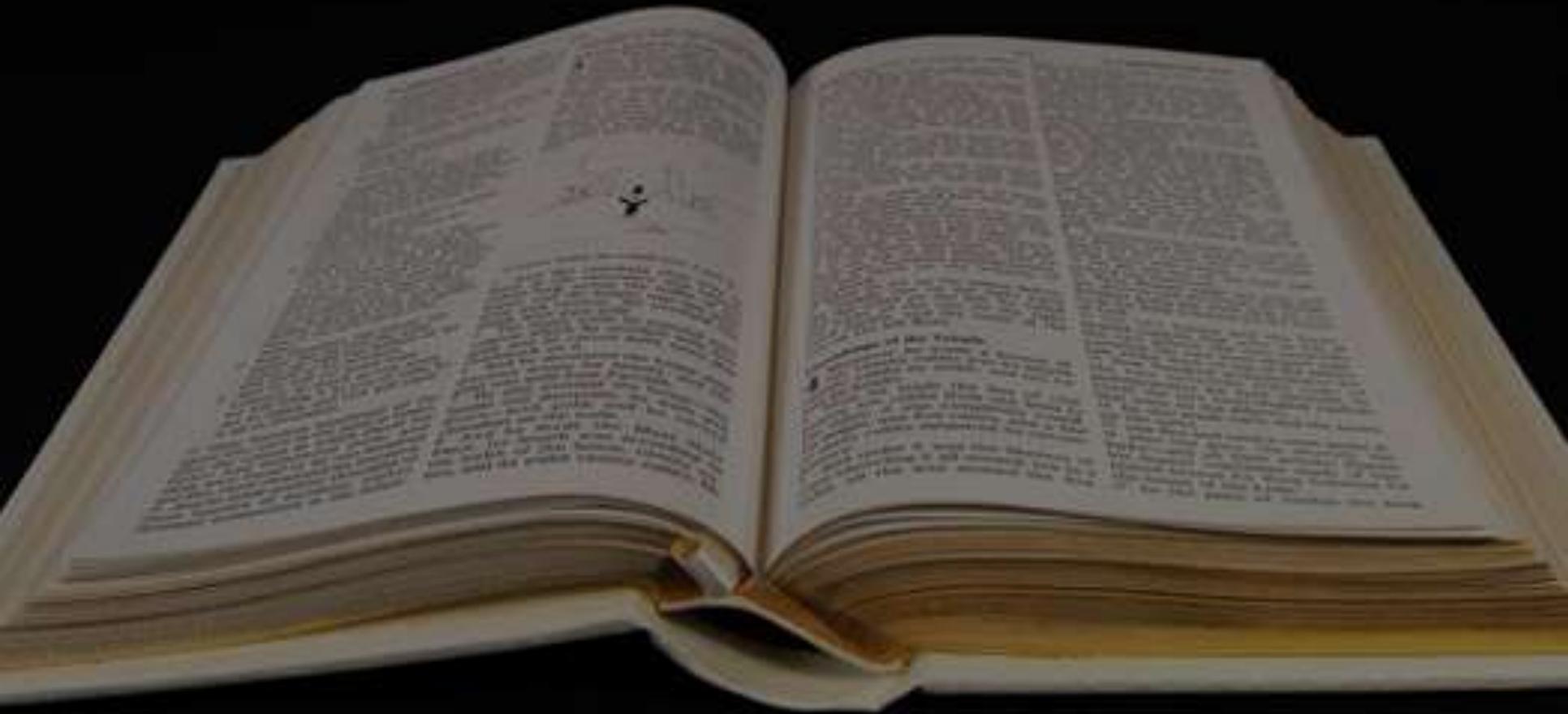
A blue compass rose with a red needle pointing towards the top right. The words 'STRATEGY' and 'PLANNING' are visible in large, light blue, 3D-style letters around the compass. The text 'Consensus Vision and Strategic Planning' is overlaid in white, bold font in the center.

**Consensus Vision and  
Strategic Planning**

**Do you  
sometimes  
feel like your  
stuck in a  
hamster  
wheel?**



# Strategic Planning is Biblical





Where there is  
no vision, the  
people perish.

Proverbs 29:18

## A process to:

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





**Must  
answer 4  
questions:**

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

# The 4 Ps of



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

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



# 10 Strategic Plan Deliverables



# The 4 Deliverables From the



# Strategic Planning Process

## **1. Comprehensive Strategic Plan**

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

## **2. Inspired Teams**

## **3. Consensus Decision Makers**

## **4. Energized & Improved Culture**



## Question 1:

**WHY do we  
exist?**

## WHY Statement

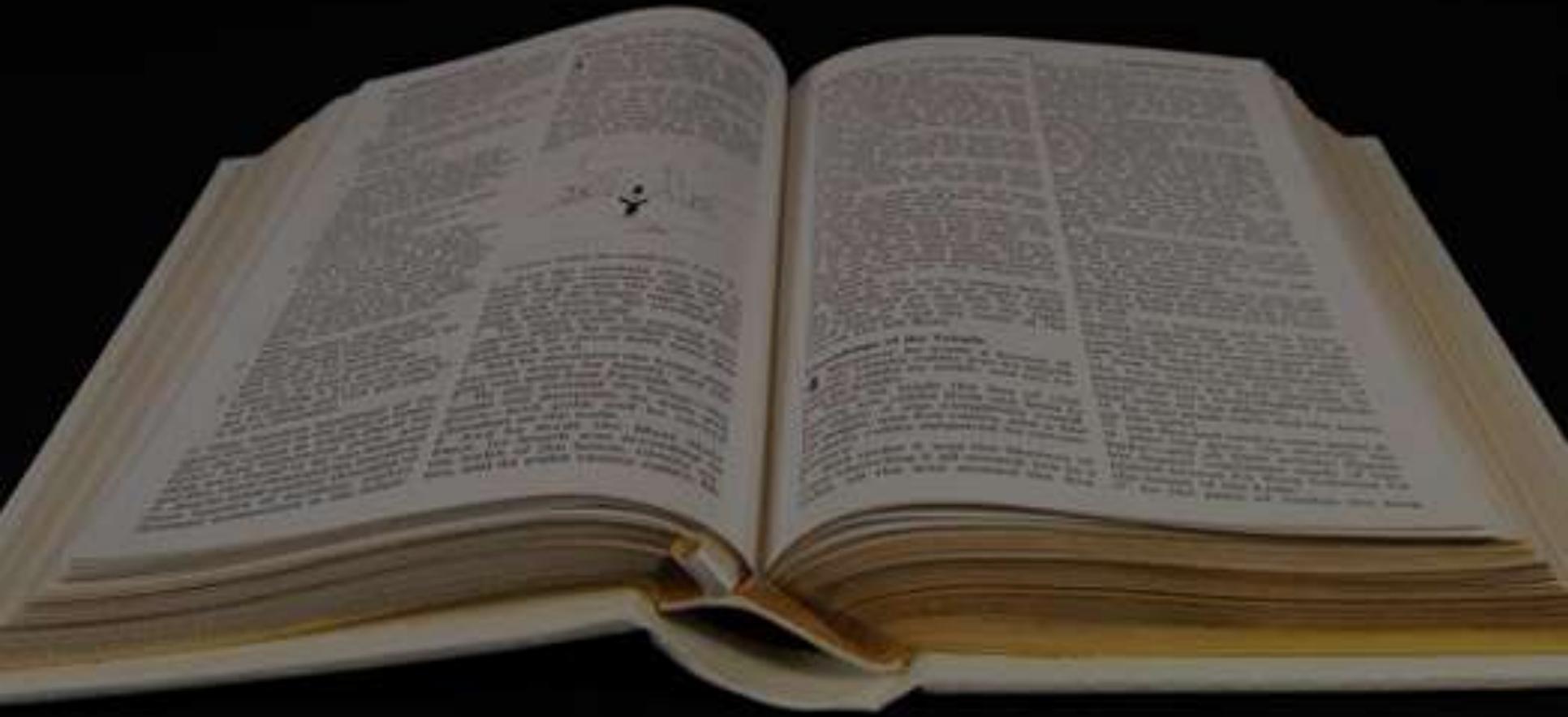
Answers strategic planning question #1:

*Why are we here?*

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



# A Statement of Why is Biblical



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

Acts 14:15

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

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

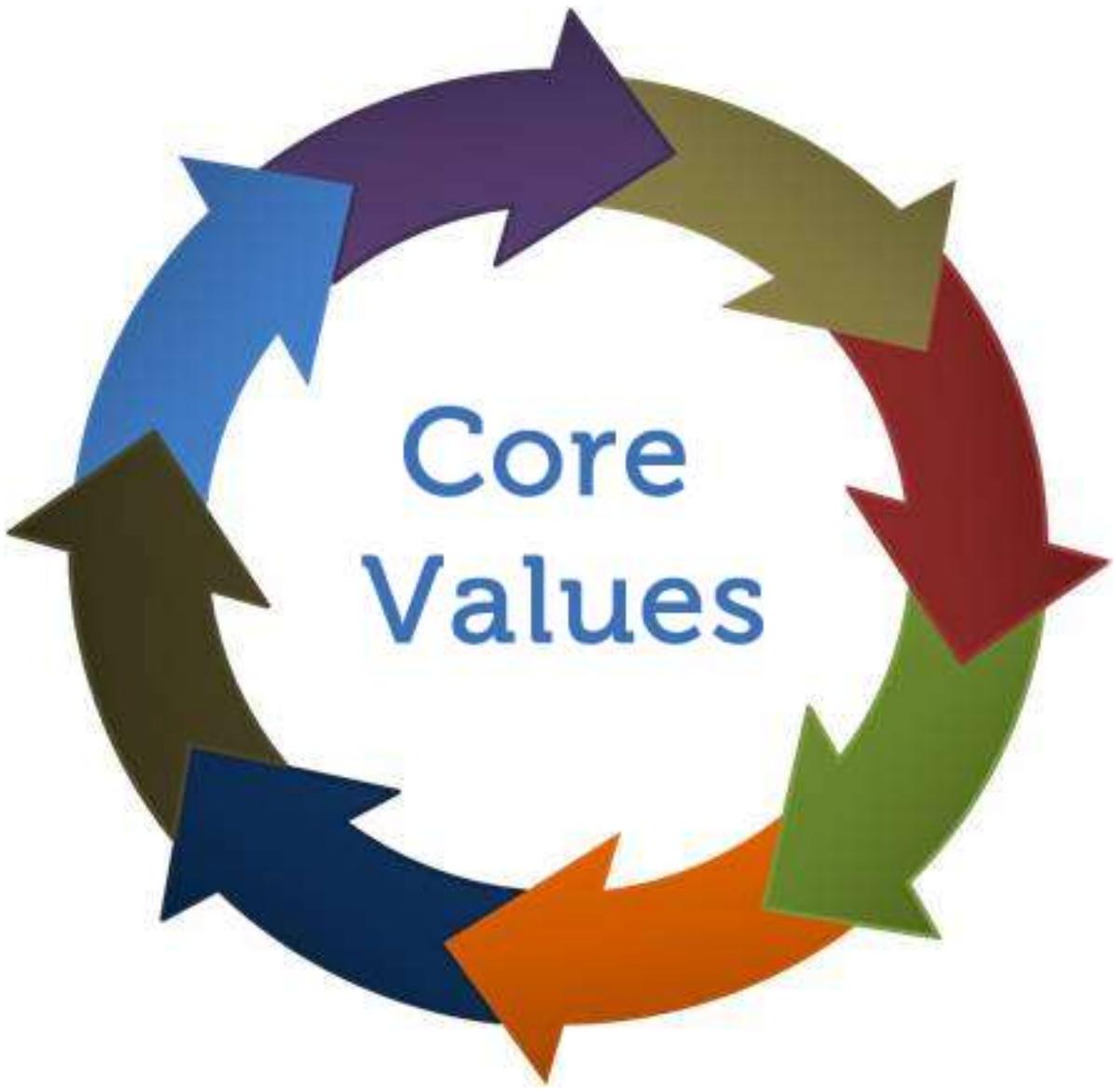




Welcome!  
To Sts. RNI Greek Orthodox Church

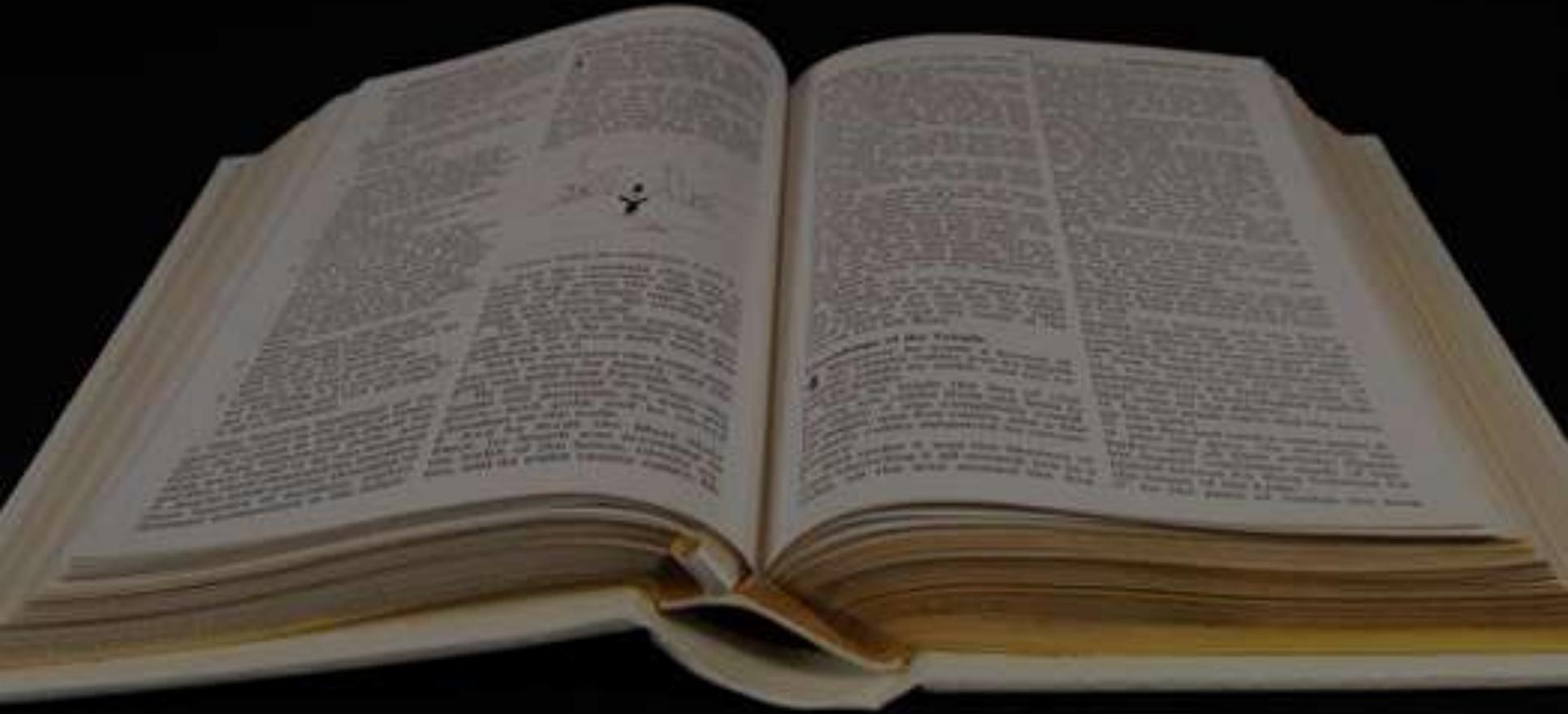
## WHY Statement

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



Core  
Values

# Core Values Are Biblical



# GOD'S Core Values

I  
THOU SHALT HAVE  
NO OTHER GODS  
BEFORE ME

II  
THOU SHALT NOT  
MAKE UNTO THEE  
ANY GRAVEN IMAGE

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

IV  
REMEMBER THE  
SABBATH DAY TO  
KEEP IT HOLY

V  
HONOR THY FATHER  
AND THY MOTHER

VI  
THOU SHALT  
NOT KILL

VII  
THOU SHALT NOT  
COMMIT ADULTERY

VIII  
THOU SHALT  
NOT STEAL

IX  
THOU SHALT NOT  
BEAR FALSE  
WITNESS AGAINST  
THY NEIGHBOR

X  
THOU SHALT  
NOT COVET

# CHRIST'S Core Values

## THE BEATITUDES

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

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

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

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

Blessed are the merciful  
for they shall obtain mercy.

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

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

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

Matthew 5:3-10

- 
- 1. Beliefs shared by the stakeholders**
- 2. Drive the organization's culture and priorities**
- 3. Provide a framework for decisions**
- Core Values**



Welcome!  
To Sts. RNI Greek Orthodox Church

## Core Values

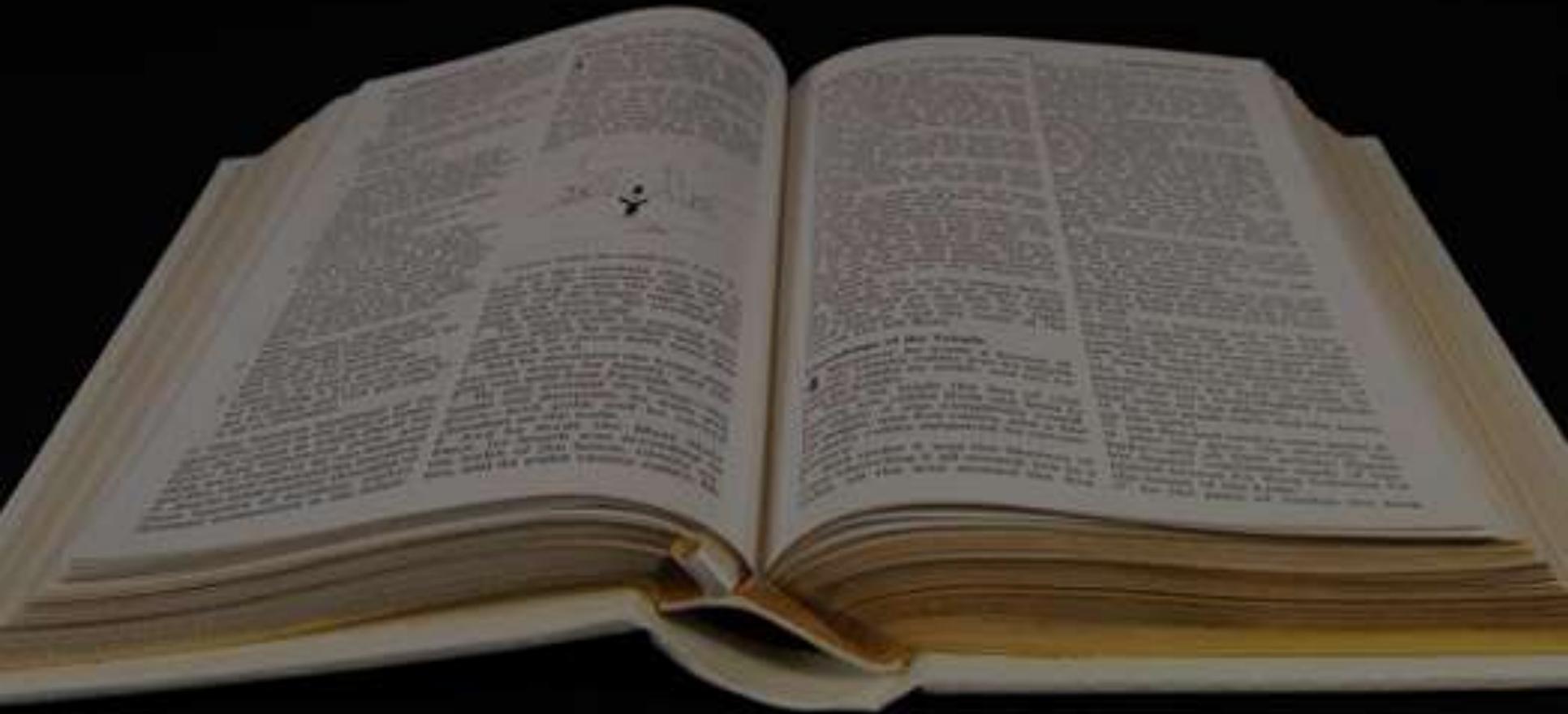
**Intentionally Orthodox  
Community  
Agape Love  
Christ-focused**



## Question 2:

**Where are  
we now?**

# Where Are We Now Assessment is Biblical



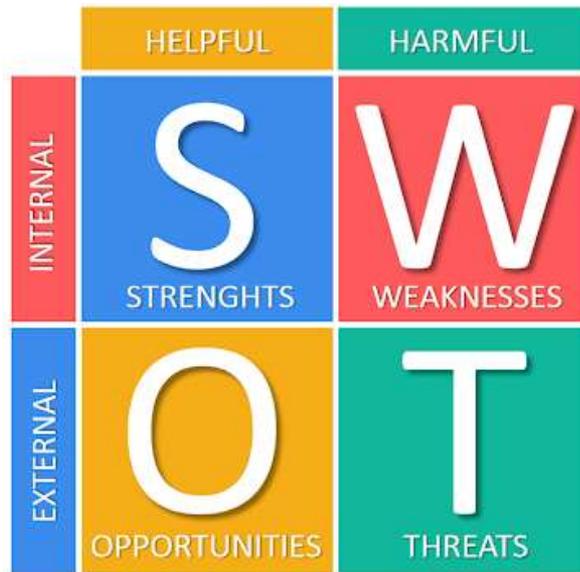


**“Examine  
yourselves as to  
whether you are  
in the faith.**

**Test yourselves!”**

2 Corinthians 13:5

# Not Mutually Exclusive Discovery Options



## OMS EFFECTIVE PARISH MODEL





## Question 3:

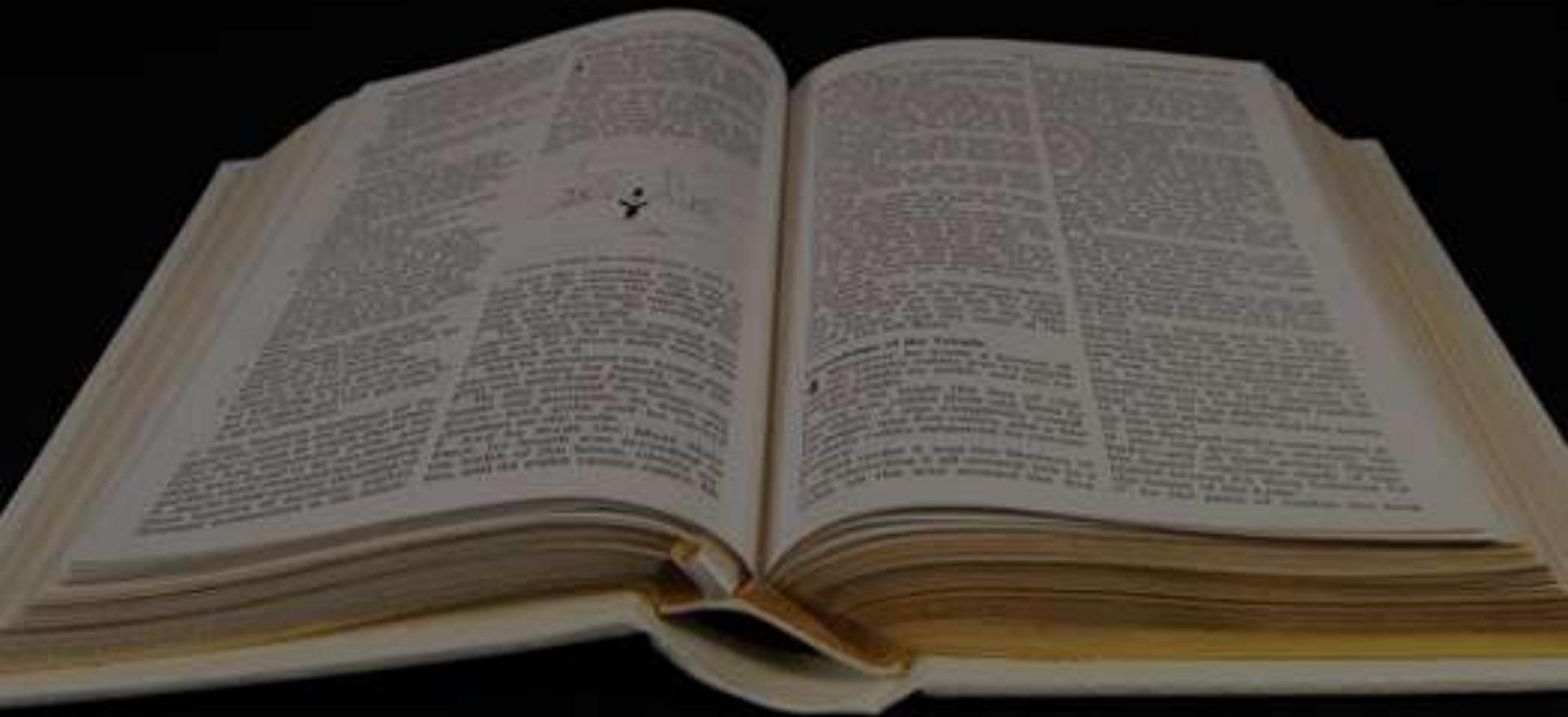
**Where do  
we want to  
be?**



Mission

Statement

# A Mission Statement Is Biblical



# The Great Commission Mission Statement

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



Matthew 28:18-20

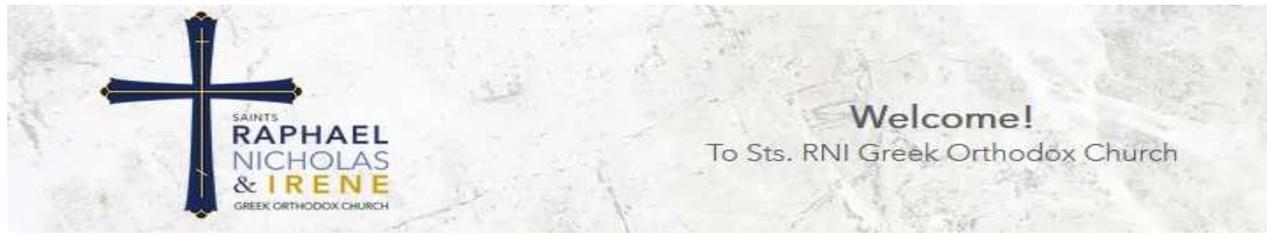
## Mission Statement

Answers strategic planning question #3:

*What do we do?*

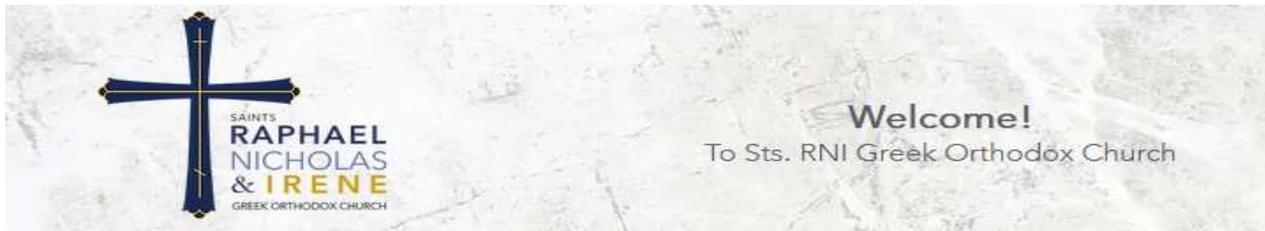
~ A clear description of the what the organization does to achieve its Why/Vision/Goals





## Mission Statement

**Sts. Raphael Nicholas & Irene is a welcoming family who develops intentional Orthodox Christians through worship, education, outreach, and service.**



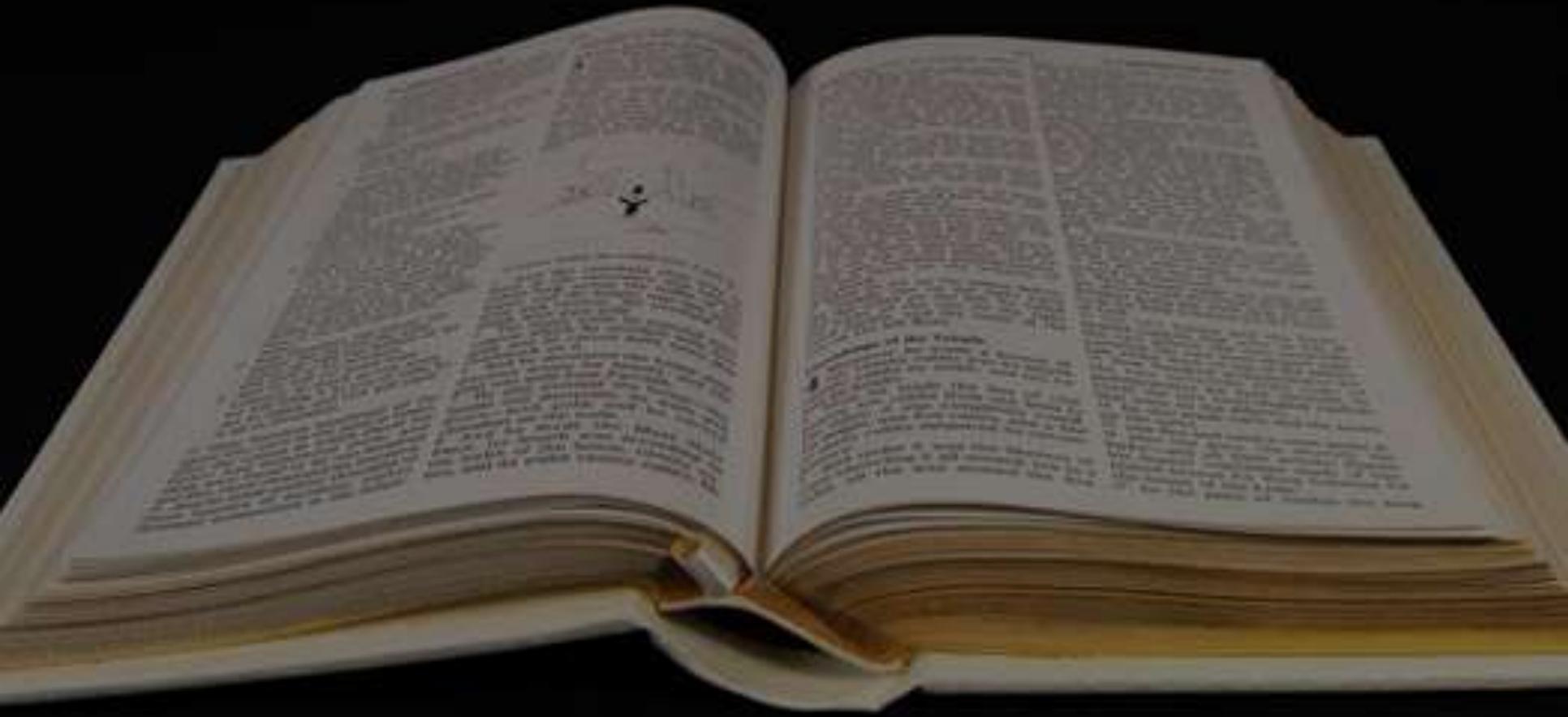
## Mission Statement

**Saints Raphael Nicholas & Irene is a welcoming family who develops intentional Orthodox Christians through **worship, education, outreach, and service.****



VISION

# A Vision Statement Is Biblical



# Vision

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

Acts 1:8



## A Vision should be:

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



## Vision Statement

We will

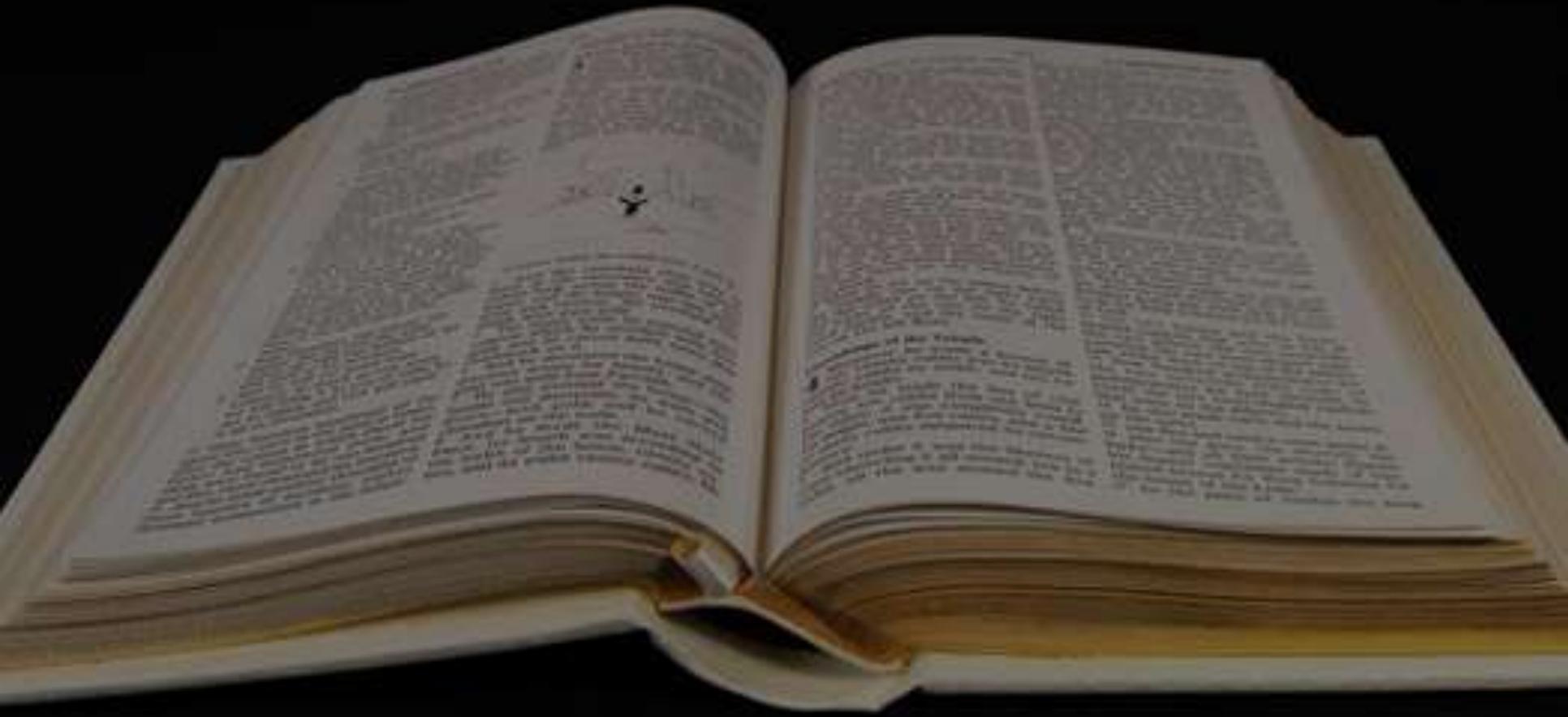
- (a) within 36 months measurably improve
  - (i) Adult and youth Stewardship & Ministry Engagement, and
  - (ii) Religious Education Ministry; and
  
- (b) Implement a viable building and capital campaign strategy to have a new church within 54 months.

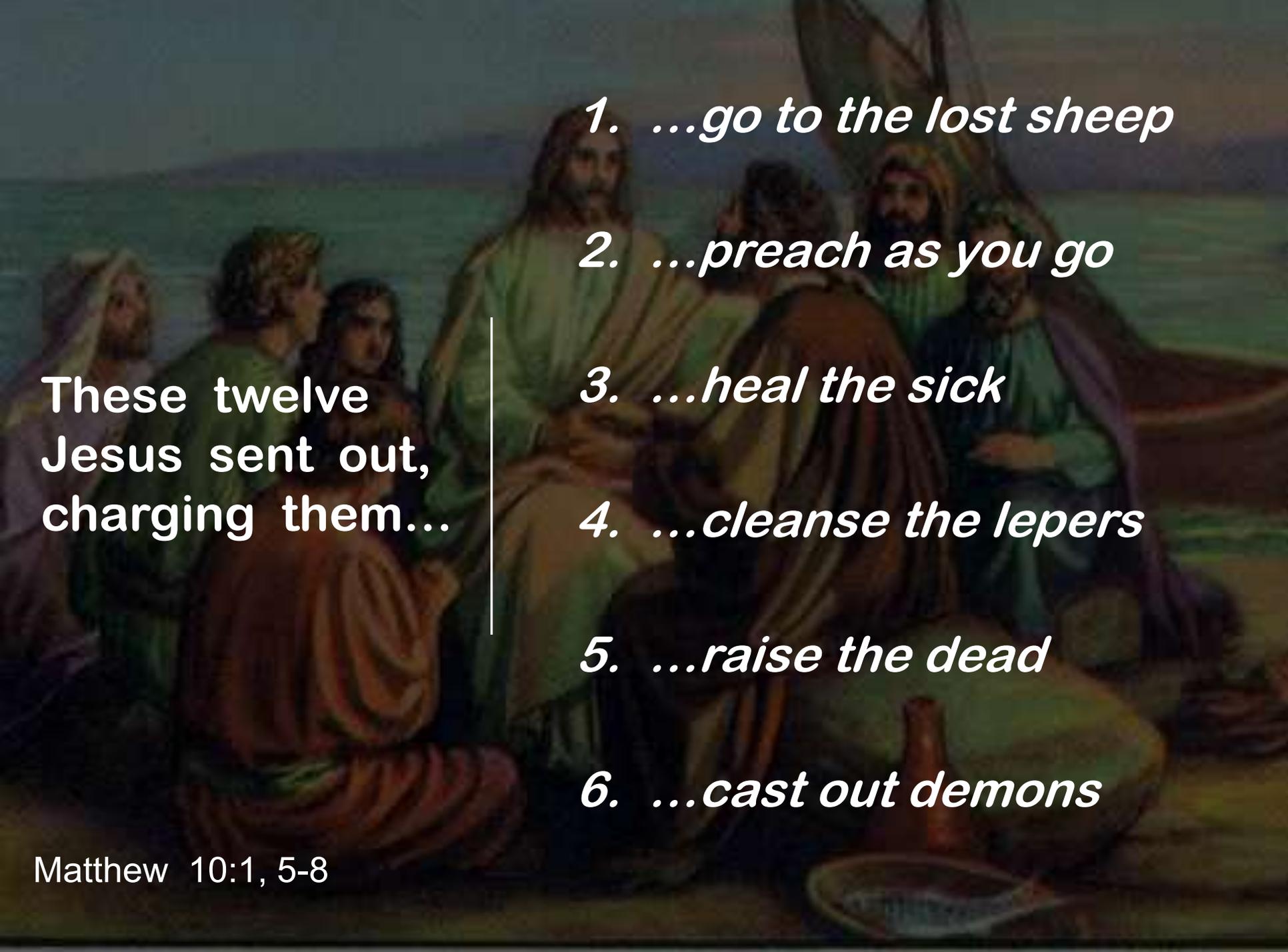


## Question 4:

**How will  
we get  
there?**

# Strategic SMART Goals Are Biblical



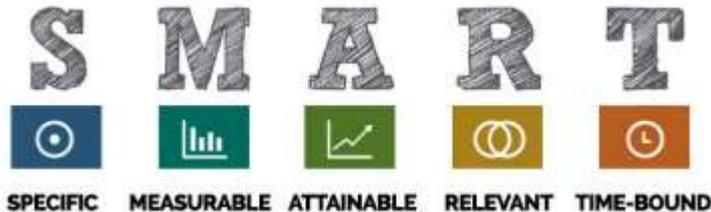


These twelve  
Jesus sent out,  
charging them...

1. *...go to the lost sheep*
2. *...preach as you go*
3. *...heal the sick*
4. *...cleanse the lepers*
5. *...raise the dead*
6. *...cast out demons*

Matthew 10:1, 5-8

# SMART Goals



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

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

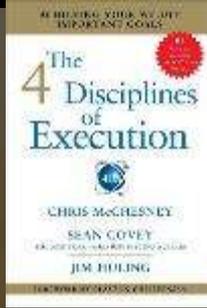
**Measurable**: Can you measure the success of the goal?

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

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

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

# The Power of FOCUS



- ~ 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 critical things produces larger scale positive impacts

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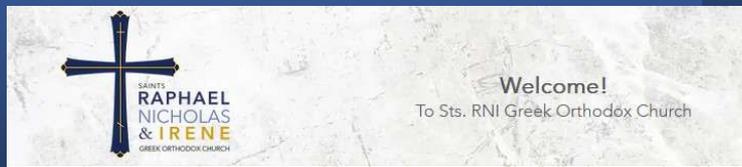
<sup>1</sup> MIT neuroscientist Earl Miller: “Trying to concentrate on two tasks causes an overload of the brain’s processing capacity.”

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



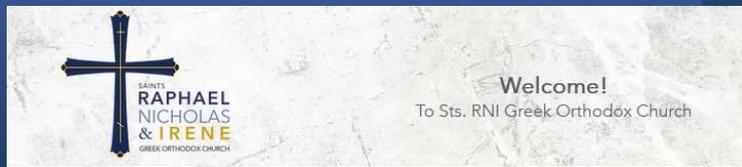
**We will research, develop, and implement a best practices and effective adult and youth Stewardship & Ministry Engagement Program (the “Stewardship & Engagement Program”) with a comprehensive communications plan that will achieve the following “Stewardship & Engagement Targets” within 34 months:**

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



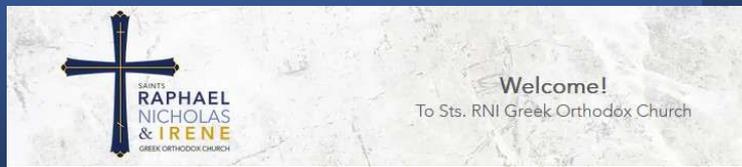
# Stewardship & Engagement Action Plan

| <u>Actions Steps</u>   | <u>Responsible Party</u>          | <u>Deadline</u>                     | <u>Completion Test</u>   |
|--|-----------------------------------|-------------------------------------|--|
| <b>Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 3 months</b>  |                                   |                                     |  |
| <b>1. Form Stewardship &amp; Engagement Program Team (S&amp;EPT).</b>  | SPT and S&EPT<br>Goal Co-Captains | 1 month after<br>Start Date         | S&EPT members<br>agree to serve  |
| <b>2. Determine adult and youth stewardship, tithing, ministry engagement, and planned giving key definitions and effectiveness metrics.</b>   | S&EPT                             | 1 month after<br>step 1             | Definitions and metrics<br>determined  |
| <b>3. Analyze the adult and youth parish baseline on those key stewardship, tithing, ministry engagement, and planned giving metrics, survey/research parish impediments to achieving increased stewardship, tithing, ministry engagement, and planned giving success.</b> | S&EPT                             | 1 month after<br>step 2             | Parish baselines and<br>parish impediments<br>determination are<br>finalized   |
| <b>4. Identify at least 3 engagement, 3 percentage giving/tithing, and 3 planned giving programs to consider from both inside and outside the Orthodox ecosystem.</b>  | S&EPT                             | Simultaneous<br>with steps 2 &<br>3 | At least 3 stewardship<br>& engagement, 3<br>percentage giving/<br>tithing, and 3 planned<br>giving programs are<br>examined |



# 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 &amp; Engagement Program within 3 months</b>  |                          |                       |  |
| <b>5. Evaluate researched adult and youth stewardship, tithing, ministry engagement, and planned giving for effectiveness against key performance metrics and parish baselines based on criteria of effectiveness determined in step 2.</b>   | S&EPT                    | 1 months 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 for utilization at the parish the Stewardship, Tithing, Ministry Engagement and Planned Giving Program (collectively the “Stewardship &amp; Engagement Program”) and establish monthly performance benchmarks and comprehensive communications strategy and plan.</b> | S&EPT                    | 2 months after step 5 | Stewardship & Engagement Program is finalized, and monthly performance benchmarks are determined               |
| <b>Interim Goal 3: Recruit and train Ambassadors within 2 months</b>  |                          |                       |  |
| <b>7. Identify and recruit personal visitation ambassadors/small group leaders (“Ambassadors”) who can implement the Stewardship &amp; Engagement Program.</b>  | S&EPT                    | 1 month after step 6  | Ambassadors are recruited  |
| <b>8. Train Ambassadors to implement the Stewardship &amp; Engagement Program.</b>  | S&EPT                    | 1 month after step 7  | Ambassadors are trained  |



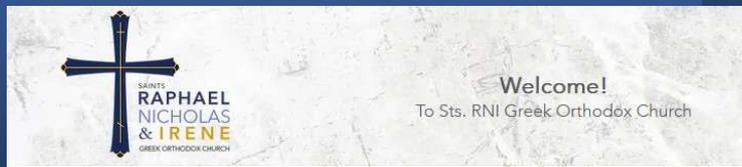
# Stewardship & Engagement Action Plan

| <u>Actions Steps</u>  | <u>Responsible Party</u> | <u>Deadline</u>             | <u>Completion Test</u>  |
|---|--------------------------|-----------------------------|---|
| <b><u>Interim Goal 4: Implement the Stewardship &amp; Engagement Program to achieve the Stewardship &amp; Engagement Targets within 24 months</u></b>   |                          |                             |   |
| <b>9. Implement Stewardship &amp; Engagement Program to achieve the Stewardship &amp; Engagement Targets.</b>   | Ambassadors              | 24 months after step 8      | Stewardship & Engagement Program 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 |



# Stewardship & Engagement Action Plan

| <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 Stewardship Program and make necessary improvements within 2 months</u></b>   |                          |                       |  |
| <b>11. Obtain and compile qualitative and quantitative data from Stewardship &amp; Engagement Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.</b>                 | Ambassadors and S&EPT    | 1 month after step 10 | Stewardship & Engagement Program assessments are completed                         |
| <b>12. Finalize and deliver Stewardship &amp; Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship &amp; Engagement Program more effective based on information identified in step 11.</b> | Ambassadors and S&EPT    | 1 month after step 11 | Analysis is completed, and Stewardship & Engagement Program is refined accordingly |



# Stewardship & Engagement Action Plan

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

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

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

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

**ONE  
TEAM  
ONE  
DREAM**



**Ecclesiastes 4:9-10**

**You are the  
most  
educated  
team I have  
been  
blessed to  
work with!**

**I was schooled.  
I became educated.**



# It Takes 3 Teams

## Community

Community-wide input from all the faithful



## Strategic Planning Team

A diverse, representative cross-section of strategic thinkers to analyze data and draft a Strategic Plan



## Implementation Team

A large diverse group of committed faithful to implement all of the Strategic Goals and Action Plans



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

*and every one  
members one of  
another.*



**Romans 12:5**

# Two Process Keys



Rules of Engagement & Consensus

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

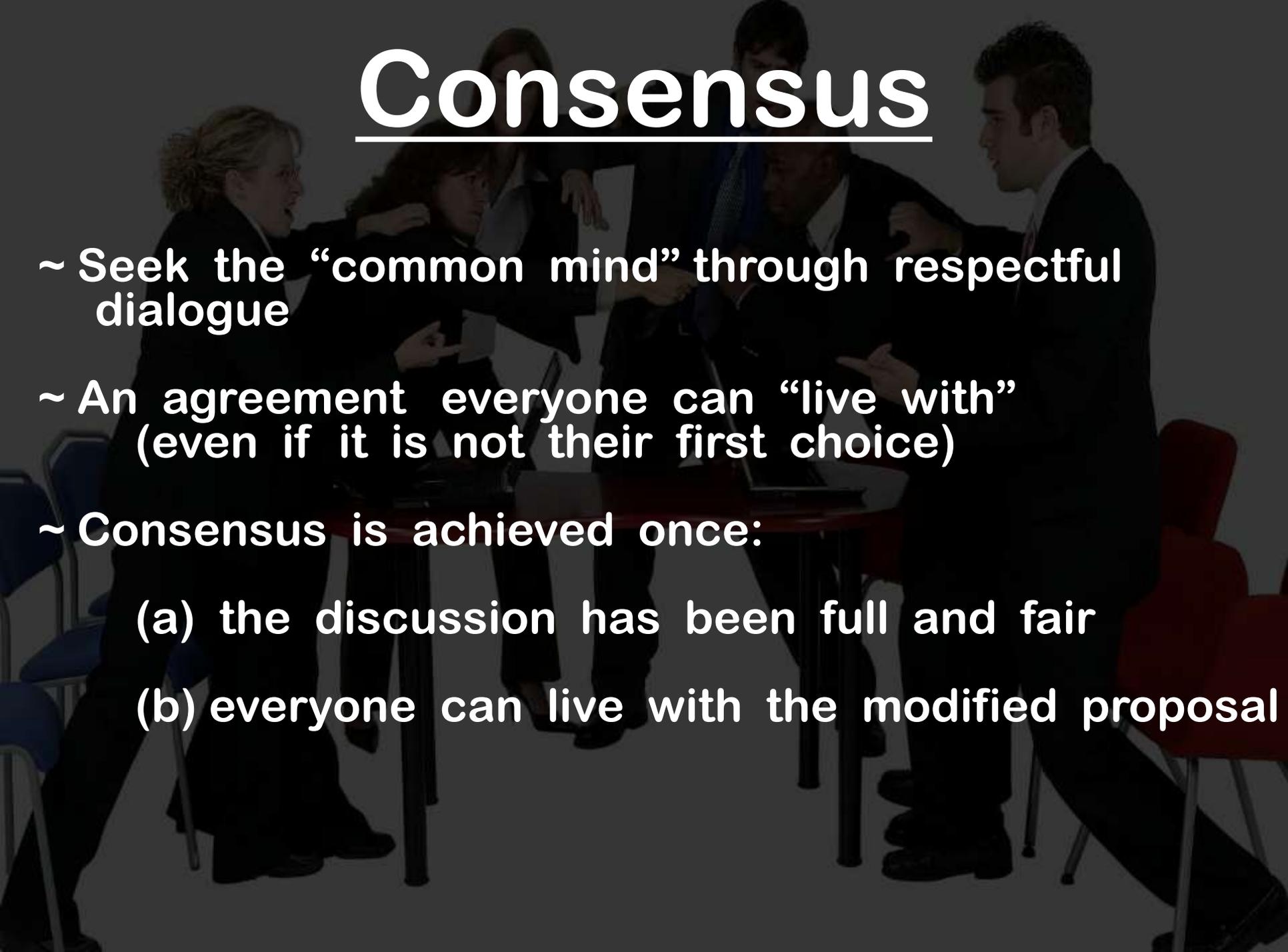


11. No defensiveness
12. NO “Discussion Killers”
13. Think strategically
14. Speak precisely and succinctly
15. We are members of the Body of Christ treating everyone with love and respect and allowing the Holy Spirit to participate freely

A group of five business professionals (three women and two men) are gathered around a red circular table in a meeting room. They are dressed in dark business suits. The scene is captured in a dramatic, slightly overexposed style. The individuals are engaged in a tense interaction; one woman on the left is pointing towards the center, another woman behind her has a concerned expression, a man in the background has his hand on a woman's shoulder, and a man on the right is pointing back towards the center. The overall atmosphere suggests a moment of high-stakes negotiation or conflict. The word "Consensus" is superimposed in large white font across the middle of the image, underlined.

# Consensus

# Consensus

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

~ Seek the “common mind” through respectful dialogue

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

~ Consensus is achieved once:

(a) the discussion has been full and fair

(b) everyone can live with the modified proposal

**zoom**



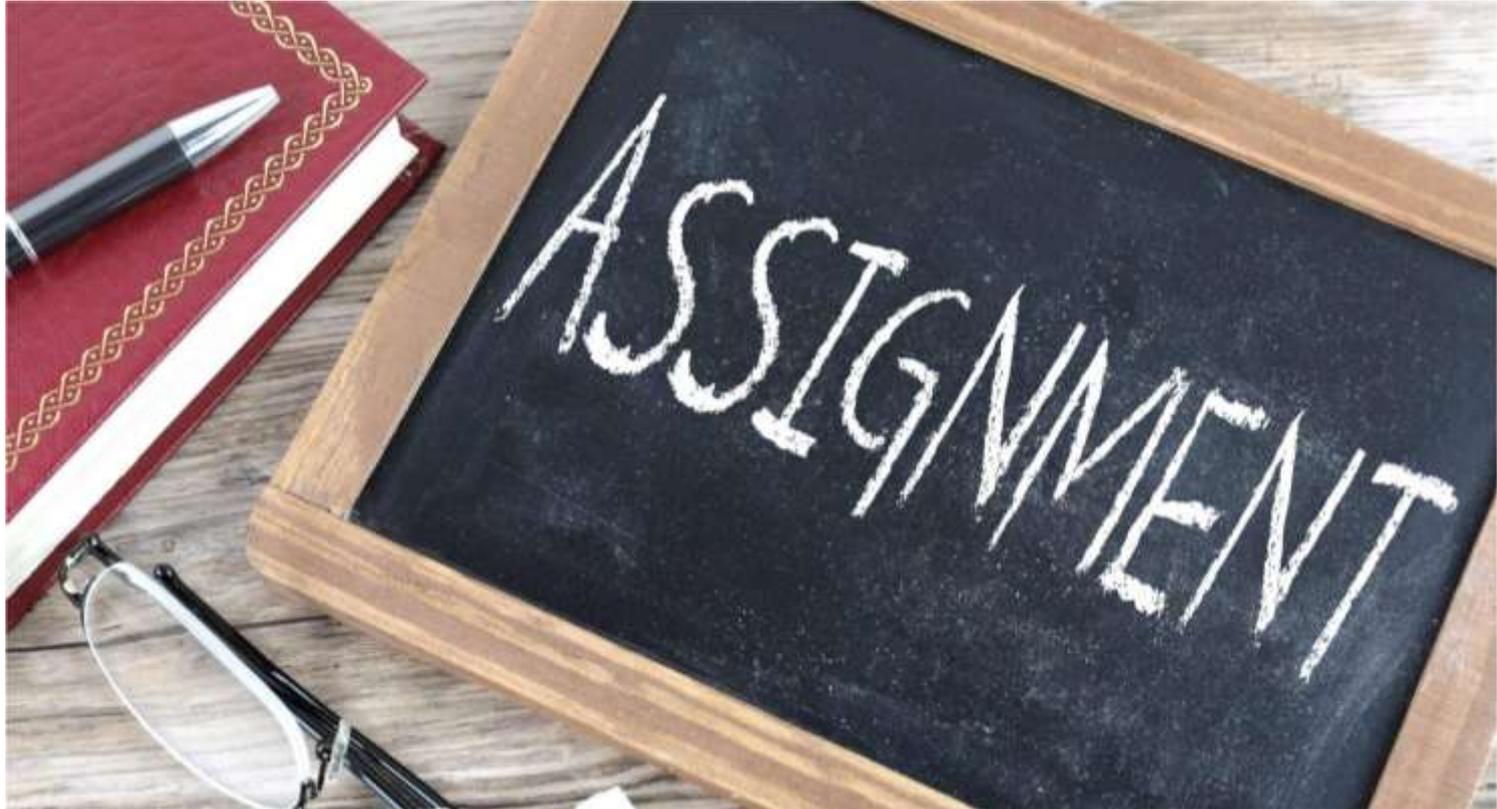
**THE HOLY ORTHODOX CHURCH OF UGANDA**



## ZOOM SUMMARY OVERALL TIMETABLE<sup>1</sup>

| <u>TASK</u>   | <u>Date</u> |
|---|-------------|
| Why Discovery Zoom 1  | _____       |
| Why Discovery Zoom 2  | _____       |
| SWOT Determination  | _____       |
| Core Values, Mission Statement<br>& Strategic Area of Focus Determination | _____       |
| 2-3 Goal Determination Zooms<br>for <u>each</u> Strategic Area of Focus   | TBD         |
| Final Retreat   | _____       |

**Please Complete Your Advanced Assignments  
As Soon As Possible  
Email the Word document to [billmarianes@gmail.com](mailto:billmarianes@gmail.com)**



**P.S. If you lost the Advance Assignment document emailed to you already, you can download it here:**

**<https://stewardshipcalling.com/orthodox-church-of-uganda/>**



**Joy Kemirembe**



**Honorable Mentions**

**Joan Mulongo**

**Theodoros Kombe Lyazi**

**Simeo Bwango**

## Sun Tzu



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

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

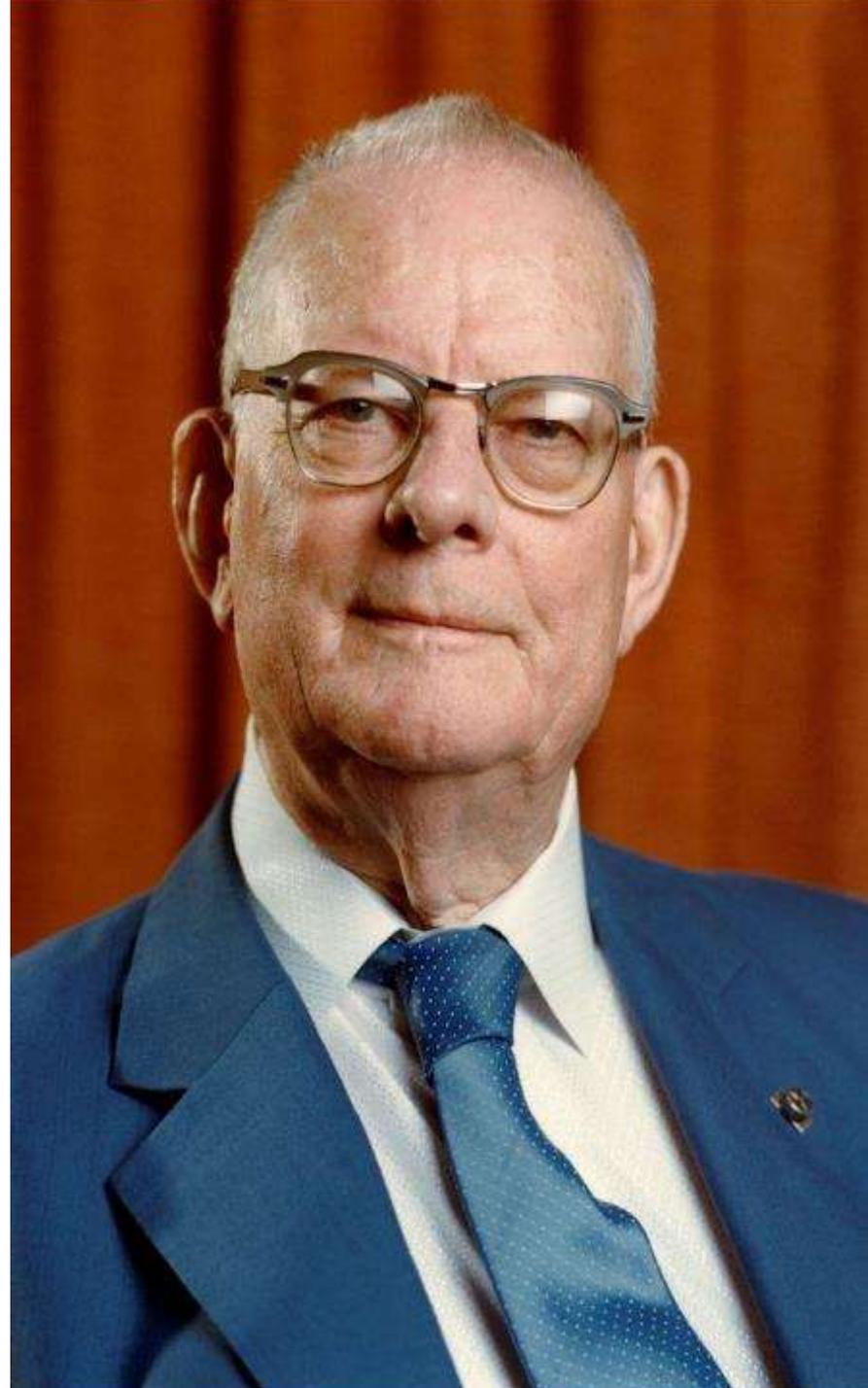
# Who Owns The Problem?

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

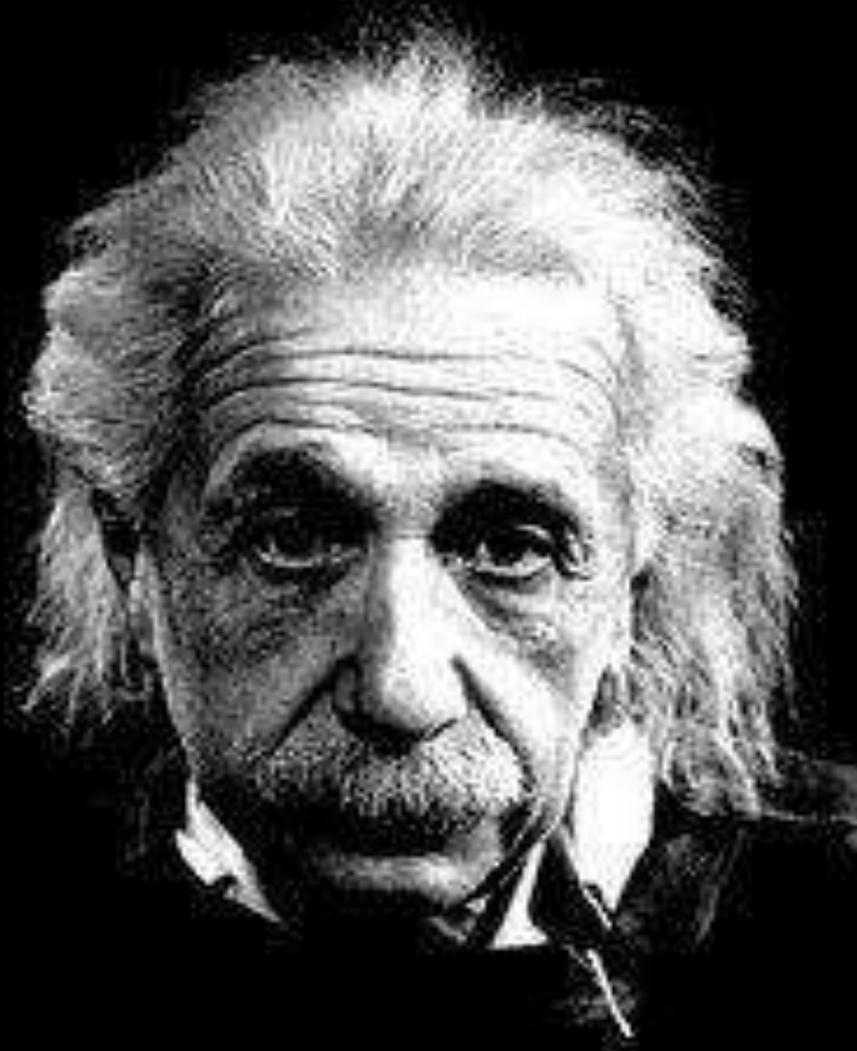
**As a leader, you own responsibility for the system.**

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

W. Edwards Deming  
(father of the Quality Movement)



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





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Strategic  
Planning

Scroll down  
to Holy  
Orthodox  
Church of  
Uganda

| WHY?     | STEWARDSHIP | STRATEGIC PLANNING  | INTERNET RADIO & PODCASTS | KEYNOTES & LEADERSHIP | RESOURCES |
|----------|-------------|---|---------------------------|-----------------------|-----------|
| PERSONAL |             | ST. SOPHIA UKRAINIAN SEMINARY   |                           |                       |           |
|          |             | HOLY ORTHODOX CHURCH OF UGANDA  |                           |                       |           |
|          |             | 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  |                           |                       |           |

**THE HOLY ORTHODOX CHURCH OF UGANDA**



Holy Orthodox Church of Uganda is undertaking a strategic planning process. This incredible work is being coordinated by His Eminence Metropolitan Jeronimos Muzeeyi, and is being coordinated by a dedicated team of senior leaders will form the work of our very diverse and extensive Strategic Planning Team can...

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**Any Questions?**

# Vision & Parish Strategic Planning