



SAINT SOPHIA

UKRAINIAN ORTHODOX SEMINARY

Strategic Plan Final Retreat

Bill Marianes



STEWARDSHIP
CALLING

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Strategic Planning Tab



St. Sophia Page

SOPHIA
UKRAINIAN SEMINARY

"If any man serve me, let him follow me, and where I am, there shall also my servant be: if any man serve me, him will my Father honour."

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LEARN MORE ABOUT ST. SOPHIA SEMINARY BY VISITING: STSUOTS.ORG

ST. SOPHIA UKRAINIAN SEMINARY

QR Code for St. Sophia Page



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

WARREN, OH – ST DEMETRIOS STRATEGIC PLAN

SAINTS RAPHAEL, NICHOLAS & IRENE – CUMMING, GA

ST. RAPHAEL – IOWA CITY

CHRIST THE SAVIOUR –

Presentation materials for Strategic Planning Retreat April 22-24, 2025



STEWARDSHIP
CALLING

TODAY
is the
day
we...



A sunset over a body of water with a small island in the distance. The sky is filled with colorful clouds in shades of orange, red, and purple, with the sun low on the horizon. The water reflects the colors of the sky. A small, dark island is visible in the middle ground.

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

Peter Drucker



Why Are We Doing This?

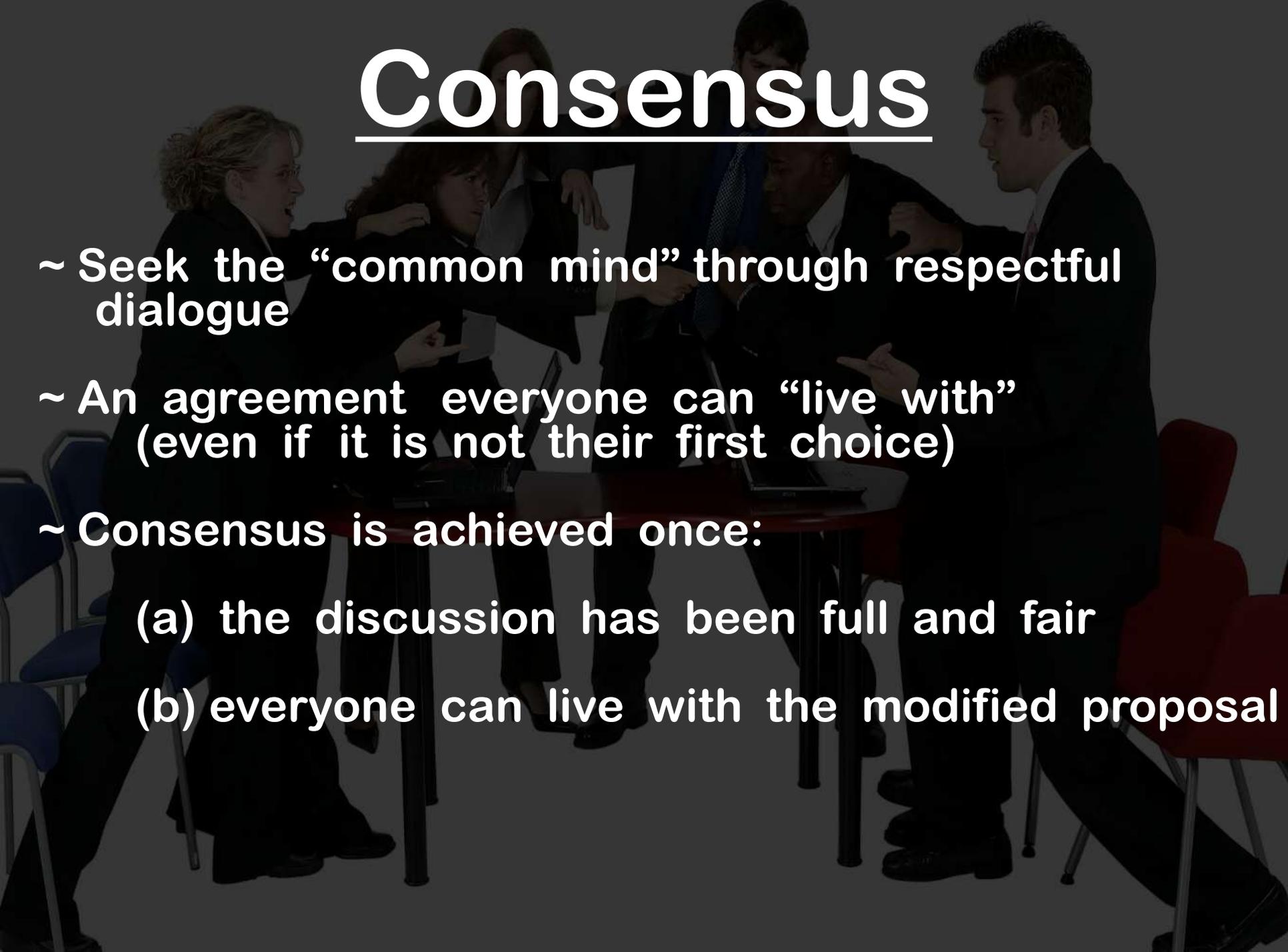
for a good
account at the
awesome
judgment seat of
Christ.”

2 Corinthians 5:10
Divine Liturgy



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

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

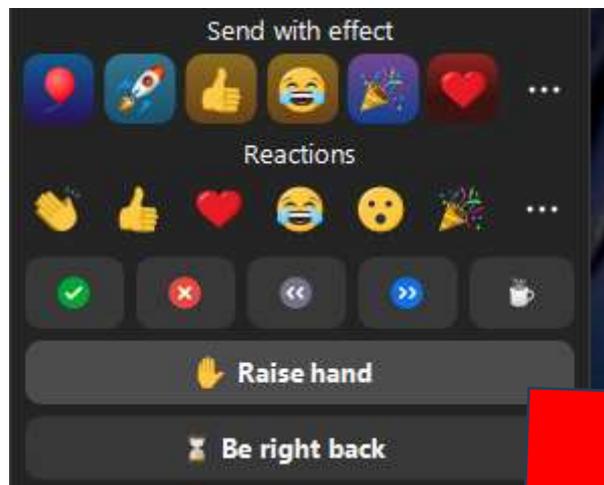
~ An agreement everyone can “live with” (even if it is not their first choice)

~ Consensus is achieved once:

(a) the discussion has been full and fair

(b) everyone can live with the modified proposal

Please use the Raise Hand Feature When
You Want To Speak
- Click the REACT button -





SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

WHY Statement

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



SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

Core Values

Christlike

Excellence

Serving

Holy Tradition



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Our mission is to bring people closer to Christ through Orthodox spiritual formation, education and the development of servant leaders.



SAINT SOPHIA
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CORE VALUES

1. Christlike
2. Excellence
3. Serving
4. Holy Tradition

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MISSION Statement

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Internal Weaknesses

- 24 – Seminary Offerings/Outputs**
- 12 - Academic Program & Distance Learning Issues**
- 5 – Financial Issues**
- 5 – Size/Enrollment Issues**
- 4 - Facilities Issues**
- 4 – Parish Connection Issues**
- 3– Staffing Issues:**
 - 2 – Technology**
 - 2 – Strategic Partnerships**



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Suggested External Opportunities

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

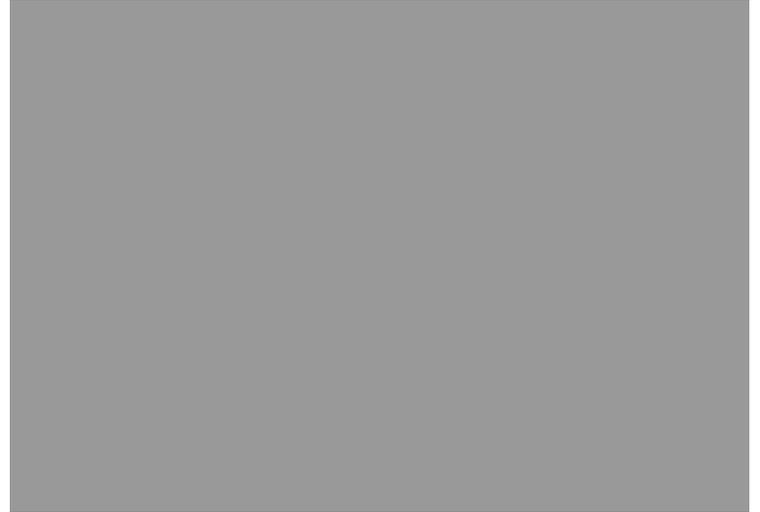


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Proposed Critical Strategic Goals

- 1. Spiritual Formation and Academic Excellence**
- 2. Stakeholder Engagement & Support**
- 3. Innovation, Institutionalization & Outreach**
- 4. Thriving & Transfiguring**



TIME FOR
SOMETHING
NEW!

Vision Statement



SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

We will use effective best practices to achieve or exceed the stated measurable targets in each Strategic Goals to create best in class:

- 1. curriculum, academic, and teaching excellence, publications and clergy continuing education programs within 24 months;**
- 2. parish ambassador program, social media, Certificate programs, and annual symposia within 27 months;**
- 3. Content delivery platform using multiple modalities for all stakeholders and create strategic partnerships within 27 months; and**
- 4. Organizational and faculty structure, married student housing, scholarships and become fully self sustaining with a robust financial plan within 60 months.**

SMART Goals

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

S



SPECIFIC

M



MEASURABLE

A



ATTAINABLE

R



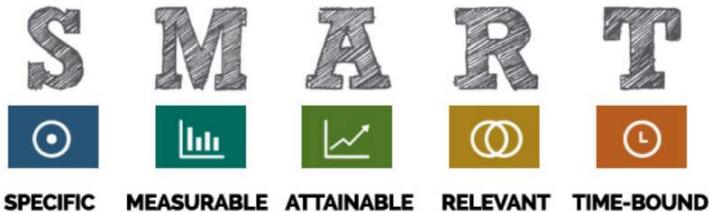
RELEVANT

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?

Spiritual Formation and Academic Excellence S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective **Spiritual Formation and Academic Excellence** (the “SFAE”) with a comprehensive communications plan that will achieve the following “SFAE Excellence Targets” within 24 months:

- (a) Within 6 months develop “SFAE Excellence Metrics” for all current St. Sophia degree and certificate programs and assess current programs against excellence metrics;**
- (b) Within 1 year, research and develop best in class and effective curriculum and programs for each degree and certificate program (“Enrolled Student Programs”) based on SFAE Excellence Metrics;**
- (c) Within 6 months develop best in class and effective supplemental “Enhanced Skills Content” in the areas of: (i) Spiritual Formation (human, spiritual, intellectual, pastoral, etc.), (ii) practical and church operational soft skills (“Management Skills”), and (iii) servant leadership, and ensure mastery in all Enhanced Skills Content by 100% of Enrolled Students within 1 year of development;**
- (d) Within 1 year, develop and implement a comprehensive robust evaluation personnel and professional program for 100% of faculty, Enrolled Students, staff, Board, and all other personnel (“Professional Evaluation Program”) and take appropriate remediation where necessary;**
- (e) Within 6 month, develop Clergy Continuing Professional Development (“CCPD”) programs that within 12 months thereafter 100% of UOC of USA ordained clergy will complete. And each year thereafter, 100% of ordained clergy will complete the new CCPD programs produced annually;**
- (f) Within 6 months, create a preeminent “Seminary Publication” with best-in-class content.**

Spiritual Formation & Academic Excellence (“SFAE”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 1: Research the most effective IIO Ministries within 4 months</u>			
1. Form Spiritual Formation and Academic Excellence (“SFAE”) Team (“SFAET”).	SFAET Co-Captains	1 month after Start Date	SFAET members agree to serve
2. Research from at least 3 different successful seminaries effective best practices and programs in each of : (a) Spiritual Formation and Academic Excellence (“SFAE Excellence Metrics”); (b) curriculum and programs for each all degree and certificate program (“Enrolled Student Programs”); (c) Spiritual Formation, Management Skills and Servant Leadership (“Enhanced Skills Content”); (d) “Professional Evaluation Program” for all faculty, Enrolled Students, staff, Board of Directors, and all other personnel; (e) comprehensive Clergy Continuing Professional Development (“CCPD”) program; and (f) Seminary Publication. All the above are collectively the “SFAE Programs”	SFAET	3 months after step 1	Specific research is completed and documented for each of the SFAE Programs
3. Analyze all the research from step 2 regarding the SFAE Programs and create at least two alternative options to implement each of the SFAE Programs.	SFAET	Simultaneous with step 2	Analysis of all step 2 research is complete and alternatives for each SFAE Program are developed

Spiritual Formation & Academic Excellence (“SFAE”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 2: Develop and implement most effective SFAET Programs within 3 months			
4. Finalize and determine final best: (a) SFAE Metrics will be used to assess all Enrolled Student Programs; (b) Enrolled Student Programs; (c) Enhanced Skills Content all Enrolled Students will complete; (d) Professional Evaluation Program will be used to assess all people; (e) CCPD programs for all clergy; (f) all Seminary Publication guidelines.	SFAET	3 months after step 3	SFAE Metrics, Enhanced Skills Content, Professional Evaluation Program, CCPD programs, and Seminary Publication guidelines are finalized and determined
Interim Goal 3: Begin to Implement SFAET Programs within 3 months			
5. Complete development of best in class and effective Enrolled Student Programs and CCPD programs based on SFAE Metrics and ensure appropriate faculty are trained to deliver such content.	SFAET	3 months after step 4	Development is completed on Enrolled Student Programs and CCPD programs based on SFAE Metrics and faculty training is complete.
6. Initiate publication of preeminent Seminary Publication and complete first round of Professional Evaluation Program assessments.	SFAET	Simultaneous with step 5	First Seminary Publication is released, and first round of Professional Evaluation assessments are completed

Spiritual Formation & Academic Excellence (“SFAE”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 4: Execution SFAET Programs to achieve the SFAE Targets within 12 months			
7. Complete full year deployment of new Enrolled Student Programs, Enhanced Skills Content, CCPD programs, Professional Evaluation Program and at least two Seminary Publication editions are issued.	SFAET	<u>12</u> months after steps 5 and 6	Enrolled Student Programs, Enhanced Skills Content, CCPD programs, Professional Evaluation Program and two Seminary Publications are completed.
Interim Goal 5: Compile and assess the results of the SFAET Programs and make necessary improvements within 2 months			
8. Obtain and compile qualitative and quantitative data and determine effectiveness and success of all Enrolled Student Programs, Enhanced Skills Content, Professional Evaluation Program and CCPD programs, Seminary Publication, and identify areas for improvement and plans for the next year’s version of all such programs. Finalize and deliver assessment analysis report, and make all refinements necessary to improve SFAET Programs and next three years goals are established.	SFAET	<u>2</u> months after step 7	Assessment of past Enrolled Student Programs, Enhanced Skills Content, Professional Evaluation Program and CCPD programs, Seminary Publication is complete and improvements are finalized for next cycle

Spiritual Formation & Academic Excellence (“SFAE”)

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Spiritual Formation & Academic Excellence Team		
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Stakeholder Engagement & Support S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective Stakeholder Engagement & Support (“SES”) Programs with a comprehensive communications plan that will achieve the following “SES Targets” within 27 months:

- (a) implement a parish “Ambassadors Program” where at least 80% of UOC of USA parishes will have a designated St. Sophia Orthodox Seminary (“STSOS”) “Ambassador” within 2 years to: (a) promote to the laity all high-quality multi-week educational offerings (“Online Courses”) that will be completed by at least 450 Casual Learners per year and (b) facilitate at least one parishioner per year qualified individuals to enroll in STSOS degree and certificate programs;**
- (b) At least semi-annually, gather all Ambassadors to: (i) provide information about the latest STSOS programs, courses, and resources; (ii) provide Ambassador training; and (iii) obtain feedback from the Ambassadors about the needs and opinions of the parishioners;**
- (c) Within 1 year, establish an effective, high quality, and engaging bi-lingual social media education program (on at least Facebook, Instagram, and YouTube) (the “Social Media Program”) where STSOS provides engaging weekly content that experiences interaction metrics that increase at least 10% each quarter;**
- (d) Within 1 year, offer effective “Certificate Programs” in at least the areas of adult education, youth education, iconography, parish administration, finance, church education, servant leadership, choir/music chanting, stewardship & engagement development that would result in at least 300 Certificates being earned each year thereafter;**
- (e) Within 1 year, conduct the following “Annual STSOS Programs” (i) at least 1 symposium in partnership with the Orthodox and Non-Orthodox Seminaries willing to participate featuring the most engaging presenters on the most in-demand topics; and (ii) at least 1 sponsored Colloquium event each year at STSOS with at least 200 attendees for qualified featured presenters to address the most relevant and in-demand topics;**
- (f) Within 1 year establish an “Enrolled Student Parish Visitation Program” (“ESPVP”) where at least one week each year: (i) each full and part-time seminarian is assigned to serve at a parish; and (ii) other Enrolled Students are provided opportunities to serve parishes in areas in which they are studying.**

Stakeholder Engagement & Support (“SES”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 1: Research the most effective IIO Ministries within 4 months			
1. Form Stakeholder Engagement & Support (“SES”) Team (“SEST”).	SEST Co-Captains	1 month after Start Date	SEST members agree to serve
2. Research at least 2 different successful effective best practices and programs in: (a) creating “Ambassadors” to represent and promote programs for St. Sophia Orthodox Seminary (“STSOS”) to the parishes; (b) best practices in promotion of Online Programs; (c) successful effective, high quality, and engaging bi-lingual social media education programs for engaging weekly content (“Social Media Program”); (d) meaningful named 9 and other “Certificate Programs” STSOS should offer and the corresponding “SEST Effectiveness Metrics” for each; (e) annual symposiums with seminaries and SOS sponsored Colloquium (the “Annual STSOS Programs”); and (f) parish visitation and engagement programs for all Enrolled Students (the “Enrolled Students Parish Visitation Program”). All of the above are collectively the “SES Programs.”	SEST	3 months after step 1	Specific research is completed and documented for each of the SES Programs
3. Analyze all the research from step 2 regarding the SES Programs and create at least two alternative options to implement each of the SES Programs.	SEST	Concurrent with step 2	Complete analysis of step 2 research and create SES Program alternatives

Stakeholder Engagement & Support (“SES”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 2: Develop and implement most effective SES Programs within 3 months			
4. Finalize and create best” SES Programs” consisting of: (a) Ambassadors Program; (b) Online Programs; (c) Social Media Program; (d) Certificate Programs, including any additional Certificate Programs beyond the 9 enumerated ones; (e) “Annual STSOS Programs; and (f) “ESPVP” Enrolled Student Parish Visitation Programs.	SEST	3 months after step 3	All 6 best practices SES Programs are finalized and determined
Interim Goal 3: Begin to Implement SES Programs within 6 months			
5. Recruit and train faculty for all 9 (or more) Certificate Programs and all Online Programs. Begin roll out of Social Media Program and gather baseline metrics. Conduct first of Annual STOS Programs. Initiate Ambassador’s Program and recruit Ambassadors from at least 50% of parishes and begin first semi-annual Ambassador retreat. Initiate first ESPVP.	SEST	3 months after step 4	All faculty for Certificate Programs and Online Programs are recruited and trained. First Annual STOS Programs and ESPVP are completed and assessed
6. Initiate the offering of the developed Certificate Programs with faculty Continue Ambassador’s Program and recruit active Ambassadors from at least 80% of parishes by the end of the first year and continue semi-annual Ambassador retreats.	SEST	3 months after step 5	Certificate Programs released and at least 70% of parishes have Ambassadors.

Stakeholder Engagement & Support (“SES”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 4: Execution SES Programs to achieve the Targets within 12 months			
7. Ensure at least 80% of parishes have actively engaged Ambassadors and at least 450 Casual Learners per year complete Online Programs and at least 1 parishioner from each parish completes a Certificate Program each year. Complete full year deployment with monthly assessment of effectiveness of each SES Program with necessary course corrections to reach goals.	SEST	12 months after steps 5 and 6	All SES Programs are fully implemented for a year
Interim Goal 5: Compile and assess the results of the SES Programs and make necessary improvements within 2 months			
8. Obtain and compile qualitative and quantitative data and determine effectiveness and success of all SES Programs and identify areas for improvement and plans for the next year’s version of all such programs. Finalize and deliver assessment analysis report, and make all refinements necessary to improve SEST Programs and establish next three years goals	SEST	2 months after step 7	Assessment of all SES Programs against stated goals is complete and improvements are finalized for 12-month next cycles.

Stakeholder Engagement & Support (“SES”)

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form Spiritual Formation & Academic Excellence Team		
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Innovation, Institutionalization & Outreach S.M.A.R.T. Goal

We will research, develop, and implement a best practices and effective Innovation, Institutionalization & Outreach (“IIO”) programs and activities with a comprehensive communications plan that will achieve the following “IIO Targets” within 27 months:

(a) implement a robust content delivery systems that addresses all educational needs of:

- 1. 100% of clergy enrolled continuing clergy education,**
- 2. 100% of “Enrolled Students” (those seeking degrees or certificates),**
- 3. at least 75% of parishes use the “Enrichment Studies Program” and at least 300 parishioners (“Casual Learners”) have completed at least one Enrichment Studies Program,**
- 4. implement the “Casual Learners” Program (seeing content on an online platform) a minimum of 500 views per day with 10% monthly increase in average total monthly views of content;**

(b) implement specific youth and other demographic programs and delivery vehicles for every demographic age group;

(c) Implement strategic partnerships with 100% of other Orthodox seminaries, most Orthodox influencers and YouTube Channels/podcasters, libraries, other recognized theological seminaries, and Colleges and Universities with theology studies, 100% Ukrainian Seminaries, Ukrainian cultural organizations, Lilly and other similar endowments; and

(d) establish an “experimental laboratory” that is constantly working on examining and implementing the latest and best practices and technologies.

Innovation, Institutionalization & Outreach (“IIO”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 1: Research the most effective IIO Ministries within 5 months			
1. Form Innovation, Institutionalization & Outreach (“IIO”) Ministries Team (IIO MT).	SPT and IIO MT Co-Captains	1 month after Start Date	IIO MT members agree to serve
2. Determine IIO initiatives key definitions and effectiveness metrics for each of SMART Goals identified in a1, a2, a3, a 4, b, c, d, and e (the “7 IIO SMART Goal Objectives”).	IIO MT	2 months after step 1	IIO Ministries key definitions and metrics determined for all 7 IIO SMART Goal Objective elements
3. Analyze the baseline on all 7 IIO SMART Goal Objectives effectiveness metrics and survey stakeholders to determine what IIO content they need and what delivery modalities they will use regularly.	IIO MT	2 months after step 2	Baselines, and content delivery vehicles and frequency of IIO content are analyzed and finalized
4. Research at least 2 best practices examples of programs from both inside and outside the Orthodox ecosystem for each of 7 IIO SMART Goal Objectives.	IIO MT	Simultaneous with steps 2 & 3	At least 2 best practices alternatives of each of the 7 IIO SMART Goal Objectives are examined

Innovation, Institutionalization & Outreach (“IIO”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 2: Develop the most effective IIO Ministries within 5 months			
5. Evaluate all the researched 7 IIO SMART Goal Objectives Ministries items from step 3 for effectiveness against key performance metrics and baselines based and criteria of effectiveness determined in step 2 and determine 7 IIO SMART Goal Objectives education topics, programs, and modalities (collectively the “IIO Ministries”).	IIO MT	1 months after step 4	Evaluation of alternative IIO Ministry offerings is completed for all 7 IIO SMART Goal Objectives
6. Develop new best practices specific programs for each of 7 IIO SMART Goal Objectives (collectively, the “7 IIO SMART Goal Education Ministries”) and establish monthly performance benchmarks to achieve each of the 7 IIO SMART Goal Objectives (the “IIO Targets”).	IIO MT	4 months after step 5	IIO Ministries are finalized, and monthly performance benchmarks and IIO Targets are determined
Interim Goal 3: Recruit and train IIO Ministries within 3 months			
7. Identify and recruit IIO Ministries “Educators” who can teach and implement each of the IIO Ministries	IIO MT	1 month after step 6	Educators are recruited
8. Train Educators to implement the IIO Ministries content.	IIO MT	2 months after step 7	Educators are trained

Innovation, Institutionalization & Outreach (“IIO”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 4: Implement the IIO Ministries to achieve the IIO Targets within 12 months</u>			
9. Implement IIO Ministries to achieve the IIO Targets.	Educators	12 months after step 8	IIO Ministries are fully launched
10. Track and report on monthly performance benchmarks determined in step 6 and continue Educators follow-up with stakeholders and make changes as needed until IIO Targets are achieved.	Educators	Contemporaneous with step 9	Established monthly IIO Targets are achieved

Innovation, Institutionalization & Outreach (“IIO”)

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 5: Compile and assess the results of the IIO Ministry and make necessary improvements within 2 months</u>			
11. Obtain and compile qualitative and quantitative data from IIO Ministries and determine effectiveness and success (based on IIO Targets and criteria established in step 2) and identify areas for improvement.	Educators and IIO MT	1 month after step 10	IIO Ministry assessments are completed
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.	Educators and IIO MT	1 month after step 11	Analysis is completed, and all elements of IIO Ministry are refined accordingly

Innovation, Institutionalization & Outreach (“IIO”)

<u>Lead Measure Action</u>	<u>Deadline Date</u>	<u>% Complete and Date</u>
1. Form IIO Ministry Team		
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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; and**
- (f) Become fully self-sustaining within 5 years (including seminarian scholarships, faculty and professional development of clergy, and capital expenditure reserves).**

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.

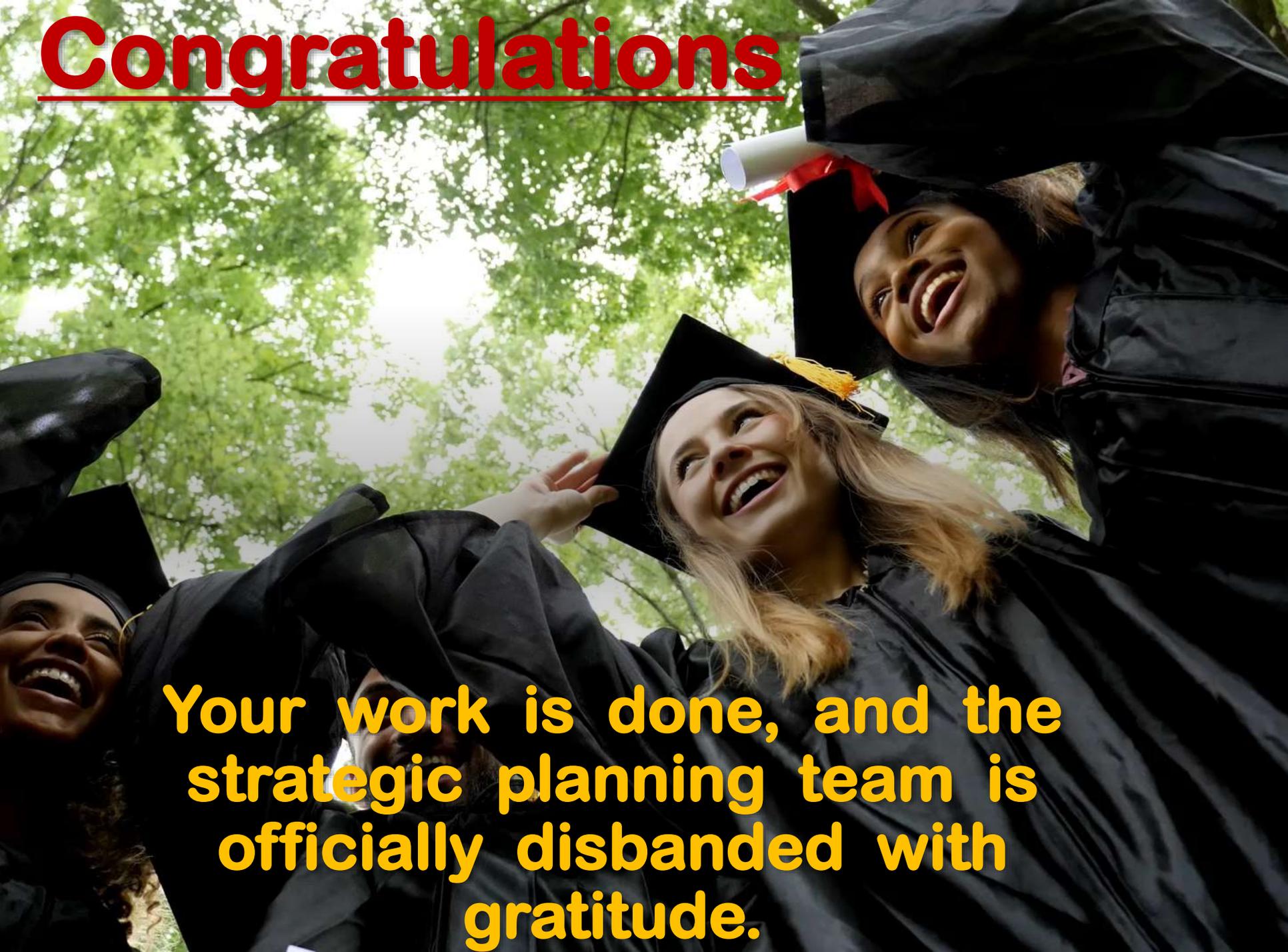
Thriving & Transfiguring (“T&T”)

<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		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

Congratulations

A group of graduates in black caps and gowns are celebrating outdoors. They are smiling and looking upwards, with one graduate in the center holding up her cap. The background is filled with green trees and a bright sky.

Your work is done, and the strategic planning team is officially disbanded with gratitude.



**Transition from Strategic
Planning to Implementation**



SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

WHY Statement

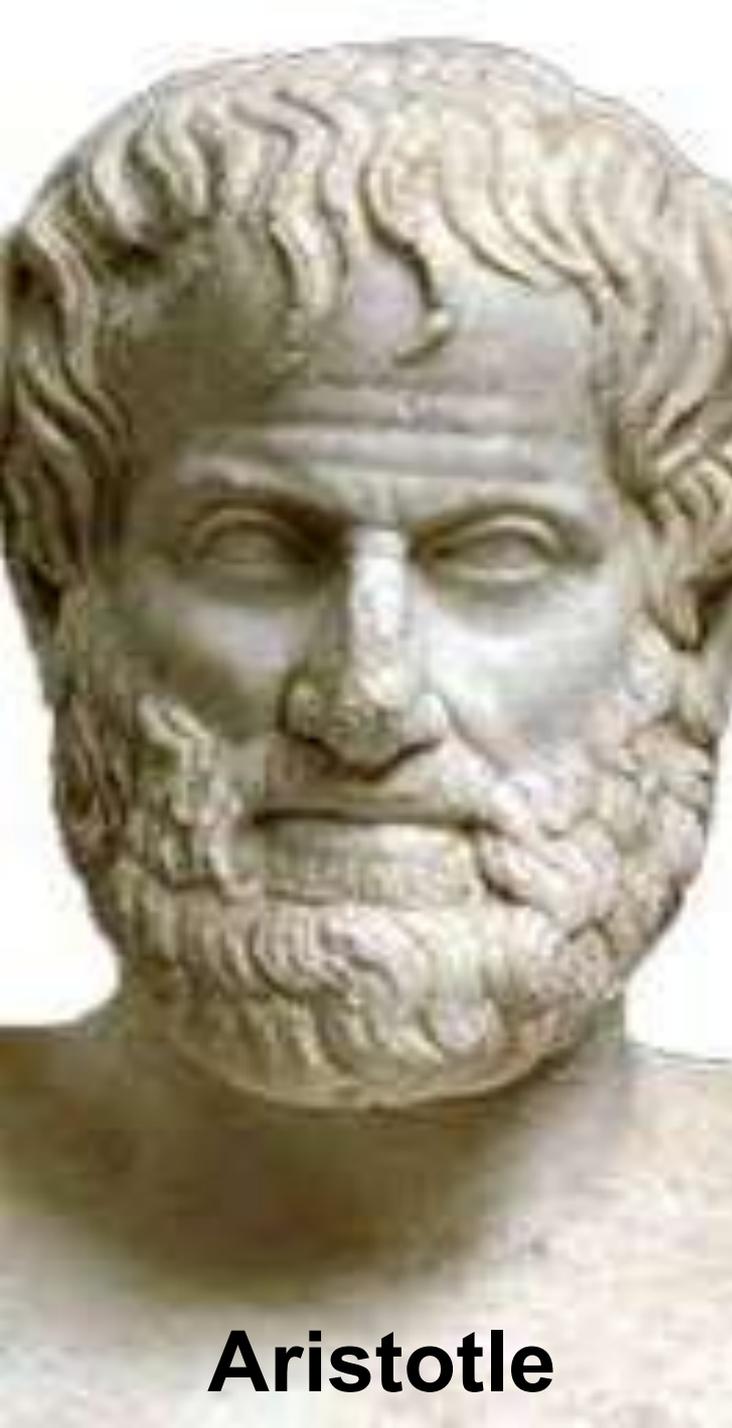
**Inspiring servant leaders equipped
to fulfill Christ's saving mission to a
world in need.**



Words may inspire, but only ACTION creates change. Most of us live our lives by accident - we live life as it happens. Fulfillment comes when we live our lives on purpose.

— *Simon Sinek* —

AZ QUOTES



Aristotle

**We are what we
repeatedly DO.**

**Excellence, then,
is not an act, but
a HABIT**

Next Steps For Success

LEADERSHIP



Implementation Management

- ~ All 3 Strategic Goals will have:
 - A. Its own Implementation Team
 - B. 2 Goal Co-Captains to manage and lead the team's execution of the Action Plan steps
- ~ 2 Head Coaches will coordinate with the 8 Goal Co-Captains
- ~ Hierarchs and the two Head Coaches will form the Implementation Headquarters (“IHQ”) and ultimately be responsible for the entire implementation process

Next Steps

**Find A Strategic Plan Template
in the book: “A Roadmap for
American Churches and People
of Faith: W.W.J.D. (What Would
Jesus Do?)”**

**Chapter 7: Strategic
Planning – Exhibit “A” (pages
169-184)**

**P.S. Find Stewardship & Engagement and
Spiritual Formation and Religious Education
best practices in:**

**Chapters 9-11: Stewardship & Engagement
Best Practices**

**Chapters 12 & 14: Spiritual Formation,
Religious Education Best Practices, and
Seminary Strategic Foresight**



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

Next Steps For Success

UOC of USA Roll-Out Celebration

- ~ Sobor is where entire UOC of USA community celebrates and gets a copy of new Strategic Plan and hears details from IHQ and Co-Captains and are recruited to join Implementation Teams

Consistory and Ministry Leaders

- ~ Review SWOT Weaknesses that did not rise to the level of a Strategic Goal (“Low Hanging Fruit Issues”)
- ~ Address Low Hanging Fruit Issues immediately during the “Strategic Plan Quiet Period” (approx. 9 mo. during S.M.A.R.T. Goals research/new program development and rollout)
- ~ Publicly celebrate addressing Low Hanging Fruit as Strategic Planning success



**LEADERS WHO DON'T
LISTEN WILL EVENTUALLY
BE SURROUNDED BY
PEOPLE WHO HAVE
NOTHING TO SAY**

ANDY STANLEY

SMARTLEADERSHIP

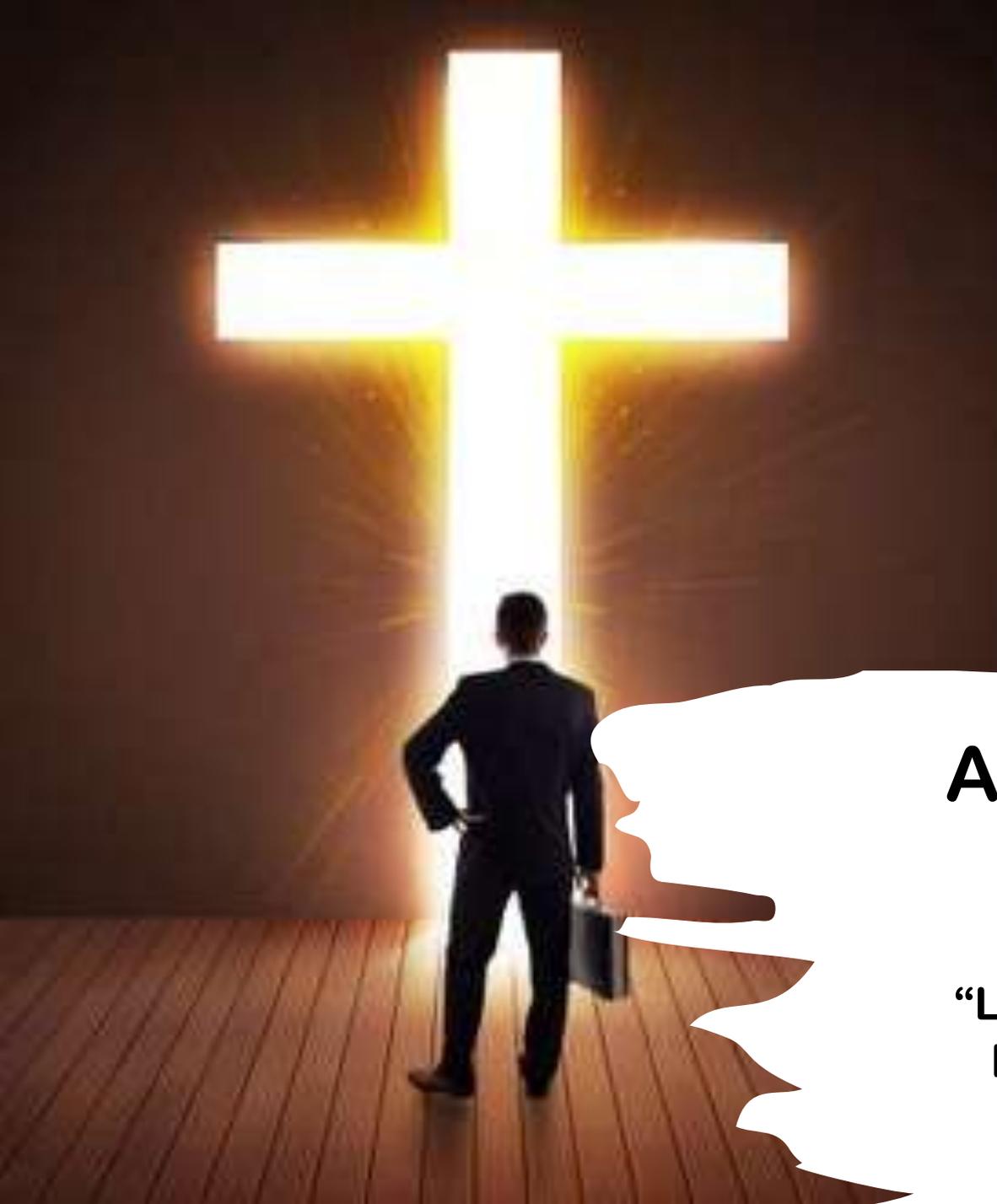


Next Steps For Success



Communications

- ~ Constant and regular reporting on the Strategic Planning process in all parish media outlets and forms, including in Metropolia, church announcements, bulletins, homilies, General Assemblies, etc.
- ~ St. Sophia AND UOC of USA websites add strategic planning pages where everything is posted (including all Scoreboard updates)
- ~ Reporting on Low Hanging Fruit Issues progress and other activities is essential during Strategic Planning “Quiet Period”



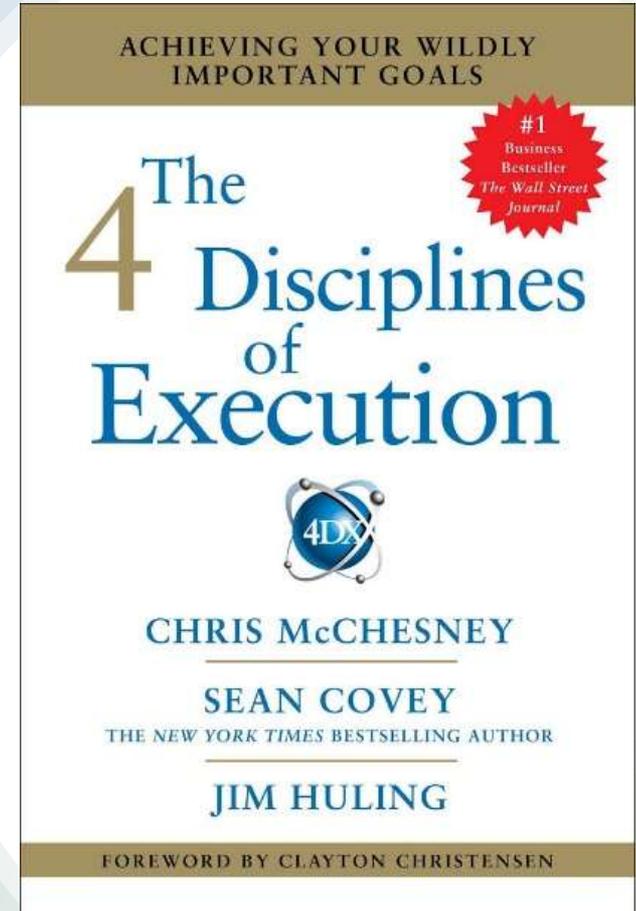
A Leader Leads By Example

**“Leadership is not about
personality. It’s about
behavior”**

SMART Gap Accountability Plan

(A Cadence of Accountability)

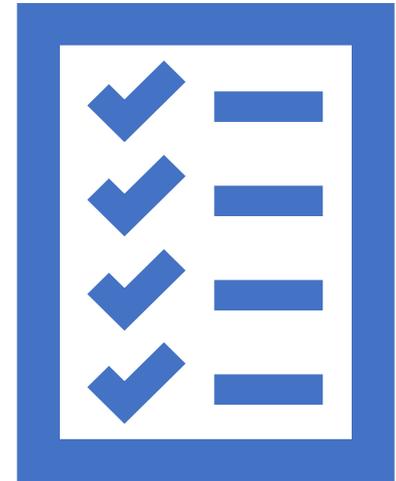
- ~ Regular and frequent team meetings that solely focus on the Strategic Goals
- ~ Team members hold each other accountable for their commitments



SMART Gap Accountability Plan

(A Cadence of Accountability)

- ~ Implementation Team weekly check-ins on Goal Scoreboard progress
- ~ IHQ regular accountability check-ins with Co-Captains

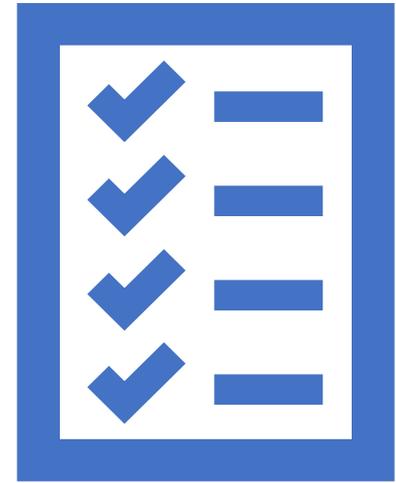


SMART Gap Accountability Plan

(A Cadence of Accountability)

1. Implementation Goal Team check-ins

- Short (10-15 minutes
WEEKLY update call
- Each member reports:
 - What they said they'd do
 - What they did
 - What they will do this week
 - Any help they need
- Goal Scoreboard is updated and posted for everyone to see



SMART Gap

Accountability Plan

(A Cadence of Accountability)

2. Head Coach regular accountability check-ins

- a) Bi-weekly calls among Head Coach and Goal Co-Captains to review progress and update Goal Scoreboard
- b) Co-Captains identify successes, failures, and action plan next steps
- c) Head Coaches identify issues that need to be addressed

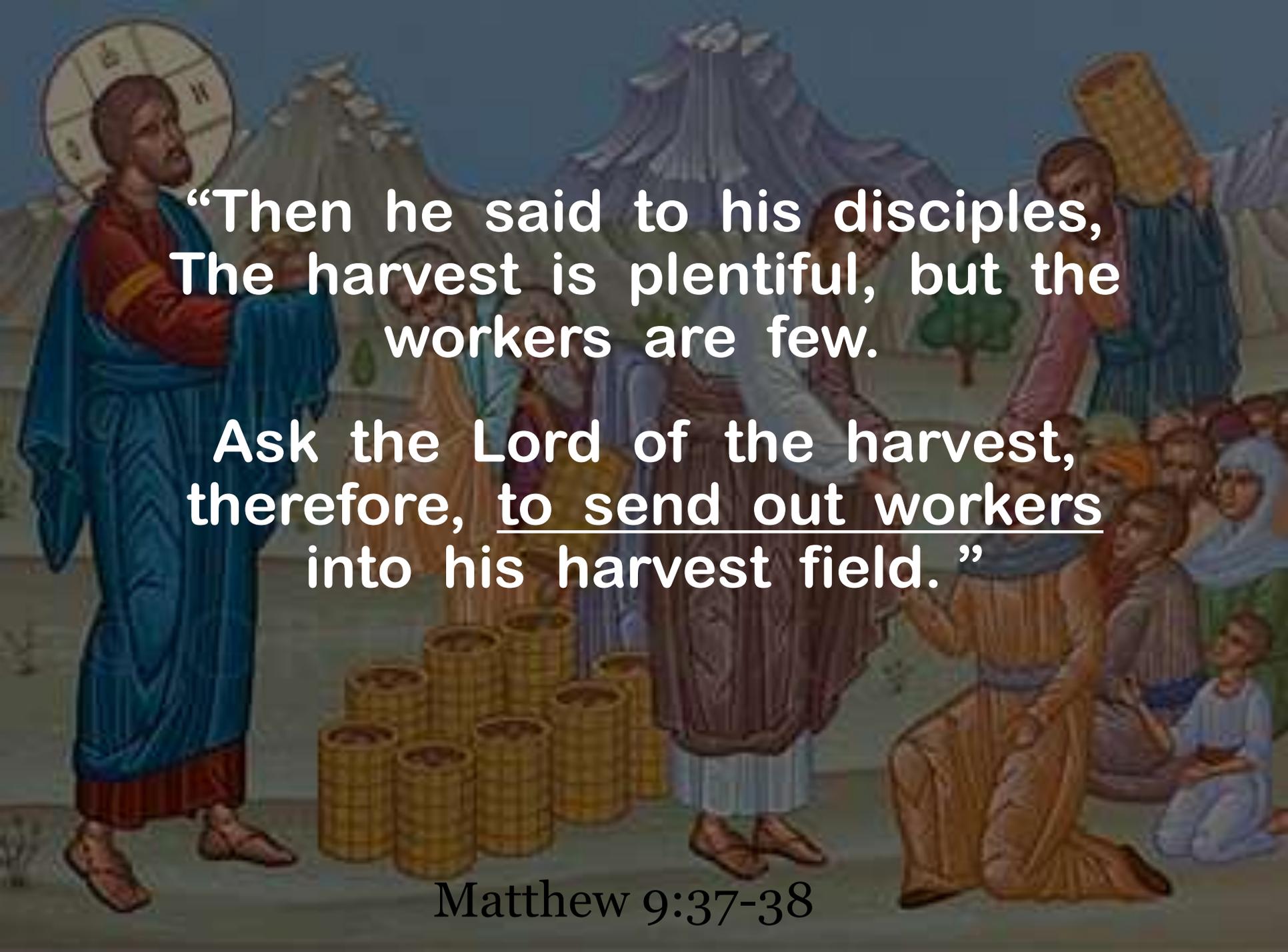


Top 5 Implementation Challenges

1. Lack of discipline and momentum
2. Resistance to change
3. Insider “nattering nabobs of negativism” & naysayers (“not my idea” (not invented here syndrome), “we always did it differently”)
4. Absence of visible activity and immediate results
5. Loss of focus on your **WHY**



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



“Then he said to his disciples,
The harvest is plentiful, but the
workers are few.

Ask the Lord of the harvest,
therefore, to send out workers
into his harvest field.”

Matthew 9:37-38

We Need To Build High Performing Implementation Teams



Next Steps For Success



...to complete the
Implementation
Volunteer Form and
tell us on which
Implementation Task
Force you will work

Tell us if you're willing to be considered as a possible Goal Co-Captain to manage the implementation of a Goal using the Action Plan.

Next Steps For Success

Rat out (recruit) your talented friends to work on these Strategic Goals.



Next Steps For Success

- ~ Integrate existing related ministries into Strategic Goal Teams and research/develop new best practices
- ~ Continuously recruit new parishioners and converts to implementation teams over the next three years

Next Steps For Success



Fill out your Implementation Team Volunteer Form you will receive from Fr Theophan or downloadable at:
<https://stewardshipcalling.com/st-sophia-ukrainian-seminary/>
and turn it in to Fr. Theophan ASAP.

STRATEGIC PLAN IMPLEMENTATION VOLUNTEER FORM
(Please Type Or Print Legibly)

1. Full Name: _____

2. Full Mailing Address: _____

3. Email: _____

4. Phone number: _____

5. I agree to give my time and talents to work on the following Strategic Goal:

- Goal 1 – Spiritual Formation and Academic Excellence
- Goal 2 – Stakeholder Engagement & Support
- Goal 3 – Innovation, Institutionalization & Outreach
- Goal 4 – Thriving & Transfiguring

6. I am willing to volunteer to be considered to co-lead the implementation of a Goal (identify the specific Goal number): _____

I am willing to be considered to serve as Co-Captain for Goal Number _____

7. Any other people you think would serve on a Goal Team, or as a Goal Co-Captain (please specify the specific Goal full number and provide their name and any contact information you have):

8. Any other comments / suggestions: _____

Next Steps For Success



WE WANT YOU



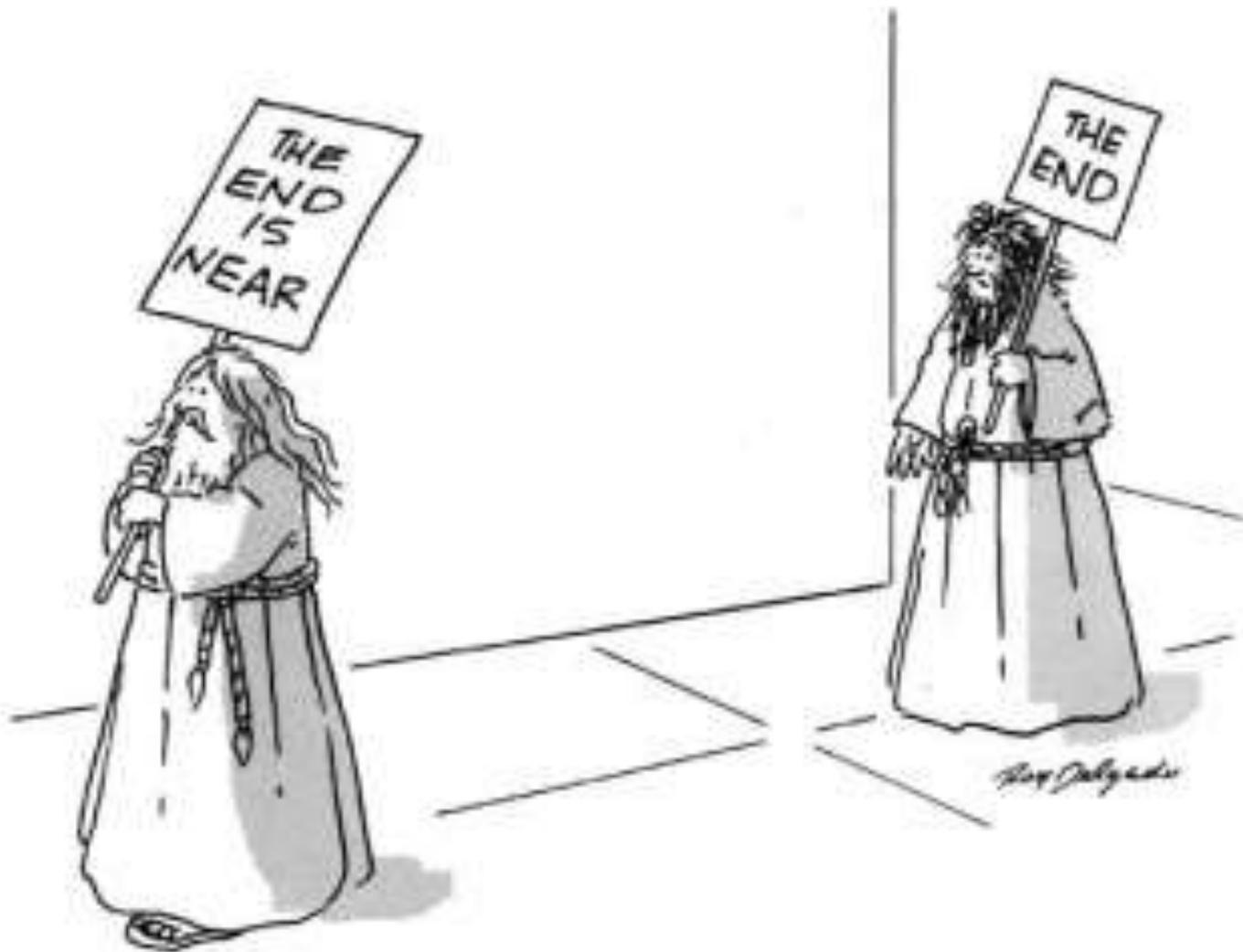
What can you do?

1. Promote Strategic Planning Roll Out at Sobor
2. Get your friends to sign up to work on an Implementation Team by completing the Implementation Volunteer Form at:
<https://stewardshipcalling.com/st-sophia-ukrainian-seminary> and submit it to Fr Theophan
3. Be positive and talk it up with everyone and recruit others to attend the Sobor roll-out and work on the implementation



QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES

Any Questions?



www.stewardshipcalling.com



Strategic Planning Tab



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

SOPHIA UKRAINIAN SEMINARY

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STSUOTS.ORG

Follow Me

QR Code for St. Sophia Page



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

Presentation materials for Strategic Planning Retreat April 22-24, 2025

ST. RAPHAEL – IOWA CITY

CHRIST THE SAVIOUR –

Special Thanks

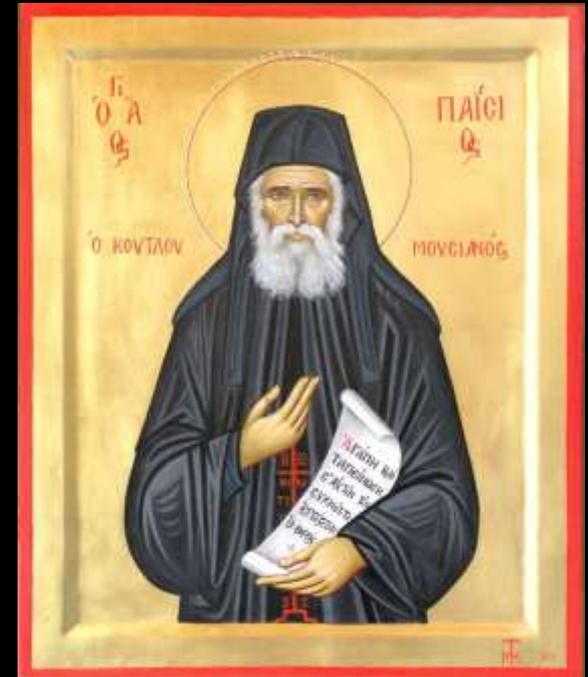
1. Metropolitan Antony

2. Fr. Theophan

3. All of you...



Tough Love



St. Paisios the Athonite

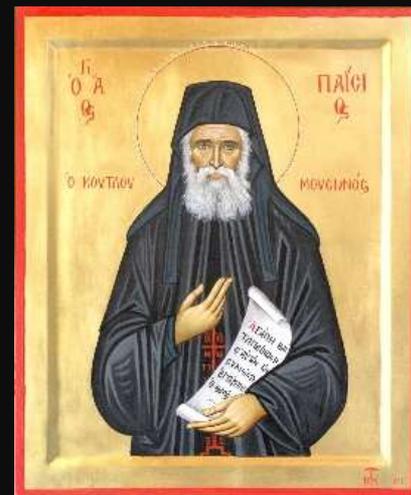
The spirit of luke-
warmness reigns.

We've been spoiled
for good.

How does God still
tolerate us?



St. Paisios the Athonite



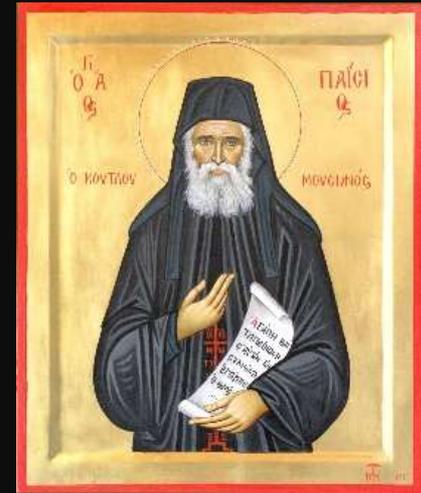
Today's generation
is the generation
of indifference.

There are no
Palikaria (warriors)!

The majority are
fit for parades and
feasts only.



St. Paisios the Athonite

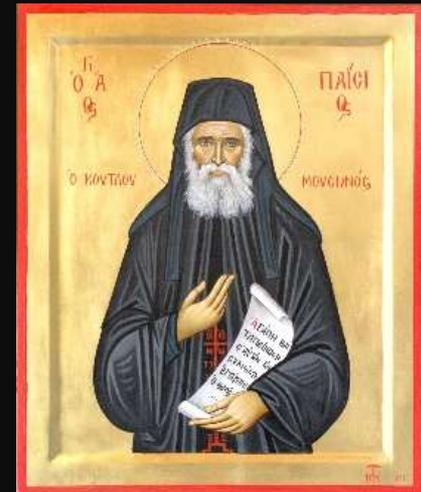


Even people who've
got something
inside have begun
to grow cool
saying,

Can I really do
anything to change
the situation ?



St. Paisios the Athonite



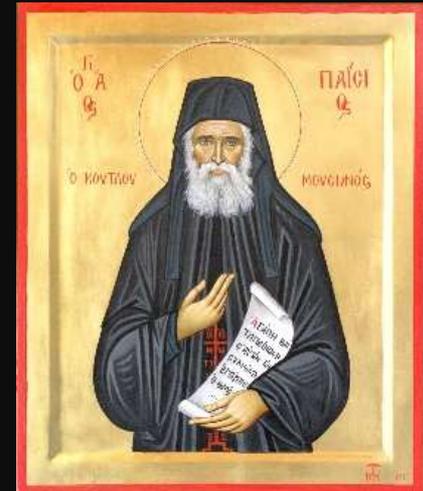
In these difficult days, **each must do** what is in their own power.

Leave what's out of their power to **GOD.**

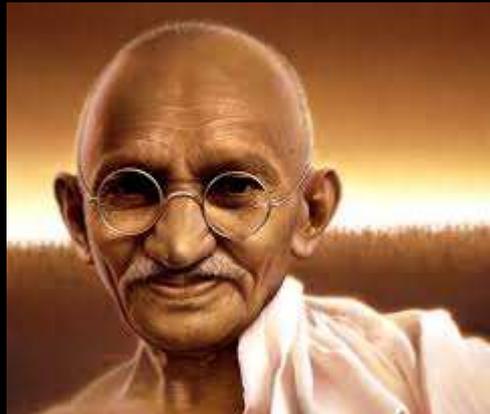
In this way, our **conscience will be clear.**



St. Paisios the Athonite



**“You must be the change
you wish to see in the
world.”**



Mahatma Gandhi



**“God doesn’t call
the qualified;**

**God
qualifies
the
called.”**





“The most basic task of the Church leader is to

- 1. discern the spiritual gifts of all those under his authority, and**
- 2. to encourage those gifts to be used**
- 3. to the full**
- 4. for the benefit of all.”**

“Only a person who can discern the gifts of others and can humbly rejoice at the flowering of those gifts is fit to lead the Church.”

A large, leafy tree dominates the left and center of the frame. Its branches are full of vibrant green leaves, creating a dense canopy. In the background, a red car and a white car are parked on a paved area. A person is sitting in a green folding chair in the shade of the tree, reading a book. The ground is a well-maintained green lawn.

“A society grows great
when old men and
women plant trees in
whose shade they
shall never sit.”

Greek Proverb



Old Chinese Proverb

**“The best time to plant a tree
was 20 years ago.**

The second best time is today.”

Persistence

“It is not the critic who counts; not the person who points out how the strong person stumbled or where the doer of deeds could have done them better.

The credit belongs to the person who is actually in the arena,

**whose face is marred by dust and sweat and blood;
who strives valiantly;
who errs and comes short again and again;
who knows great enthusiasms, the great devotions;
who spends themselves in a worthy cause;
who at the best, knows in the end the triumph of high achievement, and**

who, at the worst, if they fail, at least fail while daring greatly so that their place shall never be with those timid souls who neither know victory nor defeat.”



President Theodore Roosevelt



Why Are We Doing 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.”

2 Corinthians 5:10
Divine Liturgy



St. Paisios the Athonite and WHY

“After our death, when we come face to face with Christ, we will understand the why and how of our lives, and will be told everything we went through in this world.

Then with all the power of our existence we will say to Him, ‘Thank you my God, for allowing these for me!’ ”



Leaders of a church will either be risk takers, or church caretakers who will eventually become its undertaker.



SAINT SOPHIA
UKRAINIAN ORTHODOX SEMINARY

WHY Statement

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

“Either lead, follow
or get out of the way.”



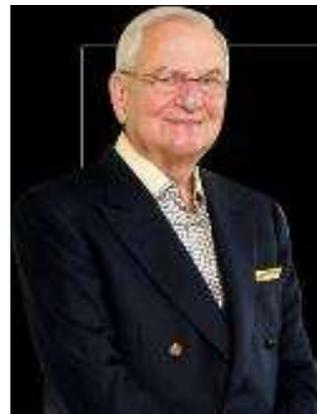
Ted Turner



Thomas Paine



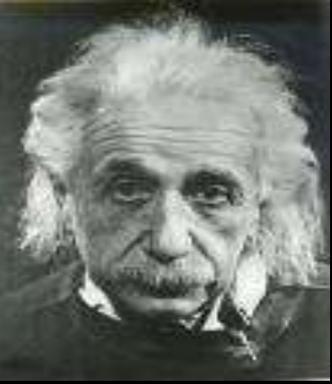
General George S. Patton



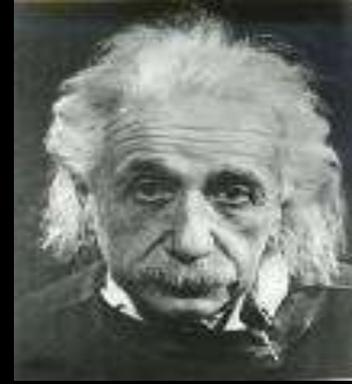
Lee A. Iacocca



Bill Marianes



Albert's Insight



- ❖ What was Albert Einstein's greatest contribution?
- ❖ ~~$E=mc^2$~~

“NOTHING HAPPENS UNTIL
SOMETHING MOVES”

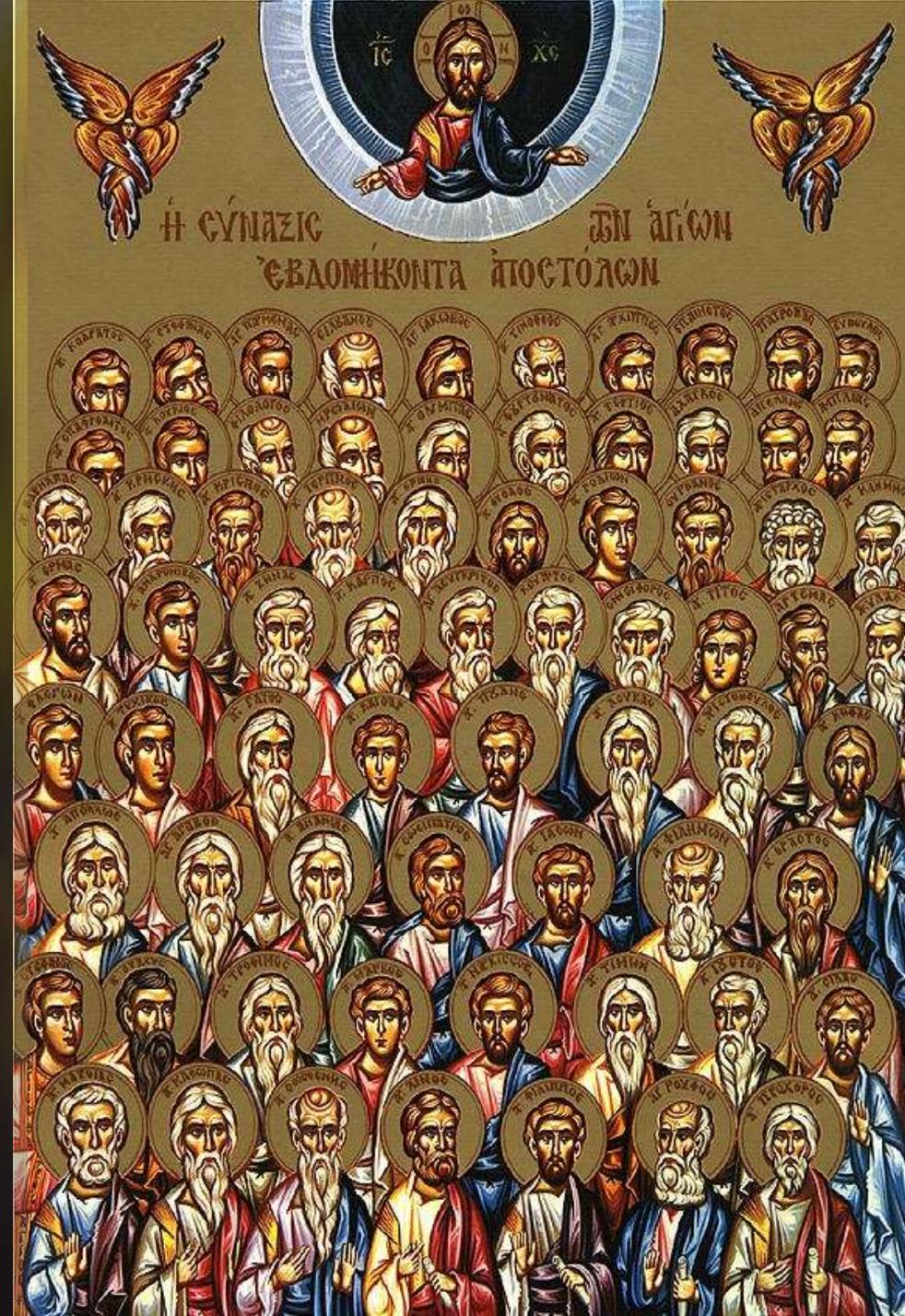


The Marianes Corollary

**“NOTHING HAPPENS
UNTIL SOMEBODY
MOVES”**

You have
now been
called as
one of the
70 Disciples

Luke 10:1





SAINT SOPHIA

UKRAINIAN ORTHODOX SEMINARY

Strategic Plan Final Retreat

Bill Marianes



STEWARDSHIP
CALLING