



CHRIST THE SAVIOR ACADEMY

***Vision &
Strategic
Planning Core
Team Meeting
9-30-25***

Bill Marianes
www.stewardshipcalling.com



STEWARDSHIP
CALLING

1. SWOT / EPA / OCAI Analysis
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



1. Core team of 5-6 people to facilitate entire process

2. Core Team pick schedule and timeline

3. Core team selects SPT invitees (need twice as many invitees as final desired SPT)

4. Board Chair and Head Master send out invitation letters to all invitees explaining process and with FAQ, etc.

5. SPT Invitees had 2 weeks to respond

6. Core team follows up with invitees not yet responding

7. Process begins with SPT completing "advanced assignments," and entire school community (and possibly parish community) complete SWOT

SPT Makeup

Entire School Board

Headmaster and any principals

Several faculty representatives (of various age groups)

Major donors/sponsors

Parish Council Presidents or their appointees

Several representatives from both parishes

A few responsible students (and graduates) with confidence

Selected SPT Criteria

YES:

- ~ Who must be a part of the team
- ~ Many different perspectives
- ~ Many diverse gifts
- ~ All major constituencies
- ~ Team-players
- ~ Intelligent
- ~ Strategic thinkers and not small thinkers
- ~ Creative
- ~ Visionaries + futurists not rooted in the past
- ~ Articulate
- ~ Engaged
- ~ Faithful
- ~ Intellectually honest
- ~ Well-adjusted
- ~ Genuinely care about doing the right thing
- ~ Can leave their egos at the door
- ~ Must represent all areas and all different constituencies (young/old, non-ethnic/ethnic, urban/rural, professional/non-professional, convert/cradle, men/women, incidental/intentional, etc.)

SPT members must be willing to dedicate a fair amount of time over the next 6-7 months

NO:

- ~ serial arsonists
- ~ “know-it-alls”
- ~ non-team players
- ~ mean-spirited folks
- ~ inarticulate thinkers or talkers
- ~ people who say nothing
- ~ people who can't stop talking
- ~ malcontents
- ~ people who are so sad/mad/angry/hostile that they cannot see beyond their own circumstances.
- ~ not just the same “usual suspects”



ZOOM SUMMARY OVERALL TIMETABLE

TASK

DATES

**Pick and Recruit SPT & Solicit “SWOT”
Data from Board, Parents & Parishioners**

**Why Discovery Zoom (part 1)
Why Discovery Zoom Part 2)**

SWOT Determination Zoom

**Core Values, Mission Statement & Strategic
Area of Focus Determination Zoom**

**SAF Teams Determine SMART Goals
And Action Plans (2-3 Zooms per SAF)**

Final SPT Retreat

Public rollout event



CHRIST THE SAVIOR ACADEMY

Vision & Strategic Planning Process

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STEWARDSHIP
CALLING

“The domain of
the Leader is the

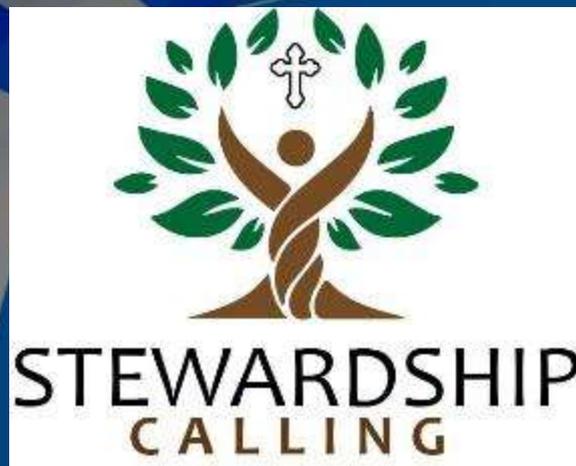


The work of the
leader is
change.”



Dr. James Kouzes

Consensus Vision and Strategic Planning



A journey ...

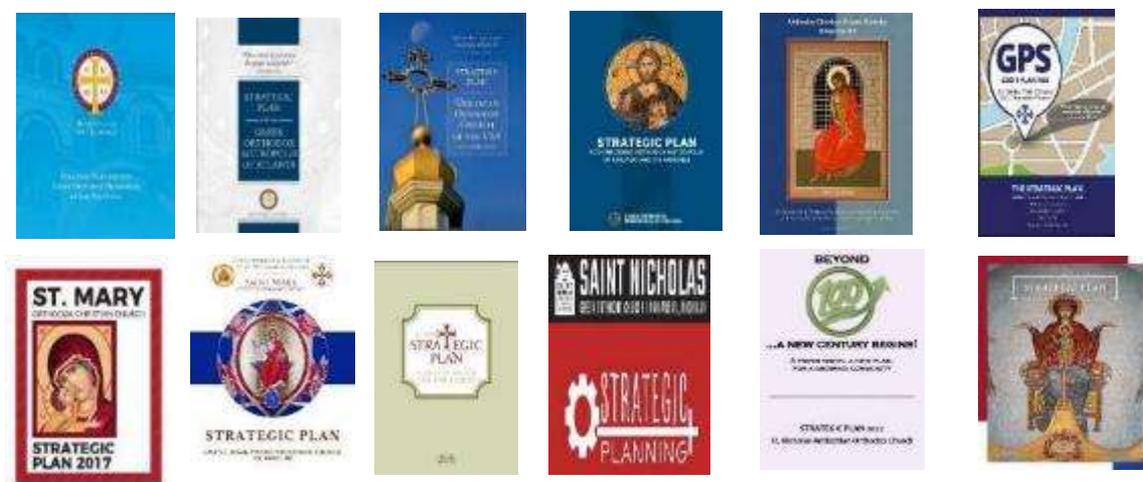
... 455,000+ airlines miles over 30 years

*...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 U.S. Orthodox Christians



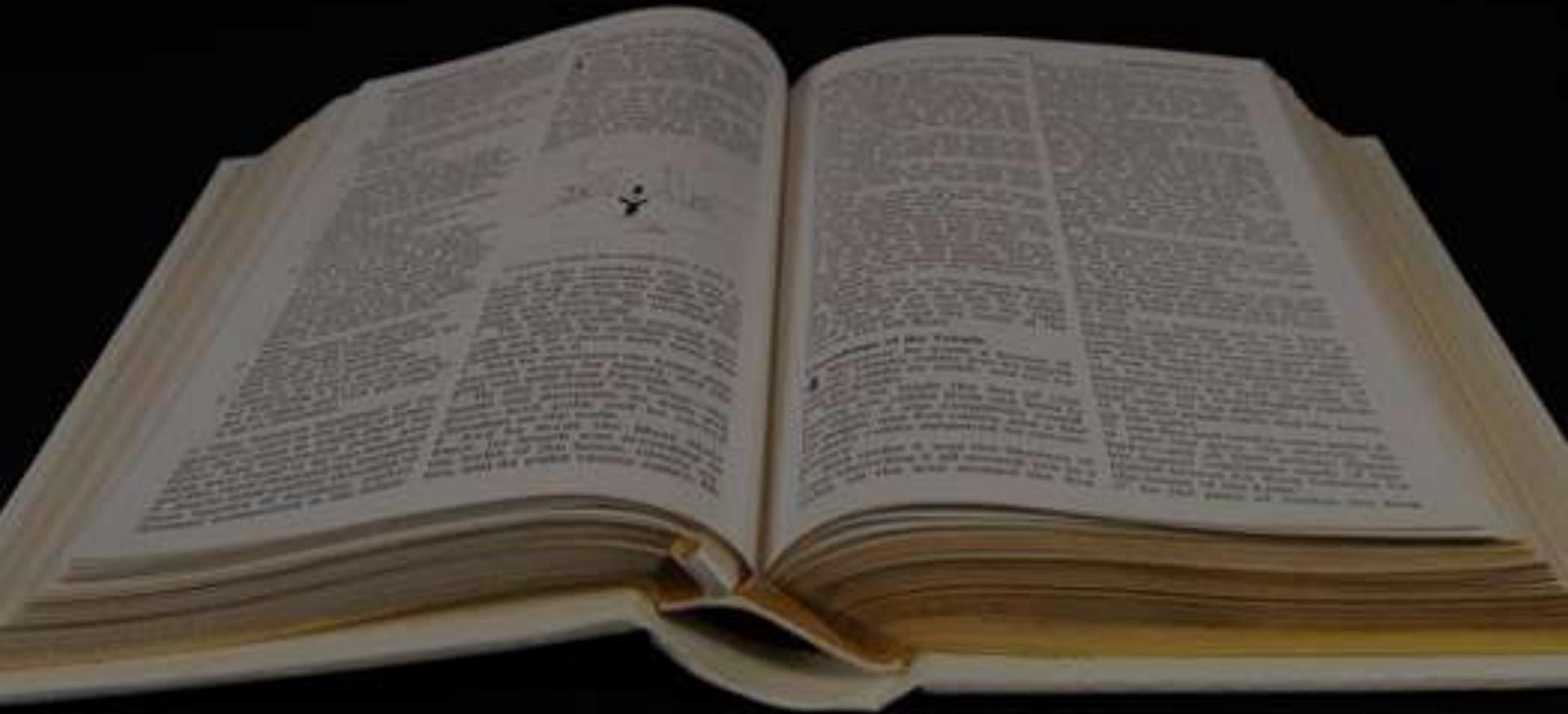
GOA Metropolis of San Francisco
Ukrainian Orthodox Church of the USA
GOA Metropolis of Atlanta
OCA Diocese of New England
GOA Metropolis of Chicago
OCA Diocese of Midwest
Sts. Mark, Mary, Philopater Coptic (Troy, MI)
Annunciation Cathedral (Atlanta, GA)
Sts. Raphael, Nicholas & Irene (Cumming, GA)
Dormition 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)
St. Sophia Seminary (S.Bound Brook, NJ)
Ugandan Orthodox Church

(Many more currently in progr



Strategic Planning is Biblical





Where there is
no vision, the
people perish.

Proverbs 29:18

A process to:

1. **manage the “busyness” of our School without turning our School 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

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10 Strategic Plan Deliverables





Question 1:

**WHY do we
exist?**

WHY Statement

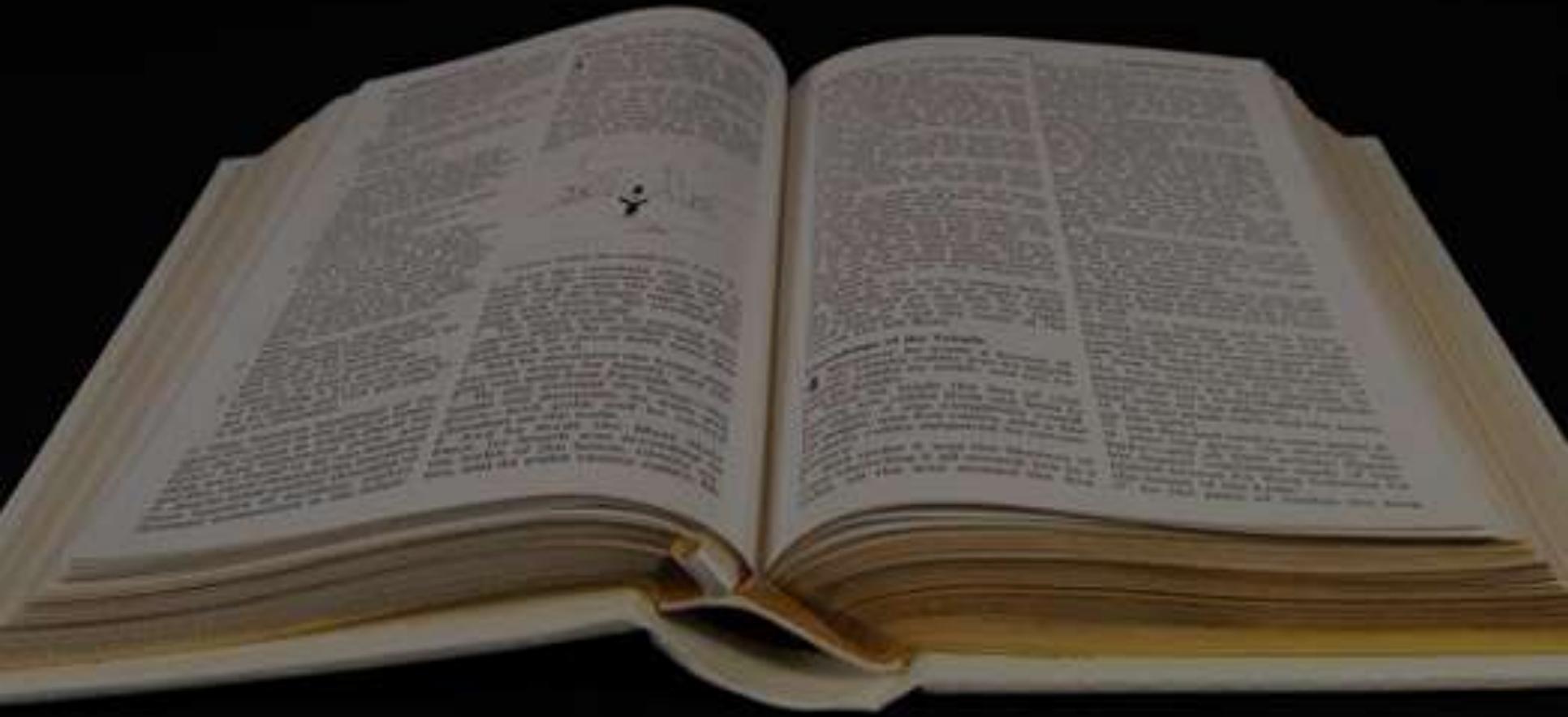
Answers strategic planning question #1:

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

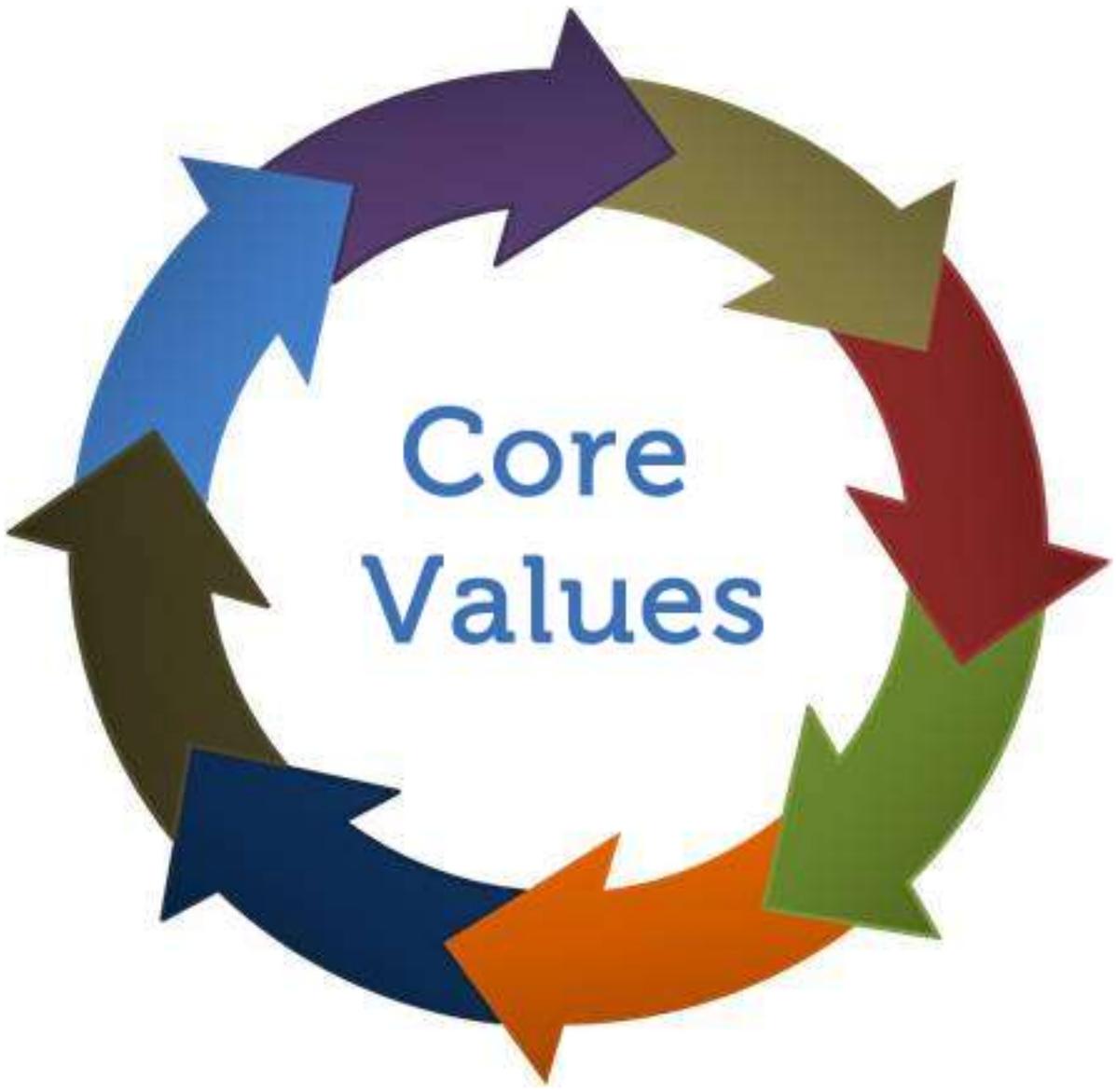
WHY Statement

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



OCPM WHY Statement

To share the love of Christ and His Church with those who are incarcerated and their families so that lives are transformed and God is glorified.

A circular diagram consisting of seven thick, curved arrows pointing clockwise. The arrows are colored in a sequence: purple, olive green, red, green, orange, dark blue, and brown. In the center of the circle, the words "Core Values" are written in a blue, sans-serif font.

Core
Values

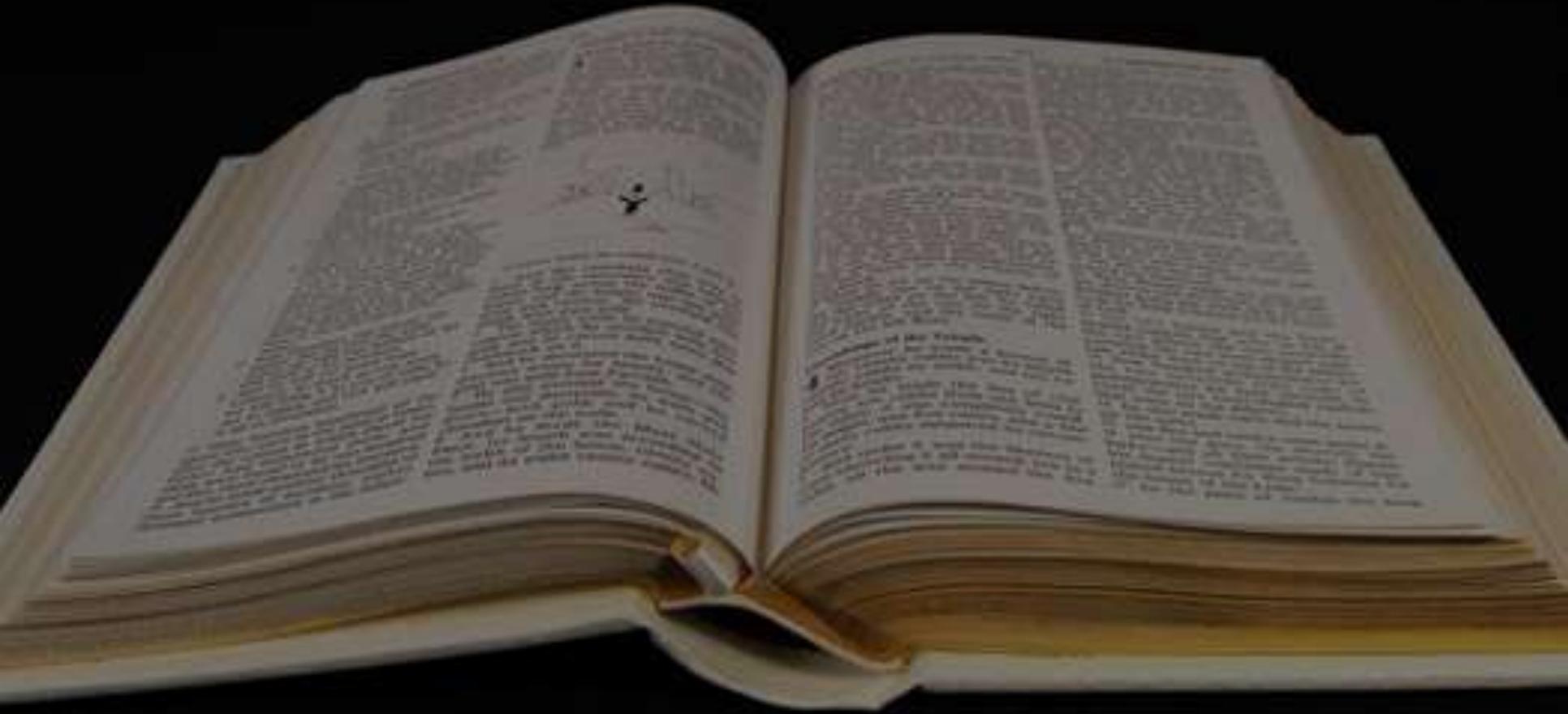


1. Beliefs shared by the stakeholders

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

3. Provide a framework for decisions

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



Welcome!
To Sts. RNI Greek Orthodox Church

Core Values

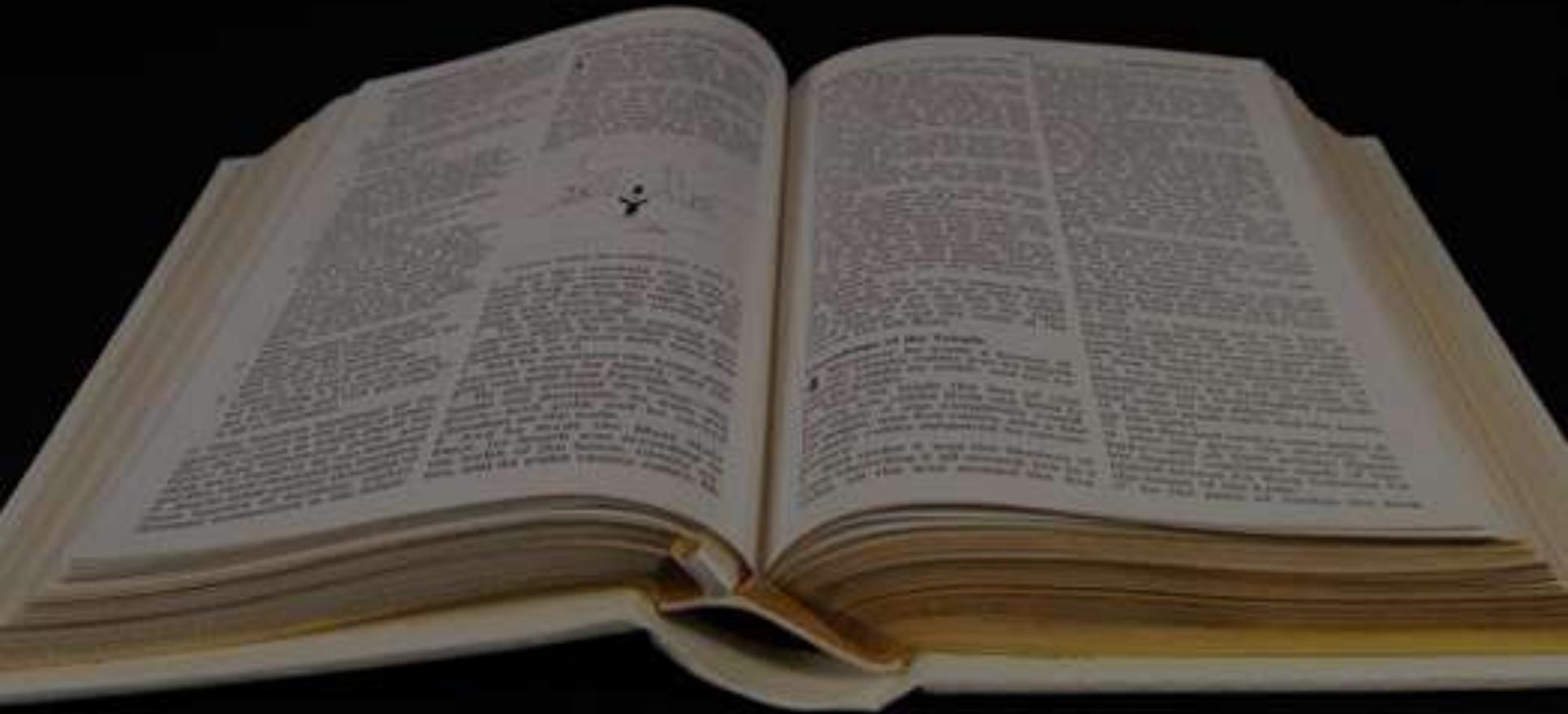
Intentionally Orthodox
Community
Agape Love
Christ-focused



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

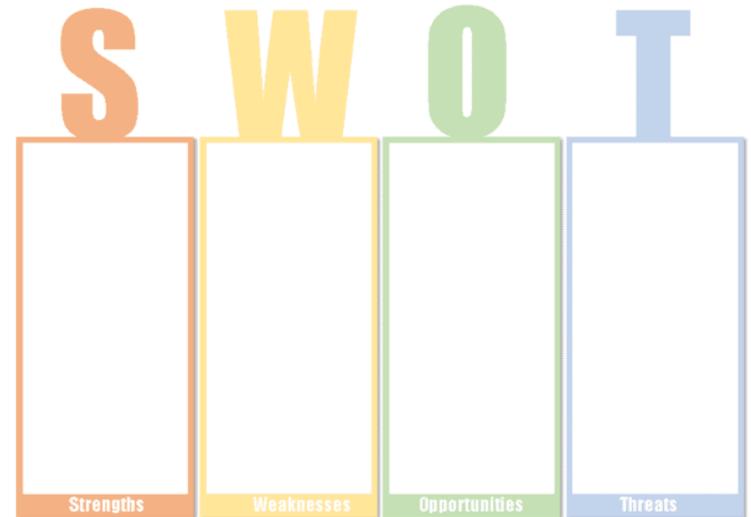
SWOT ANALYSIS

Answers strategic planning question #2:

Where are we now?

~ First focus on INTERNAL School Strengths and Weaknesses

~ Second focus on EXTERNAL Opportunities and Threats that our School faces



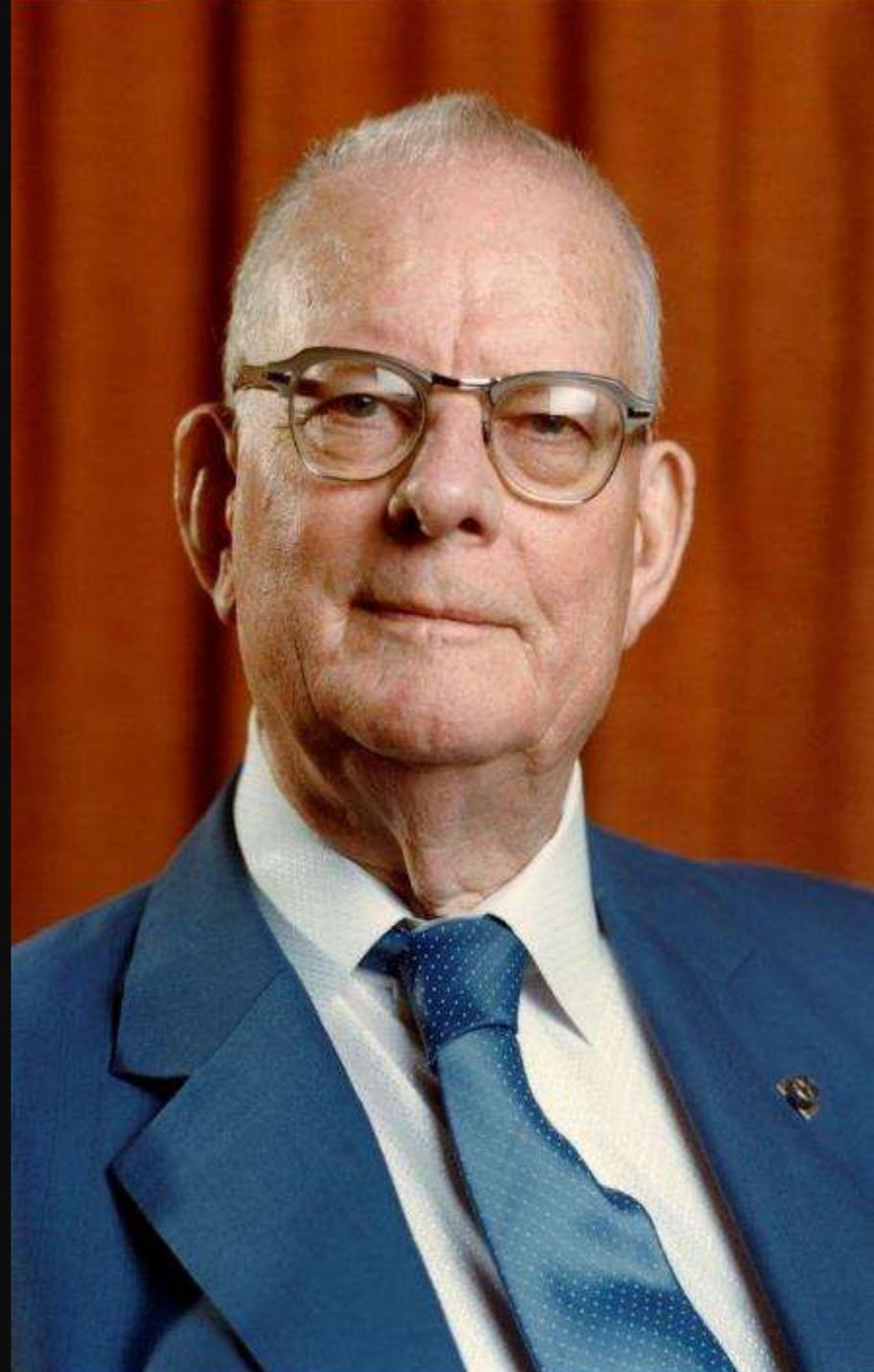
Who Owns The Problem?

“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)**





Question 3:

**Where do we
want to be?**



Mission

Statement

Mission Statement

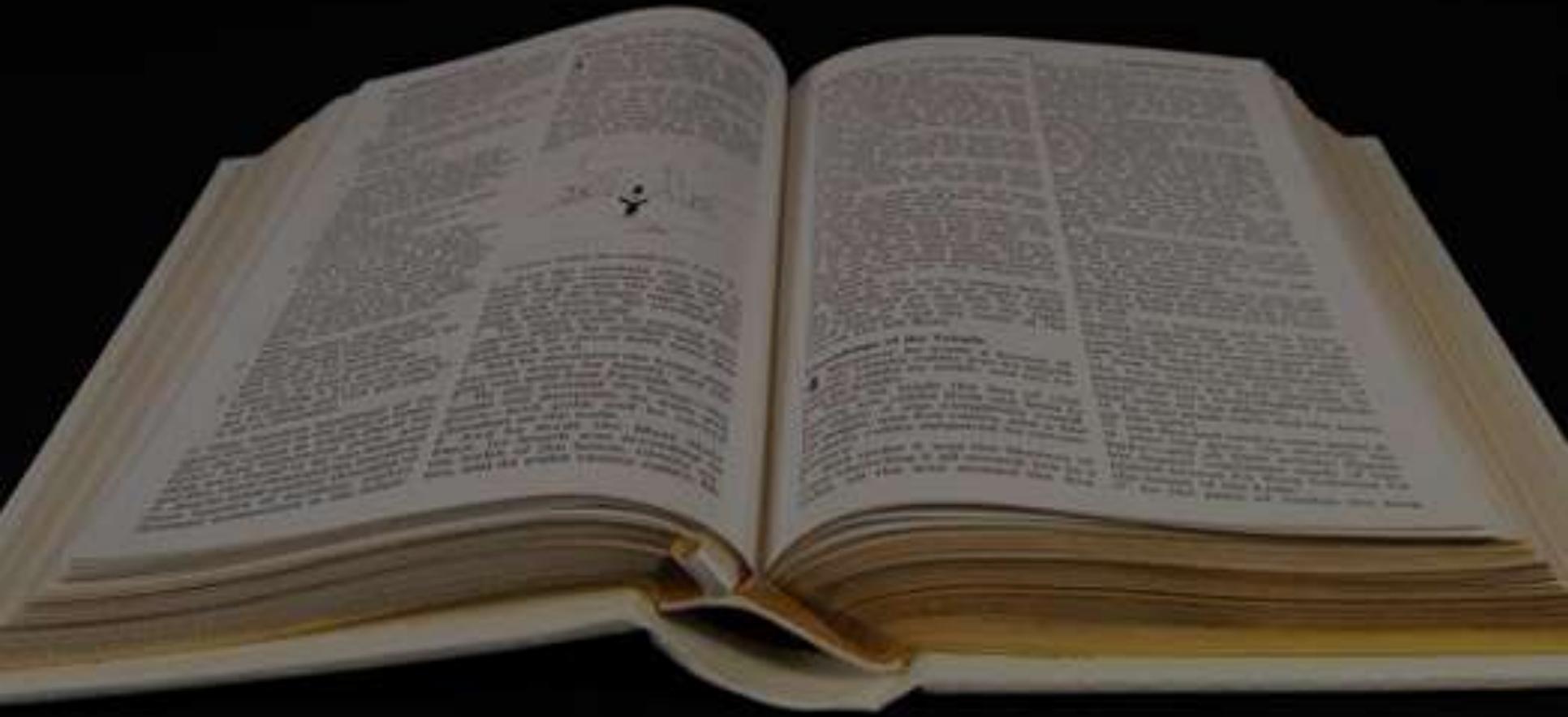
Answers strategic planning question #3:

What do we do?

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



A Mission Statement Is Biblical



The Great Commission Mission Statement

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



Matthew 28:18-20



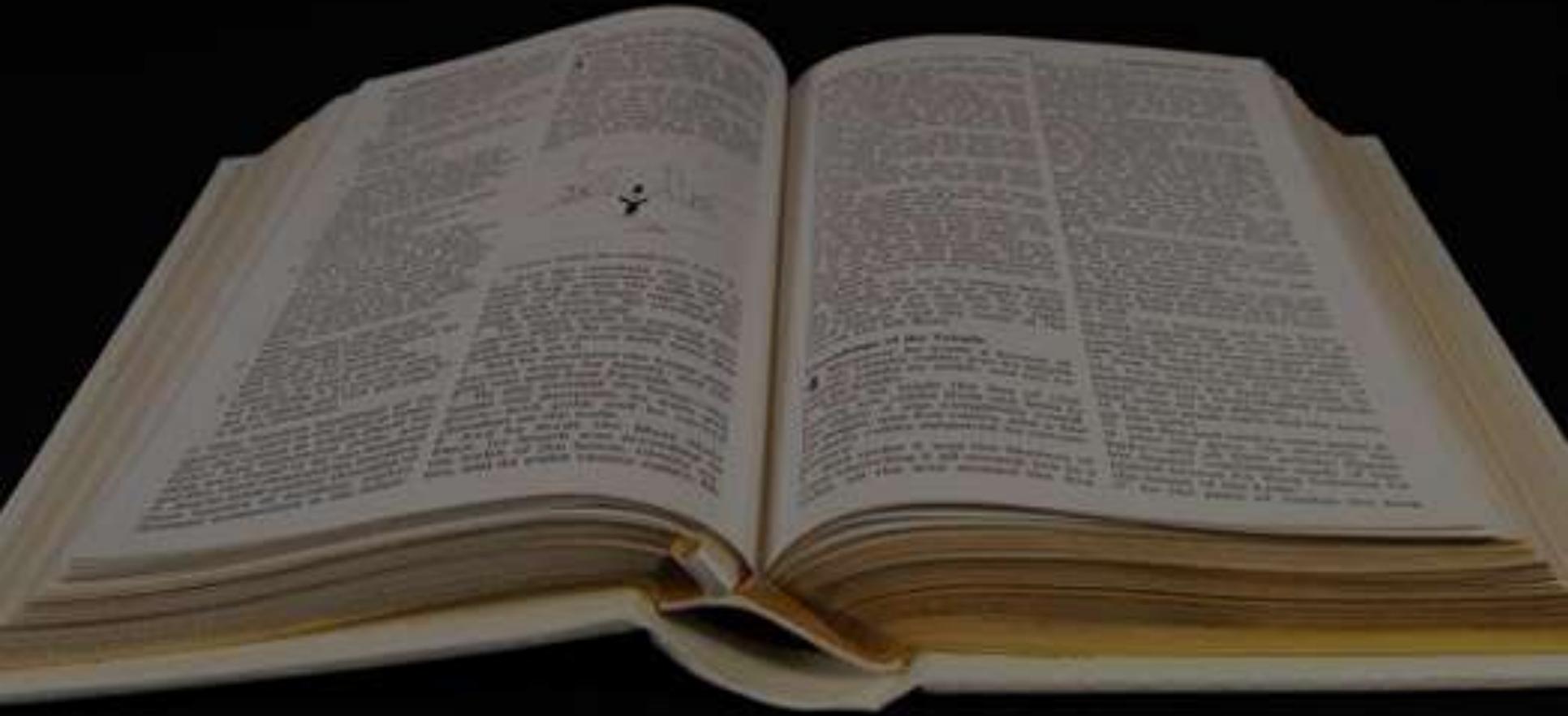
OCPM Mission Statement

To serve those who are incarcerated and their families, and provide resources, training and support to our ministry partners.



VISION

A Vision Statement Is Biblical



Vision

Acts 1:8

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



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...



OCPM Vision Statement

Within 4 years OCPM will:

P - *Partner* with affiliates and other

R - *Refine* and develop *Resources* and model

I - *Inspire* through effective communications

S - *Serve* those who are incarcerated and

O - *Optimize* organizational and financial performance

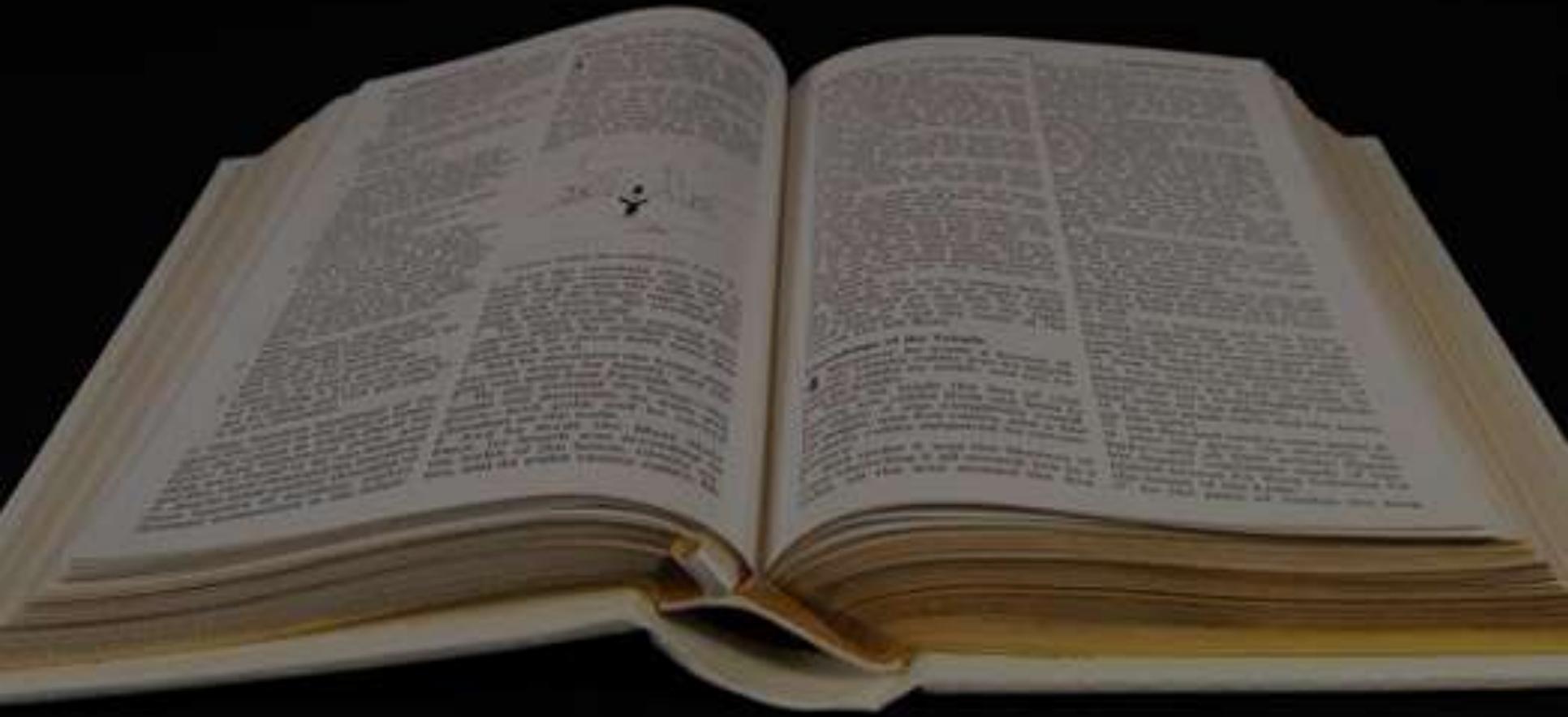
N - be a *Nationally-recognized* ministry leader

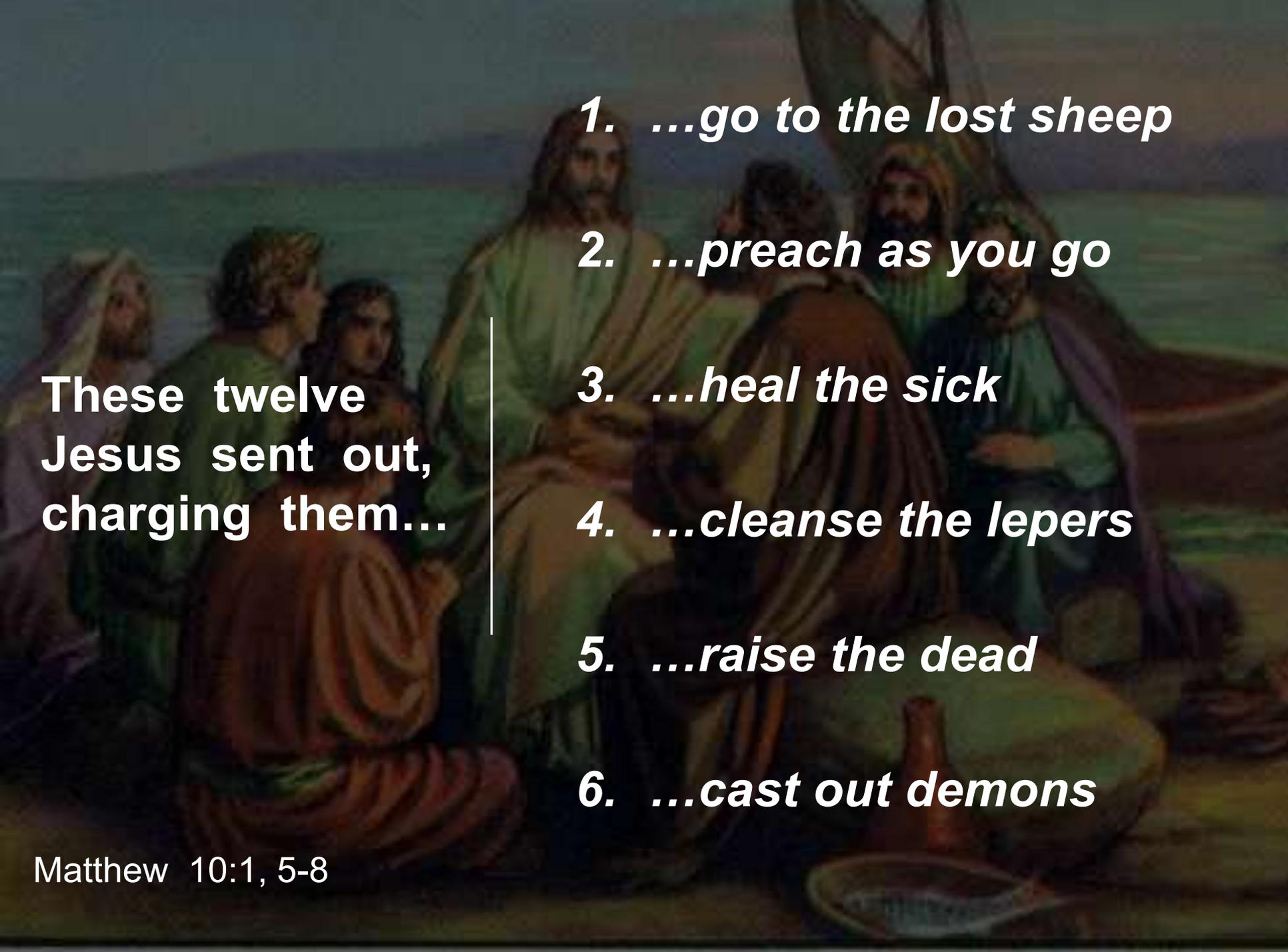


Question 4:

**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*

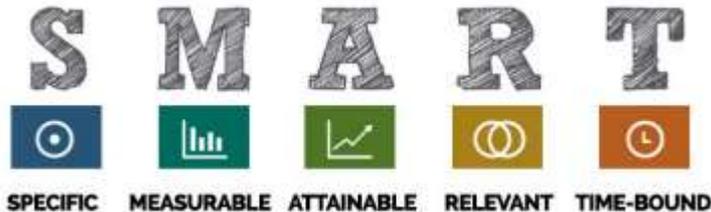
4. *...cleanses the lepers*

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

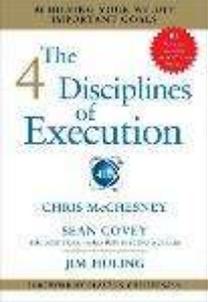
Specific: Is the goal clear and specific enough to be understandable?

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 excellence¹
- ~ Focus on the most critical things produces larger scale positive impacts
- ~ “The few things that can change everything.”

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



**Sample Parish Strategic
S.M.A.R.T. Goal and
Implementation Action Plan**

Fundraising & Team Expansion

Within 14 months, we will develop and begin to implement a comprehensive fundraising plan that will allow us to completely fund the entire OCPM operating budget, including funding for expanded programs and other initiatives arising from our Strategic Plan.

Fundraising and Team Expansion Action Plan

Specific Key Actions Necessary To Achieve Strategic Goal <u>3.1</u>	Who Must Do Each <u>Action</u>	Timetable: How Many Months or Days To Finish Action From <u>Previous Action</u>	How Will We Know When This Action Has <u>Been Completed</u>
1. Form Fundraising & Team Expansion Goal 3.1 Task Force (“F&TE3.1TF”).	Strategic Planning Team and Goal Captain	1 month from Start Date	F&TE3.1TF team members agree to serve
2. Research and gather information on fundraising programs and best practices used by other national Orthodox and non-Orthodox nonprofit organizations.	F&TE3.1-TF	3 months after step 1	Research completed and summarized
3. Gather and analyze OCPM historical fundraising data and donor capacity/fatigue of current annual givers, and obtain budgetary needs from all current and projected expanded OCPM programs.	F&TE3.1TF	Simultaneously with step 2	Information gathered and analyzed
4. Create 3 year forecast of comprehensive fundraising goals (both reasonable & stretch goals), using historical data, best practices, and taking into consideration the budgetary needs of expanded programs and initiatives.	F&TE3.1TF	2 months after step 3 (assuming other task forces have provided funding/budget needs)	3 year forecast completed
5. Using best practices identified in step 2, historical data gathered in step 3, and forecasting from step 4, develop a comprehensive OCPM Fundraising Strategy, Development Action Plan, and Evaluation Process and determine if Development Officer services are needed, and if so, refer to F&TE3.3TF.	F&TE3.1TF and OCPM Board	4 months after step 4	Fundraising Strategy, Development Action Plan, and Evaluation Process is completed and approved by the OCPM Board

Fundraising and Team Expansion Action Plan

<u>Specific Key Actions Necessary To Achieve Strategic Goal 3.1</u>	<u>Who Must Do Each Action</u>	<u>Timetable: How Many Months or Days To Finish Action From <u>Previous Action</u></u>	<u>How Will We Know When This Action Has Been <u>Completed</u></u>
6. Begin Implementation of Fundraising Strategy in accordance with Development Action Plan, including raising initial funding for and recruitment of additional development staff as dictated by Action Plan.	F&TE3.1TF, OCPM Board and Executive Director	4 months after step 5	Development Action Plan is implemented
7. Implement a follow-up assessment and measurement system to assess ongoing effectiveness and ensure constant alignment with overall organizational goals. Update Fundraising Strategy and Action Plan based on assessment of results.	F&TE3.1TF, Board Development Committee and OCPM Board	Starting 3 months after step 6, and continuously every 3 months thereafter	Fundraising Strategy is revised as needed and success is measured



ZOOM SUMMARY OVERALL TIMETABLE

TASK

TIME

**Pick and Recruit SPT & Solicit “SWOT”
Data from Board, Parents & Parishioners**

1-2 months after start

Why Discovery Zoom (part 1&2)

During SWOT compilation

SWOT Determination

2-3 weeks later

**Core Values, Mission Statement
& Strategic Area of Focus Determination**

2-3 weeks later

**SAF Teams Determine SMART Goals
And Action Plans (2-3 Zooms per SAF)**

during next 8 weeks

Final SPT Retreat

2-3 weeks later

Public rollout event

1 month later

“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**

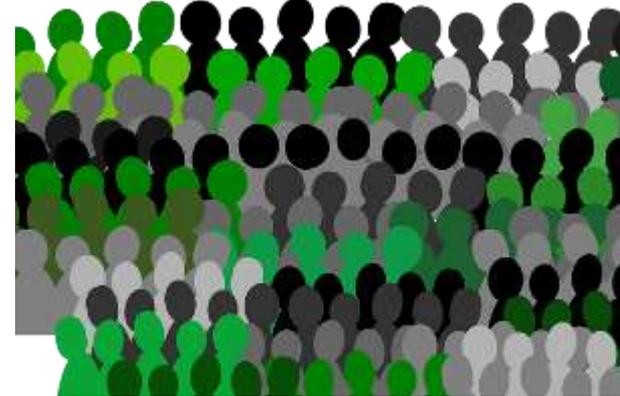


Ecclesiastes 4:9-10

It Takes 3 Teams

School Community

Input throughout process from all Stakeholders (Board, Clergy, Faculty and Staff, Parents & Parishioners)



Strategic Planning Team

6+ Board, 2 Clergy, HM, 3 faculty, 5 parents (not parishioners) 2+ St Mary's and 5+ St George parishioners who analyze the data and help draft a Strategic Plan



Implementation Team

A larger diverse group of stakeholders who implement all Strategic Goals and Action Plans



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

***and every one
members one of
another.***



Romans 12:5

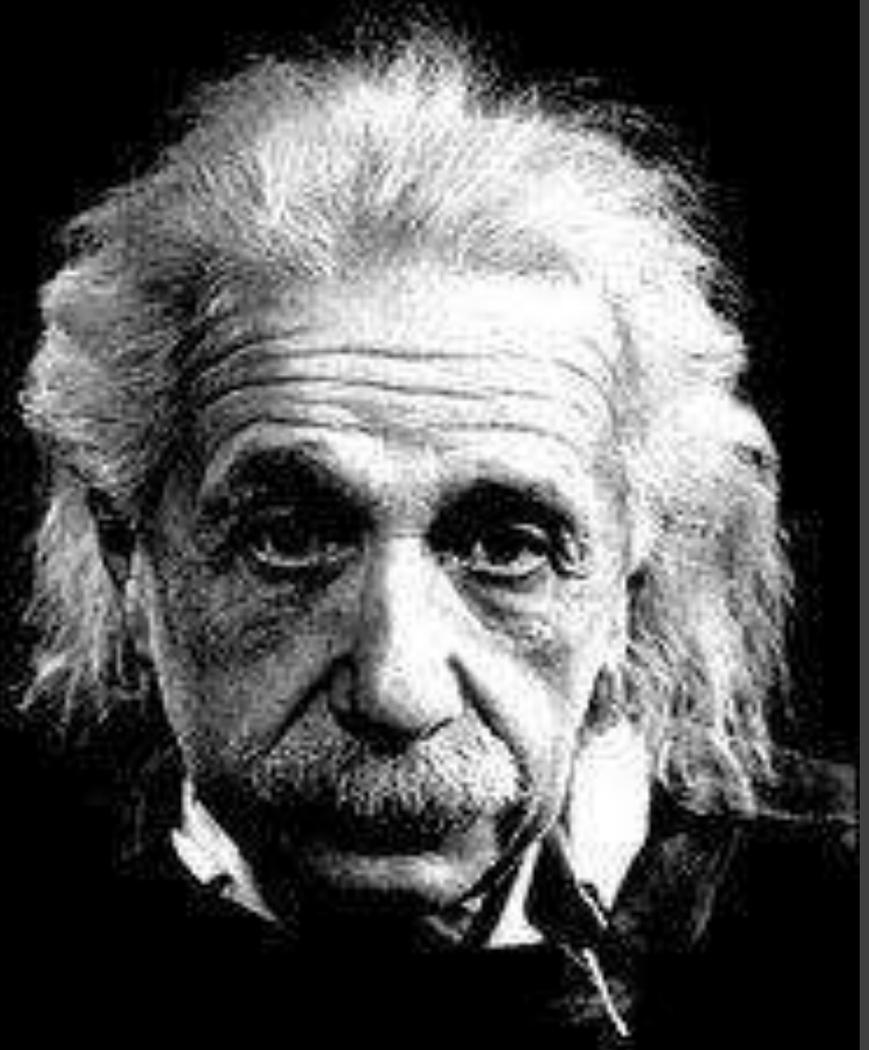
Sun Tzu



“Strategy without tactics is the slowest route to victory.

Tactics without strategy is the noise before defeat.”

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



Albert Einstein

Two Process Keys



Rules of Engagement & Consensus

Rules Of Engagement

ROEs

- 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”**

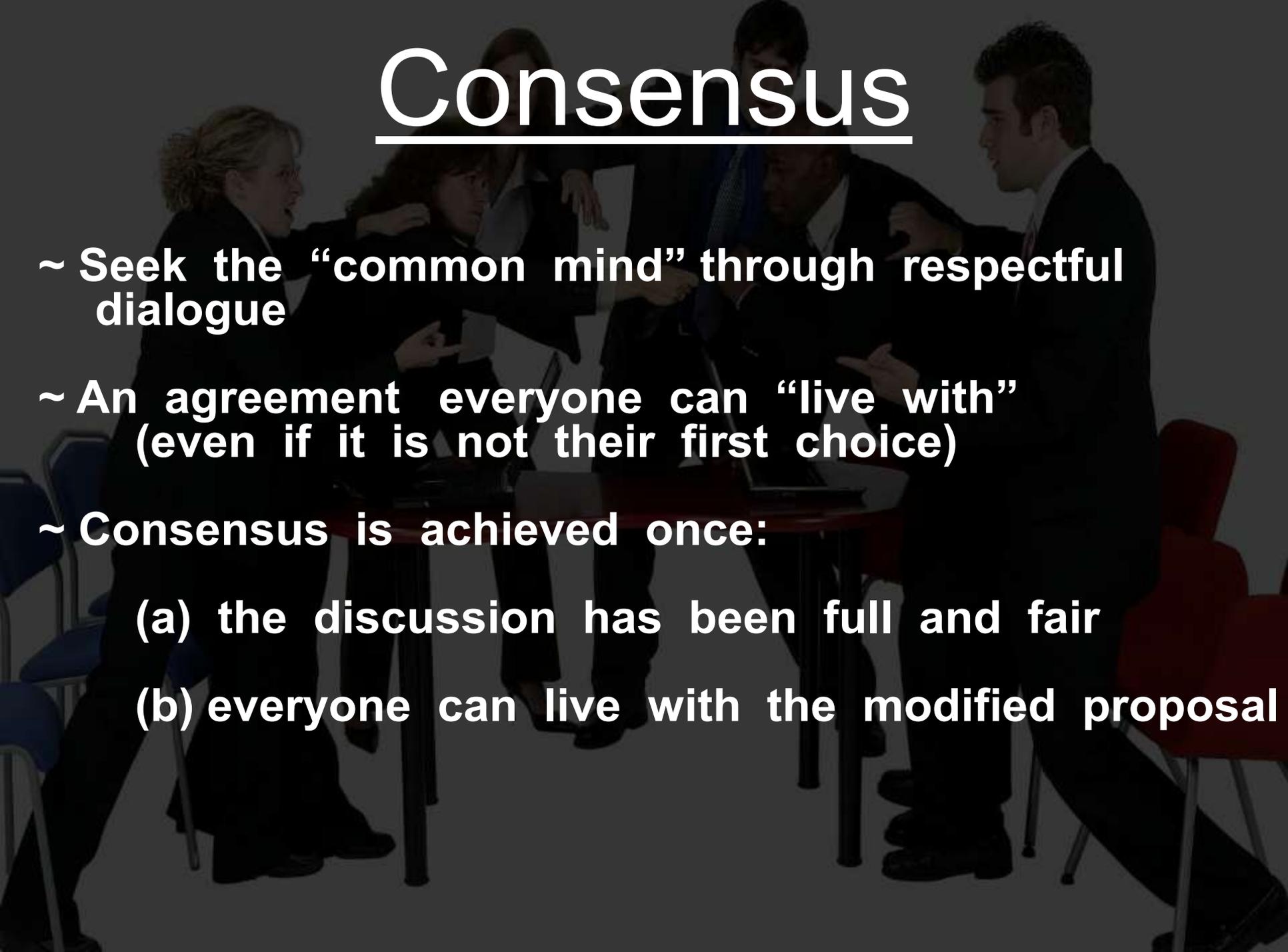


- 11. No defensiveness**
- 12. NO “Discussion Killers”**
- 13. Think strategically**
- 14. Speak precisely and succinctly**
- 15. We are members of the Body of Christ treating everyone with love and respect and allowing the Holy Spirit to participate freely**



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 overlaid in white on a dark, semi-transparent 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

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



QUESTIONS
ANSWERED
HERE
EVEN THE
SILLY ONES

Any Questions?

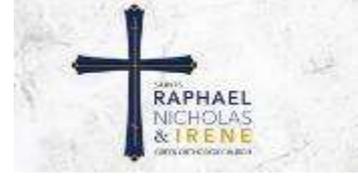


STEWARDSHIP
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***Vision &
Strategic
Planning for
Ministries***

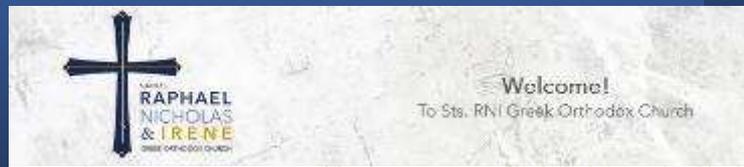
Bill Marianes
www.stewardshipcalling.com

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**



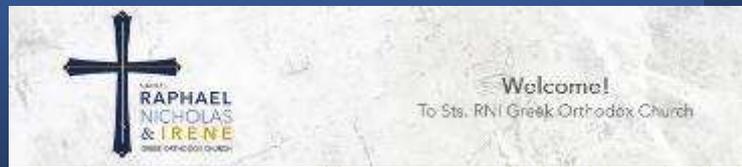
Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 3 months			
1. Form Stewardship & Engagement Program Team (S&EPT).	SPT and S&EPT Goal Co-Captains	1 month after Start Date	S&EPT members agree to serve
2. Determine adult and youth stewardship, tithing, ministry engagement, and planned giving key definitions and effectiveness metrics.	S&EPT	1 month after step 1	Definitions and metrics determined
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.	S&EPT	1 month after step 2	Parish baselines and parish impediments determination are finalized
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.	S&EPT	Simultaneous with steps 2 & 3	At least 3 stewardship & engagement, 3 percentage giving/ tithing, and 3 planned giving programs are examined



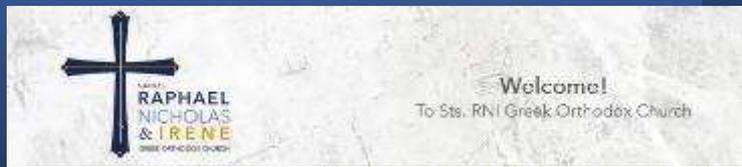
Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
Interim Goal 2: Develop the most effective Stewardship & Engagement Program within 3 months			
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.	S&EPT	1 months after step 4	Evaluation of alternative stewardship & ministry engagement, tithing, and planned giving programs is completed
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 & Engagement Program”) and establish monthly performance benchmarks and comprehensive communications strategy and plan.	S&EPT	2 months after step 5	Stewardship & Engagement Program is finalized, and monthly performance benchmarks are determined
Interim Goal 3: Recruit and train Ambassadors within 2 months			
7. Identify and recruit personal visitation ambassadors/small group leaders (“Ambassadors”) who can implement the Stewardship & Engagement Program.	S&EPT	1 month after step 6	Ambassadors are recruited
8. Train Ambassadors to implement the Stewardship & Engagement Program.	S&EPT	1 month after step 7	Ambassadors are trained



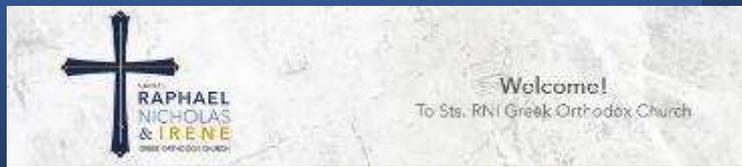
Stewardship & Engagement Action Plan

<u>Actions Steps</u>	<u>Responsible Party</u>	<u>Deadline</u>	<u>Completion Test</u>
<u>Interim Goal 4: Implement the Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets within 24 months</u>			
9. Implement Stewardship & Engagement Program to achieve the Stewardship & Engagement Targets.	Ambassadors	24 months after step 8	Stewardship & Engagement Program is fully launched
10. Track and report on monthly performance benchmarks determined in step 6 and continue Ambassadors follow-up with parishioners until Stewardship & Engagement Targets are achieved	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>
<u>Interim Goal 5: Compile and assess the results of the Stewardship Program and make necessary improvements within 2 months</u>			
11. Obtain and compile qualitative and quantitative data from Stewardship & Engagement Program and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement.	Ambassadors and S&EPT	1 month after step 10	Stewardship & Engagement Program assessments are completed
12. Finalize and deliver Stewardship & Engagement Program assessment analysis report, and make all refinements necessary to make the Stewardship & Engagement Program more effective based on information identified in step 11.	Ambassadors and S&EPT	1 month after step 11	Analysis is completed, and Stewardship & Engagement Program 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 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		