



ST. SOPHIA, Ss. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH

Strategic Planning Retreat 2

Bill Marianes



STEWARDSHIP
CALLING



[StewardshipCalling.com](https://stewardshipcalling.com)

Stewardship Calling
What are you doing with all of the gifts God has given you?

Strategic Planning

Scroll down to St. Sophia page

| WHY? | STEWARDSHIP | STRATEGIC PLANNING | INTERNET RADIO & PODCASTS | KEYNOTES & LEADERSHIP | RESOURCES |
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| PERSONAL | | HOLY ORTHODOX CHURCH OF UGANDA | | | |
| | | ST. SOPHIA JEFFERSONVILLE, PA STRATEGIC PLAN | | | |
| | | SAMPLE S.M.A.R.T GOAL & ACTION PLANS | | | |
| | | BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING | | | |
| | | ST. SOPHIA UKRAINIAN SEMINARY | | | |

St. Sophia Jeffersonville
By the grace of God, the transformational and collaborative work of Father Symeon Williams and an additional 40+ parishioners Strategic Planning Team

ST. SOPHIA, Ss. FAITH, HOPE & AGAPE
ORTHODOX CHURCH OF VALLEY FORGE
A Greek Orthodox Church in Jefferson, PA. is undertaking a strategic planning process. This incredible work is under the inspired leadership of a dedicated Core Team. This Core Team will be supplemented with an Strategic Planning Team. The ongoing work of our very diverse and extensive

<https://stewardshipcalling.com/st-sophia-jefferson-pa-strategic-plan/>

TODAY
is the
day
we...



A sunset over a body of water with a small boat in the distance. The sky is filled with colorful clouds in shades of orange, red, and purple, reflecting on the water. The sun is low on the horizon, creating a bright glow. A small boat is visible in the middle ground on the water.

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

Peter Drucker



Why Are We Doing This?

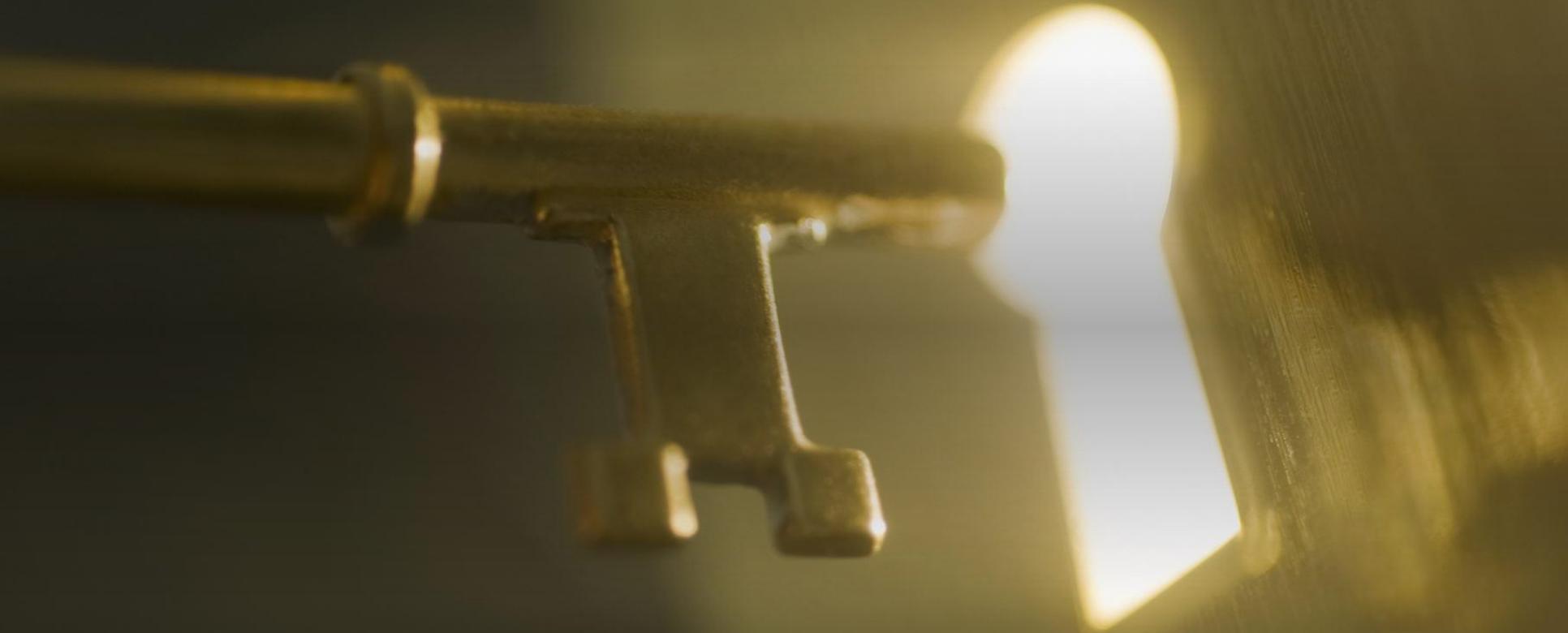
“That the end of our lives may be Christian, without pain, blameless and peaceful, and for a good account at the awesome judgment seat of Christ.”

2 Corinthians 5:10
Divine Liturgy



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

Two Process Keys



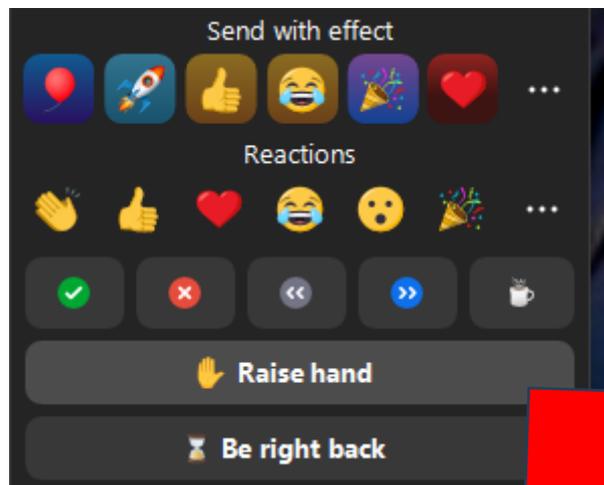
Rules of Engagement & Consensus

- 1. We stay on schedule**
- 2. Everyone is equal**
- 3. We interact confidentially.**
- 4. Ask questions**
- 5. We'll 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."**

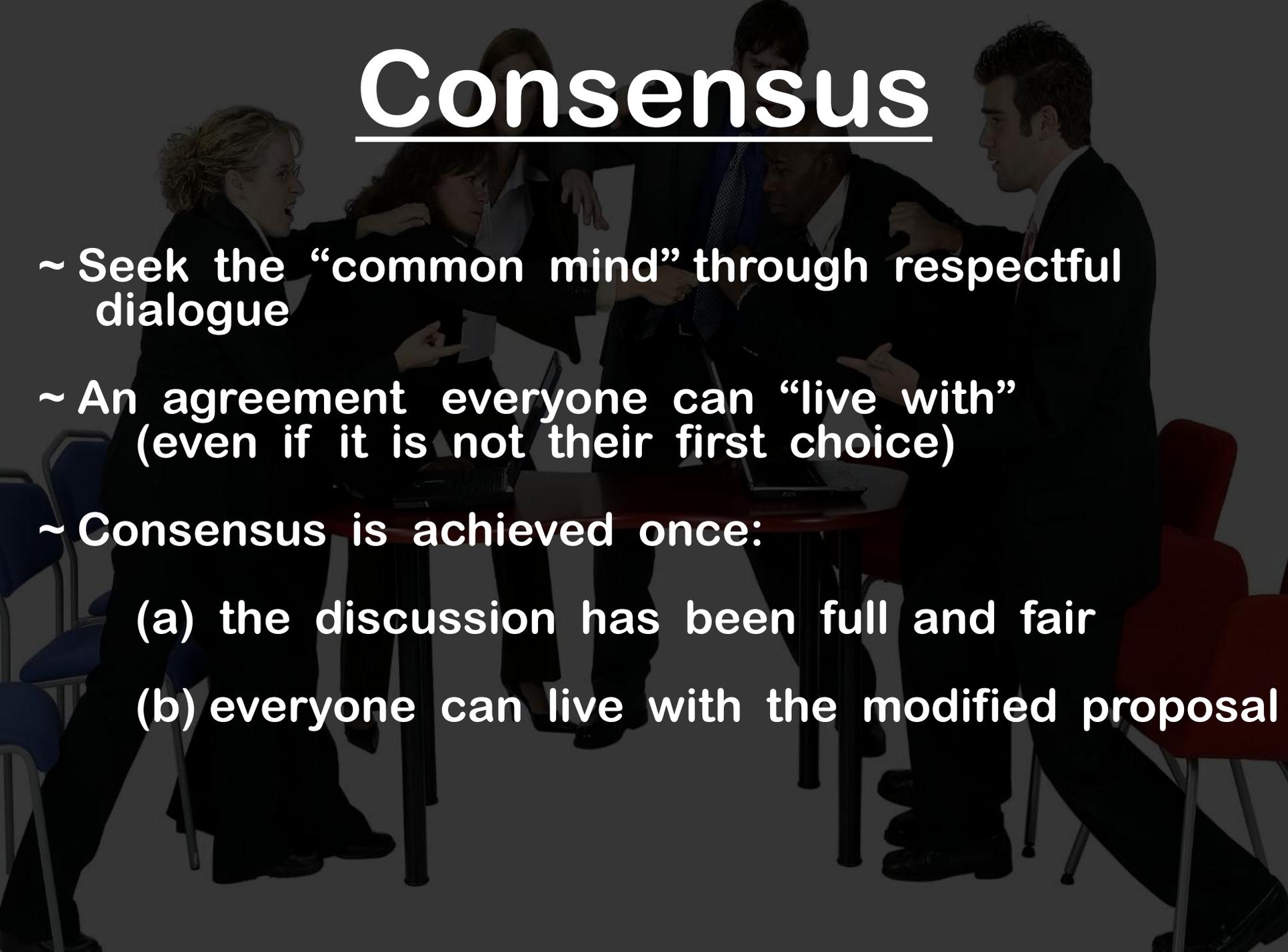


- 11. No defensiveness.**
- 12. NO "Discussion Killers."**
- 13. Think strategically and outside the box.**
- 14. Speak precisely and succinctly.**
- 15. We are members of the Body of Christ treating everyone with love and respect and allowing the Holy Spirit to participate freely.**

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



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



ST. SOPHIA, SS. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH

WHY Statement

To glorify God, serve all through love, and live a purposeful life in Christ.

S

STRENGTHS



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GREEK ORTHODOX CHURCH

S

STRENGTHS

STRENGTHS

Loving & Welcoming Community

Facilities & Location

Fr. Symeon

**Diverse Parishioners (including
Hellenic Heritage)**



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WEAKNESSES

Stewardship & Ministry Engagement

Church Services and Worship Participation

Youth & Young Adults



OPPORTUNITIES



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GREEK ORTHODOX CHURCH



OPPORTUNITIES

OPPORTUNITIES

Technology, Social And New Media

Location & Community Opportunities

**Greater Numbers Of Seekers & Interest In
Orthodoxy**

T

THREATS



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GREEK ORTHODOX CHURCH

T

THREATS

THREATS

Secularization & Cultural/Societal Shifts

Economic & Financial

Technology & Media

Politics & Polarization

**Competition From Other Religions &
Competing Sports/Activities**



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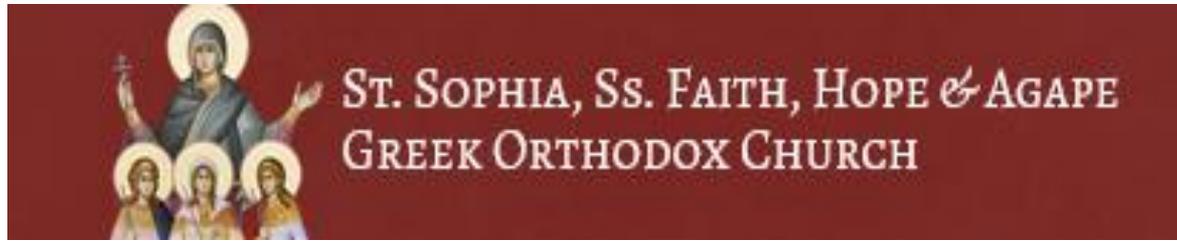
Core Values

**Christ-Centered Worship &
Prayer**

Welcoming Community

Love

Stewardship



Mission Statement

We welcome all to grow in and share our Orthodox Christian faith through love, stewardship, education, and service.



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GREEK ORTHODOX CHURCH

Strategic Areas of Focus

- 1. Stewardship & Engagement**
- 2. Religious Formation & Worship Participation**
- 3. Youth & Young Adults**

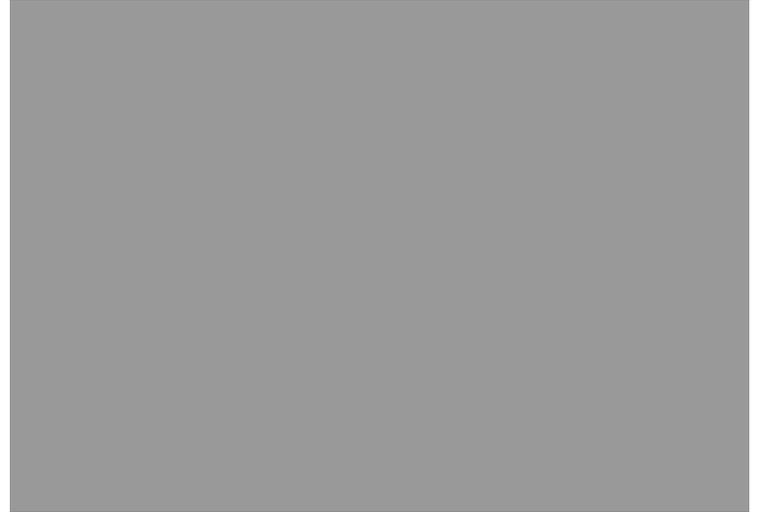


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“Low Hanging Fruit” Tactical Work



- ~ Communications**
- ~ Leadership & Succession**
- ~ Catechesis & Education**



TIME FOR
SOMETHING
NEW!



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GREEK ORTHODOX CHURCH

Vision Statement

We will use effective best practices to achieve the measurable targets in the Strategic Goals to materially improve:

- (a) Stewardship & Engagement within 34 months,**
- (b) Religious Formation & Worship Participation within 47 months, and**
- (c) Youth and Young Adult Programs & Engagement within 47 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



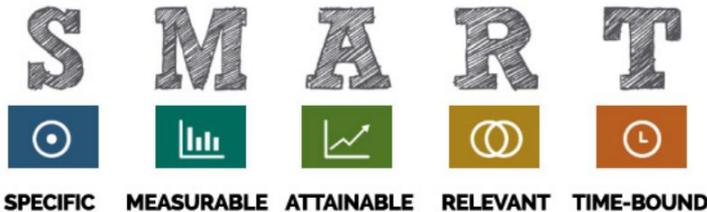
RELEVANT

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?

Stewardship & Engagement Goal & Action Plan



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

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

- (a) Transition the parish stewardship program to teach all parishioners to become percentage givers on the journey to becoming at least 10% tithers;**
- (b) Increase the adult and youth ministry engagement so that at least: (i) 70% of parishioners are actively engaged in a ministry after the first year of implementation; and (ii) 80% of parishioners are actively engaged in a ministry after the second year of implementation;**
- (c) Parishioner stewardship contributions cover at least: (i) 80% of all parish operating expenses after the first year of implementation; and (ii) 95% of all parish operating expenses after the second year of implementation;**
- (d) Implement a planned giving campaign in which at least 30% of parishioners participate within two years of implementation.**

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 Ministry Team (S&EMT). | SPT and S&EMT Goal Co-Captains | 1 month after Start Date | S&EMT members agree to serve |
| 2. Determine adult and youth stewardship, tithing, ministry engagement, and planned giving key definitions, data, and effectiveness metrics. | S&EMT | 1 month after step 1 | Definitions and metrics determined |
| 3. Analyze the adult and youth parish baselines on those key stewardship, tithing, ministry engagement, and planned giving metrics, survey/research parish impediments to achieving increased stewardship, tithing, ministry engagement, and planned giving success. | S&EMT | 1 months after step 2 | Parish baselines and parish impediments determination are finalized |
| 4. Identify at least 2-3 ministry engagement, 2-3 stewardship, percentage giving/tithing, and 2-3 planned giving programs to consider from both inside and outside the Orthodox ecosystem. | S&EMT | Simultaneous with steps 2 & 3 | At least 2-3 of each of stewardship, ministry engagement & 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, Ministry Engagement & Planned Giving Ministry within 3 months | | | |
| 5. Evaluate researched adult and youth stewardship, tithing, ministry engagement, and planned giving programs for effectiveness against key parish performance metrics and baselines based on criteria of effectiveness determined in step 2. | S&EMT | 1 month 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 ministry programs for utilization at the parish (the “SMEPG Ministry”) and establish monthly performance benchmarks and comprehensive communications strategy and plan. | S&EMT | 2 months after step 5 | SMEPG Ministry is finalized, and monthly performance benchmarks are determined |
| Interim Goal 3: Recruit and train Ambassadors within 2 months | | | |
| 7. Identify and recruit stewardship personal visitation (“Ambassadors”) who can implement the SMEPG Ministry. | S&EMT | 1 month after step 6 | Ambassadors are recruited |
| 8. Train Ambassadors to implement all aspects of the SMEPG Ministry. | S&EMT | 1 months after step 7 | Ambassadors are trained |

Stewardship & Engagement Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|--------------------------|-----------------------------|---|
| <u>Interim Goal 4: Implement the Stewardship, Engagement & Tithing Ministry to achieve the Stewardship & Engagement Targets within 24 months</u> | | | |
| 9. Fully implement the SMEPG Ministry to achieve the Stewardship & Engagement Targets. | Ambassadors | 24 months after step 8 | SMEPG Ministry 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 |
| <u>Interim Goal 5: Compile and assess the results of the Stewardship, Engagement & Tithing Ministry and make necessary improvements within 2 months</u> | | | |
| 11. Obtain and compile qualitative and quantitative data from SMEPG Ministry and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement. | Ambassadors and S&EMT | 1 month after step 10 | SMEPG Ministry assessments are completed |
| 12. Finalize and deliver SMEPG Ministry assessment analysis report and make all refinements necessary to make the SMEPG Ministry more effective. | Ambassadors and S&EMT | 1 month after step 11 | Analysis is completed, and SMEPG Ministry is refined accordingly |

Stewardship & Engagement Action Plan

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

***Religious
Formation &
Worship
Participation
Goal & Action Plan***



Religious Formation & Worship Participation SMART Goal

We will research, develop, and implement best practices and effective “Religious Formation Programs” in each of the following eight areas with a comprehensive communications plan where within 47 months we will achieve the following “Religious Formation Targets” after implementation of the following Religious Formation Programs:

1. A “Bible Study & Religious Text Program” will be offered live and via Zoom: (i) at least 50 parishioners regularly attending by the end of year 1, (ii) at least 75 parishioners regularly attending by the end of year 2, and (iii) at least 100 parishioners regularly attending by the end of year 3; and (iv) at least 30 parishioners agreeing to completely read the Bible each year.
2. A parish “Religious Formation Media Center” will be created that engages at least 50 parishioners at least weekly by providing on the parish website, email, text messaging and social media and other platforms at least 75 items of Religious Formation and spiritual growth content over the course of each year with specific metrics of delivery, opening, viewing, reading, and engaging to be determined in step 2 of the Action Plan.
3. The parish will implement a “Congregational Singing Ministry” engaged in by at least 55% of parishioners attending Sunday Divine Liturgy within 12 months of implementation.
4. At least one personal prayer life education program will be delivered that at least 50 parishioners complete each year, with 75% of participants self-reporting in an annual qualitative survey that they have experienced a material increase in their prayer life effectiveness.
5. Increase regular Sunday Divine Liturgy attendance to: (a) at least 175 parishioners by the end of year one, (b) at least 200 parishioners by the end of the year two, and (c) at least 250 parishioners by the end of the year three.
6. Increase regular Sunday Orthos attendance to: (a) at least 40 parishioners by the end of year one, (b) at least 60 parishioners by the end of the year two, and (c) at least 75 parishioners by the end of the year three.
7. Increase average attendance at church service other than Sunday Divine Liturgy to: (a) at least 40 parishioners by the end of year one, (b) at least 60 parishioners by the end of the year two, and (c) at least 75 parishioners by the end of the year three.
8. Increase the percentage of parishioners attending the Divine Liturgy who will take Holy Communion to: (a) at least 75% by the end of year one, (b) at least 80% by the end of the year two, and (c) at least 85% by the end of the year three.

Religious Formation Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|----------------------------|-------------------------------------|--|
| Interim Goal 1: Research the most effective Religious Formation Programs within 3 months | | | |
| 1. Form Religious Formation Team (RFT). | SPT and RFT Co-Captains | 1 month after Start Date | RFT members agree to serve |
| 2. Determine Religious Formation key definitions and effectiveness metrics for each of the eight SMART Goal religious formation (collectively the “Religious Formation Programs”). | RFT | 1 months after step 1 | Religious Formation Programs key definitions and metrics determined for all eight elements |
| 3. Analyze the parish baseline on those key Religious Formation effectiveness metrics and survey parishioners to determine what Religious Formation content they need and what delivery modalities they will use regularly and how best to achieve the Religious Formation Targets | RFT | 1 month after step 2 | Parish baselines, and content delivery vehicle and frequency of Religious Formation content is finalized |
| 4. Identify at 2-3 best practices examples of <u>each</u> of the Religious Formation Programs from both inside and outside the Orthodox ecosystem. | RFT | Simultaneous with steps 2 & 3 | At least 2-3 alternatives of each of the eight elements of the Religious Formation Program are examined |

Religious Formation Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|--------------------------|-----------------------|---|
| <u>Interim Goal 2: Develop the most effective Religious Formation Programs within 4 months</u> | | | |
| 5. Evaluate all the researched Religious Formation Programs items from step 4 for effectiveness against key performance metrics and parish baselines based and criteria of effectiveness determined in step 2 and determine details of every Religious Formation program and modalities. | RFT | 2 months after step 4 | Evaluation of alternative Religious Formation Programs is completed |
| 6. Finalize development of all eight Religious Formation Programs and establish monthly performance benchmarks to achieve each of the Religious Formation Targets. | RFT | 2 months after step 5 | Religious Formation Programs are finalized, and monthly performance benchmarks are determined |
| <u>Interim Goal 3: Recruit and train Religious Formation Educators Leaders within 2 months</u> | | | |
| 7. Identify and recruit Religious Formation Programs “Educators” who can help teach and implement each of the Religious Formation Programs | RFT | 1 month after step 6 | Educators are recruited |
| 8. Train Educators to implement the Religious Formation Programs. | RFT | 1 month after step 7 | Educators are trained |

Religious Formation Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|--------------------------|--|--|
| <u>Interim Goal 4: Implement the Religious Formation Program to achieve the Religious Formation Targets within 36 months</u> | | | |
| 9. Implement Religious Formation Programs to achieve the Religious Formation Targets. | Educators | Continuously over 36 months after step 8 | Religious Formation Programs are fully launched |
| 10. Track and report on monthly performance benchmarks determined in step 6 and continue Educators follow-up with parishioners until Religious Formation Targets are achieved. | Educators | Contemporaneous with step 9 | Established monthly Religious Formation Targets are achieved |

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

Parochial School Action Plan – Part 2

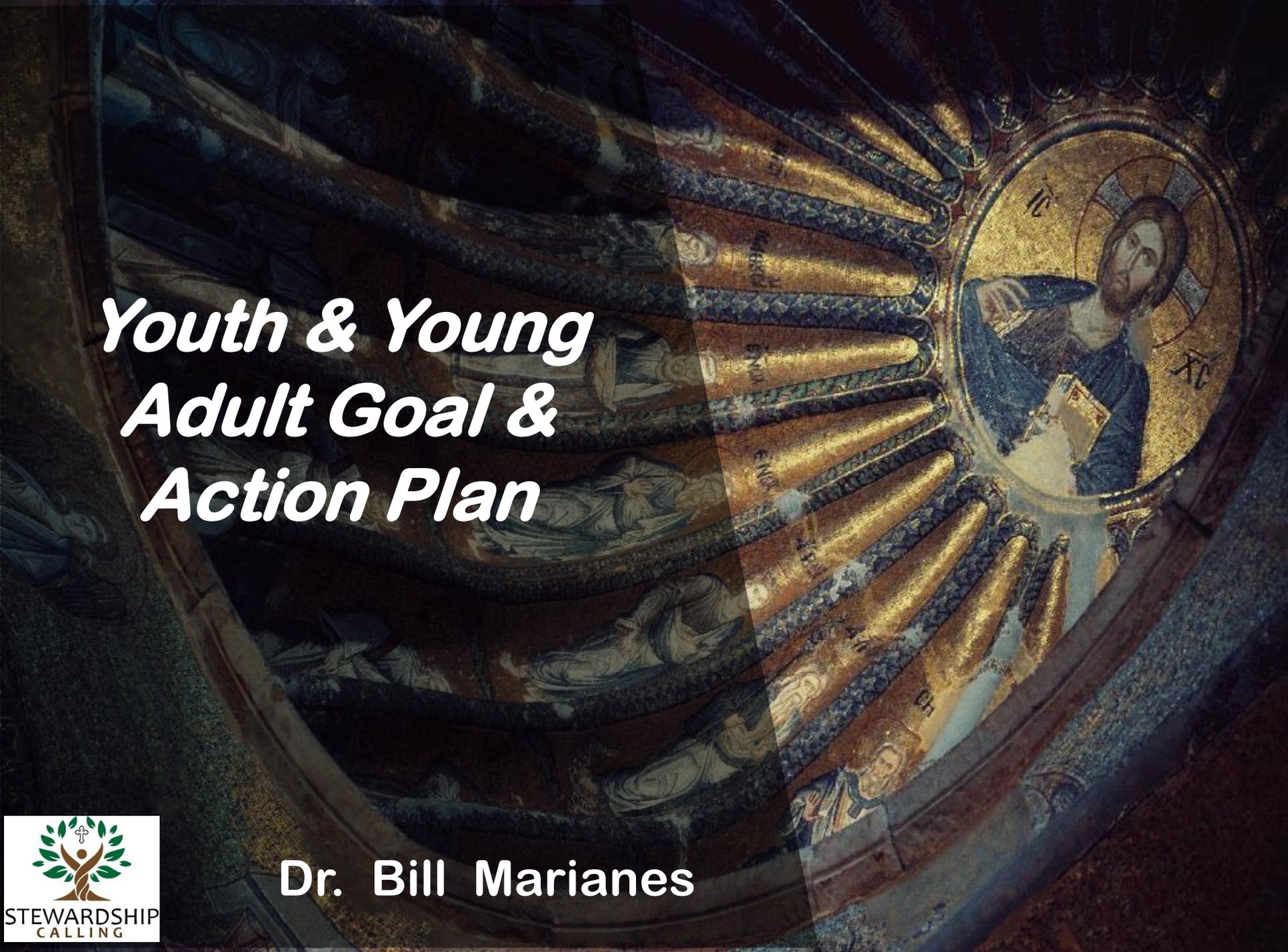
| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|----------------------------|-----------------------------|---|
| Interim Goal 1: Research interest in Parochial School and alternatives within 9 months | | | |
| 1. Form Parochial School Team (PST). | SPT and PST Co-Captains | 1 month after Start Date | PST members agree to serve |
| 2. Determine Parochial School (PS) desired outcomes and effectiveness metrics | PST | 2 months after step 1 | PS metrics determined |
| 3. Survey and analyze parish interest in developing some form of PS solution and optimum alternative approaches. | PST | 2 months after step 2 | Parish interest in PS and alternatives are determined |
| 4. Assuming sufficient interest in step 3, identify at least 3-5 existing parochial schools to examine, including Holy Trinity Academy in Warren, Ohio, and St. Constantine School in Houston, TX. Conduct site visits and interviews with all such schools, their administration and Boards and conduct due diligence. Research specific action plan to create a parish PS solution. | PST | 4 months after step 3 | At least 3-5 alternative PS models are diligenced along with the necessary steps to develop the parish's PS solution. |

Parochial School Action Plan – Part 2

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|---|--------------------------|--------------------------------|---|
| <u>Interim Goal 2: Develop the most effective PS alternative within 9 months</u> | | | |
| 5. Evaluate all the researched parochial school alternatives and develop a specific proposal and submit it to the parish for approval. | PST | 3 months after step 4 | Evaluation of alternative PS alternatives and proposal submitted to the parish for approval |
| 6. If approved by the parish, select initial Board of Directors (Board) and Headmaster and crate a strategic, operational and financial plan for the preferred PS alternative. | PST | 6 months after step 5 | PS Board and Headmaster selected, and strategic, operational and financial plan developed |
| <u>Interim Goal 3: Implement Plan to be prepared for opening within 6 months</u> | | | |
| 7. Implement strategic, operational, and financial plan to prepare for opening of preferred PS alternative in time for the next available academic year opportunity. | Board and Headmaster | 6 months after step 6 | PS alternative opened |
| 8. Track and report on monthly performance benchmarks determined in strategic, operational, and financial plan. | Board and Headmaster | Each month during PS operation | Monthly reports of progress released |
| <u>Interim Goal 4: Compile and assess the results of the PS and make necessary improvements within 2 months</u> | | | |
| 9. Obtain and compile qualitative and quantitative data of PS effectiveness, identify areas for improvement, and make all refinements necessary. | Board and Headmaster | At least annually | Assessment and remediation plans created and implemented |

Religious Formation Action Plan

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



***Youth & Young
Adult Goal &
Action Plan***

Dr. Bill Marianes



**STEWARDSHIP
CALLING**

Youth & Young Adults SMART Goal

We will research, develop, and implement best practices and effective youth and young adults “Youth & Young Adults Programs” in each of the following 7 areas with a comprehensive communications plan where after development of the following best practices programs and materials, such that within 47 months we will achieve the following “Youth & Young Adults Targets” :

- (a) At least 90% of parish youth will complete their grade level curriculum revamped full academic year “Youth Sunday School Program,” each year and achieve measurable outcomes identified in step 2 of the Action Plan;**
- (b) Each year the parish YAL will collaborate and engage with a different parish YAL to on at least one service project and at least one social interaction activity with at least: (i) 65% of young adults participating in year 1; (ii) 75% of young adults participating in year 2; and (iii) 85% young adults participating in year 3;**
- (c) Joy, Hope, GOYA parish and Metropolis meetings and events will achieve at least: (i) 50% participating in year 1; (ii) 75% of participating in year 2; and (iii) 85% participating in year 3;**
- (d) A Bible Camp for youngsters and at least one high school retreat twice a year with at least: (i) 65% participation of relevant youth and high schoolers in year 1; and (ii) 75% participation of relevant youth and high schoolers in year 2; and (iii) 85% participation of relevant youth and high schoolers in year 3;**
- (e) After the first year, each: (i) YAL member will have a trained adult mentor, (ii) GOYA member will have a trained YAL mentor, and (iii) Hope member will have a trained GOYA mentor;**
- (f) Within 12 months, at least once a quarter, a Children’s choir will participate with the adult choir in singing during a Divine Liturgy or other church service; and**
- (g) Within 12 months, we will hire a full-time youth and young adult director staff member to help plan and lead all youth and young adult activities.**

Youth & Young Adults Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|--------------------------|-------------------------------|--|
| Interim Goal 1: Research the most effective Youth & Young Adults Action Programs within 3 months | | | |
| 1. Form Youth & Young Adults Team (Y2AT). | SPT and Y2AT Co-Captains | 1 month after Start Date | Y2AT members agree to serve |
| 2. Determine religious education key definitions and effectiveness metrics for adults and youth for each of the 7 SMART Goal Youth & Young Adults objectives (collectively the “Youth & Young Adults Programs”). | Y2AT | 1 months after step 1 | Youth & Young Adults Programs key definitions and metrics determined for all six elements |
| 3. Analyze the parish baseline on those key Youth & Young Adults Ministry effectiveness metrics and survey parishioners to determine what religious education content they need and what delivery modalities they will use regularly. | Y2AT | 1 month after step 2 | Parish baselines, and content delivery vehicle and frequency of religious education content is finalized |
| 4. Identify at 2-3 of each of youth and young adult programs to consider from both inside and outside the Orthodox ecosystem. | Y2AT | Simultaneous with steps 2 & 3 | At least 2-3 alternatives of each of the 7 elements of the Youth & Young Adults Programs are examined |

Youth & Young Adults Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|--------------------------|-----------------------|--|
| <u>Interim Goal 2: Develop the most effective Youth & Young Adults Education Programs within 4 months</u> | | | |
| 5. Evaluate all the researched Youth & Young Adults Programs items from step 4 for effectiveness against key performance metrics and parish baselines based and criteria of effectiveness determined in step 2 and determine Youth & Young Adults topics, programs, and modalities. | Y2AT | 2 months after step 4 | Evaluation of alternative Youth & Young Adults Programs is completed |
| 6. Develop each of the new 7 Youth & Young Adult Programs and establish monthly performance benchmarks to achieve each of the Religious Education Targets. | Y2AT | 2 months after step 5 | Youth & Young Adults Programs are finalized, and monthly performance benchmarks are determined |
| <u>Interim Goal 3: Recruit and train Religious Educators Leaders within 2 months</u> | | | |
| 7. Identify and recruit Youth & Young Adults Programs “Educators” who can teach and implement each of the Youth & Young Adults Programs | Y2AT | 1 month after step 6 | Educators are recruited |
| 8. Train Educators to implement the Religious Education Programs. | Y2AT | 1 month after step 7 | Educators are trained |

Youth & Young Adults Action Plan

| <u>Actions Steps</u> | <u>Responsible Party</u> | <u>Deadline</u> | <u>Completion Test</u> |
|--|--------------------------|-----------------------------|---|
| <u>Interim Goal 4: Implement the Youth & Young Adults Program to achieve the Youth & Young Adults Targets within 36 months</u> | | | |
| 9. Implement Youth & Young Adults Programs to achieve the Religious Education Targets. | Educators | 36 months after step 8 | Youth & Young Adults Programs are fully launched |
| 10. Track and report on monthly performance benchmarks determined in step 6 and continue Educators follow-up with parishioners until Youth & Young Adults Targets are achieved. | Educators | Contemporaneous with step 9 | Established monthly Targets are achieved |

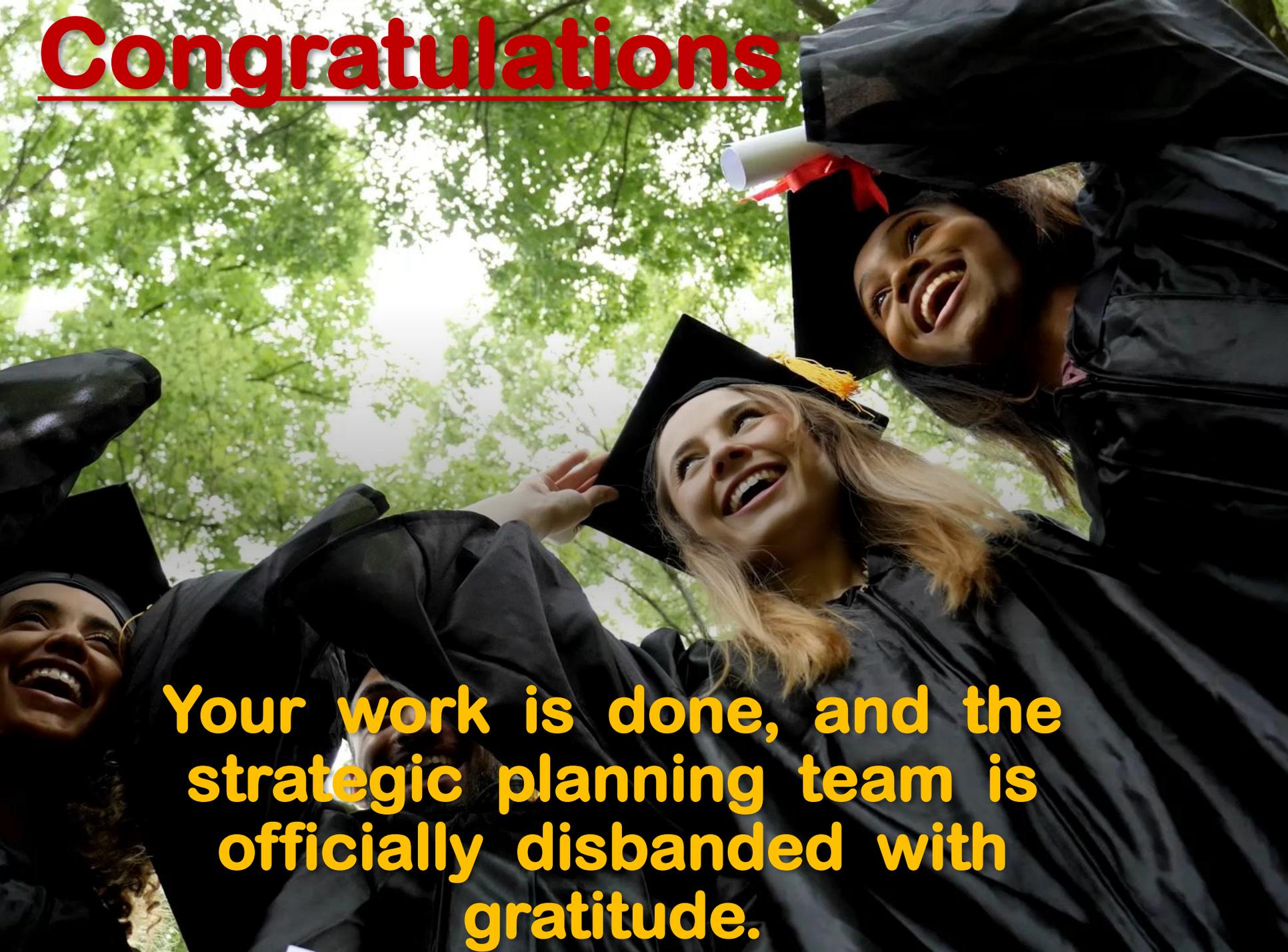
Youth & Young Adults Action Plan

| <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 Religious Education Program and make necessary improvements within 2 months</u> | | | |
| 11. Obtain and compile qualitative and quantitative data from Religious Education Programs and determine effectiveness and success (based on criteria established in step 2) and identify areas for improvement. | Educators and Y2AT | 1 month after step 10 | Religious Education Program assessments are completed |
| 12. Finalize and deliver Religious Education Programs assessment analysis report, and make all refinements necessary to make the Religious Education Programs more effective based on information identified in step 11. | Educators and Y2AT | 1 month after step 11 | Analysis is completed, and Religious Education Program is refined accordingly |

Youth and Young Adult Action Plan

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

Congratulations

A low-angle, upward-looking photograph of several graduates in black academic regalia. They are smiling and laughing joyfully. One graduate in the center is holding up her cap. The background is filled with lush green trees under a bright sky.

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



**Transition from Strategic
Planning to Implementation**



ST. SOPHIA, SS. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH

WHY Statement

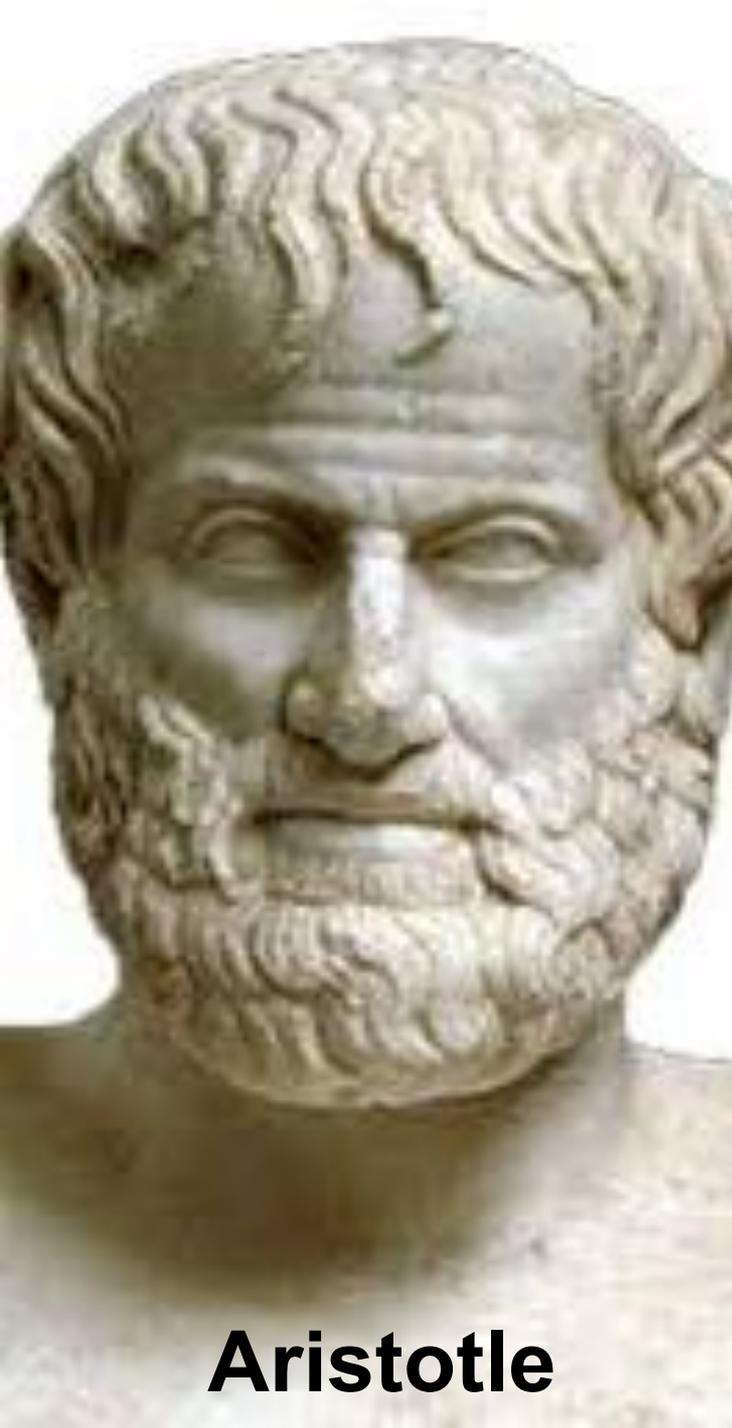
To glorify God, serve all through love, and live a purposeful life in Christ.



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 6 Goal Co-Captains
- ~ Fr. Konstantinos 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

Community Roll-Out Celebration

- ~ Date TBD where entire 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

Parish Council 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

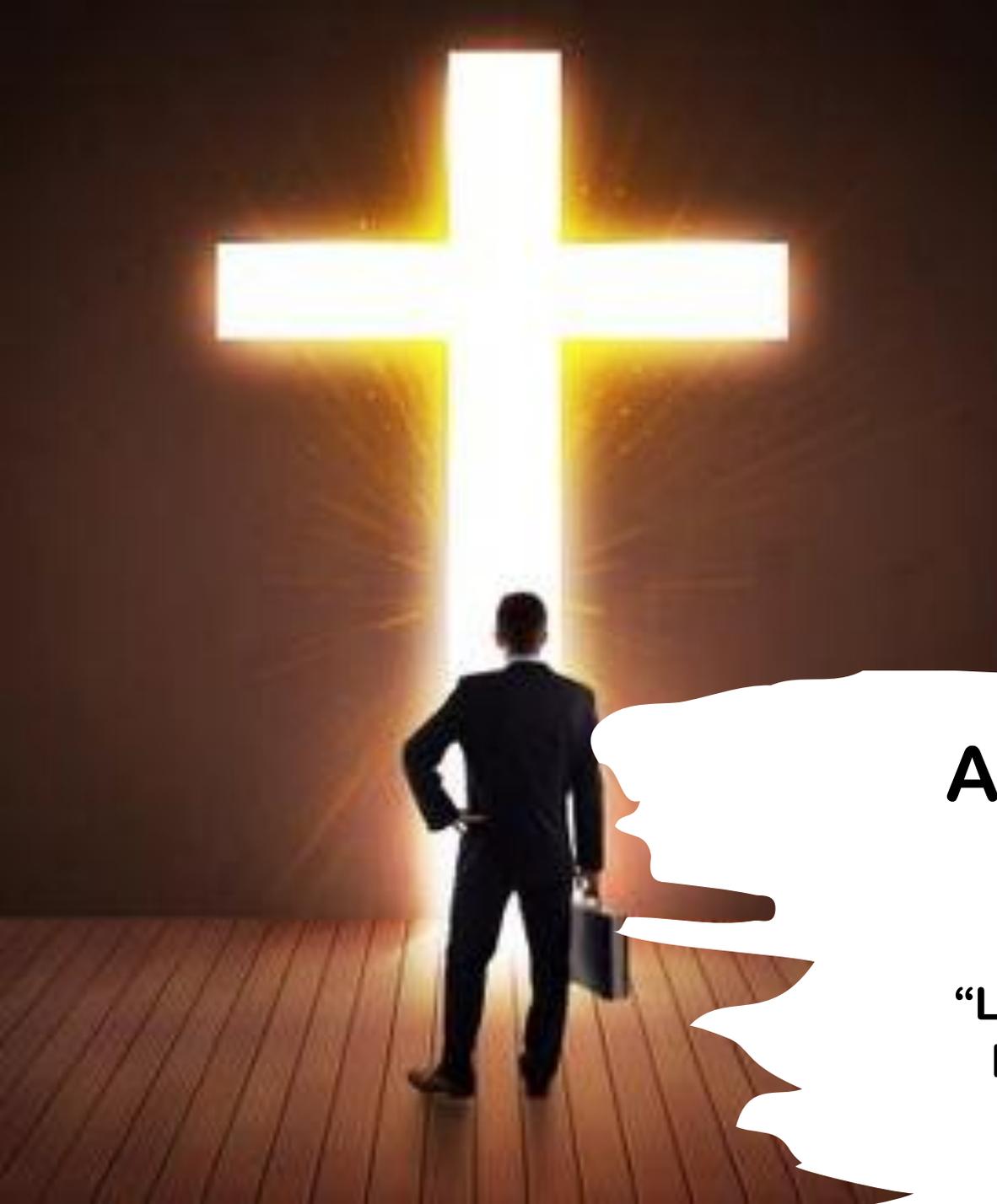


Next Steps For Success



Communications

- ~ Constant and regular reporting on the Strategic Planning process in all parish media outlets and forms, including in church announcements, bulletins, homilies, General Assemblies, etc.
- ~ Parish website adds a strategic planning page 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”



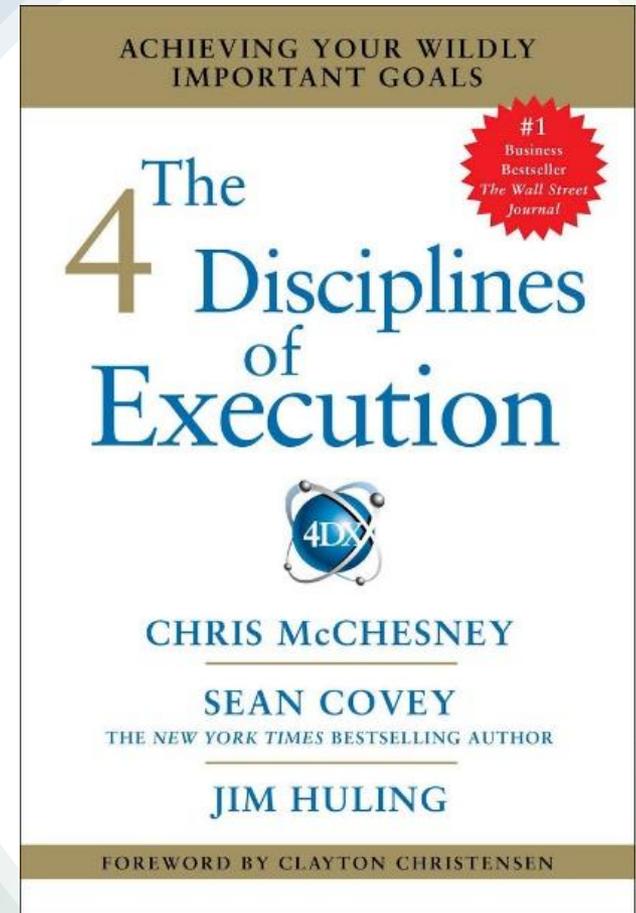
A Leader Leads By Example

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

SMART Gap Accountability Plan

(A Cadence of Accountability)

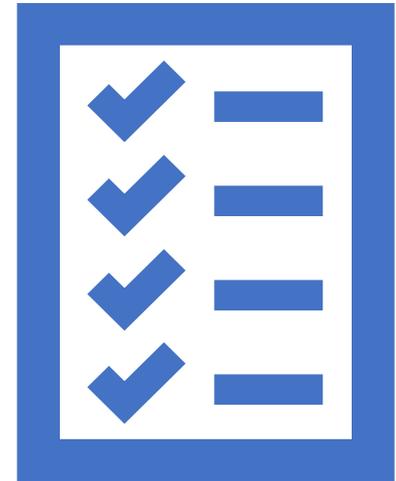
- ~ Regular and frequent team meetings that solely focus on the Strategic Goals
- ~ Team members hold each other accountable for their commitments



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

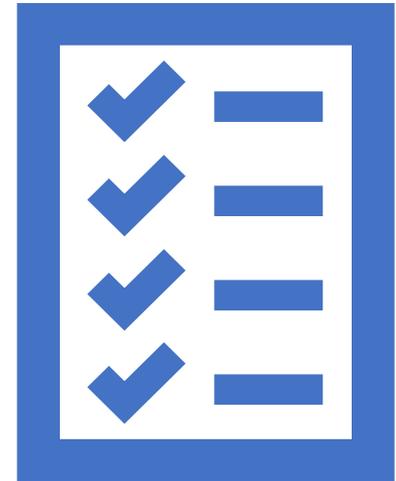


SMART Gap Accountability Plan

(A Cadence of Accountability)

1. Implementation Goal Team check-ins

- Short (10-15-minute
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

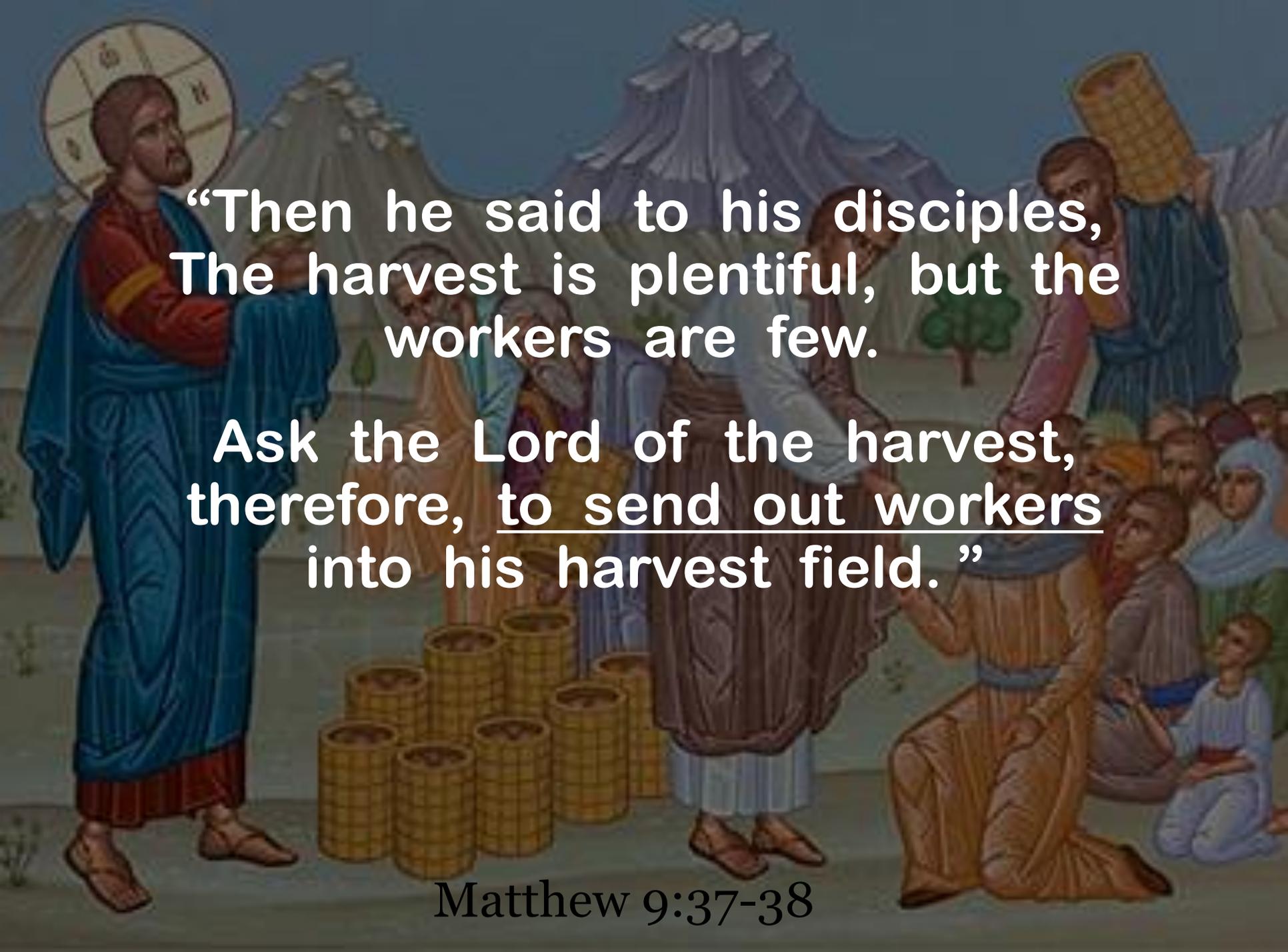


Top 5 Implementation Challenges

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**



To glorify God, serve all through love, and live a purposeful life in Christ.



“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/converts to implementation teams over the next three years

Next Steps For Success



Fill out your Implementation Team Volunteer Form downloadable at:
<https://stewardshipcalling.com/st-sophia-jefferson-pa-strategic-plan/> and turn it in to the church office ASAP.


**ST. SOPHIA, SS. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH**

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 – Stewardship & Engagement |

Goal 2 – Religious Formation & Worship Participation

Goal 3 – Youth & Young Adults

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



What can you do?

1. Promote Strategic Planning Roll Event (date TBD)
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-jefferson-pa-strategic-plan/> and submit it to
FuturePlanning@saintsophiachurch.org
3. Be positive and talk it up with everyone and recruit others to attend the roll-out event and work on the implementation



[StewardshipCalling.com](https://stewardshipcalling.com)

Stewardship Calling
What are you doing with all of the gifts God has given you?

Strategic Planning

Scroll down to St. Sophia page

| WHY? | STEWARDSHIP | STRATEGIC PLANNING | INTERNET RADIO & PODCASTS | KEYNOTES & LEADERSHIP | RESOURCES |
|----------|-------------|---|---------------------------|-----------------------|-----------|
| PERSONAL | | HOLY ORTHODOX CHURCH OF UGANDA | | | |
| | | ST. SOPHIA JEFFERSONVILLE, PA STRATEGIC PLAN | | | |
| | | SAMPLE S.M.A.R.T GOAL & ACTION PLANS | | | |
| | | BOSTON METROPOLIS – THRIVING CONGREGATIONS TRAINING PROGRAMS ON PARISH STRATEGIC PLANNING | | | |
| | | ST. SOPHIA UKRAINIAN SEMINARY | | | |

St. Sophia Jeffersonville
By the grace of God, the transformational and collaborative work of Father Symeon Williams and an additional 40+ parishioners Strategic Planning Team

...IA, Ss. FAITH, HOPE & AGAPE
...RTHODOX CHURCH OF VALLEY FORGE
...a Greek Orthodox Church in Jefferson, PA. is undertaking a planning process. This incredible work is under the inspired leadership of a dedicated Core Team. This Core Team will be supplemented with an Strategic Planning Team. The ongoing work of our very diverse and extensive

<https://stewardshipcalling.com/st-sophia-jefferson-pa-strategic-plan/>

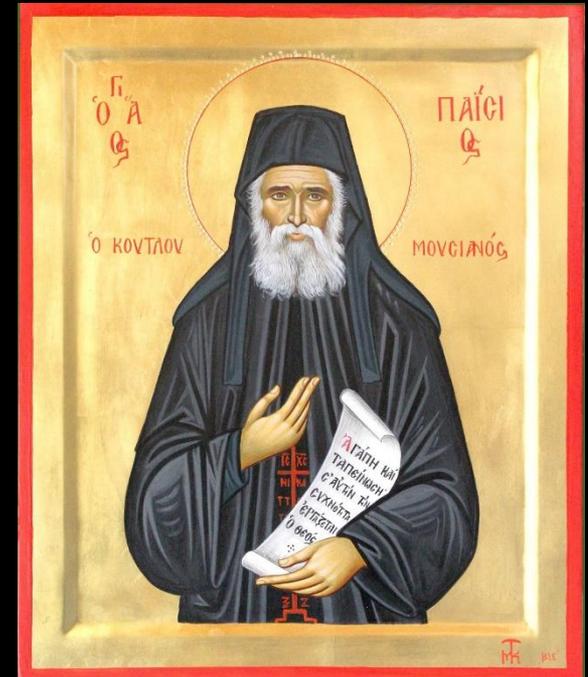
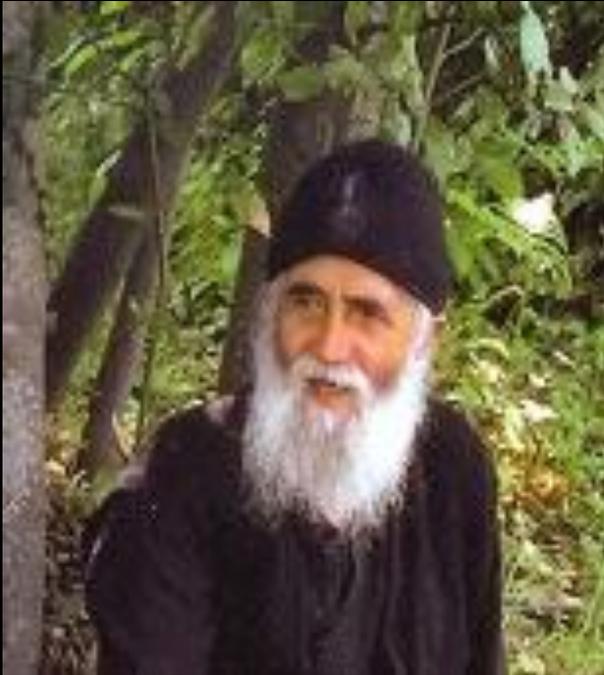
Special Thanks

1. Fr. Symeon, Fr. Konstantinos,
John Pogas, Coleen and Bob
Moses, Tab McElhinney...

2. All of you...



Tough Love

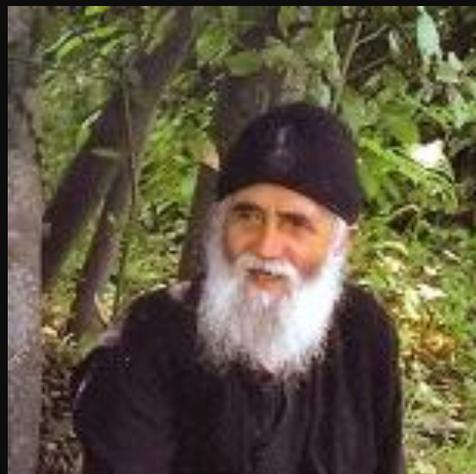


St. Paisios the Athonite

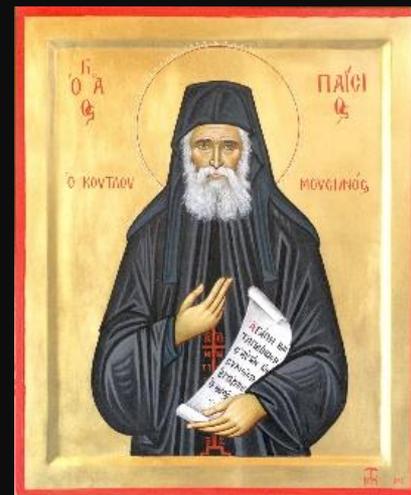
The spirit of luke-
warmness reigns.

We've been spoiled
for good.

How does God still
tolerate us?



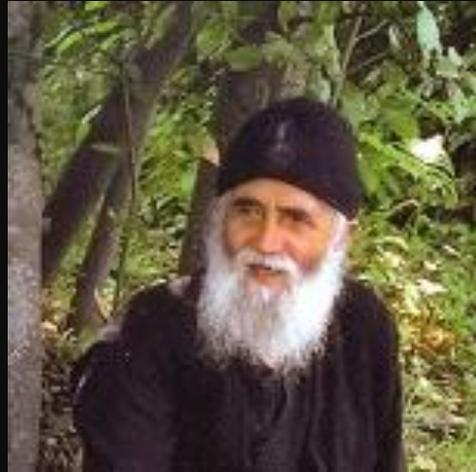
St. Paisios the Athonite



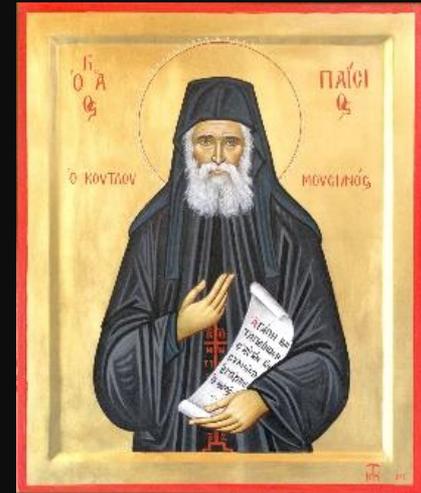
Today's generation
is the generation
of indifference.

There are no
Palikaria (warriors)!

The majority are
fit for parades and
feasts only.

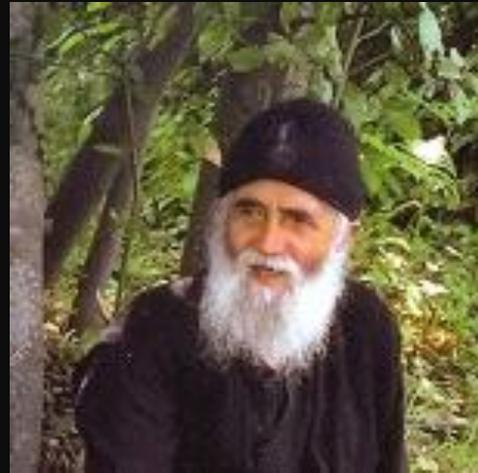


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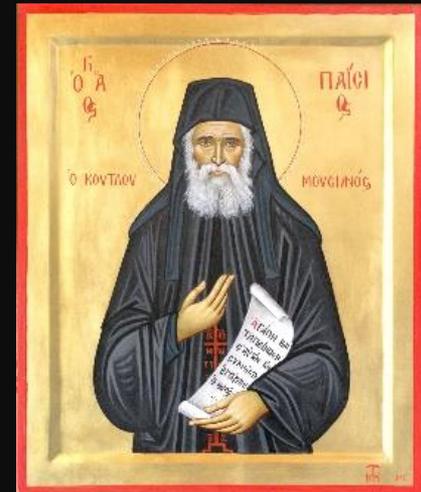


Even people who've
got something
inside have begun
to grow cool
saying,

Can I really do
anything to change
the situation ?

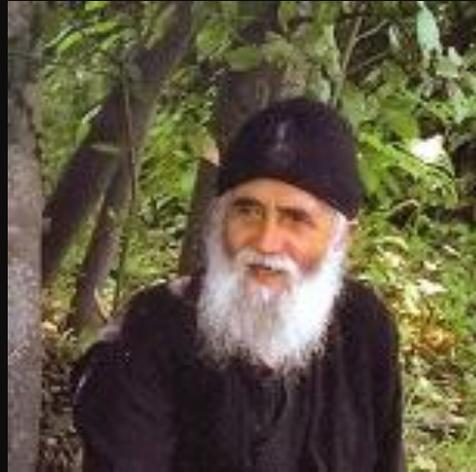


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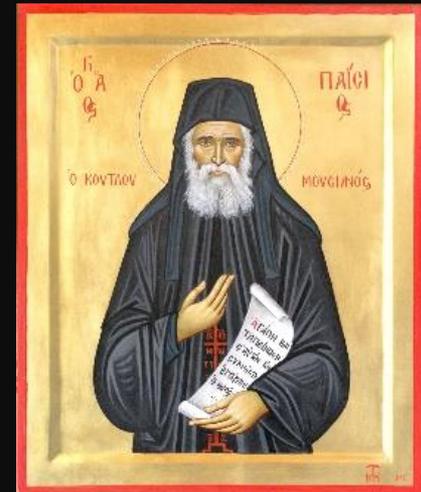


We have to
witness our Faith
with **boldness**,

because if we
continue to remain
silent, we'll have
to **answer** in the
end.



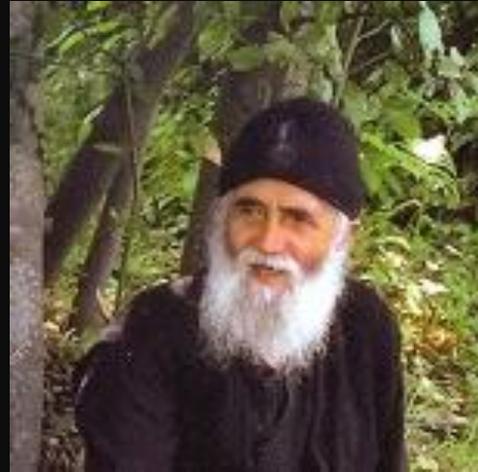
St. Paisios the Athonite



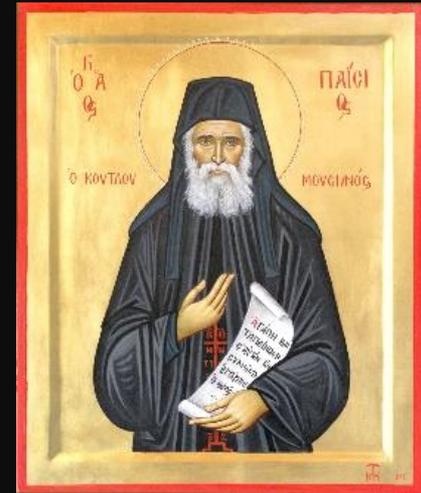
In these difficult days, **each must do** what is in their own power.

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

Greek 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,

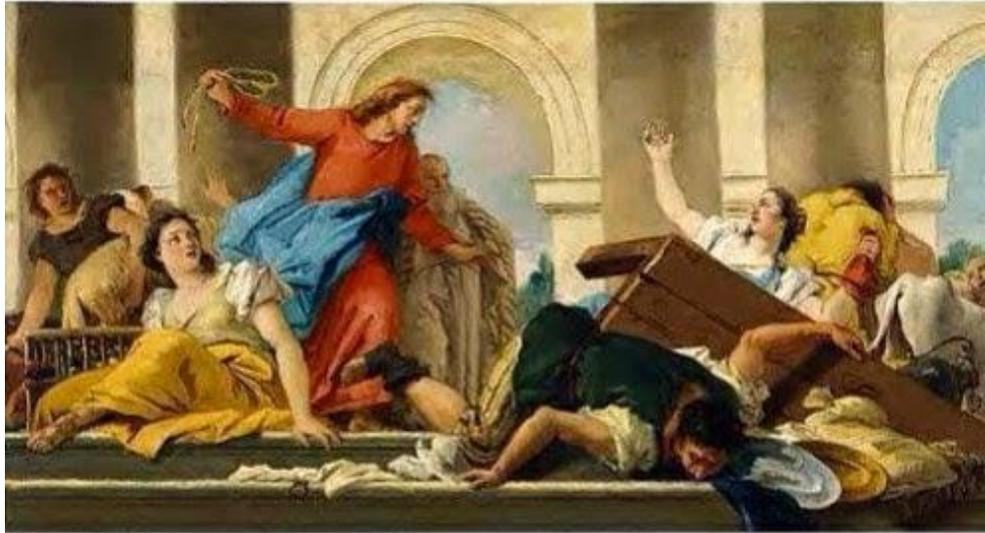
**whose face is marred by dust and sweat and blood;
who strives valiantly;
who errs and comes short again and again;
who knows great enthusiasms, the great devotions;
who spends themselves in a worthy cause;
who at the best, knows in the end the triumph of high achievement, and**

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

If anyone ever asks you, "What Would Jesus Do?"



Remind them that flipping over tables and chasing people with a whip is within the realm of possibilities.

Matthew 21:12

Mark 11:15

Luke 19:45

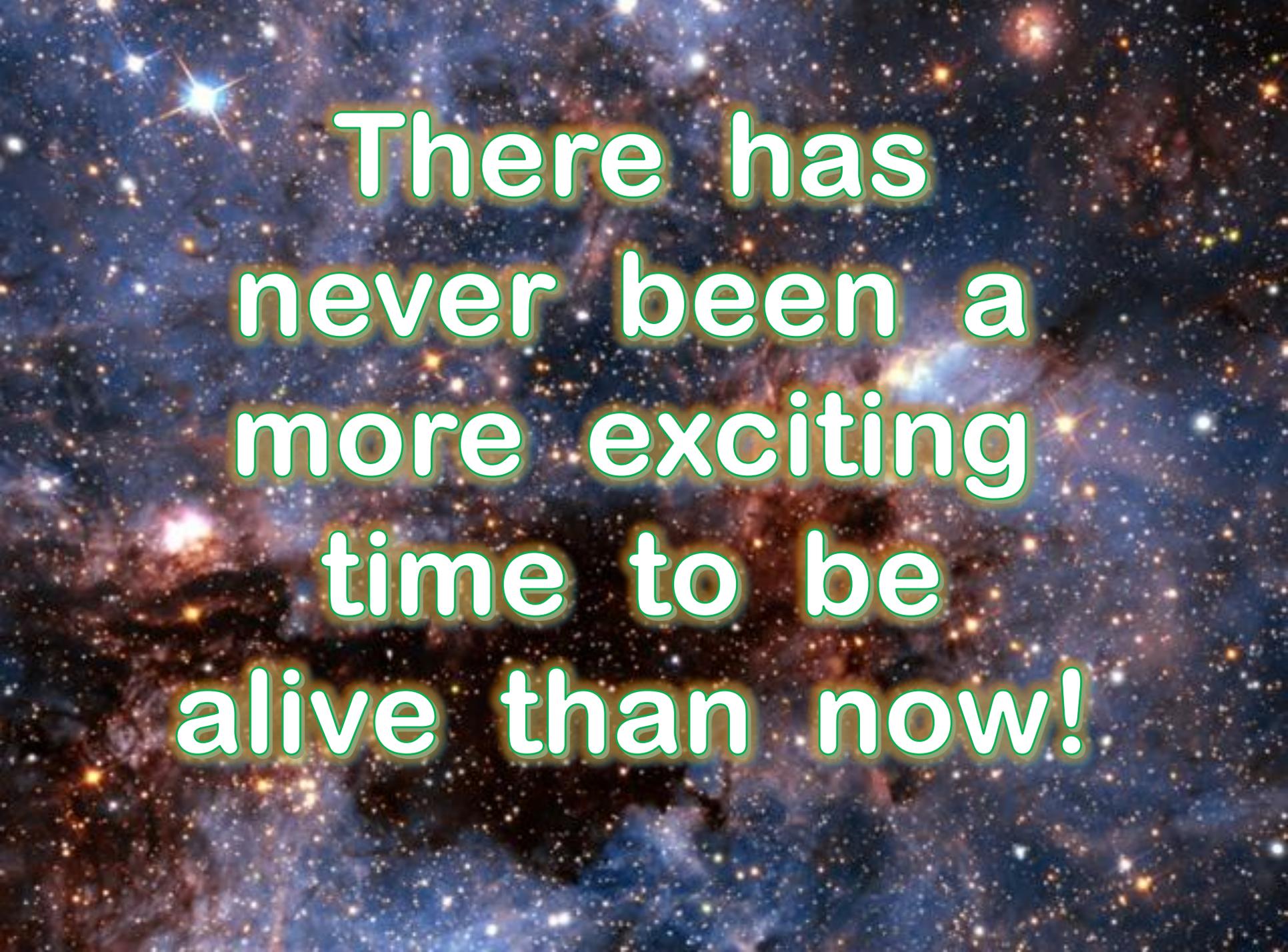
John 2:15

**This story of courage is told
in all four Gospels**

“In the next 10 years, we will experience as many changes as humanity has seen during the past century.”



Ray Kurzweil
Futurist at Google, Co-
Founder of Singularity
University

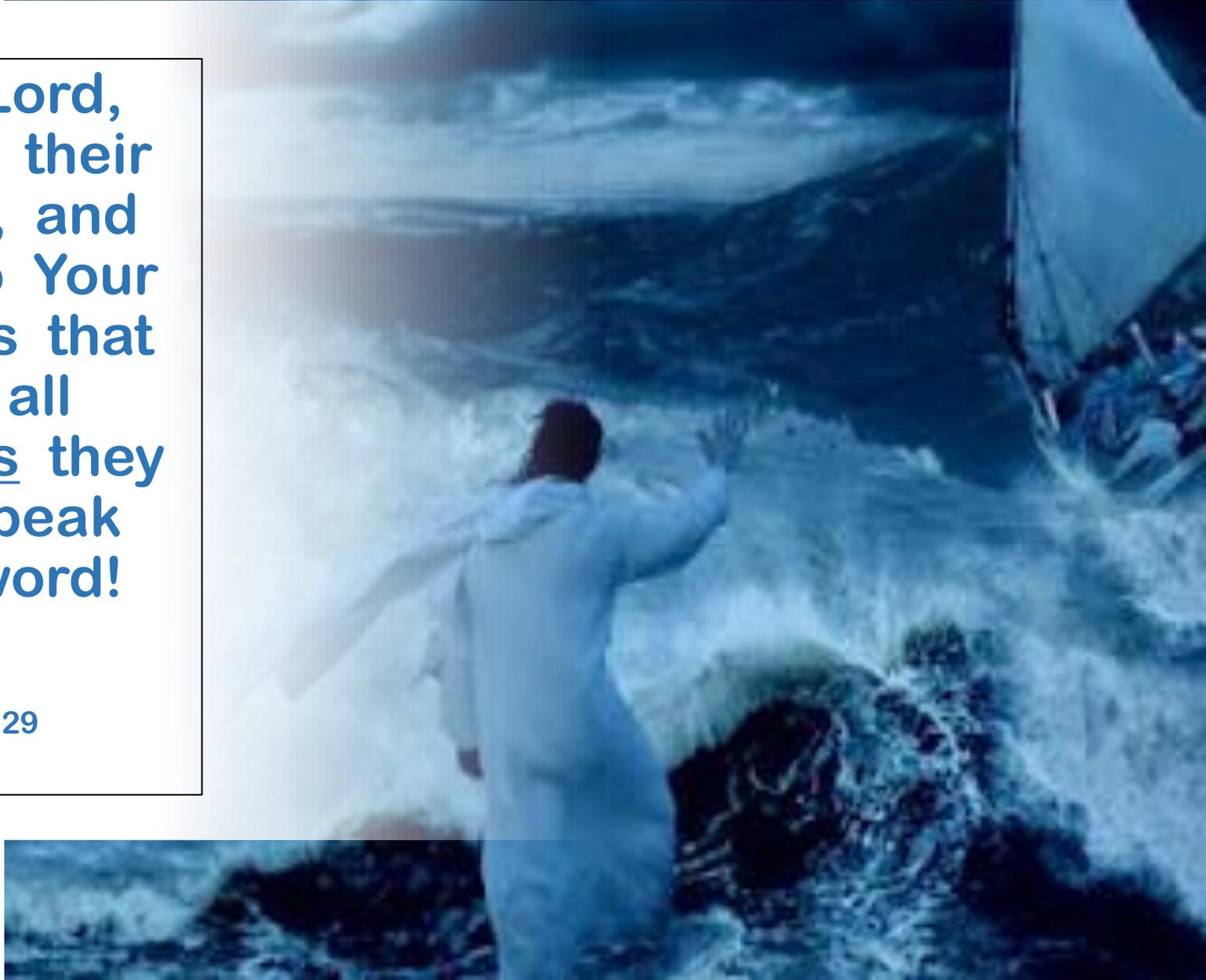


There has
never been a
more exciting
time to be
alive than now!

Fortune Favors The Bold...

Now, Lord,
look on their
threats, and
grant to Your
servants that
with all
boldness they
may speak
Your word!

Acts 4:29





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.

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



Ted Turner



Thomas Paine



General George S. Patton



Lee A. Iacocca



Bill Marianes



ST. SOPHIA, SS. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH

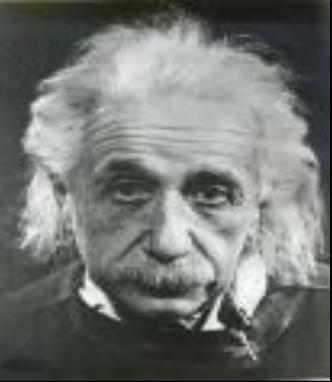
WHY Statement

To glorify God, serve all through love, and live a purposeful life in Christ.

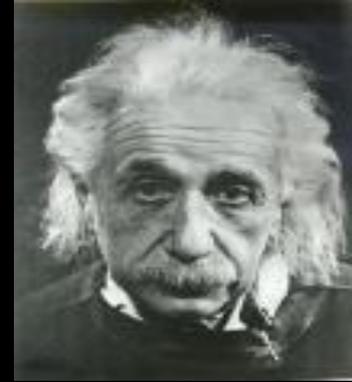


Be the change!





Albert's Insight



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

“NOTHING HAPPENS UNTIL
SOMETHING MOVES”

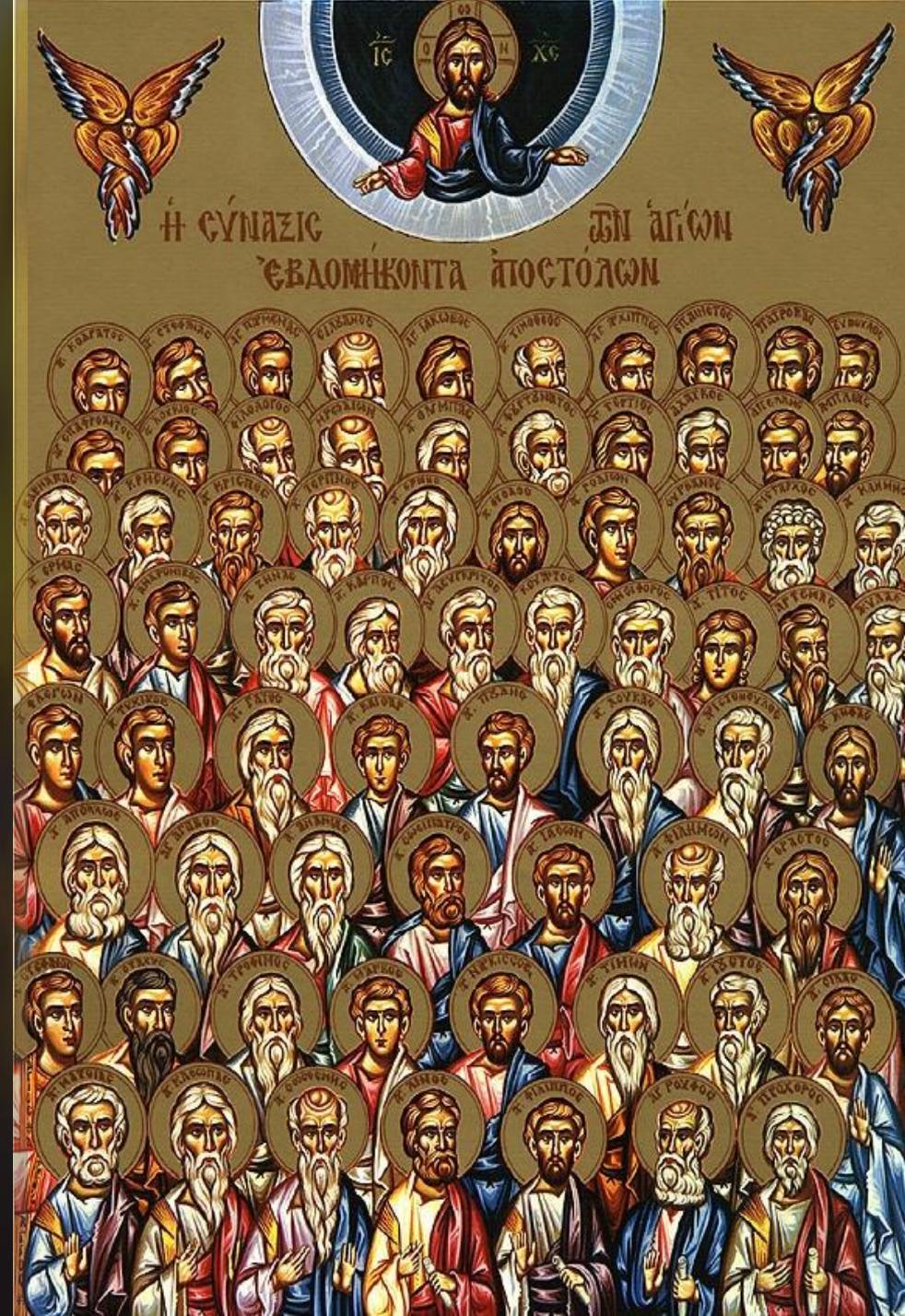


The Marianes Corollary

**“NOTHING HAPPENS
UNTIL SOMEBODY
MOVES”**

You have
now been
called as
one of the
70 Disciples

Luke 10:1





ST. SOPHIA, Ss. FAITH, HOPE & AGAPE
GREEK ORTHODOX CHURCH

Strategic Planning Retreat 2

Bill Marianes



STEWARDSHIP
CALLING