A Roadmap for American Churches and People of Faith: W.W.J.D. (What Would Jesus Do?)

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Stewardship Calling

CHAPTER 7.   Vision And Strategic Positioning & Planning.

Scriptural Foundation Of Vision And Strategic Positioning & Planning.

Is your parish operating by design or default? Does it have a consensus clarity of its fundamental WHY (purpose), non-negotiable Core Values, a clear Mission of what it does, and Strategic Goals and Action Plans to achieve an inspiring and transformational Vision? If it does, then glory to God, and you can skip to the next Chapter (unless you want to assess what your parish is doing). However, if any of the above elements are missing, if it feels like your parish is wandering, or if it has been quite some time since you last evaluated your Vision and plans to achieve it, then read on.

I think it is critical to begin by setting the record straight. Businesspeople did not invent Strategic Planning (which you can refer to as Vision & Planning, Strategic Positioning & Planning, or whatever sounds better to you and your parish, all of which I will collectively define as "**SP**"). The SP discipline is as old as creation and was modeled by Jesus Christ. Indeed, as this Chapter will demonstrate, every aspect of what is included in SP is Biblical in its foundation. Thus, SP in parishes is completely consonant with the Lord's teaching and what it means to be a Christian.

One of the essential practices for effective parish SP is faith in an inspiring Vision. Moses was perhaps one of the most inspirational and visionary leaders. He spoke with God; however, his gifts extended to inspiring an extremely diverse "rag-tag" group of followers to pursue a singular righteous Vision over an extremely long period of time as they faced and overcame incredible adversities and traveled massive distances. This requires great skill, faith, love, and patience. Moses cast an extremely large Vision for his followers by focusing on a "promised land" that was foretold by the ancient fathers in the Law and Prophets (what we call the Old Testament).

Amazingly, just as Moses led his people to this promised land, it was not for him to see with his own eyes: "*Then the Lord said to Moses, this is the land I swore to give to Abraham, Isaac, and Jacob…I show it to your eyes, but you shall not go there*" (Deuteronomy 34:4). This is not unusual in church SP as many times a priest or parish leader will begin an SP process that spans multiple years the final results of which they do not see under their leadership watch. However, as the Holy Scripture repeatedly instructs, visionary true leaders faithfully guide their followers on the journey to the ultimate Vision without focusing on the road or their benefit.

Even when he felt (or was) lost in the wilderness, Moses's faith in the WHY and Vision God gave him was his true North and constant guiding light and encouragement. Just as Moses saw a better place for his faithful, any parish leader can also become committed and motivated to help achieve the unimaginable. Don't take my word for it. In Jeremiah 29:11, we learn, "*For I know the plans I have for you,' declares the Lord, 'plans to prosper and not to harm you, plans to give you hope and a future*.' "

The necessity of a Vision is clear in every leader we study in the Bible. King Solomon explicitly called out the critical importance of Vision with his admonition reminder in Proverbs 29:18: "*Where there is no vision, the people perish.*"

We hear the critical importance of Vision repeatedly throughout the Bible. For example, the Orthodox Study Bible commentary notes that Jewish Academy teacher Jesus ben Sirach wrote Jewish manuscripts comprising his lectures that his grandson translated into Greek to facilitate widespread distribution. Sirach reminded his students and followers that words and faithful pursuit of a Vision are what allow one to be a Prophet who can inspire followers just as Drs. Kouzes and Posner have repeatedly concluded. Sirach says it clearly: "*By his faithfulness he proved to be a true prophet, and by his words, he was known to be faithful in vision*" (The Wisdom of Sirach 46:15).

St. Paul underscores the importance of faith in pursuing a Vision: "*Now faith is the substance of things hoped for, the evidence of things not seen*" (*Hebrews 11:1).* To supplement this understanding, the Orthodox Study Bible commentary of Hebrews 11:1 instructs:

> This is not so much a definition of faith as it is a description of how faith works, especially during hard times… Things hoped for and not seen, a vision of the future, have encouraged the people of God throughout history… (The Orthodox Study Bible, 2008, p. 1666).

As I explain my unique Stewardship Calling parish SP process in this Chapter, I will begin each element by pointing out some of the many Holy Scripture passages that illustrate its importance. By the end of my Roadmap journey, I hope you will realize that SP for churches is not only historically called for but fully supported by the Bible. The fact that modernity has also confirmed the organizational benefit to SP is gravy.

Why Should A Parish Do Strategic Planning?

My Stewardship Calling SP approach is a process to manage the "busyness" of your parish without turning it into a "business." At its core, SP is a detailed process that defines your strategy to allocate your resources to achieve your Vision. Thus, the elements require articulating a clear Vision and marshaling whatever resources the parish has at its disposal presently (or can obtain in the future) and strategically allocating them in pursuit of the Vision.

Undertaking an SP for a parish is critical because, left to their past practices, most parishes like to either ignore or put band-aids on problems. Until the root cause of the issue is identified and addressed, all the band-aids in the world will not stop the hemorrhaging. For example, every time I hear a parish express concern about their financial situation, their usual idea is to schedule another fundraiser. This becomes a self-perpetuating downward cycle of addiction to the tyranny of the urgent rather than the systematic addressing of the root cause.

As we will discover in the Stewardship and Engagement Chapters 9, 10, and 11 of my Roadmap, failing to address the root cause of the problem means it will never stop causing agony over the long term. Accordingly, unless a parish is prepared and willing to engage in the hard work of continuing to dig until it identifies the real cause of its problems and the best way to address them, its efforts will be unsuccessful and unproductive.

A verbal Roadmap summary of my SP process includes the following:

1. finding the right time to begin the SP journey,

2. leading a diverse team,

3. managing by consensus,

4. gathering all necessary facts,

5. aggressively listening to all relevant messengers,

6. determining your parish WHY and Core Values to guide all actions in pursuit of long-term Mission, intermediate-term Vision, and Strategic Goals,

7. never let temporary setbacks deter you,

8. achieving a transformational change of heart shared by the parish,

9. celebrating successes along the journey,

10. staying faithful and awaiting the inevitable miracles.

My Stewardship Calling SP process has been uniquely designed for Christian parishes and answers four critical questions:

1. WHY does our parish exist? What is our fundamental purpose for why your parish exists and why anyone should join you?

2. WHERE are we now? A factual assessment of the current status of your parish and where it is strong and weak, what its resources are, and what is going on around you that needs to be watched and planned for.

3. WHERE do we want to be? In the foreseeable future, what are the most significant strategic issues your parish must address to overcome your root cause challenges and put you in a healthier and better position?

4. HOW will we get there? This is where the rubber meets the road and where you identify the most critical Strategic Goals that you must achieve and the step-by-step Action Plans to get you where you need to be.

Differences In Strategic Planning Approaches.

I admit ab initio that my Stewardship Calling process will differ from the way others implement SP. I assure you that all divergences are highly intentional and the result of my

research and experience having done SP for over four decades and specifically completing SPs that cover over 26% of all Orthodox Christians in America.

For example, I believe many people confuse the Vision Statement and WHY Statement by saying the Vision is completely aspirational and never achievable. That is not logical to me because the very word Vision contemplates something you can see. I submit that for a parish Vision to be motivational in any way, it must be achievable and visualizable within about 3-5 years.

I know others allow Visions to extend 10 years or beyond, but given the exponential pace of change in our world and your parish, I am confident that any 10-year-old Vision will never be achieved, as too many things will change. Thus, as will be discussed below, I focus primarily on the WHY Statement as the fundamental purpose for which a parish exists. While perhaps the WHY is never fully achieved, it always remains the inspirational, true North motivation and driving force of the parish and its parishioners.

The Four Ps Of Strategic Planning And Four Questions That Must Be Answered.

To do SP well, I advocate that **4 Ps** must be present:

1. **P**eople - The right diverse group of people must lead, develop, and implement the SP process, with input from everyone along the way. Recruiting representatives of the diversity of the parish brings all the necessary perspectives and ideas that can bring about a brighter future. In his insightful book *Groupthink,* Dr. Irving Janis described the evil of Groupthink, where the overwhelming drive for concurrence and agreement becomes so dominant in a cohesive in-group that it ignores alternative actions (Janis, 1972).

Everyone has seen (or lived through) examples of this phenomenon when new and creative ideas are excluded or squashed by the in-group that drives out dissenting voices and new approaches. This happens frequently in non-profit organizations where, to be honest, accountability and performance evaluations are less common than in the private sector. Having a broad, diverse, inclusive, and empowered group of faithful parishioners will help develop the best ideas, strategies, and teams to drive the difference needed.

2. **P**rocess - SP must be a comprehensive, inclusive, and methodical process with a detailed and enforced schedule. I discuss my recommended process and my belief that outside facilitation is essential in most cases in greater detail below. However, many parishes that hastily say they did SP, take shortcuts, and ignore any SP process they established. Expert external facilitation of the SP step-by-step process better ensures no critical step is overlooked or given short shrift.

In answering the listed four critical SP questions, my Stewardship Calling SP Process produces ten deliverables (all of which will be described in greater detail in this Chapter 7:

1. S.W.O.T. Analysis and/or Effective Parish Assessment
2. Why Statement
3. Core Values
4. Mission Statement
5. Strategic S.M.A.R.T. Goals
6. Vision Statement
7. Interim Goals, Interim Actions & Success Timeline
8. "Low Hanging Fruit" non-strategic goals for parish council to address
9. "SMART GAP" S.M.A.R.T. Goal Accountability Implementation Process
10. Strategic Plan

3. **P**lan - The above ten elements form a comprehensive SP that includes detailed Strategic Goals, detailed implementation Action Plans, and timeline scoreboards. To assist all parishes seeking to perform an SP on their own, I have attached as **Exhibit "A"** to this Chapter 7 my proposed final Strategic Plan template you can use by inserting your strategic planning elements where indicated by the yellow highlighting. In **Exhibit "B"** to this Chapter 7, I also included a sample strategic plan from a parish I recently completed.

4. **P**erformance - SP must include a well-managed and persistent implementation plan with full accountability. This is critical as most SPs in nonprofits fail. Indeed, Harvard Business School professor Robert Kaplan suggested as many as 90% of SPs fail (Kaplan & Norton, 1996; Gibson, 2023). Most fail in this fourth step by not ensuring that the team is properly organized to ensure effective implementation. To help with implementation, I am a big proponent of the approaches found in the Covey organization's Four Disciplines of Execution (McChesney et al., 2012). I concur with their constant emphasis on "the few things that can change everything." This focus aligns with my philosophy of always addressing the "root cause" of any issues that are manifesting the symptoms and problems observed.

Unlike other SP consultants that may merely deliver a plan document, my Stewardship Calling SP process includes all the above ten deliverables, each of which serves an essential purpose. However, there are at least three other critical objectives I believe must be done to have a successful SP.

1. Team: Any successful SP process must ensure that a large enough motivated and dedicated team is organized through the process to achieve the Strategic Goals by executing the Action Plans and thus achieving the Vision. If your process does not set up an energized team, then as time goes by, the work efforts will diminish, and the enthusiasm will dissipate.

2. Consensus: Everyone in your process must learn how to make SP decisions using the consensus model that is integral to many Christian theologies. Consensus is essential if a community-wide enthusiastic engagement is to be achieved. This is important enough that it will be described in greater detail in its own section of this Chapter 7 of my Roadmap.

3. Culture Change: As important as anything, the SP process must transform the culture of your parish. This is not to say your parish culture is bad. However, stagnancy in parish cultures is an epidemic, and it is easy to keep doing the same things. This is especially true when leaders get tired or burned out or when resistance is realized. Ideally, when the SP process is complete, as close to 100% of your parishioners should be enthusiastically in favor of the changes to be achieved and the overall process. Once your parish gets in the practice of tackling significant challenges and overcoming them over time, it will transform into the kind of dynamic parish of Christ-followers that is unafraid of anything and will fulfill the Lord's vision for His church.

In short, arguably the best hockey player, Wayne Gretzky, got it right when he confessed, "I skate to where I think the puck will be,"   As I like to say: "**Proper SP is all about having the insight to use foresight, to avoid hindsight, to achieve perfect sight of the promised land of your Vision**." That's why it is critical to engage in a process that understands WHY you exist, Where you are currently, Where you would like your parish to be, and the comprehensive and methodical plan to get there while avoiding the previously cited exceedingly high failure rate in successful SP implementation (Bryson, 1988). If you believe Jesus Christ is who he says He is, and you want to lead people closer to Christ and each other, then nothing less than the best SP process is critical.

Outside Facilitation And Challenging The Status Quo.

External realities sometimes drive or force change, including stakeholder customer opportunities/wishes and defensive strategies. Henry Ford said of his Model T, "Any customer can have a car painted any color he wants so long as it is black" (Ford, 1922). His decision was not out of arrogance or conceit. Black was the cheapest color, and a single color meant keeping the assembly line operating without stoppages to change colors. Those were all logical internal reasons in 1914. However, he missed critical insights from understanding that his customers wanted choices. Within eight years, the need for alternatives forced Ford to offer his Model T in maroon, grey, and green (Sullivan, 2023).

Outsiders with requisite skills and diverse experiences have seen many alternative ideas, approaches, perspectives, successes, and failures. With markets accelerating "four times faster than 20 years ago" and people being "825 times more connected than 20 years ago" (Fisk 2021), the right experienced facilitator with more "reps" (repetitions) and experiences can provide efficiencies, alternative insights, and proven approaches to help guide an organization's change initiatives.

An example of perhaps the most significant global change driven by defensive needs partnered outside consulting teams with insiders to develop the most transformational and dangerous invention of modern times. After Albert Einstein's 1939 letter to President Roosevelt regarding the discovery by Berlin chemists of how to split the atom (American Museum of Natural History, n.d.), the U.S. Military did not rely solely

on their own very capable and experienced internal "experts." They mobilized a diverse and creative group of outside SP facilitators led by Dr. J. Robert Oppenheimer.

Under the Manhattan Project, this eclectic team coalesced to develop the great change instrument, the devastating atomic bomb that tragically killed over 100,000 people but ended World War II (Metcalfe, 2023). Finding experienced outsiders who explore alternatives is a change management best practice recipe for better decision-making. To do this effectively, one must discover outside experts who can focus on the correct areas, trends, and alternative strategies (Hatch, 2018).

Confirmation Bias & Disruption.

Socrates's famous insight was, "The only true wisdom is in knowing you know nothing." This is a sober reminder of how little we sometimes truly know, notwithstanding all the available data and information. Moreover, the human tendency to want to reach a quick and collegial agreement within organizations is strong enough to cause the refusal to evaluate alternatives because of the previously discussed Confirmation Bias and Groupthink. The escalation of the Vietnam War and the Bay of Pigs disaster are two examples of the psychological Groupthink tendency to discourage change, creativity, and other ideas/options. Research has repeatedly validated Groupthink's limiting impacts and identified political motivations as another tendency to restrict the consideration of alternatives (Kramer, 1998).

The Confirmation Bias drive to look only at information supporting our preconceived notion and exclude contrary data explains why one may miss alternatives (Simkus, 2023). Additionally, inside perspectives often develop "knowledge resistance" based on rationalizing prior beliefs and experiences and excluding other points of view (Strömbäck, 2022). Because of their independence, external SP facilitators are more likely to look beyond homogeneous consensus conclusions. As a change management best practice, helping internal teams explore unique ideas and novel solutions in a non-confrontational fashion is a core competency of experienced SP facilitators.

Attributable to Albert Einstein is the wisdom that: "*The only source of knowledge is experience*." Many individuals or organizations are experiencing challenges or issues for the first time or in a way they believe to be novel. However, what seems new to an insider may be an old hat for the right outsider. While we are encouraged not to reinvent the wheel, internal pressures (including economics, ego, and not rocking the boat) often prevent seeking the outside experience of others who can help traverse what seems like a long, dry desert road with alacrity and speed (Roberto, 2010).

Change Vs. Status Quo.

Few things strike more fear in people's hearts than the "C" word: Change. This has risen to the level where the number of "*how many (fill in the blank) does it take to change a lightbulb*?" jokes is a comedic epidemic. However, research proves how ineffective most change initiatives are within organizations (Weeks et al., 2004). The disruption to

continuity and stability and the incessant fear of failure and negative personal consequences make it perceived to be less risky to maintain the status quo. In 1979, "prospect theory" established that people frequently believed the potential for loss exceeded the benefit potential of gains (Kahneman & Tversky, 1979).

Raising alternative views and different ideas is sometimes perceived to have graver negative consequences for insiders than outsiders (e.g., demotion, firing, or being "shot" or run over by a tank) (Chavez, 2008). Outside SP facilitators often have greater freedom to challenge the status quo and ask the WHY question the requisite five (or more) times without negative consequences until the root cause of the problem is identified and addressed (MindTools, n.d.).

In addition, a critical change management principle involves assessing the optimal speed for change within an organization. For example, "complex adaptive systems change" focuses on engaging human activities not solely driven from the top down to consider the history and ability of an organization to effect change juxtaposed against external environments (Olson & Eoyang, 2001). To be most effective, this requires a partnership of insider historical perspectives subjected to the external SP facilitator's scrutiny and experience to find the acceptable organizational level of status quo pushback.

Research And Reshape Perspectives And Alternatives.

Everything invented was new once. No less an internal "expert" than the Commissioner of the U.S. Patent Office, Charles Holland Duell, foolishly pronounced in 1902 that "Everything that can be invented has been invented (Morgan & Langford, 1981). Swing and a miss!

Fortunately, experimentation and research have continued to reorient the trajectory of every aspect of humanity. Reshaping change management techniques like "appreciative inquiry" allows insiders and external consultants to focus on further expanding or developing things that work well within an organization rather than merely obsessing over problems (Coghlan et al., 2003). However, not every organization has sufficient capitalization, incentives, or leadership to experiment and discover a brighter future. This is another place where outside SP facilitators can provide much-needed reshaping perspectives, research, and lessons learned from the experiments, successes, and failures of others (Sacolick, 2022).

Rarely does the first iteration of a new plan or idea yield the perfect solution. Scholars can point to the differences of opinion and approaches that disrupted even the early Christian Church (e.g., Acts 15:1-41). Experimentation and seeking alternatives are often critical. Having encouragement from an experienced outside facilitator can usually provide the confidence a parish needs to move forward. "*Now faith is the assurance of things hoped for, the evidence of things not seen*" (Hebrews 11:1).

The Twin Ingredients Or Success: Rules Of Engagement And Consensus ("I Am OZ, Ahe Great And Powerful.")

I am confident that some people who hear me say I recommend a parish **Strategic Planning Team** ("**SPT**") of between 30 and 50 people (depending on parish size) stop reading because they see this is a recipe for disaster. It certainly can be problematic if the process is not well-managed and grounded in a Christian understanding of community that intentionally invites the Holy Spirit to be present and work through the people. To assist in this holy work, I believe it is essential to establish **Rules Of Engagement ("ROEs")** for the entire process.

Indeed, when I lead a parish SP process, I send out the ROEs along with the invitation letter for parishioners to consider joining the SPT. They are told that if they agree to serve, these SPT candidates must agree to those ROEs. If any ROEs are unacceptable to SPT candidates, they should decline participation. This establishes the critical importance of the ROEs and the professionalism of the process.

At each SPT retreat, I always hand out the ROEs and remind them that at the beginning of each session, I will invoke them. If someone violates an ROE, I gently remind them. A second violation invites a more public rebuke. A third violation results in a personal conversation where I ask them why they are repeatedly disrespecting others, the process, and the rules they agreed to abide by.

This conversation would include an invitation for them to either rejoin and follow the ROEs or exit the process. Some reading this might find this harsh, although it is important to respect everyone else who is dedicated to the task. Everyone has participated in a session where a person with either an axe to grind, a fragile ego, or a toxic approach brings the entire team, discussion, and process to a halt. In medicine, doctors are trained to deal with the "cancer cell" before it metastasizes, which is best for the entire organism. (Yes, I know that it is harsh language, and I reserve it only for those extremely rare troublemakers who resemble it.)

In decades of doing parish SP, I only had to invite someone to leave once. It was at the opening retreat, and I got no further than reviewing the multi-month process we had agreed to implement before the "smartest guy in the room" (you know that kind of person) had to remind everyone who he was. Publicly and in a harsh tone, he announced, "This is not how SP is done." Everyone was embarrassed at this rude treatment of a visiting facilitator (working for free). I knew from prior conversations that this guy was a bully who did this often in the parish. (I later found out there was a lot of debate regarding his inclusion in the SPT among those who knew him.)

I negotiated for a living, and I call all bluffs. So, I invited him to explain the authoritative sources that allowed him to conclude we were doing SP wrong. I will spare the back and forth; however, it became clear that he had no training or expertise in SP whatsoever and had merely seen it done once in his company. (He wasn't even a part of the process used in that case.)

After patiently (for me) explaining to him the authoritative sources for the way we were going to do it, he said we were still wrong and that his one-off indirect experience was the only right way to do SP. The tone of his conclusion made everyone squirm. I saw the priest start to raise his hand, and knowing him, I expected him to try to apologize and calm things down. I never want a priest to use their "political capital" to protect me. So, instead, I just told the obstreperous "know-it-all all" that I respected his one experience but were going to do it the way we all (including him) had agreed when they agreed to serve on the SPT. And since I didn't want him to feel uncomfortable or waste his time, he could leave the process now with no hard feelings.

It took a few seconds for everyone to understand that I was serious even though I was smiling lovingly. I then stood in front of the room, saying nothing, and looked at him, waiting for him to decide. Again, the Holy Spirit did what the Holy Spirit does, and he sheepishly said that it was all right and he would stay. I asked him if he agreed with the ROEs and process 100%. There was no need to allow him to sabotage from the inside. He expressed his sincere apology; I made him stand up, and I walked over to him, and we "hugged it out," as they say.

Long story short, his epiphany was sincere, and he became one of the best and most enthusiastic SPT participants in the process. Sometimes, even bullies can change with the help of the Holy Spirit. However, in 99.99% of all other cases, if the ROEs ever come up (which they almost never do), they are enforced with humor, and everyone goes along. I love it the first time an unmuted phone rings in a retreat and allows the rest of the SPT to tease the ROE #6 offender. I usually tell that person to "tell the President I am busy now and hang up," which always brings howls of laughter. Thereafter, everyone mutes their phones, and we proceed collegially and respectfully.

There are many different ROEs one can consider; however, I have provided the ROEs I use below. And before you question my sanity any further, I have fun telling everyone on the SPT that as the outside facilitator, I am "the great and powerful and all-knowing OZ." This always interjects humor into the rule-making process and engenders a lot of good-natured ribbing of me throughout the SP process. While I will not accept compensation for my services, several parishes have given icons of Orthodox Saints or Wizard of OZ gag gifts at the end of the SP process.

Stewardship Calling Rules Of Engagement For Strategic Planning.

1. We will stay on schedule (unless modified by the Facilitator who is "OZ").

2. Titles, rank, position, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).

3. We will speak and interact confidentially. There can be NO repercussions for anything said. ("What happens in our meetings, stays in our meeting").

4. Ask questions if you don't understand, because no idea or question is dumb (unless it has already been asked and answered).

5. Tangential/side issues will be parked.

6. No texting, emailing, tweeting, Facebooking, private conversations, phone calls, or other distractions during our retreats. We must all stay focused and be dedicated.

7. All decisions will be made by consensus. We will not be voting (except for occasional straw votes to assess consensus). Majority does not rule. Consensus will prevail.

8. OZ's 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.

9. Everyone MUST participate. ("Get in the game, or stay home")

10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Parish and not just what you want. It's all about Christ's church.

11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. ("Seek first to understand, and then to be understood.")

12. Absolutely NO "Discussion Killers." (e.g., "We tried that once," "It won't work," "You don't know what you're talking about," etc.) Be positive/encouraging.

13. Think strategically, creatively, and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)

15. We are all members of the Body of Christ, our Holy Parish, and are made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

Pick whatever ROEs you want, but it is important to have process procedures established and announced well in advance and agreed to by the entire SPT.

Majority Does Not Rule.

The concept that a majority gets to rule likely originated in Ancient Greece and remains the prevailing decision-making authority in America today (Heinberg, 1926). The problem with this time-honored tradition in SP is that it can lead to those in the minority feeling their opinions are not welcomed or considered and their perspectives are not embraced. Thus, the team to achieve the Vision in the volunteer-controlled parish can become decimated before the journey begins.

A more inclusive and engaging decision-making model in parish SP is the time-honored "consensus" tradition. This was the model for decisions in the early days of the Christian church. History records multiple Ecumenical Councils where theologians and clergy would gather to debate a theological principle or alternative theory and eventually agree on the final decision through the process of consensus. Consensus decision-making involves a good faith attempt to hear all voices in a full and fair discussion to achieve a decision everyone can support and live with, even if it was not their first choice (Susskind et al., 1999).

When creating a path through a complicated set of decisions to an uncertain future, sometimes the consensus process is a journey rather than a specific decisive moment where the team realizes they have reached a solution they can live with (Mintzberg & Waters, 1990). This is why in parish SP, it is critical to move deliberately but take the time to reach a consensus and not leave parishioners behind with a decision they cannot accept or support.

Moses learned this lesson the hard way. After a time on Mount Sinai, Moses received ten critical commandments directly from God. In a dramatic scene described in Exodus 20:18 that rivals anything modern movies could present, the team saw lightning, heard thunder and trumpets blaring, and witnessed mountains engulfed in smoke. Not surprisingly, they "*trembled and stood far off*" (Exodus 20:21). When Moses descended with the Ten Commandments written in stone, he observed the lack of consensus among his followers as angry human leaders reacted by breaking the stone tablets into the mountain (Exodus 32:19). However, after taking the time to teach and preach and discuss and rebuild a consensus among the followers, Moses returned to rewrite these critical Core Values which the followers eventually embraced so they could continue their journey (Deuteronomy 10:4).

The SP application of consensus is merely seeking the "common mind" through respectful dialogue. Ultimately, you should seek an agreement everyone can "live with" (even if it is not their first choice). Indeed, the question you should repeatedly ask the SPT is if the revised proposal is something they can live with. Consensus is achieved once everyone agrees that the discussion has been full and fair and everyone can accept the modified proposal.

There are times in an SP process when consensus is not achievable after the period allotted to the discussion. This is where great facilitation steps in. If the facilitator (OZ) determines that the group is close, they should extend the time to see if consensus can be reached while the discussion is fresh on everyone's mind. However, if OZ determines consensus is still far away, the best strategy is to "park" the discussion. This is done by

letting everyone know consensus has not been achieved, and the group will either take a break or move on to the next topic and come back to the open matter later.

In my experience, faithful groups of parishioners in an SPT can usually talk through differences of opinion and reach a consensus if given enough time and facilitation. However, parking an issue and moving on is not to be feared, and it often allows the Holy Spirit an opportunity to move the process forward. In one parish I worked with, even after an extended time, there was one phrase in a Mission Statement that the group could not reconcile. So, I called an audible, parked that issue for resolution later, and moved on to the next task.

About 10 minutes into that following task, an SPT member raised their hand and begged me to return to the previous unresolved issue because they had an epiphany and fresh take. The group looked at me to see what I would do, and leaning into the feeling the Holy Spirit had been at work, I said, "OK, you have one chance before we keep it parked." After stating their revised language, even before they could explain or defend it, several people in the group shouted, "That's it!" And in less than a minute, the entire group enthusiastically celebrated the compromise. I asked everyone to quietly thank the Holy Spirit as I thanked the whole SPT for their dedication to the critical task at hand and willingness to engage in consensus decision-making.

SP Schedule And Timelines - The Two Phases.

There are two phases to my SP process: Planning and Implementation. The Planning phase (about 7-9 months) is when the SP is developed, and the Implementation Phase (anywhere from 2-5 years) is when all steps defined in the planning phase are fully completed. Some people are good at doing foundational research and considering options to meet needs, thinking strategically for the longer term, and developing strategy and action plans. Other people's Godly gifts are better suited to project management and executing defined action steps rather than conceptualizing grand Visions. This is why there are two separate teams, one to develop strategy and another to implement it.

Of course, every SPT member who created the strategy is encouraged to join an **Implementation Team** ("**IT**") once the SP is developed. At the same time, parishioners who could not commit to the rigor of the SP process but are interested in implementing it are encouraged to join an IT in a Strategic Goal they are passionate about. Additionally, some Strategic Goals are in areas where parish ministries already exist. All members of any such ministry are encouraged to join the IT in that area to help develop new and better solutions. I also encourage the parish community at large to be recruited into ITs. The bigger the committed army, the more likely the Strategic Goals will be accomplished.

One note of caution, however. When someone who was not part of the SPT is added to the IT team, they will need to be brought up to speed on everything done in the SP process. Particularly, they will need to understand and embrace the parish's WHY and Core Values and review the SWOT to see why these Strategic Areas of Focus were chosen and understand how the Strategic Goal was developed.

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If a new IT member has been involved in a ministry in the area of a Strategic Goal in the past, you might find them resistant to change. They may be wed to the way things have always been done and threatened by the need to research best practices, identify measurable goals to achieve, and implement accountability processes. Groupthink and "that's not the way we've always done it" must be addressed.

Change is not easy for most people, especially parishioners who have been doing what they believe was the right thing for a long time, even though the results (as demonstrated by the Weaknesses identified by the parishioners) indicate otherwise. Occasionally, it is time to move past those people refusing to change so they can keep a suboptimal ministry or process rooted in past inadequacies. In those cases, it is OK to have a "succession event," thank them for their distinguished service, and move forward.

The 2 Stewardship Calling SP Process Options.

I have found that, as much as possible, gathering people together in person to conduct an SP process is the most engaging and effective manner to proceed. While quite a few of the activities can be done via Zoom or other virtual processes, there is no better way to form and inspire a team than to have them all together in the same place, going through the two SPT Retreats in my SP process.

However, after the SARS-CoV-2 pandemic, I experimented and was able to migrate the entire Stewardship Calling SP process to be completed virtually. As a result, I will provide two different overall timelines below. One method includes two in-person retreats, and the second process allows SP to be done virtually. Again, either way, you can finish everything properly. However, having everybody together for the three-day first retreat and second one-day retreat just provides better interpersonal dynamics that make for a more positive result.

Regardless of whether the live or virtual program is implemented, those retreats must be action-packed, stay on schedule, and be as entertaining and enjoyable as possible. Accordingly, I routinely include a variety of different activities that can allow for interaction and socialization. I also invite and instigate some good-natured kidding back and forth to build esprit de corps. Indeed, my style is to encourage a fair amount of fun joking with me (and anybody else who can take it). Parish SP is serious work, but the more enjoyable we make it, the more enthusiastically committed your team will be.

I typically look for somebody who is good-hearted, confident in themselves, and a dedicated parishioner who likes joking around to be one of the people I "pick on" in a loving way during the whole process. I encourage them to return the favor of making fun of me. Recently, I identified one of the most well-liked older parishioners who had a good sense of humor, and I always used his name when I described what some wackadoodle might say or do. Every time I did that, immediately the whole SPT came to his defense and reiterated what a great guy he was. Their circling of the wagons around one of their

own was a critical step in their learning to coalesce as a unified team and "fight like Spartans" by always protecting their colleagues.

To bring in happiness, I also like to instigate natural fights. As someone from Atlanta who will insist that Coke products be served, I will routinely criticize anytime I see a non-Coke beverage. Similarly, as a caffeine addict, I insist on having fresh and strong Starbucks coffee present and will "poo-poo" any inferior or non-fresh coffee. (Of course, I'm grateful for any hospitality in the meals and will graciously accept anything that is offered.) However, I have learned that the more fun people can have on insignificant things as they learn to work closely and diligently together over a very intense schedule, the better the experience is for everyone.

The Stewardship Calling Live SP Process Timeline.

I have set out the general timeline and schedule parameters below for both my In-Person approach and the Virtual approach:

<u>In Person Summary Overall Timetable</u>[1]

Finalize SPT	≈ 2 months from start
First retreat	≈ 4-5 months from start
Second retreat	≈ 7-8 months from start
Public Rollout	≈ 8-9 months after start

[1] Subject to Easter/Pascha/Christmas and major parish events and activities (e.g., parish festivals, Sunday School graduations, etc.)

<u>TASK</u>	<u>TIME</u>
Pick and Recruit SPT	1-2 months after start
Solicit "Where Are We Now" Data	2-3 months after start
First in-person 3-day retreat	4-5 months after start
Create SMART Goals and Action Plans	6-7 months after start
Second retreat	7-8 months after start
Public rollout event	8-9 months after start

The Stewardship Calling ZOOM/Virtual SP Process Timeline.

<u>Virtual Summary Overall Timetable</u>[1]

Finalize SPT[2]	≈ 2 months from start
SP Element Determination	≈ 4 months from start
Strategic Goal &	

Action Plans	≈ 5-6 months from start
Second retreat	≈ 7 months from start
Public Rollout	≈ 8 months after start

¹ Subject to Easter/Pascha/Christmas and major parish events and activities (e.g., parish festivals, Sunday School graduations, etc.)

TASK	TIME
Pick and Recruit SPT & Solicit	
"Where are we now?" Data	1-2 months after start
WHY Discovery Zoom	3 months after start
SWOT Determination Zoom	2-3 weeks later
Core Values, Mission Statement & Strategic Area of Focus Determination Zoom	2-3 weeks later
Second retreat	7 months after start
Public rollout event	8 months after start

There are substantial similarities between these two respective overall timetables. The biggest difference is that in the in-person approach at the first three-day retreat, the SPT is able to reach consensus on the SWOT analysis, WHY Statement, Core Values, Mission Statement, and the identification of the top two or three Strategic Areas of Focus that will be pursued. In the Virtual version, these activities need to be undertaken at different Zoom/Virtual sessions. I have provided an Example of a 1st SP In-Person Retreat handbook (with schedule and actions) in **Exhibit "G"** to this Chapter 7.

The Three Teams – CT, SPT & IT – Size Matters.

Some prefer doing parish SP with a small planning group that usually consists of leaders or other insiders. I acknowledge it is easier that way; however, I believe it tends to be more of the choir speaking to itself and fails to consider the needs of the broader community as a whole because it does not represent the vast diversity of the parish. While I never advocate diversity for its own sake, if we are truly reimagining a healthier and more effective parish, we must ensure it meets the growing and different needs of the vast array of other people God has entrusted to us.

Thus, I strongly prefer the Strategic Positioning/Planning Team ("**SPT**") of between 30-50 people, which I find is necessary to reflect more substantial diversity (with smaller parishes at the lower range and larger parishes at the higher end). I have found that by

the time you do the "Noah's ark" exercise of ensuring you have a couple of all different constituencies, including PIPs, APIPs, FPIPs, cradle believers, converts, male, female, older timers, empty nesters, families, young marrieds, young singles, widows/widowers, high-schoolers, catechumens, seekers, and other critical stakeholders, 30 is a bare minimum. Plus, if you cannot excite that many parishioners into creating an SP and Vision for the future, your parish is probably not yet ready.

I have had a few difficult conversations with some clergy and laity who tend to be more control-oriented and do not want a big group. If they insist on doing it with a small group, I know I am not the right person to help them, and I wish them well. I even spoke with one clergyman who said he was unable to inspire even his parish council to undertake SP, so he developed one on his own. I congratulated him on developing his personal SP rather than one for the whole parish since they were neither consulted nor included. I think he got the message, but he did not change his approach. Unsurprisingly, his plan went nowhere, his leadership reputation took a hit, and the parish remains stuck and spiraling.

I hated being right in that case because I did love that priest and his parish. However, as I repeatedly say, Drs. Kouzes and Poser are 100% right: "In the end, leaders don't decide who leads. Followers do. If you think you're a leader and you turn around and no one is following you, then you're simply out for a walk" (Kouzes & Posner, 2010). I think that the priest has finally realized he has been out for a long and lonely walk by himself. Building a team is hard but critical if you want a parish SP to succeed.

Unlike businesses, parishes do not have paid staff to implement their SP. Parishes rely on volunteers who have personal lives, families, and day jobs. One of my repeated humorous legal reminders is "The 13th Amendment to the Constitution freed the slaves and the church volunteers."

In my second law firm, with over 1,200 lawyers in over 21 global offices, we religiously (pun intended) did SP every three years. Representatives of the vast diversity of our firm participated, and input from all partners was solicited. When we finished the SP, we had a paid staff who helped us stay on top of the implementation of the strategic goals.

No such paid SP implementation staff is present in any parish. For a parish SP to be successfully implemented, you need a veritable army of dedicated volunteers for all the work to achieve the Strategic Goals. You must start building the army in the planning phase by engaging a loyal and committed group of volunteers who do their best work designing a transformational SP that the separate Implementation Team (with lots of overlap) will actually execute.

Core Team (CT).

When I begin a parish SP exercise, I always like to have a small **Core Team** ("**CT**") of about five to seven parish leaders who are most dedicated to a successful SP process that includes the lead priest. This CT tends to be leaders of the community who have a good strategic vision of what is going on and what needs to happen and generally know

most of the people within the parish. At the same time, it needs to be diverse enough to represent or at least know the different major constituencies.

I use this CT to help identify the candidates to serve on the SPT utilizing the process I will describe below. This is why they need to know as many parishioners as possible from different demographics and constituencies within the parish. The CT members will also divide the list of SPT candidates and help solicit their participation in the SP process. In addition, I use the CT to help me do the "heat mapping" of the parish data (described in **Exhibit "F"** to this Chapter 7) we will gather through the SWOT analysis. Having this small group of leaders learn my SP process is also a way I try to perform a knowledge transfer so that in the years following the completion of their first SP, they are more capable of leading the next SP.

Strategic Planning Team (SPT).

I suggest the Core Team use the following criteria to determine who your best choices for SPT are.

1. Who <u>must</u> be a part of the SPT for it to be successful, and who would we be better off if they were not a part of the SPT? We must have a frank (and very confidential) conversation. We are all acutely aware of psychology and human behavior. Some people, if they are not in the room, will kill whatever is developed. Some people, if they are in the room, will kill whatever is not their idea. Both are dangerous and not helpful.

2. We need to have people from many different perspectives and with many diverse gifts who represent the required constituencies within the parish.

3. All SPT members must be able (as we say in the South) "to play nice in the sandbox" and work well in a team environment.

4. We need intelligent, articulate, engaged, faithful, intellectually honest, well-adjusted team players who genuinely care about doing the right thing and can leave their egos at the door.

5. We do not need 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, or malcontents. I am sorry to be so blunt; however, I have seen many good planning processes get killed because of the wrong people in the room or die due to a thousand paper cuts because someone was not in the room. Thus, care as to the SPT composition is as important to success as is the process and timetable.

6. The SPT must represent all areas within your parish and all different major constituencies (young/old, cradle/convert, ethnic/non-ethnic, urban/rural, professional/blue collar, working/stay-at-home parents, men/women, etc.). It cannot just be the "usual suspects" and the same folks you see on your PC or at your general assemblies.

7. SPT members must be capable of strategic thought and not merely be small thinkers. We are building something big, important, transformational, and long-term.

8. SPT members must be creative and think like visionaries and futurists and not people who are rooted in the past.

9. We need well-adjusted parishioners and not people who are not so sad/mad/angry/hostile that they cannot see beyond their own circumstances.

10. SPT members must be willing to dedicate a fair amount of time over the next 7-9 months and make this SP work a priority. There may be some people you think do not have the time who will surprise you if invited to participate in something this transformational. They have just been waiting to make a difference. There will be some who you would think have plenty of time and who will not want to participate because they do not appreciate this kind of process. You will not always know which is which, so invite the best folks and let them decide if they are willing to devote the time.

Some original SPT members will drop out for different reasons (e.g., a bigger priority may arise in their lives, they may not like the process or amount of work it takes, they may realize they can't add value or have the necessary time, etc.). That should be expected and is OK. This is one reason you will include a larger number of SPT invitees so that when you have departures, you do not harm your critical mass. After the first retreat, you will also have "on-ramping" opportunities to bring in new blood interested in the strategic areas we identify as necessary. The Holy Spirit will guide and work with you if you have faith.

Strategic Planning Team (SPT) Selection.

I use a somewhat untraditional way to select the SPT invitees that have been validated over time in many situations. I ask all CT members, including the clergy, to send me the maximum list of individuals that they can think of throughout the parish that meet all the criteria I set out previously. I then compile an aggregate list of names from all members of the CT, alphabetize it, and remove any common names.

In a special CT meeting, I read every name alphabetically, and any member of the CT who does not believe that particular SPT candidate is a good fit and meets all the criteria can merely say "B." This signifies that they will not be invited to be a part of the SPT in the first round but will instead be added to the "B-Team," which you may "on-ramp" later. No CT member is required to explain their reason for placing a candidate on the B Team. This is to protect whatever confidential reasons they might know that may make this candidate less than ideal.

Typically, If the CT has done a good job of going through the parish list and identifying SPT candidates, it takes no more than one pass through the names to identify the remainder that you invite to be members of the SPT. My usual experience has been

to invite at least twice as many parishioners as you hope to have on your SPT ultimately. Thus, for a larger parish where you may be seeking an SPT of 50 members, you would try to make sure that you have invited at least 110 parishioners. For smaller parishes that may only need a 30-member SPT, you would look to invite between 70 and 75 individuals. My extensive experience has discovered that a 50% yield rate from invites to acceptances is normal.

After the CT has finalized the list of SPT invitees, a formal letter of invitation is sent out that describes the entire process, what is expected of them, and includes both the ROEs we will follow, the expected timelines and deadlines, and some FAQs to answer their questions in advance. A sample of this letter is attached as **Exhibit "C"** to this Chapter 7.

I have discovered that you will typically get between 25% and 40% of the SPT invitees to respond to the RSVP in the invitation letter within ten days of when it is delivered. For this reason, I recommend that it is delivered both via mail and e-mail (and even via text message if a parish has that capability). I also recommend that the RSVP period be left open for about three weeks at a maximum. About one week before the deadline, all SPT invitees who have not yet responded are allocated among the members of the CT so they can follow up personally to answer any questions and help the SPT invitee decide whether or not they should participate. Deadlines are important if you're to stay on track in this process, which is why I try to rigorously manage this phase of the program so that we can make sure that we have the right team in place.

Implementation Team (IT).

Once the SP is finalized, the members of the SPT are, as I jokingly say, "fired and thanked for their service." Immediately thereafter, I start recruiting them to join an IT team of their choice for one of the final Strategic Goals in order to execute all the actions determined in the SP Action Plan. A natural starting point for each IT is the members of the SPT that helped design each of the Strategic Goals and Action Plans. However, I have discovered that some people who are really good strategic thinkers are poor at implementing an SP, and therefore, they elect not to participate in the implementation phase. Similarly, some individuals who may have worked on one Strategic Goal may become more excited about working on the implementation of another Strategic Goal. Therefore, you should facilitate their migration to where they feel the most passion.

In addition to the members of the SPT that carry over onto the IT, anybody who is involved in a ministry that a Strategic Goal directly or indirectly touches must be invited to be a member of that goal's IT. Their insights and past experiences are important as long as they don't become a hindrance to surveying or evaluating new and improved solutions. Finally, at the Open Community Rollout Event, where the SP is presented for enthusiastic acceptance by the parish as a whole, all parishioners should be invited to join an IT and thus become part of the solution of creating the new Vision for the parish. Most won't, but it is always good to ask.

Some individuals worry about having an IT that is too large. However, experience has demonstrated that quite a few people who sign up may not be willing actually to do the work. In addition, once the actual Action Plan is determined for each Strategic Goal, a whole host of different activities need to be undertaken. Thus, a large group can be allocated amongst the various tasks to be performed so that there's no significant overlap, redundancy, or too many people getting in the way of others.

Spending time identifying, recruiting, and developing the best and largest team possible is absolutely critical for your SP to be fully and successfully implemented. Having the largest army fighting the parish battles that need to be fought is the goal. To put the parish in the best position for the future requires "all hands on deck" and participation by as many people as God has called to provide service to this great end.

The Whole Parish Community.

One critical point that cannot be overstated is the essential importance of ensuring that the entire community is involved in this process as much as possible. Ultimately, any successful SP will require the consensus support of the whole parish community to ensure that all the hard work will be done effectively. Accordingly, extensive and continual communication of every step of the SP process is essential. In addition, I strongly recommend the inclusion of every type of parish communication activity to help inform and include the broadest possible support from the parish at large.

While the information regarding the SWOT analysis will be discussed more below, one of these community-wide opportunities is to have an open community forum SWOT analysis discussion. At this forum, I typically present a 10-to-15-minute PowerPoint regarding the overall strategic planning the parish is undertaking and explain what each element of the SWOT analysis means. We would then open the floor for comments from everyone in attendance to offer their parish strengths, weaknesses, opportunities, and threats.

This is done as an open community forum for a variety of reasons. Some people are verbal auditory communicators and do that much better than writing their SWOT analysis answers. Secondly, If people attend and hear the ideas expressed by others, it will often trigger new ideas that they can offer verbally. Additionally, in some cases, parishioners can reinforce the concepts that other parishioners offer.

Finally, you want to make sure that parishioners all have the maximum number of opportunities to be heard. It is essential that gathering the data from the greatest number and diversity of parishioners occur through multiple opportunities to provide their input so that with integrity, it can be said that every parishioner was able to become part of the process and offer their input and wisdom.

The last engagement action in the planning phase is the invitation to the community-wide celebration of the SP so that every parishioner can embrace the SP and engage with an IT to help ensure that the Strategic Plan is fully and effectively implemented. Throughout the SP process, constant communication regarding the SP and progress is critically important. Furthermore, as the implementation of the SP begins, it is

equally important that the SP efforts be effectively communicated. One way to do this is to establish a page on the parish's website just for the SP with updated information and the relevant scoreboards of accomplishments. Showing the levels of achievement of each of the Strategic Goals, as well as the "low-hanging fruit" (discussed in more detail later), helps convey the seriousness of the SP process and the achievement of the Vision.

Question 2 – Where Are We Now? - Effective Parish Assessment - EPA.

I always preach the well-worn truth that "you cannot master what you do not measure." This is a nuanced version of management guru Peter Drucker's version of "you can't manage what you don't measure." Unfortunately, in church-world most things go unmeasured. And the few things measured tend to be symptoms and not root causes of issues. For example, parishes can tell you about financial collections and how they are paying expenses (both lagging indicators of symptoms) but not how they achieved them or why their results were not better.

Most parishes do not even measure how many people are present for their various services (by different demographic) groups. This means they cannot determine if they are reaching a significant portion of parishioners or if some groups are missing. Moreover, if they were to experiment with some theologically appropriate innovation without having a baseline of attendance, it would be impossible to determine if the innovation is an improvement or not.

Doctors can assess your personal health. Financial planners can determine your financial well-being. Educators can assess your academic proficiency. However, one thing that bothered me was the complete absence of a free, methodical, empirically and experientially validated, and convenient and easy-to-administer tool to assess the operational health and effectiveness of Christian parishes.

Thus, after 30 years of working with over 1,000 parishes and completing strategic plans that covered over 26% of Orthodox Christians in the United States and studying all of the relevant church empirical data I could find, I assembled a treasure trove of useful information. I was then blessed to gather a few colleagues to see if we could develop an empirical parish health and effectiveness assessment. After meetings and ZOOMs over several years, the Effective Parish Assessment (**EPA**) was born.

Based on all the empirical data, we identified 30 "Building Blocks" of operational excellence and parish health that can be grouped into 6 "Pillars." The diagram on the next page depicts the totality of what a healthy and effective Christian parish must provide.

At the top, under the dome, is the worship experience. In traditional churches like the Orthodox and Roman Catholic denominations, this includes various precise liturgical and sacramental practices handed down from the time of the Apostles and Ecumenical Councils. For other more modern faiths, the worship experience varies. Regardless of the style of worship, a healthy and effective parish must excel at this. However, since that is mostly under the purview of the clergy, this is largely not evaluated in the EPA (with a few exceptions).

Similarly, an effective parish must foster personal faith formation, depicted as the foundational element at the bottom of the "living house of faith." How one lives one's faith is a critical process. In traditional faiths, this would include a sacramental life (e.g., communion (Eucharist), confession or penance, baptism, chrismation or confirmation, Holy Unction or anointing of the sick, marriage, ordination). It also includes an active prayer life, study of the Holy Scripture, and other elements of living one's Christian faith. Since this is highly personal and varies widely, it is also not included in the EPA.

However, everything else the parish does falls within the broadly defined rubric of what I call "the operational side of the house of God." This includes all the ways the faithful can interact with the parish (other than liturgically), including ministries, philanthropy, education, service, social, and the parish's Vision to bring people closer to Christ and each other. All of that is the subject matter of the comprehensive EPA assessment.

The EPA consists of a free online survey all parishioners complete. The EPA is a reliable, easy, and empirical way to assess the Parish health and operational effectiveness by surveying parishioners and any other relevant stakeholders. The EPA consists of a series of validated statements that parishioners evaluate on a 5-point Likert scale from "strongly disagree," "disagree," "neither disagree nor agree," "agree" to "strongly agree." In addition, an "I Don't Know" option is available for each statement, which helps provide valuable feedback for parish leaders regarding activities, programs, and initiatives being implemented for which inadequate or ineffective communications cause their availability not to be known by parishioners.

The EPA results are grouped as: (a) Favorable = Strongly Agree and Agree; (b) Unfavorable = Disagree and Strongly Disagree; (c) Neutral = Neither Agree nor Disagree. "I Don't Know" answers are tabulated separately to assess the effectiveness of Parish communications. Indeed, as part of the readout of EPA results, we include a slide showing

all 30 building blocks ranked from the most "I Don't Know" answers to the least, as represented in the example below:

Pillar	Building Block	% I don't know
Stewardship & Generosity	Capital Campaign	56%
Stewardship & Generosity	Planned Giving & Endowments	54%
Operational Effectiveness	Financial Excellence	41%
Stewardship & Generosity	External Philanthropy	36%
Vision & Planning	Strategic Planning	35%
Ministries	Ministry Management	35%
Parishioner Engagement	Outreach	34%
Operational Effectiveness	Staff Management	34%
Stewardship & Generosity	Giving & Tithing	33%
Vision & Planning	Goal Achievement and Accountability	33%
Vision & Planning	Parishioner Involvement	32%
Stewardship & Generosity	Transparency & Accountability	30%
Stewardship & Generosity	Stewardship Campaign	30%
Ministries	Youth & Young Adult	29%
Operational Effectiveness	Safety & Security	28%
Vision & Planning	Operational & Technical Planning	25%
Parishioner Engagement	Evangelism	25%
Ministries	Volunteer Management	25%
Ministries	Ministry Engagement	23%
Ministries	Defines Needs of Parishioners	21%
Operational Effectiveness	Facilities & Technology	19%
Operational Effectiveness	Communications & Digital Strategies	19%
Parishioner Engagement	Spiritual Engagement & Catechism	17%
Parishioner Engagement	Liturgical & Sacramental Participation	17%
Leadership & Teams	Conflict Management	16%
Leadership & Teams	Effective Teams	9%
Leadership & Teams	Parish Council & Boards	8%
Leadership & Teams	Leading & Coaching	8%
Leadership & Teams	Christian Leadership	6%
Parishioner Engagement	Welcoming & Fellowship	5%

Possible Communication Opportunities

Over a three-week period, all parishioners are repeatedly asked to complete this EPA survey. Following the completion of a statistically significant sample size of parishioners and the necessary calculations of results, a color-coded analysis is delivered at the Pillar level. As usual, Green indicates things are relatively good in this Pillar, yellow signifies a need for caution and some areas that may need attention, and red indicates a DEFCON One need for attention and remediation. The following hypothetical sample shows the Pillar names at the top and the Building Blocks in the bullets below, as well as an overall color of the summary results for the entire Pillar.

EFECTIVE PARISH ASSESSMENT
Sample Pillar Report Card

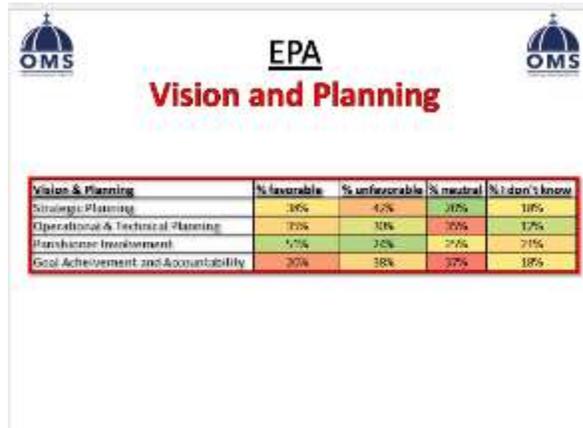| Vision & Planning	Leadership & Teams	Stewardship & Generosity	Parishioner Engagement	Ministries	Operational Effectiveness
• Strategic Planning • Operational & Tactical Planning • Parishioner Involvement • Goal Achievement & Accountability	• Christian Leadership • Leading & Coaching • Conflict Management • Effective Teams • Parish Council & Boards	• Giving & Tithing • Stewardship Campaign • Capital Campaign • Planned Giving & Endowments • External Philanthropy • Transparency & Accountability	• Spiritual Education & Catechism • Liturgical & Sacramental Participation • Outreach • Evangelism • Welcoming & Fellowship	• Defines Needs of Parishioners • Ministry Management • Ministry Engagement • Volunteer Management • Youth & Young Adult	• Communication & Digital Strategies • Facilities & Technology • Financial Excellence • Safety & Security • Staff Management

A statistically significant approximately 10% of Greek Orthodox parishes have completed version 1.0 of the EPA, as well as parishes from other Orthodox jurisdictions. As a result of the data from these early adopters and innovators, a Version 2.0 of the EPA is being developed that will make it even easier to implement while still yielding extraordinarily valuable information. The next iteration will hopefully include using artificial intelligence to help facilitate the gathering and analysis of the data. However, my absolute Stewardship Calling commitment is to ensure that I (or another experienced church consultant) will analyze and deliver all data directly to the parish council and other leadership, answer all questions, and help them chart strategies to respond to the results.

Delivery of these EPA results usually takes place over three sessions. In the first parish ZOOM, we review the EPA tools, present the overall Pillar assessment, and then present the detailed Building Block results depicted above. We then go down to the next level to show the detailed percentages of responses that were favorable, unfavorable, neutral, and I Don't Know for each Pillar. See the example below:
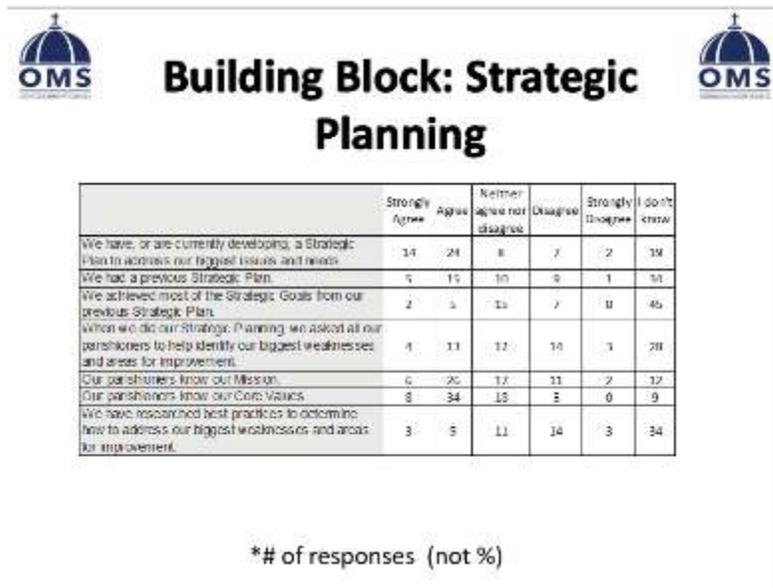
Effective Parish Preliminary Assessment Results

	% favorable	% unfavorable	% neutral	% I don't know
Vision & Planning	37%	34%	29%	17%
Leadership & Teams	50%	21%	28%	7%
Stewardship & Generosity	28%	45%	26%	30%
Parishioner Engagement	44%	38%	18%	15%
Ministries	33%	40%	27%	15%
Operational Effectiveness	45%	29%	26%	23%

After this Pillar data is presented and understood, we then present the percentage favorable, neutral, unfavorable, and "I don't know" for each of the thirty building blocks one at a time, focusing on the areas that the data shows provide the need for the greatest attention. See an example to the right.

EPA
Vision and Planning

Vision & Planning	% favorable	% unfavorable	% neutral	% I don't know
Strategic Planning	38%	42%	30%	10%
Operational & Technical Planning	71%	10%	36%	17%
Parishioner Involvement	57%	30%	20%	21%
Goal Achievement and Accountability	30%	38%	37%	18%

This analysis is repeated for all of the thirty building blocks. Any preliminary parish council questions are answered in this first presentation of results, and the parish leadership is challenged to start to identify if any of the responses are anomalous and unexpected or easily explainable by a fact unknown to me or my team.

The second EPA Zoom session occurs after the parish leadership has digested the results and provided answers to a questionnaire about the things they would like to be explained in greater detail. In this second session, we can go down to the question-by-question level to review responses and identify the root cause of the issue. Below is an example of parishioners' responses:

Building Block: Strategic Planning

	Strongly Agree	Agree	Neither agree nor disagree	Disagree	Strongly Disagree	I don't know
We have, or are currently developing, a Strategic Plan to address our biggest issues and needs	14	24	8	7	2	19
We had a previous Strategic Plan.	5	15	10	9	1	14
We achieved most of the Strategic Goals from our previous Strategic Plan	2	5	13	7	0	46
When we did our Strategic Planning, we asked all our parishioners to help identify our biggest weaknesses and areas for improvement.	4	11	17	14	1	28
Our parishioners know our Mission.	6	20	17	11	2	12
Our parishioners know our Core Values.	8	34	18	5	0	9
We have researched best practices to determine how to address our biggest weaknesses and areas for improvement.	3	5	11	14	3	34

*# of responses (not %)

For those parishes undertaking an SP, the level one and two analysis of the EPA is critical data the SPT will use to identify the most vital root cause issues that must be addressed. Those parishes that are not yet ready to undertake SP can use the data from these two EPA sessions to begin to explore the concerns most important to their parishioners and start to consider solutions.

Over decades, leadership scholars Drs. Kouzes and Posner have surveyed over 100,000 people who have consistently identified the critical importance of honesty, integrity, and trustworthiness in all research and organizational improvement efforts (Kouzes & Posner, 2017). The next highest-rated element followers looked for in their leaders was well below these elements of trust. There is no better way to earn the trust of your parishioners than to solicit their input, concerns, and thoughts objectively and then transparently report on and use that data to address the biggest challenges they identify.

While often attributed to President Ronald Regan, the phrase "Trust but verify" has Russian roots. "Doveryay, no proveryay" which translates into "a responsible person always verifies everything before trusting" (Shevchenko, 2019). The Apostle Thomas is treated as the poster child for the scriptural imperative of not trusting until you can see for yourself. "*Unless I see in His hands the print of the nails, and put my finger into the print of the nails, and put my hand into his side, I will not believe*" (John 20:25). In this way, he demonstrated humans' need to see things with their own eyes.

For this and other reasons, every parish is highly advised to use a tool like the EPA (and/or SWOT analysis that is discussed next) to regularly survey the parishioners and let them know their concerns are heard and will be addressed in order of priority. If you are interested in learning more about the free EPA, please get in touch with me at Bill@stewardhipcalling.com or check out the Effective Parish Assessment website: www.effectiveparish.org.

SWOT Data Gathering: "Facts Don't Care About Your Feelings."

Before executing transformational SP, one must answer the second of the four critical questions: Where are we now? Finding the answer requires using one (or more) accepted SP assessment techniques. Bensoussan and Fleisher (2008) discussed how thoughtful data analysis, separated into its constituent parts, is often overlooked or underemphasized in processes such as excellent SP.

One of the older and very successful truth discovery processes is what is widely defined as a **SWOT Analysis** (**S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats), which remains a mainstay in SP despite its efficacy critics (Leigh, 2009). In every SP I have led over many decades, the fact discovery process yielded a clear consensus of the most critical challenges a parish is facing. This was also true when I did SP for business clients, religious schools on whose Board I served, and the countless number of churches and ministries I have been blessed to lead through SP.

I repeatedly say that every element of an SP process is biblical in its foundation, and a SWOT Analysis is no different. St. Paul preaches in II Corinthians 13:5, "*Examine yourselves as to whether you are in the faith. Test yourselves*." The Orthodox Study Bible (2008) commentary on this powerful passage instructs "that the test of being in Christ is a humble, virtuous life lived in communion with the Church" (p. 1586). This is exactly what a SWOT Analysis is attempting to discern in asking what your parish does well to bring people closer to Christ and each other (your Strengths) and what your parish does not do well or that needs to improve (Weaknesses).

However, the SWOT analysis is not only introspective, looking within the four walls and activities of the parish, but also forces you to look outside. You know that in modernity, there are forces at work outside of your parish that it can use or take advantage of (Opportunities) and headwinds that can cause your parish difficulties (Threats). Understanding both the internal things you do well and that need improvement, as well as the external factors to deploy and avoid, is a critical part of helping a parish determine a bright new future.

Among the SWOT Analysis benefits is the ability to quantify concerns and show the community in order of the number of mentions. These things are top priorities for the majority of parishioners. In this way, planners can help people realize when their opinions are unique and not mainstream concerns of a consensus of other stakeholders. This recognition allows a parish to prioritize the biggest consensus problems they must address in their SP.

Moses modeled this practice many times, perhaps most famously when he sent out the "twelve spies" (Numbers 13:1-33). The Twelve Tribes of Israel descended from Jacob, and each sent a "spy" to factually assess the prospective lands for their suitability to be the "promised land" and to return with empirical evidence of what they found. This is essential to discover the quality of the parish soil into which new seeds are planted through the SP process.

Fascinatingly, the data presented by ten of the twelve spies underscored the difficulty of their journey while simultaneously sharing how rich the land was in the resources they needed (Numbers 13:27-28). However, the remaining two data-gathering spies, Joshua and Caleb, disagreed and concluded they should take the journey and claim the land (Numbers 13:30). The people foolishly followed the majority until God killed the first ten spies (other than Joshua and Caleb) with a plague. Since the people ignored the empirical and factual data and acted on feelings of journey difficulty, they made the wrong decision and required God's intervention to correct their error.

Gathering this SWOT data from as many parishioners and other stakeholders as possible is critical. This is why in my Stewardship Calling SP process, I have every member of the SPT and CT complete a SWOT as well as having them ask every parishioner to do the same. This is done in as many different communications media and vehicles as possible. Thus, I suggest a parish mail <u>AND</u> email the SWOT request to everyone at least twice, as well as placing it in any parish bulletin, on the parish website, in the area outside the church (narthex), and through every other media vehicle at the parish's disposal. I have provided a sample of my simple parish-wide SWOT request letter and form in **Exhibit "D"** to this Chapter 7.

I recommend leaving the SWOT deadline open for at least three weeks. The priest should mention it every Sunday and in any other weekday services, as well as in any announcements in church and mailings of bulletins. It is also helpful to talk it up at any Ministry or Small Group meetings, Bible studies, or other activities happening at the parish over those three weeks. I encourage everyone to complete it using the Microsoft Word document to make the transcription easier. Still, some people will inevitably handwrite their responses, so someone will need to transcribe the written work into a Word document.

If you have parishioners for whom English is not their primary language, it is helpful to have translation services available. Also, for senior citizens who may not be computer literate, I have found it helpful to have some computers, notebooks, or iPads in the church hall where people can fill out the forms. It is also a great idea for some of your youth to be available to help the seniors complete the forms as one of their community service stewardship projects. Some parishes have created online Google Docs or used MailChimp, Constant Contact, parish APPs, or other vehicles to get SWOT data from as many parishioners as possible so that their voices can be heard.

Every member of the SPT must complete a SWOT; however, there is additional information they need to submit for the first retreat. I have provided a sample of my simple SPT SWOT and Advanced Assignments request letter and form in **Exhibit "E"** to this Chapter 7. As the forms are submitted, someone needs to move the individual entries onto separate Microsoft Word documents to facilitate the heat mapping process. There will ultimately need to be seven separate Word documents, one for each of Strengths, Weaknesses, Opportunities, Threats, Core Values, Mission Statements, and proposed Strategic Areas of Focus (with the last three items only coming from SPT members and not the entire parish).

In addition, as the SPT Advance Assignments are submitted, someone in the parish office or a volunteer will have to log in the choice of the SPT members for the two different sets of breakout groups, namely either (a) Mission or Vision, and (b) Strengths, Weaknesses, Opportunities Threats, and Core Values. For the first SPT retreat breakouts, there should be relatively even numbers of SPT members allocated to each of the five choices in (b) above and then two or three different groups of Mission Statement teams and two different groups of Strategic Area of Focus Teams.

In addition to the written submissions, as previously mentioned, I strongly recommend having at least one open community forum night where anyone who wants to can come to offer their own SWOT suggestions verbally. A short presentation of the SP process should proceed with the "open mic night" opportunities when people can come forward and state their suggested Strengths, Weaknesses, Opportunities, or Threats. I recommend doing them one at a time, and I ask people to try to come to the microphone only once for each of the four elements with as many ideas as they wish to offer for each item. Of course, someone will offer an idea that triggers a neuron firing in another person who has already contributed so they can come up a second time after everyone who wants to speak has made their first offering.

It is fine if a person submits both a written form and offers some verbal suggestions (as the law of large numbers will not make their doubling input statistically significant). However, parishioners are discouraged from coming to the open forum and merely reading their written form. This event is primarily for the people who are more comfortable verbalizing ideas rather than writing them. However, it is also another opportunity to speak with your parishioners about the SP process and let them know that you want their voices to be heard. A CT member or the facilitator should transcribe all comments offered, which must be integrated with whoever is compiling the seven Word documents with all the submissions for heat mapping.

Once the deadline has passed, all the written SWOT and Advance Assignments are in from parishioners and SPT members, and the open forum comments have been included, it is time to "heat map" and organize the results. The heat mapping process is merely the act of reorganizing every submission (verbatim) by grouping them into like topics. People will articulate their ideas using different words, but they often mean the same categories of things. The heat mapping process is all about taking a lot of data and identifying how frequently a common topic occurs (regardless of the words used). The topics are then listed in the order of the number of times they are mentioned. I typically recruit CT members to help with the heat mapping by each taking one of the SP elements. I have provided my heat mapping instructions and some sample heat-mapped data in **Exhibit "F"** to this Chapter 7.

One note of caution. I have discovered that no matter how many times I explain it, and no matter how I write the instructions, quite a few people always get Opportunities and Threats wrong. These are supposed to be things happening outside the parish. However, the word "Opportunity" conjures up internally focused sentiments such as "I think we have a real opportunity to make our service more accessible." This is not an external Opportunity and thus cannot be included in the list of Opportunities. I tell my heat mappers to take all those internal comments and put them at the bottom of the document under the heading NOT EXTERNAL OPPORTUNITIES and not include those comments in the count. The same is true of Threats, as many people still look inside the parish to identify something happening internally that they call a threat. That is not a proper SWOT Threat and, again, should be listed at the bottom and not included in the count.

And now for the big reveal that demonstrates another difference between my Stewardship Calling parish SP process and how others do SP. I think the Strengths should be celebrated and their continuation reinforced. But you do not need a SP process to do that. In addition, someone in parish leadership should be assigned to keep the watch tower on external Threats, but they will likely not drive strategy and the future vision. Thus, in my Stewardship Calling SP process, I focus first (and sometimes exclusively) on the identified Weaknesses. I strongly suggest that if the parish tackles the root causes of the top 2 or 3 Weaknesses and develops a strategic solution to fix them over a few years, the health of the parish and its effectiveness will be most positively impacted.

Thus, when the time comes for the first retreat to identify the top two or three Strategic Areas of Focus for which the parish will develop strategic goals, I have them start with the top Weaknesses. Once a consensus is reached about the top several weaknesses, they can scan the Opportunities and see if any of those external phenomena can help address one of the top three Weaknesses. But I truly believe that the greatest results and momentum are achieved when a parish fundamentally addresses and solves its greatest Weaknesses.

I have repeatedly mentioned that only the top two or three Weaknesses should be addressed in any SP. I learned to limit the list both due to research and practical experience. The Covey organization's Four Disciplines of Execution ("4DX") provides substantial research confirming our ability to address only a few big things at a time. MIT neuroscientist Earl Miller concluded that "trying to concentrate on two tasks causes an overload of the brain's processing capacity" (McChesney, 2012). Dr. Miller's research

confirmed that human beings are genetically hardwired to do a very small number of things at a time with excellence. Thus, focusing on the critical root causes of the major Weaknesses produces a larger scale of positive impacts.

This is even more true in nonprofit organizations like parishes, which depend almost exclusively on volunteers who have families, day jobs and can only give limited time to their parish as opposed to businesses where people can be hired to implement SPs. Thus, it is much more effective to successfully transform the top two or three identified weaknesses with great focus and energy than to try the "peanut butter approach" of spreading your limited people and time resources too thin trying to do many things halfway.

When I first started doing parish, Diocese, and national church SP, I would let them convince me to allow them to tackle as many of the top Weaknesses as they thought they could. Honestly, in retrospect, no parish has successfully handled more than three Strategic Goals with any degree of comprehensive effectiveness. To be sure, they often made progress in many of the other areas, but usually at the expense of completing the really big things properly and fully. The phrase borrowed and modified from Covey's 4DX process asks what are "the <u>few things</u> that can change everything."

For example, (spoiler alert) the research unquestionably shows (as will be discussed in Chapter 10 of my Roadmap) that when parishioners are more engaged liturgically and in ministry, they give substantially more money. Thus, if a parish says they have financial problems, that always translates to them having ministry engagement and volunteerism problems. So, if they create one Strategic Area of Focus on stewardship and engagement, they will solve multiple problems with that initiative. This is why Chapters 9, 10, and 11 of my Roadmap fairly exhaustively focus on how a parish addresses its significant Stewardship and Engagement challenges. By prioritizing the biggest Weaknesses and addressing their root causes, you will have the greatest impact from your SP.

One final note. My Stewardship Calling parish SP process always uses all three of a SWOT analysis, EPA, and a Financial Stewardship Analysis (discussed in Chapter 10 of my Roadmap) to answer SP question #2 of "Where are we now?" I find that all three tools add valuable insights into framing and understanding the biggest challenges. Moreover, when they tend to point in the same direction, it provides cross-validation that the most critical Strategic Areas of Focus are "the few things that can change everything!"

Why Start With WHY - Part 1.

I believe that asking the why question is perhaps the most critical question that anyone must answer both for themselves and their parishes and ministries. I think this is truly, at its root, the question that the Lord has placed in each of our hearts to ascertain why we exist. Why, out of the trillion to the trillionth power times infinity of things that God created, which is to say everything, He only made one in His image and likeness. And that is you and each of your parishioners. And yet, even amongst that similarity with our

maker, we are all unique. Even genetic twins have different characteristics that will allow them to grow up looking the same but able to act differently.

Because of my focus on WHY, one of the differentiating characteristics of my Stewardship Calling SP process is the critical aspect of helping parishes discover their WHY. Author Fyodor Dostoyevsky once said, "The mystery of human existence lies not in just staying alive but in finding something to live for" (Dostoyevsky, 1880). Another clarion call for discerning one's why is the great wisdom most often attributed to Mark Twain but probably first uttered in a sermon by Dr. Earnest Campbell that I use in every Stewardship Calling Igniting The Flame programs and my Ancient Faith Radio podcasts: "The two most important days of your life are first the day you were born, and second the day you figure out why" (Campbell, 1970).

This prominent focus on WHY differentiates my Stewardship Calling SP process from most others who do not make the WHY Statement a principal focus. Alternatively, I believe some confuse the WHY and the Vision. Some SP consultants believe the Vision should be aspirational and not achievable. I take a different view since the word Vision naturally implies you can see it. Instead, I maintain the aspiration of what the parish seeks to become should be found in its WHY Statement.

Thus, the WHY Statement of the parish's fundamental beliefs is the first and most critical question you must answer in any SP process. The WHY Statement should be the articulate, compelling, and inspirational reason why the parish exists and why anyone should want to care or want to join. I believe WHY Statements are the most important foundational aspirations along with your parish's Core Values. I modified Pastor Andy Stanley's quote, as I advise that your parish "date your vision, marry your Mission, and die living your WHY and Core Values."

I say this because your parish Vision Statement will change every three or four years as the prior Vision is achieved and a new Vision is cast for the future. In contrast, your Mission Statement defines the fundamental things your parish does and will not change over time (if it is aligned with Christ's teachings). This is why you marry your Mission Statement. Ultimately, the foundational truth of everything a parish should do is live its WHY and Core Values.

The WHY Statement is also biblical in its foundation. In Acts 14:15, St. Paul challenged the people by saying, "*Friends, why are you doing these things?*" This was in response to the Jewish people of the time continuing habits out of rote memory rather than out of fundamental belief. That oftentimes defines one of the reasons why your parish is stuck in the past and not moving to the future.

Stewardship Calling Parish WHY Discovery Process.

My Stewardship Calling SP process includes a WHY discovery that consists of some WHY education I offer at the beginning, followed by watching Simon Sinek's inspirational Start With Why TED Talk (Sinek, 2010). In eighteen minutes, he articulates the differentiation between a WHY (the fundamental purpose your parish exists), the

WHAT it does (which is found in your parish's Mission Statement), and the HOW it does its work (which is found in your Strategic Goals and Action Plans).

In emphasizing the WHY, I have slightly edited Simon Sinek's articulation by saying (my additions in parenthesis): "People don't buy (into) what you do; they buy (into) why you do it. But if you don't know why you do what you do, how will you inspire anyone else to follow you?" While he did not articulate it In the context of a parish, I agree with his conclusion: "The goal is not to attract people who need what you have. The goal is to attract people who believe what you believe" (Sinek, 2010).

When you consider the statement of bringing people closer to Christ and each other, you can start to appreciate the reason a WHY Statement is critically important. Your parish WHY Statement should inspire the parishioners and help explain its fundamental purpose to others who may be seeking it. To be most effective, the WHY Statement must be simple, clear, compelling, inspirational, actionable, and focused on the parish's contribution to others. It should be expressed in positive and affirmative language that will resonate with people and inspire them to take action. Thus, the WHY Statement is targeted to one's heart and gut rather than the neocortex part of your brain that processes language.

The WHY Obsession.

I confess to having been obsessed with the concept of WHY since the late 70s and early 1980s. Indeed, in Joey Asher's book about better communications, <u>Even a Geek Can Speak</u>, he quoted my WHY Statement from 1981 (Asher, 2001). He mentioned the time that he met me and asked what I did. My answer was (and remains today): "I'm a problem solver and dream facilitator." As he gave me a puzzled expression, trying to understand what that meant, I could see that the wheels were turning, and he started to think about me in an entirely different way. I became someone who could hear his problems and seek solutions or facilitate a dream he would like to achieve. He started to think of me as his partner and not just another service provider he could hire to perform a discrete task.

Having been pulled into my WHY, Joey said it was intriguing and wanted to know what and how I accomplished those objectives. This invited me to migrate from the WHY to the What and How. It allowed me to explain that I was a lawyer who worked with businesses and non-profits to resolve their issues and pursue their transactional dreams.

At that moment, he understood that I viewed my responsibility as far more than just the tactical use of the law. I was able to communicate to him that my primary focus was always on understanding the problem the client needed to solve or the dream they were pursuing. In this way, I signaled I was allowing myself to more creatively find solutions using the vehicle of the law in which I was trained, but I wasn't limiting myself just to those tactics that I learned in law school.

Indeed, as my career developed, I was called upon to provide "business judgment" advice well beyond the practice of law because clients realized that I was investing myself in knowing their situation and helping them achieve their desired outcome. When one

connects with your parish's WHY, the impact of what is possible becomes enlarged and exciting.

In Sinek's Start With WHY TED talk and book, he specifically explains how the WHY appeals to the limbic part of your brain, which actually drives emotions and behavior (Sinek, 2010, 2011). I submit it is one degree more complex than that. In Dr. Michael Gershon's book, <u>The Second Brain,</u> he explains how the enteric nervous system (what he calls the "second brain") in our gut has over 100 million neurons that transmit data and information from our guts to our brains (Gershon, 1998). Indeed, Dr. Gershon concluded, "a big part of our emotions are probably influenced by the nerves in our gut" (Gershon, 1998).

Thirteen years ago, I attended the defense of my older daughter's doctoral dissertation on intestinal stem cells at Johns Hopkins University. In Alexis's PhD thesis, she produced microscopic images of stem cells in our guts. In reviewing one of those images, I asked her what were the things that looked like spaghetti noodles. As she gave me the raised eyebrow look that only a scientist would give to a liberal arts dunce, she politely corrected me and said: "Dad, those aren't spaghetti noodles. That's part of the enteric neuron system that connects the cells in your gut to your brain" (Marianes, 2013). And that is when I truly understood the power of WHY in driving behavior.

When we talk about making "gut decisions," our behaviors and opinions are being shaped by the biological reality of our Lord's great human creation and the way He hard-wired our circuitry to allow our guts (and hearts) to communicate with our brains and influence our thinking and behaviors.

As a result, my simplistic picture to the right depicts how I view my Stewardship Calling SP process integrates with the way God created our organs to work. The WHY speaks to your heart, and the Core Values to your gut. Similarly, your parish's Mission Statement, which defines what your parish does, speaks to your neocortex brain, where language is processed. In contrast, your parish Vision Statement arrow points to your eye so you can see where your parish is going. Finally, your arms and legs are what you use to accomplish your parish's Strategic Goals and Action Plans. In this simplistic diagram, we can see how perfectly aligned our Creator's human design is with my Stewardship Calling SP process.
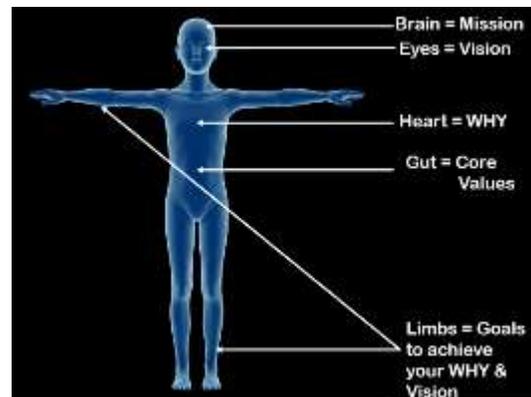
How To Get To WHY - Part 2.

After my Strategic Planning Teams (SPT) watch the Start With WHY TED Talk, I discuss the WHY Statement rubric Simon Sinek suggested. This begins with "TO" and defines the contribution, followed by "SO THAT" which explains the desired impact. I then share examples of many powerful parish WHY Statements.

I also share (a) Simon Sinek's WHY: "To inspire people to do the things that inspire them so that together we can change our world." and (b) my Stewardship Calling WHY "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." This way, SPT members can see the "contribution" I am trying to make by helping people and parishes discover their WHY. I define it as your "stewardship calling" to demonstrate that living your WHY is how you use the gifts God has allowed you to be a steward of (i.e., caretaker). Finally, my WHY focuses on the "impact" I'm trying to accomplish, which is tied to your and my II Corinthians 5:10 Moment of a "good account before the awesome judgment seat of Christ."

Similarly, the Orthodox Ministry Services WHY Statement I developed for colleagues was to "Help transform and improve Orthodox Church parishes organizations and ministries in order to strengthen the body of Christ." Notice how the contribution and impact can be articulated without having to use the "to" and "so that" rubric.

A powerful WHY Statement can help your parish (and you personally) make decisions. For example, if I was discussing SP with you and you explained your parish was not interested in discerning its WHY, I know I am not the right person to help you. If you are merely trying to put a Band-Aid on a problem rather than address the root cause consistent with your WHY and Core Values, I can sincerely and lovingly explain why you need someone else for your more limited journey.

However, if you wish to be transformed and improve your parish or life and discover how best to accomplish what God has called you or your parish to do, then I might be the right person to help. Often, merely explaining why I am not the right person leads to a deeper dialogue about what a WHY Discovery and comprehensive SP process entails and what it would accomplish. This further education, more often than not, changes people's perspective.

I have found it helpful for parishioners to see other parish WHY Statements which I have helped develop. I have provided below several WHY Statements from selected parishes, dioceses, or national churches so you can start to get a feel for what a WHY Statement might look like:

~ To share love, spread joy, instill hope, and live with purpose.

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

~ To seek and share Christ's love so that all will find eternal life in Him.

~ To bring people closer to Christ and each other.

~ To glorify God by growing in life, faith, and spiritual understanding.

~ To welcome all so that we may share Christ's love with one another.

~To be a warm, caring Christian environment so that faith, service, and community thrive.

~ To receive and share unconditional love, mercy, healing, and peace so that life has greater meaning and purpose.

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Let's briefly unpack the first parish WHY Statement in greater depth. You notice their fundamental purpose is all about "sharing love, spreading joy, instilling hope, and living with purpose." Do these aspirational goals sound uplifting and righteous to you? Might you be interested in learning how to live with a greater purpose or more lovingly and joyfully?

Another way to look at the impact of a good WHY Statement is to reverse the order. This parish would tell you something like: "If you're looking for a place where you can share love, spread joy, instill hope, and live with greater purpose, boy, do I have a church for you." I think just by articulating it that way and actually listening to the words and thinking about them, you can feel how different this is from the way most people describe their parishes. At this point, either your heart and gut want your brain to find out more, or you are not interested and are not a good fit for that parish.

Notice how this WHY does not describe what the parish does or how it achieves its objectives. That is for the Mission Statement, Vision Statement, and Strategic Goals, but only if the WHY interests you. Rather than leading with a laundry list of your parish's activities, location, number of parishioners, or any other facts and figures, why not engage your "**FPIPs**" (**Future Parishioners In Pews**) deeper and more intimately? While what your parish does should be engaging and interesting, it may not always be motivational and drive behavior. But if you were to look at someone and say we really want to give you the opportunity to begin a transformational life of purpose, that kind of inspiration can drive someone to want to learn more about your parish.

After presenting a variety of different WHY Statements and my teaching about WHY Statements, I ask SPT members to take 10 minutes by themselves to draft their proposed parish WHY Statement. I then aggregate all their WHY Statements into one document and present them all to the entire SPT several times. To get a sense of which WHY Statements touch their hearts and guts the most, I conduct a straw poll where everyone is permitted to vote for their top three WHY Statements. We do not make decisions by voting and merely try to get a sense from the SPT if there are any proposed WHY Statements that are most impactful and inspirational.

Following the straw poll, I identify the clear top several finalists and lead the SPT through an exercise of parsing the words to see what elements most drive people's motivations and inspirations. Through a dialogue that includes the entire SPT, I help them mix and match words and, in some cases, replace words or combine them with other phrases to reach a consensus. I continue the dialogue until everybody in the room identifies a WHY Statement that would motivate them to really want to learn how to become an active member of such a parish and to bring others to it.

Interestingly, this is a great place where the Holy Spirit works through individual parishioners to help them discover their parish's fundamental reason. Indeed, it takes time for us to get "out of our heads" and the typical way we think about describing our parish. But almost always, within about 60 minutes or less, SPTs reach a strong consensus and enthusiastically support the WHY Statement they develop. Occasionally, we'll get to a blockage point where we need a short break to allow the Holy Spirit to help, and inevitably, the SPT returns with refreshed vigor and motivation.

Importantly, developing a WHY Statement is not enough by itself. It must be enculturated in every aspect of the parish. Therefore, I strongly encourage every parish to take their WHY Statement and repeat it constantly and plaster it everywhere. Yes, I do mean everywhere.

For example, I ask parishes to place their WHY Statements in every parish bulletin and communications, at the top of every parish council agenda, on placards and signs in their halls, and all over their website. Parishes should also ensure that all WHY messaging shows how it has been actualized and implemented. It is only when a WHY Statement is fully understood and enculturated that its impact can be fully realized. Parish power is achieved by parishioners and parishes fulfilling and living their respective WHYs. Your WHY Statement can honestly be one of the most powerful outcomes of a good and well-run SP process.

I now offer you one additional personal note. I use the SP process to encourage all SPT members to wrestle with and understand their personal WHY. I repeatedly find SPT members who share with me that they used what they learned in the SP process to figure out their WHY. And the results they report are usually transformational as it helps them make decisions in their lives.

I have known people to change what they did with their lives as a result of the journey that they began when they started to focus on their WHY. I respectfully submit that you must remember that your Creator gave you a calling and fundamental purpose for your existence. It is, therefore, your job to figure out what you are called to do and start living the most fulfilled and meaningful life possible.

Core Values.

Core Values are beliefs shared by the stakeholders that drive decisions. Cambridge University Press (n.d.) defines "values" as how one decides "what is right and wrong" and, thus, what is appropriate behavior. The Greek origin of values is the word "αξίες" which focuses on one's worth or actions (Axias, 2017).

Church consultant Aubrey Malphurs identified the critical importance of Core Values as a part of the DNA (genetic material) that forms every parish or other faith-based organization (Malphurs, 2004). Core Values are strategic and serve as the foundation for everything built atop them, especially when enculturated in every parish decision (Tocquigny & Butcher, 2012). Core Values also determine the priorities of the parish and its ministries and how parishioners and other stakeholders interact and identify what is critical. They ultimately form the essence of the organization's culture (Malphurs, 2004, p. 96).

An excellent contemporary example of living Core Values in every aspect is Chick-fil-A, which Schmidt (2022) identified as America's favorite restaurant for eight consecutive years. Notwithstanding the occasional public relations conflict between modernity's constantly shifting values and Chick-fil-A's timeless Core Value to "glorify God," Singal *et al.* (2016) identified how this enterprise's commitment to quality, service,

altruism, and honoring the Sabbath (among other values) are lived out every day and in every aspect of what they do.

Like everything else in SP, Core Values are Biblical. For example, in the Ten Commandments, God establishes critical fundamental Core Values that Moses accepted unconditionally and his followers embraced over time. While most Core Values and WHY Statements are not written with such thunderous and dramatic sights and sounds as Moses experienced with God's ten Core Value commandments, taking the time to ensure stakeholders fully embrace and live the organization's Core Values and WHY is among the most important and foundational efforts any parish leader can undertake. Thus, as God spoke to His people with ten critical Core Values, a proper parish SP process must result in adopting and living the organization's consensus-developed Core Values.

How Did Biblical Leaders Present Values To The World?

In Chapter 4 of my Roadmap, I explained fairly extensively how the Holy Scripture is replete with lessons about the importance of defining and living one's Core Values. Please feel free to re-review that section (with the same title as this Section) to refresh your recollection. I merely reinforce the Biblical journey of discovery of Core Values found in Job 1:1 and the Lord's teaching about how He fulfilled the Law and Prophets (Old Testament) focus on Core Values (Exodus 18:13-24; Titus 2:11-15; Matthew 5:17; Luke 10:25-37; John 13:34). Central to the Bible's teachings is the critical importance of adherence to the most righteous few values that are so central to one's existence that they deserve the title Core Values.

The Marines Path To Core Values, Ethics, And Culture.

In my Stewardship Calling SP process, I use a powerful example of an organization that practices clear Core Values, culture, and ethics, which leads to a way of life centered on a solid WHY. In the United States Marine Corps, "… values and virtues acquire a special meaning, and they combine with several other elements to become part of a strong spirituality" (Yaroslaski & Tripodi, 2006, p. 68). While it may seem paradoxical to think of a global premier fighting force as a manifestation of spiritual values, culture, and ethics, the Marine Corps' cultural values extend to honoring the human life of both the civilians they protect and the enemies they fight.

The Marine Corps system of Core Values always focuses on "doing the right thing," which creates a culture that includes a sense of "spirituality" (Yaroslaski & Tripodi, 2006). Indeed, the motto of the Marine Corps is "Semper Fidelis," Latin for "Always Faithful." Values, culture, and ethics combine into one motto and mindset for those who commit to becoming a Marine.

This juxtaposition of the adherence to an ethical value system that constantly seeks to "do the right thing" and remain selflessly faithful to all Marines ("leave no man behind") stands in marked contrast to some corporate value systems where human loyalty is sometimes freely sacrificed for a personal financial incentive. This contrast led business

strategist Simon Sinek to conclude, "In the military, they give medals to people who sacrifice themselves so that others may gain. In business, they give bonuses to people who sacrifice others so that they may gain" (Sinek, 2014b).

As you contemplate your parish Core Values, it is easy to start with God's ten essential Core Value "commandments" given to Moses (Exodus 20:2-17; Deuteronomy 5:6-21). Jesus expanded these through the "Beatitudes" (Matthew 5:3-10) and added His final new "commandment" that we "*love one another*" as He loved us (John 13:34). In Christ's time, only God could give a commandment. Thus, Christ's use of that word informed everyone precisely who He was and the significance of this foundational Core Value He was introducing. Teaching and enculturating righteous Core Values were central to the Lord's work, and His righteous Core Values have stood the test of time for almost 2,000 years.

In American culture (and, unfortunately, in some churches), we have seen the consequences of dishonoring Core Values. There are many examples of so-called "blue chip" organizations whose failure to adhere to their Core Values resulted in significant calamities of epic proportions (Green, 2004). In contrast, the research shows that a large part of Chick-fil-A's year-after-year success is attributable to every stakeholder clearly understanding and firmly practicing their critical and righteous Core Values (Uttakalla et al., 2017).

Thus, as a grounding of the true North, a parish should have the five or so most critical Core Values that define it and form the basis for all its decisions. I have found that when parishes include more than five or six Core Values, they become watered down and forgotten. Moreover, parishes also confuse "aspirational values" with Core Values. Patrick Lencioni, in his powerful leadership book, The Advantage, clarifies the difference between these two types of values.

If something is truly an essential Core Value, your parish models it currently and consistently (recognizing we occasionally fall short). However, what if your parish identifies a value it would like to embrace but does not do so consistently? In that case, it should be labeled an "aspirational value" that the parish wishes to eventually fulfill (Lencioni, 2012). However, only when something becomes a non-negotiable commitment can it truly be called a Core Value.

I was able to apply the lessons of immutable Core Values early in my legal career. A partner and I represented a healthcare organization that was growing and a profitable client for the firm. They then decided it would be very profitable to perform abortions. My partner was Roman Catholic, and I am Greek Orthodox, and that practice, while common in the U.S., was inconsistent with his and my Core Values. After extensive conversations with the client, we agreed that we could no longer represent them.

This led to some interesting conversations with our law firm partners, who inquired about why we were "firing" such a profitable client. However, when we explained our moral dilemma and our need to live consistently with our Core Values, the firm's Core Value of respecting each other kicked in, and everyone agreed we needed to move on. So, when you're willing to give up something valuable because it is inconsistent with what you believe, you will know you have identified a Core Value.

Mission Statement.

The topic that seems to create the most confusion when individuals talk about SP is the Mission Statement. Regrettably, over time, people have used Mission Statements as a "verbal diarrhea" expression of every possible thing the individual organization might consider doing or believing in. As a result, they become highly unmemorable and are impossible to memorize. If you can't say it, you probably won't live it.

I believe the Mission Statement should be the most succinct list of the most critical actions the parish performs. In this way, it speaks to people's neocortex and does not describe every activity undertaken by the parish. It remains focused on first things, first principles of importance.

As with every other element of SP, I submit that Mission Statements are biblical in their foundation. For example, perhaps the most well-known Mission Statement ever created was the one our Lord gave to His Apostles: "*Go therefore and make disciples of all nations*" (Matthew 28:18). In that simple expression, he defines for the Apostles what their "job" is. From that moment forward, they are disciple-makers, plain and simple.

To be sure, there are other activities that the Apostles were to undertake, which we will review when I share the biblical foundation of Strategic Goals. However, the clarity and simplicity of understanding that the Apostles' mission was disciple-making is made powerfully apparent as the Lord defines who a "disciple" is in John 13:34-35. The reason I decry paragraph-long mission statements that try to list ad nauseam every activity a parish performs is because no one remembers it, and they most certainly do not live it.

In contrast, let me give you a few sample Mission Statements that were created by parishes I took through SP. I am not saying I would have written them this way, and I sometimes believe they are a bit more verbose than they need to be. However, at the end of the process I take parishes through to developing their Mission Statement, the SPT members embrace the key elements with such clarity and enthusiasm that I become convinced they will be able to articulate and live them. Here are a few examples:

~ The Mission of _____ is to: Love God, Love Others, Make Disciples.

~ We are a Christ-centered community that welcomes all to worship, to pray, to serve others, and to learn our Orthodox faith.

~ We are a worshiping community, living and sharing the Faith given by Christ to the Apostles.

~We are a welcoming Orthodox community supporting each other in spiritual growth and philanthropy in Christ.

~ _____ Church welcomes all to experience and share Christ's love and the apostolic faith through worship, education, fellowship, stewardship, and service.

~ The Mission of _____ is to proclaim the Holy Gospel by teaching and spreading the Orthodox Christian Faith in a dynamic and welcoming community devoted to serving all people who seek a growing relationship with Jesus Christ.

~ The Mission of _____ Church is to worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy, and service to others.

~ _____ is a Christ-centered community that loves, guides, engages and serves all people.

~ The mission of _____ is to energize, cultivate and guide the faithful by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.

~ The Mission of _____ is to be a Christ-centered community welcoming all people to grow spiritually in the fullness of the Orthodox Christian faith through love, worship, and service.

~ We will establish and grow a Church community in Christ that embraces and teaches the Orthodox Christian Faith.

Allow me to briefly unpack the first two examples to explain why I think they are effective Mission Statements. In the first one, you know exactly what they do: 1. love God, 2. love others, 3. make disciples. This is extremely clear and concise. Of course, there's more detail that goes into how they go about doing those critical actions. However, its simplicity, focus, and inspiration are its power. The parishioners recognize that all their ministries and other activities must focus on loving God and others and thus making disciples.

In the second example, they begin by clearly stating that they are a Christ-centered community. This phrase has a further depth of meaning but is clear enough on its face to be direct. However, the parish proceeds to add that they will welcome all… to worship, pray, serve others, and learn their faith. In this regard, they are articulating a series of top-level actions that the parish will undertake.

Of course, there may be similarities from time to time between parish Mission Statements or WHY Statements that sometimes cause SPT members to want to make changes. I tell them that these statements do not have to be unique in the entire universe. They merely have to describe your parish accurately. Thus, if there are elements that are similar to other parishes, glory to God, it is great that others are focused on the same things that your parish finds valuable. You are not in competition with other parishes. You merely have to be authentic to your beliefs. Rather than engaging in extensive wordsmithing to be distinctive, it is far more critical to speak the truth in your Mission Statement with clarity and resolve.

There are a variety of ways in which a parish can develop its Mission Statement; however, drafting by committee is one of the most difficult ways to do it. Thus, I ask several subgroups of the SPT to look at all their parish's Strengths (from the SWOT Analysis) and

other parish examples I provide and then draft proposed Mission Statements in the context of their particular parish. By having a couple of different SPT groups develop a version of the Mission Statement, we have a variety of perspectives to share with the entire SPT. We write them on the board for everyone to see, diagram the sentences, and heat map the concepts to identify those elements that are consistent amongst all of them and, therefore, should definitely find their way into the final Mission Statement. The SPT can then pick one and start to wordsmith it with the other common concepts until, again, everybody can agree that the final version depicts the critical activities the parish does. This final Mission Statement is repeated everywhere anyone can look to read about that parish.

While it is theoretically possible that over time, an element of a Mission Statement might change slightly in practice for Christian parishes, it's more typical to say that the Mission remains the same throughout the entire life cycle of the parish. This is why the earlier rule of "Marry your Mission" signifies a long-term commitment.

Strategic Areas Of Focus & S.M.A.R.T. Goals And Action Plans.

My SP process I have defined up to this point has answered the first several critical questions by identifying why the parish exists, what its values are, where it is now, and what it is that it does. The next step in the SP is to answer question #3 of where it wants to be in the future. The good news is that if you have followed my process, you have already gathered an enormous amount of data about what your parishioners think is going well and not so well through your FSA, SWOT Analysis, EPA, etc. However, I believe the greatest place for parish transformational improvement, growth, and health is by focusing on the consensus that determines the greatest weaknesses your parishioners have identified. If the root causes of these "pain-point" strategic challenges can be addressed, the future of the parish is much brighter.

At this time in my SP process, the SPT reviews all the SWOT and EPA data, reorients themselves with their WHY, Core Values, and Mission Statement, and discusses the most critical challenges they must address. To facilitate this process, I typically have a couple of small breakout groups of SPT members who think about all that data and come back with their recommendations for the top two or three strategic areas that need to be addressed.

Once again, all the different break-out teams present their conclusions to the entire SPT. I help them identify those items that are common to each group's lists and thus should make the final list of Strategic Areas of Focus. We then discuss any other alternatives identified. This is where a lot of creativity is brought into the process. So, for example, it's not uncommon for youth and young adult issues to be brought up as one of the top five weaknesses of a parish. If this topic were not to make the list of the final three strategic areas of focus for the parish, the many people who have children or are concerned about the youth would feel that their concerns were not addressed.

Therefore, a creative way we can address this item that would otherwise be too low on the list to make the top three is to insist the parish focus on the youth as well as

adults in their solutions to each of the top three issues. As I previously noted, parishes always have an overwhelming list of strategic areas that they want to focus on based on the data from their parishioners. I confess that in the early days of doing SP with parishes, I let them have longer lists of Strategic Areas of Focus.

However, it is clear that parishes comprised of volunteers are largely unable to deal with more than two or three of the most critical strategic areas that need to be addressed. This information is again validated by the work of the Covey organization and many other church researchers who identified how the brain gets overloaded when trying to focus on too many critical items. Thus, it is essential in parish SP processes that an enormous focus be placed on the most vital challenges that would produce the greatest positive impact for your parish and parishioners.

This is difficult because of the pace of life around us and all the competing challenges we confront. Chris McChesney, in the 4DX book, says, "In the moment, urgency always trumps importance" (McChesney, 2012). The Covey organization calls these competing pressures "the whirlwind," which always distracts us from the most critical tasks in front of us. I call these the "tyranny of the urgent," where everyone justifies their interruption of your attention because of perceived urgency.

I believe urgency is doing something now, and strategy involves doing the right thing. They are both essential. However, doing strategy before urgency ensures the greatest impact by executing the most important thing with urgency.

Every one of us experiences the "whirlwind/tyranny of the urgent" regularly. For example, if you are the kind of person who takes time on Sunday night to plan the next week, everything falls apart when you show up in the office on Monday, and the phone starts ringing, emails and text messages pile up, and it seems like Noah's Ark parked outside your office with every type of animal dropping in two by two to discuss their problems. And in an instant, the big strategic issues you listed that you would address drop lower and lower on your to-do list.

In fact, one of the most critical success disciplines of the best leaders is the ability to say "no" specifically to some logical things that are somewhat relevant so that they can provide the extra time and focus on the most critical issues. Everyone is familiar with the Pareto Principle, often called the 80/20 rule, which applies equally well to time management. Thus, I encourage you to try to dedicate only 80% of your time to the "whirlwind/tyranny of the urgent" and reserve at least 20% of your time for the most important strategic areas on which you should focus.

One of the best articulations of this principle came from Tim Cook, the President and CEO of Apple Computers. Mr. Cook was brought in by legendary founder Steve Jobs to address the many supply chain challenges that Apple was facing. Tim Cook reconfigured and transformed the supply chain with such excellence that he became the logical choice to succeed Steve Jobs when he passed to the Kingdom eternal. Tim Cook clearly articulated the need for focus by saying:

> We are the most focused company that I know of or have read of or have any knowledge of. We say no to good ideas every day.

We say no to great ideas in order to keep the amount of things we focus on very small in number so that we can put enormous energy behind the ones we do choose…

It's not just saying yes to the right products, it's saying no to many products that are good ideas, but just not nearly as good as the other ones (Frommer, 2010).

It is impossible in a volunteer-run parish to have such discipline and focus; however, an effective SP process will provide you with a clear sense of direction. I typically tell SPT members that there are two fundamental rules and one critical question that they must keep in mind. First, since change is the only constant, you must constantly change and then anticipate further change. Second, you cannot master what you do not measure. Thus, having the discipline of measuring not only the allocation of your time but also the results and objectives you are trying to achieve is equally important. The big question is how you are measuring the effectiveness in your parish and what the most critical aspects are that need to be measured and managed. This conversation then drives a large discussion about what are the two or three most critical things that can change everything in your parish if appropriate attention is brought to bear on them.

Highly focused attention must be placed on the root cause of your biggest problems and not merely the symptoms you see. The example I offer is a group of doctors that were called to sub-Saharan Africa, where children were repeatedly getting bacterial infections. The doctors followed the usual protocol of diagnosing and treating the symptoms with antibiotics.

However, they discovered that a couple of weeks later, the children were returning reinfected. The doctors did what doctors typically do. They tried to analyze the efficacy of those particular antibiotics based on the genetics of the individual children in this sub-Saharan African environment, as well as other scientific inquiries to try and determine a medical solution. However, it was not until one doctor followed the children home that they realized the children were drinking water from a contaminated stream. Thus, no matter how efficacious the antibiotics were, until they solved the root cause problem of the children drinking contaminated water, the children were continuing to be infected. This is a heightened example of digging deep enough and following the rabbit trail until the root cause is discovered.

Individuals trained in management processes are familiar with "the five Whys" process (sometimes referred to as the "seven whys"). This process approached a problem by asking why the problem arose. Regardless of the answer, they are asked, "Why is that what's happening?" The next answer receives another why question. This "why question" process is repeated until it is clear that the essential foundation of the problem has been identified.

This is the reason why, in Chapters 9 and 10 of my Roadmap, I will prove to you that no parish has a money problem. They may have a Vision problem and almost assuredly have parishioner education and engagement problems.

However, once those root causes are addressed, more than enough financial resources will be abundant.

Strategic Areas Of Focus.

All of this brings us back to the SP process, where the SPT has a thorough conversation about those critical root cause issues that are manifesting themselves in a variety of different ways in the parish until they can agree on the two or three most critical challenges that must be addressed. I call these the **Strategic Areas of Focus** ("**SAF**"). The SAFs identify the general areas in which the most significant challenges exist that demand a Strategic Goal and Action Plan to fix.

Identifying the SAFs is all that is required at the first retreat of the SPT. At the end of the first retreat, the SPT members divide themselves (by their choice) into as many teams ("**SAF Teams**") as there are SAFs. Having learned from vast prior experience, I limit a parish to no more than three SAFs, given their limited volunteer bandwidth. I will occasionally allow a fourth SAF if it is critical to the future of the parish, and they can convince me they can handle that extra workload with a dedicated team of volunteers.

Strategic S.M.A.R.T. Goal And Action Plan Development.

In the two months after the first retreat, I schedule three separate ZOOMs with each SAF Team to separately lead them through a process to define a very specific Strategic Goal and Action Plan to address the issue in their SAF. This is achieved by developing a S.M.A.R.T. Goal and comprehensive Action Plan (discussed below). I provide each SAF Team with some prior sample S.M.A.R.T. Goals and Action Plans that other parishes have developed in their SAF so they can start with a frame of reference for some of the key issues that need to be addressed. It is also always easier for a group to edit a starting point draft than to draft from scratch as a group.

Over the decades of doing parish SPs, I have accumulated some good exemplar models that are constantly updated and provided to each SAF to consider as starting drafts. Current examples are on my Stewardship Calling website at this location: https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/

In the first SAF Zoom, I lead the SAF Team's discussion of the very specific areas in their SAF they wanted to address using the exemplar samples to ensure they considered a wide array of relevant alternatives. By the end of that first ZOOM, the SAF Team has agreed upon a draft S.M.A.R.T. Goal with either specific success metrics identified or at least a tight range of success endpoints to be finalized in the second ZOOM.

I then circulate a revised draft of the Action Plan from among the examples I provided that is tailored to the specific S.M.A.R.T. Goal elements the SAF identified. In the second ZOOM, the SAF Team reviews and edits every word and timeline in the draft Action Plan to create a proposed final draft they can live with. They also finalize any of the S.M.A.R.T. Goal metrics left open in the first ZOOM.

Since I started using this method about 7 years ago, the SAF teams rarely need the third scheduled ZOOM. However, if there are any S.M.A.R.T. Goal or Action Plan elements for which they have not developed a consensus, that third ZOOM is where everything is finalized for presentation at the second SPT retreat.

S.M.A.R.T. Goal And Comprehensive Action Plan.

As with everything in my Stewardship Calling SP process, I submit that S.M.A.R.T. Goals are also biblical in their foundation. There are repeated examples within Holy Scripture where the Lord gives his Apostles and disciples specific instructions. But an easy example is found in Matthew 10:1, 5-8. Christ provides a step-by-step Action Plan to his Apostles. If you examine this pericope, you can identify that there are at least six very specific steps in His Action Plan. The Lord calls for his apostles to 1. go to the lost sheep, 2. preach as they go, 3. heal the sick, 4. cleanse the lepers, 5. raise the dead, and 6. cast out demons.

Within my Stewardship Calling SP process, I use the very traditional S.M.A.R.T. Goal concept. The "S" stands for "Specific," which asks the goal to be very clear and specific enough so that it can be understood by anybody reading it. The "M" stands for "Measurable." Are there very specific measures and effectiveness metrics that can be evaluated to ensure that the goal has been achieved? The "A" stands for "Attainable which identifies whether or not this particular parish can actually achieve the very specific goal that they've identified within a reasonable period. The "R" stands for "Relevant," which ensures that the particular goal is identified and specific to the needs and challenges of the parish. The "R" can also mean "Realistically written" to ensure that the goal has been written in a manner in which parishioners reading it can express their confidence that they understand it. Finally, the "T" means "Time-bound" or "Timetable." This is perhaps as critical as anything else since it ensures that there is a detailed timeline for each step to be accomplished and an ultimate deadline for the entire goal to be achieved. A S.M.A.R.T. Goal can thus be very narrowly tailored to address the specific challenges and ensure a high level of confidence that the parish can achieve it.

This is also a difficult part of the conversation with SPT members. Parish leaders are generally unaccustomed to having detailed goals, effectiveness metrics, and deadlines. Thus, this process of developing this S.M.A.R.T. Goal begins a more thorough cultural change to ensure that the importance of parish work is at least as high as it is for any other aspect of the parishioners' lives.

The challenge in this phase is that oftentimes, parishes don't know the benchmark beginning points for any of the specific things that they're trying to achieve. If they do not understand the starting point benchmark, then it can be difficult to craft a S.M.A.R.T. Goal in such a manner that a very specific targeted number or level of improvement is identified. In the absence of clear, detailed benchmarking of whatever element you are examining, S.M.A.R.T. Goals can be written in the form of percentage improvement or percentage participation.

For example, in a stewardship and engagement ministry, one might look to have a S.M.A.R.T. Goal that commits to having 90% of the parishioners actively engaged in a ministry within three years. The words "actively engaged in ministry" must be defined by the **Implementation Team** ("**IT**") for that S.M.A.R.T. Goal so that there is a standard of performance against which success can be measured. However, the idea is to identify a very specific metric of what you are looking for in the form of active engagement and a percentage goal you are trying to achieve within a stated time period.

Action Plan Phases.

My Stewardship Calling SP Action Plans are as precise as they can be and worded to ensure the highest level of success in its implementation period. Thus, we identify all the specific steps that must be completed to achieve the S.M.A.R.T. Goal. These steps are broken down into separate components and action items.

The Covey organization's 4DX book focuses on "leading indicators" and "lagging indicators" from which a parish identifies very specific goals that can be achieved at each level. I've discovered that what works best for most parishes is an Action Plan that includes five phases.

Phase 1 is the research phase, where the IT conducts comprehensive research on the definitions, terms, and baselines the parish needs to consider. Thus, when phrases like parishioners are "actively engaged" are used in the S.M.A.R.T. Goal, the Action Plan identified the need to define that term in this research phase. Similarly, suppose no parish baseline data exists for a S.M.A.R.T. Goal objective. In that case, the Action Plan will identify that during this research phase, the parish will benchmark/survey in order to ascertain its starting point.

Also included in the Step 1 research phase is the requirement that the IT look outside of the parish to find best practices in other churches. I also insist that they look outside of their particular religious Denomination because oftentimes, some really great practices may be found in different churches that can be adapted to address any unique theological differences.

The Action Plan should require the IT to identify at least three examples of best practices in each area from which they can draw insights. This is sometimes challenging because the natural tendency is for them to call family or friends at other parishes and ask them what they do without qualifying that parish to ensure it is implementing best practices that are effective.

Since, in my experience, so many parishes lack the discipline to have clearly defined objectives and applicable measurement methodologies, generic surveying of friends tends to be highly unproductive. Thus, I challenge each IT to ensure that they are able to explain with data why that sample program was effective and is worthy of study as a best practice.

Phase 2 of the Action Plan is the "development phase," where the IT takes all the research identified in Phase 1 (both from within the parish and outside) and analyzes it to develop a specific program in that Strategic Area of Focus that best suits the demographics and needs of the parish to achieve the S.M.A.R.T. Goal endpoint. Any solution must be based on research into best practices and internal data. During Phase 2, the IT must creatively take other best practices and make the necessary adjustments to apply them to the unique elements of their parish.

Phase 3 is the recruitment and training phase. For almost every S.M.A.R.T. Goal, it's important to have a team of individuals who are properly grounded in what is to be accomplished and trained to deliver the new program and ensure it is effectively communicated to the parishioners. Thus, for example, if the S.M.A.R.T. Goal is focused on religious education, it is critical to ensure that the best religious educators from within the parish are recruited and properly trained on the new education program developed in Phase 2. Similarly, if the parish rolls out a new stewardship program that touches all parishioners, a sufficient number of "stewardship ambassadors" need to be identified, recruited, and trained to ensure they effectively implement the new program.

Phase 4 is when the new program to achieve the S.M.A.R.T. Goal is rolled out. This is obviously the longest phase because there has to be the appropriate amount of time and effort to properly execute this new program across the parish while the IT benchmarks interim goals. During Phase 4, it is important to continuously update the information that is gathered throughout the months of the rollout to ensure that any challenges are identified or immediately addressed and that the plan is executed within the established time frame.

For example, if a new Sunday school curriculum is developed, then it is important to ensure that it is used for one complete Sunday school academic cycle to be able to assess its effectiveness properly. Similarly, if your parish is rolling out a new stewardship and engagement program, it is important to ensure that a full-year giving cycle is completed to assess its success. Regardless, this fourth phase is when the SP comes to life and fruition and where the parish starts to see the value of all the planning and research that was done previously.

I always insist on a **Phase 5** that consists of a retrospective assessment of the entire S.M.A.R.T. Goal and Action Plan process to assess if it achieved the objective in the S.M.A.R.T. Goal as well as any interim benchmarks that were identified. This assessment is ideally conducted by someone other than an IT member to ensure the absence of any bias or excuses. During this assessment phase, course corrections and adjustments should be made to the program so that when it is rolled out for the next year (or other relevant period), it will be an

improved program based on the experiences gathered in the first-round implementation period.

Parishes frequently lack the discipline and desire to do this retrospective analysis. However, it is perhaps one of the most valuable parts of a good SP process that helps ensure this new program is improved for succeeding periods.

I have provided in **Exhibit "H"** to this Chapter 7 several recent parish SMART Goals and a sample Action Plan. Additional examples developed in real-time are always posted on the specific parish's SP page on my www.stewardshipcalling.com website under the Strategic Planning Tab.

Second SPT+ Retreat.

The second and final SP retreat includes every member of the SPT, plus all parishioners "on-ramped" by each SAF Team, which represents parishioners interested in that SAF or involved in a ministry being addressed by that SAF. At this one-day retreat, I begin by reviewing all the previously decided SP elements (SWOT, WHY, Core Values, Mission) to ensure everyone remains 100% aligned and enthusiastically supportive. Each SAF Team then presents their S.M.A.R.T. Goal word for word, followed by their Action Plan. The entire SPT (including new on-ramped members) debates every word and metric in the S.M.A.R.T. Goal, asks any questions, and proposes any alternatives for consideration.

The SAF Team's objective is not to defensively defend their previous S.M.A.R.T. Goal wording but merely to answer any questions about how they got there. They then facilitate the improvements, edits, additions, or deletions so the entire SPT can reach a consensus. Again, the objective is to ensure that the expanded SPT is fully on board with each S.M.A.R.T. Goal and Action Plan.

This step is critical because other SPT members may have insights and perspectives the SAF Team did not consider, which could make their S.M.A.R.T. Goal or Actin Plan better. Moreover, we want the entire expanded SPT to be able to answer any parishioner questions about all S.M.A.R.T. Goals and strongly advocate for them to the parish at large. This is another part of building the SP implementation army.

At the end of the second retreat, I have a ceremony where I "graduate and fire" all members of the SPT and thank them for their service in developing the parish strategic plan. Applying the rule of never letting a volunteer get away, I then immediately start recruiting them to join one of the ITs for the S.M.A.R.T. Goal that most excites them. I have a sign-up form for them to identify the S.M.A.R.T. Goal they want to work on and to identify if they might be willing to be the Co-Captain leading the implementation.

We then discuss the next steps for finalizing the writing of the SP and hosting the community roll-out event. I also describe what I call the "**Implementation Headquarters**" (**IHQ**) and **SMART Gap Implementation Plan**

the parish will use (described further below). It is important to leave enough time for the expanded SPT to contemplate and celebrate all they did to create a transformational SP.

Low-Hanging Fruit.

On several occasions, I have mentioned the concept of "low-hanging fruit." These are Weaknesses that were identified in the SWOT analysis that did not rise to the level of strategic significance to make it into one of the final S.M.A.R.T. Goals. However, to show that the parish council has been listening to the parishioners and also to address some of the areas that need improvement, I ask the parish council to take on those "low-hanging fruit" Weakness items that can be addressed in a year or less.

By doing this, the parish council shows the parishioners they were heard and that the time they spent on the SWOT and the EPA was meaningful. It allows for celebrating SP successes while S.M.A.R.T. Goal IT is researching best practices and creating new programs. As the parish council fixes these identified low-hanging fruit Weaknesses and reports this accomplishment to the parishioners, they attribute this success to the SP process.

Progress on the low-hanging fruit is especially important to share during what I call the SP "Quiet Period" while IT is doing its research and development. A good SP typically requires extensive preliminary research about best practices, how they will define and measure success, and assessing their current baseline against those measures. All these steps take time and are done quietly without parishioners seeing tangible results from the SP process. No etched tablets are produced from the mountaintop.

So how do the parish leaders keep their parishioners believing transformational change is coming while all the "quiet phase" research and work takes place? The answer is identifying and addressing the low-hanging fruit nonstrategic and tactical actions they can accomplish quickly. When these tangible successes are shared publicly, the WHY and Core Values can again be reinforced and used to show how the parish is being transformed.

In every SP I have facilitated, while the parish took approximately seven to nine months to research, study, and develop best practices programs in mission-critical areas not previously optimized to excellence, it simultaneously tackled less strategic stakeholder-identified "pain points." Moses understood this several times in his journey. For example, Moses was away for forty days/nights receiving the Ten Commandments and returned to every kind of debauchery and dereliction of Core Values. However, rather than allowing God to kill the sinners, Moses pleaded for the opportunity to collaborate with them one step (or generation) at a time to return them to God's favor and their journey to the promised land (Exodus 32:1-35). Moses celebrated every low-hanging fruit victory and return to excellence as a step closer to the promised land. In this way, parish SP leaders must constantly look for improvement opportunities to implement during the arduous journey to greatness.

Vision Statement.

At the very beginning of the SP process, we were reminded of the admonition from Proverbs 29:18: "Where *there is no vision, the people will perish*." Thus, at one level, the creation of the Vision Statement is the culmination of the summary of the SP process as it provides clear guidance of where the parish will be 2-4 years into the future. There are a variety of ways in which people create Vision Statements, and I will acknowledge that my Stewardship Calling SP process does it differently than many.

As mentioned previously, I believe that SP consultants often confuse a Vision Statement with a WHY Statement. I think the WHY Statement is aspirational and defines the fundamental purpose for which the parish exists. It is harder to achieve quickly and remains the ultimate objective. In contrast, a Vision Statement should be accomplishable in a reasonable period of several years. Accordingly, I believe the Vision Statement must be seen as a completable solution by the parishioners so they can gain the enthusiasm and excitement to proceed forward with the hard work over the next several years.

Another significant way in which my Stewardship Calling SP process differs from others is that I believe the Vision Statement is one of the last items to be created and not the first. I am well aware of, and have participated in, SP processes where much time is spent at the beginning with the group trying to identify a Vision for the future. After debating a Vision Statement with no data to support it, they then go about determining where the organization is now and some of the strategies that they might want to implement. They then try to cram the strategy and goals into the Vision Statement they crafted in the beginning before they had any data or knew their WHY, Core Values, or Mission. This seems backward to me.

Accordingly, I recommend parishes complete all the previous steps of identifying WHY the parish exists, where it is now, what its Core Values and its mission are, and what strategic areas of focus are needed to identify very specific S.M.A.R.T. Goals and Action Plans. After that is all done, they should be able to see a Vision of where the parish will be in several years after all the work is complete and the S.M.A.R.T. Goals are achieved. Thus, only after all the S.M.A.R.T. Goals are finalized do I reverse engineer the Vision Statement to state affirmatively what the parish will achieve and by when. Below is an example of a Vision Statement from a parish SP I recently completed:

We will:

(a) Within 36 months, implement best practices and effective adult and youth Ministries to measurably improve our:

(i) Stewardship & Ministry Engagement, and

(ii) Religious Education;

(b) Within 23 months, implement cultural best practices through effective adult and youth:

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(i) Parish Leadership Ministry,

(ii) Comprehensive Welcoming Ministry, and

(iii) Outreach & Inreach Ministry; and

(c) Within 39 months, establish and implement a viable and effective comprehensive Buildings and Facilities Ministry that will finalize a Consensus Facilities Plan.

If you look at this parish's Vision Statement, you can easily see they identified four Strategic Areas of Focus in the areas of: 1. stewardship and ministry engagement, 2. religious education, 3. parish culture, and 4. a new church facility. Thus, it is no surprise to see those specific areas called out using the exact phraseology from the S.M.A.R.T. Goal that was created. In this way, the Vision Statement aligns perfectly with and summarizes all the other SP work. In addition, if someone were only to review the parish Vision Statement, they would immediately understand this parish's S.M.A.R.T. Goals and where the parish will be in the future (depending on each specific goal).

Implementation Of S.M.A.R.T. Goals And Action Plans.

I previously provided data concluding that close to 90% of SPs fail to reach all their endpoints. While some fail because of the wrong People, Process, or Plan, overwhelmingly, they fail in the Performance phase of implementation. This is why I have learned to spend time with the parish, identifying an organizational structure that can stay on top of the implementation and a SMART Gap process to ensure goal achievement.

This is an opportunity to build a high-performing, effective team because what we learned over and over again is repeated in the phenomenal 4DX book by the Covey organization. Our brains are genetically hardwired to only do a very small number of things at one time with excellence, regardless of those of you who, like me, are neurodivergent ADHD people who think we can do many things at once. Indeed, we can do many things, but the data shows we cannot do them all simultaneously with excellence.

Thus, the parish must focus on the critical root causes that produce larger-scale positive impacts with all the energy and resources it can muster. By having all hands on deck to work on the few things that can change everything and stop focusing all their energy on the many little details that are not as significant, the parish can achieve the transformational Vision it seeks.

IHQ = Implementation Headquarters

The management of SP Implementation I recommend has layers aligned to improve accountability. I use a football analogy for titles but encourage parishes to rename positions however they prefer. Ultimately, I recommend two Co-captains to lead each S.M.A.R.T. Goal IT. This is to ensure redundancy and support in case one person

has an issue. The Co-Captains are ultimately responsible for ensuring that every step in their S.M.A.R.T. Goal Action Plan is completed on time.

Supervising the S.M.A.R.T. Goal Co-captains are several "Head Coaches." These Head Coaches are not to manage the day-to-day implementation of the S.M.A.R.T. Goal, as that is the job of the Co-captains. Instead, the Head Coaches check in with the Co-captains assigned to them to ensure they keep their teams on track and see if they need any support. The 4th column of the draft Action Plans provided in **Exhibit "H"** identified the "completion check" for that step. This column is what the Head Coaches are managing. Thus, when a Co-captain says they are ready to move to the next step, the Head Coach reviews all the work performed and ensures they have met their current action step based on the 'completion check" requirement.

The Head Coaches ultimately report to the "Team Owner," who is the priest in the parish. The Team Owner clergy plus the several Head Coaches form what I call the "**IHQ**" (**Implementation Headquarters**). Together, they ensure that the public scoreboard for each S.M.A.R.T. Goal is updated in a timely manner, along with the SP pages on the parish's website. The IHQ also makes regular reports to the parish council and parish as a whole and is responsible for ensuring that SP communications are fully and timely delivered to all interested stakeholders.

If a parish has 3 S.M.A.R.T. Goals, then one Head Coach will have two S.M.A.R.T. Goal IT Co-Captains reporting to them, and the other Head Coach gets the third S.M.A.R.T. Goal IT Co-Captains reporting to them. If there are four goals, then each Head Coach receives two sets of Co-Captains reports. The picture on the right is a simple organization chart assuming three S.M.A.R.T. Goals.

My Stewardship Calling **S.M.A.R.T. GAP Implementation Process** tries to deploy best practices. Elements of this process include:

(a) regular and frequent team meetings that solely focus on the Strategic Goals,

(b) team members who hold each other accountable for their commitments,

(c) a public Scoreboard that keeps track of progress on all goals and

(d) constant parish communications updates of Strategic Goals and "low-hanging fruit."

The Covey 4DX process reinforces my process, creating a "cadence of accountability." This means that ideally, each IT briefly meets weekly with a short check-in on where they are in the current step of the S.M.A.R.T. Goal Action Plan. This short weekly check-in would include the Co-captains and those IT members who had responsibilities for the prior week. In that brief call, they would state what they said they were going to do the preceding week, what they actually did, and what, if anything, they

will do in the following week. Also, if they need any help, this is the time to ask. If each person who has responsibilities does this brief check-in report, the call should not take longer than 10-15 minutes. Thus, it can be conveniently added to everyone's calendar first thing on Monday each week.

Of course, there will be **S.M.A.R.T. Goal IT** members who do not have any responsibilities until later in the process. While everyone should be encouraged to attend all the weekly check-ins to be up to date, if their work does not start until step 6 in the process, then their presence is not necessary for every one of the earlier meetings.

In the training I provide for the **S.M.A.R.T. Goal** IT leaders, I focus on the critical principles that derail effective teams, advanced by Patrick Lencioni in his helpful Five Dysfunctions of a Team book that I previously discussed in Chapter 4 of my Roadmap. To review, they include:

1. Lack of TRUST = vulnerability, being open and able to productively discuss failures, errors, weaknesses, and even fears. (Ego is the #1 team killer.)

2. Fear of CONFLICT = productive, ideological conflict - passionate, unfiltered debate around important team issues. A little discomfort is helpful.

Ideal
Conflict Point

Constructive   Destructive

Artificial   Mean-Spirited
Harmony   Personal Attacks

3. Lack of COMMITMENT = embrace disagreement and temporary indecision to extract every possible idea and perspective to achieve clarity and buy-in. "Disagree then commit" with cascading communications to everyone.

4. Avoiding ACCOUNTABILITY = unwillingness to remind one another when they don't live up to the performance standards of the group.

5. Inattention to RESULTS = Use a Scoreboard to unambiguously identify how the team is doing to achieve the goal and how much time is left.

One of the lessons I have learned over and over is that the parishes (or any Goal Implementation Team) that do not follow a disciplined implementation process will not likely achieve their S.M.A.R.T. Goals and Vision. It is that simple.

The above comprehensive discussion of my Stewardship Calling SP process is an effort to provide as much detail as possible and all the necessary supporting documents so that your parish can undertake SP with or without me. The essence of succession planning is to ensure that the absence of any one person does not prevent overall success.

It is my fervent prayer that you and your parish may find the above helpful should you decide to undertake the transformational work of SP. It really is worth it. Everything in this Chapter 7 is offered with extreme humility and reflects the lessons I learned in my decades of parish SP. However, as I said at the outset, this is "A" Roadmap and not "The"

Roadmap. Thus, you are encouraged to experiment and use what you want, adapt anything, and replace what you think is better.

I sincerely hope you can improve this SP process and will be willing to share it freely with other parishes seeking the most effective roadmap. Ultimately, you must travel your path using a roadmap you earnestly believe will help you improve the health and effectiveness of your parish by bringing people closer to Christ and each other. Godspeed on that journey!

Exhibit "A" Sample Prototype Strategic Plan Document

(insert parish-specific items where indicated by yellow highlighted placeholders below)

INSERT FINAL TITLE PAGE

PARISH LETTERHEAD

Beloved in Christ,

INSERT LETTER FROM PARISH PRIEST PROMOTING THE STRATEGIC PLAN HERE.

With Love in Christ,

+Father _____

EXECUTIVE SUMMARY

Progress and success require periodically assessing where you are, where you want to be, and how you will get there. Our **FILL IN NAME OF PARISH** Parish is a pioneer in undertaking this systematic, ambitious, and exciting process. We focus on helping our faithful and creating the most robust and dynamic Parish. This comprehensive Strategic Plan will help all of us manage the "busyness" of our Parish without turning our Parish into a "business." We will make history together as we implement this Strategic Plan to benefit our Parish, parishioners, and community.

For many months, approximately ____ dedicated lay stewards and our clergy, representing the significant diversity within our Parish, have worked joyfully and diligently to analyze available data and issues and develop this Strategic Plan by consensus with input from many of our faithful throughout our Parish. Through a disciplined process, we conducted a detailed analysis of the Strengths, Weaknesses, Opportunities, and Threats (**S.W.O.T.**) of our Parish and developed the following **MISSION** statement:

We also carefully analyzed the behaviors we wanted to model in our Parish. We concluded that to drive our culture and priorities and provide a framework for decision-making, we will embrace the following shared **CORE VALUES**:

In determining what we hoped to accomplish and where we were going, we developed a dynamic and inspirational <u>VISION</u> that proclaims that:

To address our Strengths, Weaknesses, Opportunities, and Threats, stay true to our Mission and Core Values, and pursue our Vision, we identified three strategic areas of focus and organized a separate Task Force to identify and address goals in each area:

These 3 Task Forces then developed by consensus the Strategic Goals and the detailed action plans to achieve them, all of which met the "**S.M.A.R.T.**" goal criteria of being

Specific, **Measurable**, **Attainable**, **Relevant** (and **Realistically** written)**,** and with achievable **Timetable.**

Our Strategic Plan that follows this Executive Summary is in three distinct parts:

 Part 1 (pages ▆▆ through ▆▆) includes more detail about the process, the team, our Statement of Why, and our S.W.O.T. Analysis, Core Values, Mission, and Vision.

Part 2 (pages ▆▆ through ▆▆) lays out the <mark>three</mark> specific S.M.A.R.T. Goals and the very methodical, step-by-step implementation action plan and process to achieve each goal, including precise timelines, areas of responsibility, and how we will measure success.

The length of this Strategic Plan may give some pause. However, given the vast diversity of our Parish, faithful, and our needs, we wanted to provide a thorough analysis of what we must do and a comprehensive plan to accomplish everything in a unified and effective manner. We ensured that our Parish, Parish-level ministries, and parishioners were the primary focus of every aspect of our planning.

The real work begins as we commit ourselves to dedicating the necessary resources and prioritizing our efforts to work diligently and achieve this blueprint that offers us an exciting road map to our sacred destiny. We have also established a systematic process to assess our successes and challenges and adjust to achieving measurable positive results. Please walk with us as we take this journey of faith. The future of our Parish's faithful depends on how diligently we perform this Strategic Plan as stewards of God's many blessings.

With this Strategic Plan, we now have a clear road map for how our <mark>**FILL IN NAME OF PARISH**</mark> Parish *exists to <mark>INSERT WHY STATEMENT HERE</mark>.*

PART ONE – The Process, Mission, S.W.O.T., Core Values, Vision, Strategic Goals

Start With WHY.

Our Lord and Savior, Jesus Christ, gave us His life as an example of how we should live. He also asked us to nurture and grow His Church. Our Father gives us all our many other blessings. What will we do with all these gifts for God's greater glory and a righteous life both here and as we prepare for a "*good account before the awesome judgment seat of Christ*" for all eternity?

Visionaries understand the importance of first creating a clear vision of "Why?" It is said that the two most important days of your life are:

1. Frist, the day you were born, and

2. Second, the day you figure out "Why?"

Once one knows their "Why," there is no end to the creativity, enthusiasm, energy, and dedication they will devote to achieving what God has called them to do. Christ communicated the "Why" of His coming to be with us and the "Why" of God's expectations of us. The Apostles understood their "Why" and sacrificed everything to achieve the Lord's vision. Now, it is our turn.

It is also critical for each organization and Church to know its "Why." Understanding one's "Why" is Biblical: *"Men, why are you doing these things?"* Through this Strategic Plan, the <mark>FILL IN NAME OF PARISH</mark> Orthodox Church (the "Parish") commits to emulate the kingdom of God in the Southeastern United States. We unequivocally state:

<mark>*INSERT WHY STATEMENT HERE*</mark>

"*Come and see*" how you can change your life and the lives of others for the better by joining a dedicated team of disciples seeking to discover and live their callings through a strong, dynamic, faithful, and purposeful Orthodox Parish.

Why Strategic Planning?

Strategic Planning is, first and foremost, Biblical and Christ-centered. At the very end of our Lord's ministry on this earth, He gave His Apostles a clear strategic plan as to how they were to achieve his vision by saying: "*Go therefore and make disciples of all the nations, baptizing them in the name of the Father and the Son and the Holy Spirit, teaching them to observe all that I commanded you.*"

In Jeremiah 29:11-12 we hear: "*For I know the plans that I have for you,' declares the Lord, 'plans for well-being, and not for calamity, in order to give you a future and a hope. When you call out to me and come and pray to me, I will hear you*."

The Book of Acts, written by St Luke, has been described as: "…*a blueprint for reproducing the specific details and aspects of the Church…However, it is of great importance for understanding the organization and structure of the Church*…" And in the rich Holy Gospel, we find Christ's clear strategic direction and plan given to his Apostles: "*But you shall receive power when the Holy Spirit has come upon you; and you shall be witnesses to Me in Jerusalem, and in all of Judea and Samaria, and to the ends of the earth.*"

The world has changed dramatically since our Lord's time on this earth and even since the Orthodox Church first arrived in the United States. And the speed of change is accelerating at a more rapid pace.

All the data information inevitably leads to the conclusion that to thrive in the current millennium, our Parish must consider the existence of rapidly changing, practical realities without abandoning the truth and essence of our Orthodox Faith and Holy Traditions and, most notably, the timeless teachings of our Lord and Savior Jesus Christ. In other words, there can be no indifference. If we are not moving forward, we are drifting backward.

One of the common challenges of strategic planning for a diverse Parish is the need to fully appreciate and meaningfully address the issues experienced by our parishioners. Thus, the Parish's Strategic Planning Team was comprised of very diverse representatives of our Parish who primarily focused on the opportunities, needs, and challenges of all our parishioners and Parish-level ministries. It remains incumbent upon all who serve our Church to listen to and focus on the unique needs of our faithful and those seeking Christ. We believe this Strategic Plan does that.

<u>What is Strategic Planning?</u>

Strategic planning defines our direction (strategy) and allocates our resources to achieve our goals. A Strategic Plan must answer four fundamental questions:

Why do we exist?

Where are we now?

Where do we want to be?

3. How will we get there?

<u>Statement of Why</u>

1. Why do we exist? We must articulate why we exist and why anyone should want to join our Church.

<u>Current State</u>

2. Where are we now? This step consists of a factual assessment of current strengths, weaknesses, opportunities, threats, programs, talents, financial resources, and needs.

<u>Desired Future State</u>

3. Where do we want to be? Following our sense of God's calling, we determine our consensus and comprehensive vision of where we want to be within a reasonable period.

<u>Action Plan</u>

4. How will we get there? This is where specific activities are outlined in each area, which we determine to be critical in making our vision a reality.

<u>What is Our Plan?</u>

A "Strategic Planning Committee" that grew to over ▮▮▮ diverse lay leaders and clergy throughout our Parish community was formed to do the initial work. We made every effort to be as inclusive and diverse as possible as we gathered people from our Parish family's perspectives, constituencies, and regions.

Mission.

A critical part of any Strategic Planning process is developing a clear description of the fundamental purpose for which an organization exists and what it does to achieve its Vision. Mission answers the question: "What do we do?" A Mission statement is Biblical: "*Go therefore and make disciples of all the nations.*"

To address the needs of the Parish more particularly, we adopted the new Parish Mission Statement: *INSERT MISSION STATEMENT HERE.*

S.W.O.T. Analysis.

Proper Strategic Planning requires a comprehensive analysis of the current state by examining one's Strengths, Weaknesses, Opportunities, and Threats ("S.W.O.T."). A S.W.O.T. Analysis focuses on the following: (a) Internal Factors comprised of Strengths and Weaknesses; and (b) External Factors comprised of Opportunities and Threats that include sociocultural shifts, macroeconomic matters, technological advances, changes in laws or our environment, etc.

Such an analysis and testing of oneself is Biblical: "*Examine yourselves as to whether you are in the faith. Test yourselves!*" The entire Parish family and each member of the Strategic Planning Team participated in this S.W.O.T. Analysis in writing and through community forums.

At the first three-day retreat, the Strategic Planning Team assessed many unique Strengths, Weaknesses, Opportunities, and Threats. However, to make the final S.W.O.T. list, a particular item had to be recorded by many people and agreed upon by consensus. The Strategic Planning Team extensively discussed everything to reach a consensus on our Strengths, Weaknesses, Opportunities, and Threats. This list is a static assessment and will inevitably be modified as our parishioners, Parish, Diocese, and the world around us change.

As a result, the Strategic Planning process must remain dynamic and not static to address new or different Strengths, Weaknesses, Opportunities, and Threats. One of the challenges that must be addressed in this Strategic Plan is implementing, periodically reassessing, refreshing, and potentially modifying to remain a living and breathing document and roadmap through a constantly changing environment.

To maximize the effectiveness and results of any Strategic Plan, the various Strategic Goals should address as many of the items discovered in the S.W.O.T. Analysis as possible. This Strategic Plan does that. A summary of the consensus S.W.O.T. conclusions follows:

1. Strengths

Strengths include characteristics of our Parish that give us advantages. This can consist of things we do well.

INSERT FINAL STRENGTHS HERE

---

2. Weaknesses

Weaknesses include characteristics that place our Parish at a disadvantage. This can consist of problems we face that we must overcome.

INSERT FINAL WEAKNESSES HERE

---

3. Opportunities

Opportunities include external chances to improve our performance in our environment.

INSERT FINAL OPPORTUNITIES HERE

---

4. Threats

Threats include external elements in our environment that could be problematic for our Parish or inhibit our success.

INSERT FINAL THREATS HERE

Many interesting and valuable pieces of information and inferences were drawn from this S.W.O.T. Analysis. Significant time must be spent by the various ministries and leaders of the Parish to continue to assess and address the items identified in the S.W.O.T. Analysis. Indeed, we identified several Weaknesses as "low-hanging fruit" that

the Parish Council and ministries can improve while we achieve the more significant Strategic Goals.

We acknowledge that our post-immigrant generation Church is experiencing massive numbers of interfaith marriages and the significant outstanding outreach and evangelism Opportunities in our extremely ethnically diverse Parish family. Accordingly, we must work diligently to be a Church that exists *INSERT FINAL WHY STATEMENT HERE*.

CORE VALUES.

Core Values are beliefs shared among the stakeholders in an organization. They drive an organization's culture and priorities and provide a framework to help make decisions. God presented us with critical Core Values in the Ten Commandments, and our Lord and Savior Jesus Christ augmented them in his Sermon on the Mount with what is known as the Beatitudes.

After numerous small and large group discussions, the Strategic Planning Team agreed by consensus that the following Core Values should guide the Parish in everything we do:

INSERT CORE VALUES HERE

VISION.

Vision defines what the organization hopes to do in the future. Vision is a longer-term, multi-year view focusing on: (1) What do we want to accomplish? (2) Where are we going? (3) What do we want to be in the future?

A Vision is Biblical: "*Where there is no vision, the people will perish.*" After numerous and extensive small and large group discussions, the Strategic Planning Team, by consensus, agreed upon the following Vision for the Parish:

INSERT VISION STATEMENT HERE

STRATEGIC GOALS.

Strategy is a roadmap for implementing the Vision and achieving the organization's goals. It keeps the organization going in the right direction. Strategic Goals are only as effective as the process and discipline implemented to execute and monitor them.

Setting strategic goals and action plans is Biblical. Our Lord provided his Apostles and Disciples with clear direction and step-by-step instructions throughout the Holy Gospel.

"Let your light shine before men, that they may see your good works and glorify your Father in heaven." *"These twelve Jesus sent out, charging them… go rather to the lost sheep of the house of Israel. And preach as you go… Heal the sick, raise the dead, cleanse lepers, cast out demons."*

The Strategic Planning Team used the "S.M.A.R.T." goal process to help ensure that each Strategic Goal is achieved if the various actions and steps identified in the process are diligently pursued and executed.

The S.M.A.R.T. Goal process requires that each Strategic Goal be:

Specific: Is the goal specific enough for clarity so everyone will understand?

Measurable: Is there a way to measure the success of the goal?

Attainable: Is the goal genuinely achievable by us within a reasonable time?

Relevant and Realistically Written: Is the goal relevant to our situation and realistically written to address our needs?

Timeline: Is there a timeline associated with ensuring completion and accountability?

<u>Strategic Task Forces.</u>

At the first Strategic Planning retreat, the Strategic Planning Team brainstormed many specific strategic items that addressed the Weaknesses, Opportunities, and Threats, were consistent with the Core Values, focused on the Mission, and helped achieve the Vision. After many hours of discussions, the Strategic Planning Team consolidated the many items and organized them into 3 Strategic Areas of Focus to systematically address the most critical issues. The Parish's 3 Strategic Areas of Focus are:

==LIST THREE STRATEGIC AREAS OF FOCUS TITLES HERE==

<u>3 Strategic Goals.</u>

In the months between the two strategic planning retreats, the Strategic Planning Team divided itself into these 3 Strategic Task Forces. It began monthly meetings and calls to develop a reasonable number of the most critical S.M.A.R.T. Strategic Goals to achieve in their Strategic Area.

At a second retreat, the Strategic Planning Team thoroughly discussed and agreed upon the specific wording of each S.M.A.R.T. Strategic Goal and a detailed Action Plan to achieve each goal that outlined (1) each specific action to be undertaken; (2) who was responsible for doing each necessary action; (3) how we would measure the achievement of that action; and (4) the timetable for the achievement of the action.

In addition, the Strategic Planning Team, together with the Parish Council, has identified a number of items the parishioners identified as weaknesses that could be addressed in a year or less. While the Strategic Plan Implementation Teams are performing comprehensive research and design of the new programs identified in the Strategic Goals identified below, the Parish Council will tackle this Low Hanging Fruit list as part of the strategic planning process and periodically report on the results.

Can We Do This?

Some challenges we will address have been with us for a while. Others are new. We have unique gifts that must be celebrated and put to the best use for God's greater glory and our salvation. And all of us working together can achieve the unimaginable.

"God has appointed some in the church as follows: first apostles, second prophets, third teachers, then wonderworkers, also those having the gifts of healing, those able to help others, those with gifts of administration, and those with different kinds of tongues."

Just as our Lord appointed 70 Disciples to go to "*every city and place*" and preach the word, so too must all of us in the Parish family become disciples and share the good news. This Strategic Plan affords each of us that opportunity.

Implementation of Action Plans for 3 Strategic Goals and Accountability.

To be successful, any genuine Strategic Plan should follow a 4-P approach: (1) use the proper Process; (2) recruit the right People; (3) develop the best, practical Plan; and (4) Perform effectively and thoroughly implement the plan. We believe that with God's grace and the Holy Spirit's invaluable and essential assistance and presence, this Strategic Planning process allowed the right team to deploy the proper process to reach significant goals and action plans. The most critical and complex step remains, namely the performance and implementation of this Strategic Plan.

The initial hard work of the Strategic Planning Team and Facilitator is now complete with publishing this Strategic Plan. The Parish will now reorganize itself and dedicate the necessary resources (human, financial, time, and other) to ensure complete implementation and success. This will require the dedication of time and the active involvement of a much bigger and broader group of the faithful. Indeed, significant

additional human and financial resources and operational changes will be required to succeed.

To achieve the 3 Strategic Goals, reconstituted "Implementation Task Forces" will be formed - one for each of the Strategic Goals identified by the Strategic Planning Committee. These new Implementation Task Forces will include some initial Strategic Planning Task Forces members. They will also add large numbers of individuals from throughout (and perhaps outside) the Parish who can assist in achieving the 3 Strategic Goals.

We are also implementing an unprecedented level of accountability and transparency. As you can see, every action plan step for all 3 Strategic Goals is measurable and has a deadline. We will be regularly and publicly reporting on our progress. We have also instituted multiple feedback and accountability loops to ensure that we stay on track and are focused on achieving success. All of this will be publicly tracked and reported on our Parish Strategic Plan website (www._____) and will be shared with parishioners regularly. After we have achieved every Strategic Goal, we will again measure how well we have addressed our challenges and then reassess where we go from there. Failure is not an option!

You Are Invited to Join the Team

We invite anyone interested in working on any specific Strategic Goal to volunteer and offer their stewardship of time and talents. The more experienced and dedicated souls we have working together, the more we can achieve. These newly constituted and expanded 3 Strategic Planning Implementation Task Forces will execute and manage the tasks identified in the specific Strategic Action Plans contained in this Strategic Plan.

Each Strategic Goal will have "Goal Co-Captains," who are primarily responsible for ensuring that the Implementation Task Force team working on that Strategic Goal stays on track and schedule. The overall implementation of every aspect of this Strategic Plan will be coordinated by the Goal Co-Captains, a "Head Coach," and Fr. _____, all of whom form our Implementation Headquarters ("IHQ") to help ensure the entire project remains on track. At the same time, we welcome all the faithful of our Parish family to join us on this holy journey of faith by contacting us and volunteering at ___insert website or email address for volunteers to sign up_____.

Communications and Breadth

The proper and effective communication of this Strategic Plan and the progress made in its achievement will be equally critical. Accordingly, regular communication about how we are achieving our exciting Strategic Goals and Vision is an integral part of this

Strategic Plan. Our Clergy and IHQ will regularly communicate the latest updates regarding our progress to all the faithful. The Parish website and other publications will be re-formatted to feature active links and content to each element of our Vision and ==3== Strategic Goals. Regularly communicating our progress and successes will make our Strategic Plan real and achievable.

Some might be concerned that the breadth of this Strategic Plan may be overwhelming. So are the challenges facing our Parish and Holy Orthodox Church. Given our faithful's disparate needs and varied talents, it is critical to have Strategic Goals that serve the vast diversity of our Parish, stewards, and challenges. Prioritization and allocation of available resources will inevitably be required. Each step sets out the time and sequence from the previous action item(s) and steps. After the Head Coaches and Strategic Goal Co-Captains set the Start Dates for each Strategic Goal, the timetable for its achievement is established. We have also included numerous reporting, accountability processes, and feedback loops to ensure that we transparently report our progress and do not drop the ball on any of this critical and holy work.

Conclusion

There is something in this Strategic Plan for everyone that will allow us to address our most significant issues. After thorough research, careful and prayerful reflection, and diligent work by over ==____== dedicated faithful from our Parish, we believe that the systematic implementation of the detailed action plans in this Strategic Plan will allow us to directly address our needs and allow us to improve our service to the faithful entrusted to us measurably.

We do not believe our resources to implement this Strategic Plan are scarce, given the extraordinary God-given talents that exist within the faithful of our Parish. We believe we live in a world of abundance. By the Grace of God and with the essential support of the Holy Spirit, we can make a difference and achieve all of our Strategic Goals in the fullness of time. Our future can be very bright if we work together!

Throughout the process, our Parish will remain true to our Core Values:

==INSERT CORE VALUES HERE==

We want as many of our faithful as possible involved in the transformational improvements resulting from this exciting Strategic Plan. If you, or anyone you know, wants more information or to volunteer, please contact the Parish office directly or email us at ==___insert website or email address for volunteers to sign up___.==

You can always access this entire Strategic Plan and check out our progress, which we will regularly update, by going to our Parish Strategic Planning website at www._____.net.

There is plenty of room for the active engagement of every person and organization prepared to ensure that our Parish achieves our Vision to *INSERT VISION STATEMENT HERE*.

May God bless the _____INSERT PARISH NAME_____ Parish and its faithful on our journey!

PART TWO – Specific Action Plans for Each of the 3 Strategic Goals

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 1 HERE

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 2 HERE

INSERT FINAL STRATEGIC GOAL & COMPLETE ACTION PLAN 3 HERE

ENDNOTES

Exhibit "B" Sample Completed Strategic Plan

FINAL St. Demetrios Warren OH Strategic Plan.pdf

Exhibit "C" Sample Strategic Planning Team Invitation Package

[ON CHURCH LETTERHEAD]

Dear Brothers and Sisters in Christ,

Together, we can and must make a real difference for Christ's church and help prepare a "good account before the awesome judgment seat of Christ." We request your help and participation in a historic and monumental undertaking. As we seek to make our Holy and God-protected Parish a place where joy, peace, and love abound, we will undertake something unique and significant in which your assistance would be invaluable.

We ask you to please join a select group of leaders from our community who will together develop a new and comprehensive Strategic Plan that will guide our Parish for years to come as we serve our present and future parishioners.

Strategic planning is well-accepted among the world's most successful Christian, non-profit, and business organizations and was used by Christ with his Apostles. Indeed, we will use a process designed around Christ's example, Holy Scripture, and best practices tailored uniquely for us. We would truly value your participation and wisdom.

We have enclosed several documents that will hopefully give you a greater understanding of the process and what we are asking of you. These enclosed documents include (1) a brief explanation of strategic planning and the six-step comprehensive process we will use; (2) the Rules of Engagement for our entire process to which all participants must commit; and (3) some questions and answers that would be helpful for you to understand.

We ask that you carefully and prayerfully review this letter and all these documents before you decide. We want you to know that your involvement will include participating in 2 invigorating retreats that will take place. The dates of the first retreat are _____. The second retreat will be on _____, 2024. These retreats will be vigorous and enjoyably collaborative sessions with leaders throughout our Parish.

The first retreat will start with dinner _____, and continue for the rest of the evening. On _____, we will begin with a continental breakfast and continue the entire day with numerous breaks, including lunch and dinner. And we will have a brief lunch after church on _____, and finish our retreat before dinner.

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The second retreat will occur on ==_____, 2024.== If you agree to serve on our Strategic Planning Team, you are committing to attending the entirety of both of these amazing and engaging retreats.

At our initial retreat, we will develop by consensus our Parish's Statement of Why, SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats), Core Values, Mission, and Strategic Areas of Focus. You will then select one of the Strategic Areas of Focus and participate with a Team that will have three meetings between the two retreats to develop a specific strategic goal and methodical action plans to achieve those goals.

Once the goals and action plans are developed, we will all gather again in a second retreat to discuss and build a consensus around the final detailed goals, action plans, and Strategic Plan that will be written, communicated, and implemented. Ultimately, our comprehensive Strategic Plan will be publicly presented to our Parish at a special Parish-wide celebration event in ==_____.==

Your active engagement in every step is essential to ensure our success. Thus, if you cannot commit to full participation in all aspects of this project, we will understand and reluctantly accept that you will not be able to join us on this critical journey at this time. We mean this with complete love in our hearts. Because of the crucial importance of this work, we sincerely hope you will be able to commit to participating.

We wanted to provide you with this high-level outline of expectations of those who will help determine the future and direction of our Parish and to seek your honest assessment of whether or not you are in a position to be a part of our leadership Strategic Planning Team. While we have included answers to some of what we anticipate are your initial questions, if you have any additional concerns or inquiries, you can contact our Strategic Planning Facilitator, Bill Marianes, at: Bill@stewardshipcalling.com.

This is one of the most significant and strategic activities our Parish has undertaken in quite some time and will help shape our direction and goals for the next several years and beyond. Therefore, the prayerful consideration of your ability to participate and willingness to fully commit if you are able, is what we are seeking at this time.

Please give us your yes or no answer by ==_____.== Please contact the church office (==_____==) or email your answer to ==_____@_____== to let us know one or the other if you can fully commit to participating in the entire strategic planning process. If you can participate, we ask you to please provide us with your email, preferred telephone number, and address.

Again, thank you for considering this significant commitment and stewardship of your time and talents in acknowledgment of your leadership and wisdom. We urge you to carefully and prayerfully consider whether or not you will be able to complete this critical and noble task effectively. We hope you will enjoy us on this rewarding journey. Looking forward to your answer, we remain yours in Christ,

+ Fr. _____   _____, President   _____ Strategic Planning Leader

STEWARDSHIP CALLING Parish Strategic Planning Action Plan

Our Holy Parish and Churches in the United States face unprecedented critical internal and external challenges. Only by reaching a consensus on how to address these unique issues can we more fully live our Faith and give meaning to Christ's Great Commission to "make disciples of all nations."

Strategic Planning is a proven process to do this holy work. It finds its roots in the Holy Gospel, follows the process our Lord and Savior Jesus Christ developed for his Apostles, and embraces current best practices. It is transformational for a Parish!

To do it properly, the 4 Ps must be effectively aligned. The right People must go through the right Process to develop the best Product that is effectively and thoroughly Performed. The Stewardship Calling 6-step Parish Strategic Planning Program follows this Christ-inspired, best-practices process successfully implemented in national churches, Metropolises, Dioceses, and Parishes that cover over 26% of all Orthodox Christians.

A.   What is Strategic Planning?

Strategic planning effectively defines one's vision, goals, and strategies to successfully achieve one's calling and mission. It helps manage the "busyness" of our Parish without turning our Parish into a "business."

A good and comprehensive Strategic Plan must answer four fundamental questions:

Why do we exist?

Where are we now?

Where do we want to be?

How will we get there?

Why? Why does our Parish exist? We must clearly articulate why anyone should want to be a part of our Parish.

Current state: Where are we now? This requires a "brutal facts" assessment of our existing Strengths, Weaknesses, Opportunities, and Threats (a "SWOT analysis"). This should include an assessment of our current situation, environment, talent, and resources. We must examine our effectiveness from the perspective of all key stakeholders.

Desired future state: Where do we want to be? Following our sense of God's calling, we need to pick a reasonable time in the future and outline a comprehensive vision of the Parish at that time. Achieving consensus around that future vision is essential.

Action plan: How will we get there? This is the "rubber hits the road" step where specific activities and step-by-step actions for the next several years are outlined in each strategic area of focus to make the Vision a reality.

B.   Stewardship Calling 6-Step Strategic Planning Work Plan

Strategic Planning Team

A Parish Strategic Planning Team ("SPT") will be recruited. It is essential that this SPT be as diverse and inclusive as possible and have representatives from as many different constituencies, demographics, ages, experiences, and perspectives as is reasonably practicable. Only by having an SPT that is diverse and inclusive can we (together with the Holy Spirit) hope to discern a strategic plan that will work optimally for the whole Parish.

First Strategic Planning Retreat Team Homework

A. Before the retreat, each SPT member will be asked to compile a list of what they believe to be the Parish's Strengths, Weaknesses, Opportunities, and Threats and what Core Values, Mission Statements, and Strategic Areas of Focus they think are most critical. (In addition, the entire Parish will also be asked to complete a SWOT analysis

and/or offer their suggestions at a community-wide open forum so that we gather as much feedback from as many people as possible.)

B. All of their answers will be compiled and heat-mapped before the First Retreat, and the consensus top SWOT analysis, Core Values, Mission Statements, and Strategic Areas of Focus will be organized for presentation and discussion at the First Retreat.

C. At the 3-day First Retreat, the SPT led by our volunteer facilitator ("OZ") will systematically reach a consensus on a Statement of Why, SWOT analysis, Core Values, and Mission Statement, and identify the top Strategic Areas of Focus for the Parish. We will then divide the SPT into the number of Strategic Areas of Focus you have determined to be most critical.

STEP TWO – THE TEAM MEETINGS/ZOOMS AND FEEDBACK LOOPS

Each Strategic Area of Focus Team will have several scheduled meetings/ZOOMs to determine the "Strategic S.M.A.R.T. Goals" (Specific, Measurable, Attainable, Relevant, and Realistically written with an implementation Timetable)," "Interim Goals/Actions," "Accountability Scoreboard" and comprehensive "Implementation Action Plan" (all of which will be explained at our retreat and will be facilitated by OZ.). All specific Strategic S.M.A.R.T. Goals will have a detailed Action Plan to achieve them.

New individuals (not a part of the SPT) who add value to a specific Strategic Area of Focus will be solicited and brought onto the Teams ("on-ramped") during this step. Each Team will have as many meetings as necessary to complete their work (usually 3). During this time, we will also check with other constituencies affected by the Strategic Goals and Action Plans, seek input and advice, and start building the broadest consensus possible.

STEP THREE – THE COMMUNICATION OF THE STRATEGIC PLAN IN PROGRESS

Community "feedback loop" events and communications will present the proposed key elements of the Strategic Plan to the Parish (e.g., Statement of Why, SWOT Analysis, Core Values, Mission, Strategic Areas of Focus) and proposed strategic goals for feedback and consensus building. The first is the open community forum.

STEP FOUR – THE STRATEGIC PLANNING CLOSING RETREAT

At the second and final retreat, each of the Strategic Area of Focus Teams will present their work to the entire SPT so that they may (a) hear the proposed Strategic Goals and Action Plans of each Team, (b) ask questions and offer input and other considerations; (c) resolve any issues or challenges; (d) make adjustments to the work product of the

Teams; and (e) start to build an SPT group consensus around a Strategic Plan. It is expected that this retreat will be less than a full day.

STEP FIVE – THE FINALIZATION AND COMMUNICATION OF THE STRATEGIC PLAN

With input from the Strategic Area of Focus Teams regarding their final Strategic Goals and Action Plans, we will organize the written product of each Strategic Area of Focus Team, as finalized by the entire SPT, into one cohesive, comprehensive, well-written, and clear Strategic Plan. The Final Strategic Plan will be properly and professionally typeset, printed, and published.

The Final Strategic Plan will be ultimately presented at a significant community-wide celebratory and informative event, hopefully in person. If possible, several community break-out groups will take place to build consensus and enthusiasm and recruit volunteers to work on the Action Plans.

STEP SIX – THE IMPLEMENTATION OF THE STRATEGIC PLAN

The overall implementation "Head Coaches" will select "Strategic Goal Co-Captains" who will implement each Action Plan. This leadership group will manage the entire Strategic Planning process, continually assess, communicate progress, and make necessary adjustments to the Strategic Plan. They will report on the progress and results at every Parish forum, in written and electronic communications, and keep every constituency informed and engaged. Transparency, accountability, and enthusiasm will be hallmarks of the communication and implementation process as we help to achieve the unimaginable future of the Parish.

Rules of Engagement for Strategic Planning

1. We will stay on schedule (unless modified by the Facilitator who is "OZ").

2. Titles, rank, position, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).

3. We will speak and interact confidentially. There can be NO repercussions for anything said. ("What happens in our meetings, stays in our meeting").

4. Ask questions if you don't understand, because no idea or question is dumb (unless it has already been asked and answered).

5. Tangential/side issues will be parked.

6. No texting/emailing/tweeting/Facebooking/ private conversation/phone calls during our retreats. We must all stay focused and be dedicated.

7. All decisions will be made by consensus. We will not be voting (except for occasional straw votes to assess consensus). Majority does not rule. Consensus will prevail.

8. OZ's 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.

9. Everyone MUST participate. ("Get in the game, or stay home.")

10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Parish and not just what you want. It's all about Christ's church.

11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. ("Seek first to understand, and then to be understood.")

12. Absolutely NO "Discussion Killers." (e.g., "we tried that once," "it won't work," "you don't know what you're talking about," etc.) Be positive/encouraging.

13. Think strategically, creatively, and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)

15. We are all members of the Body of Christ, our Holy Orthodox Parish and made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

FREQUENTLY ASKED QUESTIONS REGARDING <u>PARISH STRATEGIC PLANNING PROCESS</u>

Q: *How was I selected?*

A: Our clergy and Strategic Planning Core Team initially identified a diverse group of faithful leaders throughout our Parish representing all constituencies, groups, and positions. We want an efficient team of strategic thinkers representing many of the different perspectives that could build, by consensus, a comprehensive Strategic Plan for our diverse Holy Parish. Your invitation to participate acknowledges your leadership, vision, faith, and ability to work well on teams.

Q: *How long will this process take?*

A: We will complete this comprehensive work in about 7-9 months! The opening strategic planning retreat in step one will occur on ==_____, 20__==. And we will have the work of the Strategic Planning Teams in step two completed in time for our second retreat scheduled for ==_____, 20__==. We will finish the Strategic Plan and present it to the community at a Parish-wide celebratory event at the beginning of 2024.

Q: *Will we develop a big-picture Mission and Vision, a series of strategic goals, or a <u>combination of the two?</u>*

A: To do things properly and maximize our success, we need to reach a consensus on our Parish's: (i) WHY (why we exist); (ii) Mission Statement (what we do); (iii) Vision Statement (where we are going in the future); and (iv) agree-upon our most critical Strategic Goals (how we will achieve our Vision).

Q: *How will the Parish communicate, follow up and implement what we decide, and what <u>will be done to ensure our parish and their leaders support our plan?</u>*

A: As a part of our Strategic Plan, we will create a detailed implementation plan to achieve our goals. We will diligently and with great vigor pursue the achievement of these consensus-built goals. To maximize our success, we intend to fully communicate our Strategic Plan as mentioned in our 6-step action plan. This will include regular communications about our progress and accomplishments. We will also build a broad-based consensus throughout our Parish that will help us ensure greater buy-in and success.

      Step six of our action plan focuses on our implementation team process dedicated to achieving our Strategic Plan. Because we intend to have measurable objectives, and our Strategic Plan and actions will be fully communicated and transparent, we can hold ourselves accountable as we achieve our goals.

Q: *What is the "track record" of strategic planning concerning church work?*

A: Our methodology has been widely and successfully used in churches, businesses, and non-profit entities to help organizations consistently become more focused and effective. Indeed, the process we will use has been successfully implemented by our Facilitator (a/k/a, "OZ") to assist many Orthodox jurisdictions, parishes, and organizations in creating dynamic and outstanding Strategic Plans that now cover over 26% of Orthodox Christians in the U.S. We know this process works and can make a real difference.

Q: *What is expected of each participant in this project?*

A: Each participant must attend two retreats, as outlined in the process summary. In advance of our first retreat, each participant must spend only about 15-30 minutes completing some advance assignments (e.g., identifying our Parish's strengths, weaknesses, opportunities, threats, Core Values, the reason for existence, and critical strategic areas of focus). Between the 2 retreats, each participant must actively participate in approximately 2 to 3 meetings/ZOOMs with one Strategic Area of Focus Team created at the first retreat. Given the critical importance of our tasks and the significant work to be done, for us to be successful, everyone must be present, attentive, and actively participate in both retreats and all meetings of one Strategic Area of Focus Team. If one cannot commit to doing all that is required of a participant in this comprehensive Strategic Planning process, we will certainly understand, and they should decline to participate in the SPT.

Q: *Why do we need a Strategic Plan, and how will it support the Parish's Ministries*

A: Most successful organizations (and individuals) do not achieve their goals by accident. It takes purposeful work preceded by proper planning. As importantly, one must thoughtfully and prayerfully consider what they hope to achieve and their vision for their essential purpose. Strategic Planning is a well-established "best practices" discipline to do everything systematically. We will determine by consensus where we are, where we want to go, and how we will collectively get there as a unified Parish family. Ultimately, our Strategic Plan will provide the roadmap for more effectively focusing on our most critical goals to operate our ministries better and serve our Parish, Parishioners, and community. You are now asked to commit yourself to this noble purpose.

<u>Community Strategic Planning SWOT Analysis Instructions</u>

Our Parish will complete a "SWOT" analysis as part of our new strategic planning efforts. This strategic planning tool evaluates our <u>S</u>trengths, <u>W</u>eaknesses, <u>O</u>pportunities, and <u>T</u>hreats. Any SWOT analysis aims to identify the key internal and external factors critical to achieving our Parish's goals. A SWOT analysis groups key pieces of information into two main categories:

1. <u>Internal factors</u> – The <u>Strengths</u> and <u>Weaknesses</u> internal to our Parish.

    (a) <u>Strengths</u> include characteristics of our Parish that give us advantages. This includes things we do well.

    (b) <u>Weaknesses</u> include characteristics that place our Parish at a disadvantage. This includes things we do not do well or problems we face that we must overcome.

2. <u>External factors</u> – The <u>Opportunities</u> and <u>Threats</u> presented by the <u>external</u> environment outside our Parish. External factors may include sociocultural changes, economic matters, technological changes, laws, and changes in our environment. They only exclude things EXTERNAL to our Parish.

    (a) <u>Opportunities</u> include things happening <u>outside our Parish</u> that we can take advantage of.

    (b) <u>Threats</u> include things happening <u>outside our Parish</u> that could cause problems or issues for our Parish.

We will undertake a comprehensive and critical SWOT analysis and challenge ourselves to ask and answer questions that generate meaningful information for each category (Strengths, Opportunities, Weaknesses, and Threats). Eventually, we will take this critical data we face and form some strategies to deal with our most pressing challenges.

BY NO LATER THAN ==================, 20== , please type your answers onto this following two-page Word document and email them to: ====================@ ============; or (b) if you cannot type your answers on this form, print them neatly and bring them to the church office. Again, the final submission deadline is ==============, 20= .

S & W Please type the most important Strengths of our Parish and the most critical Weaknesses we face internally. Please focus on the bigger, more strategic, and longer-term issues.

STRENGTHS

WEAKNESSES

Opportunities & Threats Please type things <u>outside of our Parish</u> and could present OPPORTUNITIES and things <u>outside of our Parish</u> that we need to monitor as potential THREATS. On this page, do NOT mention things our Parish could do better. This page focuses on forces and things <u>outside</u> our Parish. For example, a poor economy could be a threat, and evolving or new technologies could be an Opportunity because they are both outside our Parish and potentially affect us. Please do not include anything related to our Parish specifically.

<u>OPPORTUNITIES</u>

<u>THREATS</u>

Exhibit "E" Strategic Planning Team Advance Assignments Letter and Request Form

Beloved _____ Strategic Planning Team (SPT) Members,

We greet you in the name of our Lord and Savior, Jesus Christ, as we begin another exciting new chapter in the rich history of our Parish. We are honored you have agreed to serve on the SPT and work toward a transformational Strategic Plan to guide our Parish into the future.

On _____, we will gather in an invigorating strategic planning retreat where we will determine, among other things, our Parish WHY, Strengths, Weaknesses, Opportunists, Threats, Core Values, Mission Statement, and Strategic Areas of Focus.

To maximize our effectiveness, we need all SPT members to complete some Advance Assignments well before the retreat begins to allow the necessary time to process the information. We have attached a 2-page description (pages 2 and 3) of what we need you to do, followed by four more pages (pages 4-7) upon which you will type your answers to complete these critical Advance Assignments.

You must complete the final four pages by typing your answers directly onto this WORD document and email them to _____@_____ by NO LATER THAN _____, 20___. We need your name only on page 7 to be able to assign you to the retreat breakout groups of your choice.

If you have any questions, please email our facilitator Bill Marianes at Bill@stewardshipcalling.com. This entire document can also be downloaded at: _____. This is truly a historic undertaking, and we thank you for your willingness to be a good steward of God's many gifts to you.

Please complete pages 4, 5, 6, and 7 and email them to _____@_____ by NO LATER THAN _____, 20___.

By the grace of God, with the guidance of the Holy Spirit, and with a lot of hard work from all of you, we will accomplish this transformational work together.

We remain yours in Christ,

+ Fr. _____   _____, President _____ Strategic Planning Chair

SWOT INSTRUCTIONS

We will complete a "SWOT" analysis that evaluates our Strengths, Weaknesses, Opportunities, and Threats. Any SWOT analysis aims to identify the key internal and external factors critical to achieving our Parish's goals. A SWOT analysis groups key pieces of information into four main categories:

1. Internal factors – The Strengths and Weaknesses internal to our Parish.

      (a) Strengths include characteristics of our Parish that give us advantages. This includes things we do well.

      (b) Weaknesses include characteristics that place our Parish at a disadvantage. This includes things we do not do well or problems we face that we must overcome.

2. External factors – The Opportunities and Threats presented by the external environment outside our Parish. External factors may include sociocultural changes, economic matters, technological changes, laws, and changes in our environment. They only exclude things EXTERNAL to our Parish, so do not include anything involving it.

      (a) Opportunities include things happening outside our Parish that we can take advantage of.

      (b) Threats include things happening outside our Parish that could cause problems or issues for our Parish.

_____

CORE VALUES INSTRUCTIONS

Core Values are beliefs shared among the stakeholders. Core Values drive an organization's culture and priorities and provide a framework for decision-making. We ask you to briefly identify up to six Core Values you believe are most critical for our Parish in single words or concise phrases.

_____

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MISSION STATEMENT INSTRUCTIONS

Mission answers the question: "What do we do?" A Mission Statement concisely describes the fundamental purpose for which an organization exists and what it does to achieve its Vision. Below are some examples from other Parishes to provide some food for thought.

Sample Mission Statements (taken from various churches)

~ The Mission of _____ Church is to: Love God, Love Others, Make Disciples.

~ We are a Christ-centered community that welcomes all to worship, to pray, to serve others, and to learn our Orthodox faith.

~ We are a worshiping community, living and sharing the Faith given by Christ to the Apostles.

~We are a welcoming Orthodox community supporting each other in spiritual growth and philanthropy in Christ.

~ _____ Church welcomes all to experience and share Christ's love and the apostolic faith through worship, education, fellowship, stewardship, and service.

~ The Mission of _____ is to proclaim the Holy Gospel by teaching and spreading the Orthodox Christian Faith in a dynamic and welcoming community devoted to serving all people who seek a growing relationship with Jesus Christ.

~ The Mission of _____ Church is to worship and honor God by living and sharing the Gospel of Jesus Christ through prayer, unconditional love, mercy, and service to others.

~ _____ is a Christ-centered community that loves, guides, engages and serves all people.

~ The mission of _____ is to energize, cultivate and guide the faithful by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Christian Faith.

~ The Mission of _____ is to be a Christ-centered community welcoming all people to grow spiritually in the fullness of the Orthodox Christian faith through love, worship, and service.

~ We will establish and grow a Church community in Christ that embraces and teaches the Orthodox Christian Faith.

_____

Strategic Areas of Focus Instructions

Strategic Areas of Focus are the most essential and critical strategic areas that require our attention to make the most significant difference for our Parish. Once we know the topics and areas in which we must focus to make the most important differences for our Parish and parishioners, we will develop specific strategic goals to address the needs in these areas. They are the "few things that will change everything" and help address our issues and their root causes. To get us started, we are asking you to please

suggest the most critical 1 or 2 (no more than 3) strategic areas on which we must initially concentrate.

Strengths & Weaknesses Please type the most important Strengths of our Parish and the most critical Weaknesses we face internally. Please focus on the bigger, more strategic, and longer-term issues.

STRENGTHS

WEAKNESSES

BY NO LATER THAN_____, 20__, please type your answers onto pages 4-7 of the Word document and email them to: _____@_____

<u>O & T</u> Please type things <u style="color:red">outside of our Parish</u> and could present OPPORTUNITIES and things <u style="color:red">outside of our Parish</u> that we need to monitor as potential THREATS. On this page, do NOT mention things our Parish could do better. This page focuses on forces and things <u>outside</u> our Parish. For example, a poor economy could be a threat, and evolving or new technologies could be an Opportunity because they are both outside our Parish and potentially affect us. Please do not include anything related to our Parish.

<u>OPPORTUNITIES</u>

<u>THREATS</u>

<mark>BY NO LATER THAN_____, 20___, please type your answers onto pages 4-7 of the Word document and email them to: _____@_____</mark>

_____

Core Values Please <u>LEGIBLY TYPE</u> no more than 6 of the most critical Core Values (single words or very short phrases) you believe our Parish should embrace to define our culture, and that should help us decide what we do and how to prioritize our efforts.

1. _____   3.
_____

2. _____   4._____

5. _____   6. -
_____

Mission Statement Please <u>LEGIBLY TYPE</u> a clear, concise, compelling, inspiring, and easy-to-understand and share a Mission Statement that outlines what our Parish should do. (See examples on pages 2 and 3 for ideas.)

_____

_____

_

_____

_

_____

_

Strategic Areas of Focus Please <u>LEGIBLY TYPE</u> the top 1 or 2 (no more than 3) most critical and important strategic areas you believe our Parish must prioritize in its strategic plan with specific strategic goals to have the most significant impact and help create the healthiest Parish that helps bring people closer to Christ and helps us achieve our mission. What are the few things that can change everything?

1._____
_

2.

_____

3.

_____

various times during our strategic planning retreat on November 10-12, the SPT will break up into smaller groups to work on discrete tasks. We need to know your

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preferences. <u>Please give us your name on this page</u> so that we can try and match you to the smaller groups of your choice.

<u>PRINT YOUR NAME</u>: _____

<u>SWOT/Core Values Team</u> During the retreat, everyone will work with a subgroup in one of five categories (Strengths, Weaknesses, Opportunities, Threats, Core Values) to reach consensus conclusions in each of these areas. Please tell us which group you would prefer to be assigned by ranking all five items from 1 (my first choice) to 5 (my last choice). Put a number, 1 through 5, on <u>each</u> line based on your preference for the team on which you want to work. <u>You must fill in all lines with a number from 1 to 5 based on your choices</u>.

___ Strengths ___ Weaknesses ___ Opportunities ___ Threats ___ Core Values

<u>Mission/SAF Teams</u> During the retreat, everyone will work either on a team to (a) develop the Mission Statement of the Parish (a clear description of what we do as a church) or (b) identify the most critical Strategic Areas of Focus that the Parish must prioritize in our strategic plan to have the most significant impact and help create the healthiest Parish that brings people closer to Christ and help us achieve our mission. Rank these choices from 1 to 2 (with 1 being your first choice and 2 being your second choice). <u>You must fill in all lines with a number 1 or 2 based on your preference.</u>

_____ Mission   _____Strategic Areas of Focus

Exhibit "F" SWOT Heat Mapping Instructions

Stewardship Calling Heat Mapping Process Summary

The heat mapping process is all about taking a lot of data, identifying how often a common comment occurs, and then listing the comments in the order of the number of times they are mentioned. This process requires judgment as many people will describe the same root cause item using different words. It will also take quite a few passes through the raw data to get everything properly categorized. So, take your time and find an environment where you can concentrate and discern the key concept being expressed.

Step 1. TRANSCRIPTION PHASE

We will begin by literally transcribing all of the raw data identified by EVERYONE who submitted advanced assignments into separate Microsoft Word documents (one for each of Strengths, Weaknesses, Opportunities, Threats, Core Values, and Strategic Areas of Focus). Every item submitted will be typed into the appropriate document verbatim. No editing will be done in the Transcription Phase, and we will not need to keep track of who said what. Just the exact wording will be carried over. After this phase, we will have 6 Word documents.

Step 2 FAMILIARIZATION PHASE

The work can be divided between several people (preferably 5-6), by allocating the 5-6 separate items among the team working on this. Each person should read through whichever item(s) is assigned to them several times to familiarize themselves with all the comments. The more times you merely read through all the submissions, the more you will start to see patterns of common thoughts being expressed. It will help with the next step.

Step 3 HEAT MAP FIRST, SECOND, THIRD, ETC. PASSES

The final step is identifying the number of times and item is named. The easiest way to do this is to read each item in the order in which it was transcribed. As you find one that is similar to a previous one, copy and paste and then edit down the redundant wording after the first time that concept was identified and put the number 2 in front of the item the first time it was identified. As additional mentions of a similar item are included, you will change the number in front to 3 and then 4, etc., as the same concept is mentioned. This allows us to see the number of times a particular item is mentioned.

You can do the heat mapping however you find works best for you. But one of the easiest ways most people have found to do the work is to place two WORD documents on the same screen next to each other. One has the raw data, and the other starts out blank. You will cut and paste each item from the raw data document over to the heat-

mapped one, making sure to paste like ones after each other, and then change the number in front of the summary phrase to reflect the addition of another similar comment.

Regardless of how you do it, as additional mentions of an item occur, you can continue to edit down the wording to get to the essence of the item if need be. Many people write "essays" and you need to distill what they wrote to the specific key concept they are trying to express. This often occurs by eliminating as many extra words as you can to get to the core concept in as few words as possible.

It usually takes many passes to keep refining it down to the smallest number of repeated concepts. There will also be several items that are just "one-offs" with no more than one mention. In the heat mapping, those will naturally fall to the bottom of the list, and the more times a concept is mentioned, it will rise to the top of the list.

<u>SPECIAL NOTE</u>

This Special Note applies to just the Opportunities and Threats. By definition, Opportunities and Threats need to be <u>external</u> to the organization and not internal to it. Most people get this wrong and include both external and internal Opportunities and Threats. So, any internal Opportunity or Threat should be eliminated and NOT included on the heat map.

We will only work with the external Opportunities and Threats. For example, "A poor economy" is an external threat (not just affecting our organization) that could make the list, whereas "Poor Financial Contributions/stewardship" is an internal Weakness (not Threat) that affects just our organization and will not be included. Again, delete internal items improperly listed as opportunities and threats. This may be difficult to discern at times, so please feel free to reach out to OZ at Bill@stewardshipcalling.com.

<u>Step 4 FINAL HEAT MAPPING</u>

After you're done, OZ will take the best final version of the heat-mapped item documents, review them carefully, and make consolidating and consistency changes to produce the final heat mapping for use at the retreat.

==A redacted example of 3 of these items from a Parish process is attached as an example.==

WEAKNESSES

25 – LACK OF ENGAGEMENT - Low participation in ministries/activities because lack of commitment -too many ministries and people spread too thin- Complacency and lack of commitment in our community- Too few volunteers for work needed to be done, Volunteers usually the same group

21 – GREEK- CULTURAL ISSUES - Greek language/cultural issues - creates communication barrier and exclusionary issues- lack of balance between Greek cultural activities and Orthodox faith - Chanter's Greek is a turn off to newcomers and young members- Highest energy levels and volunteer participation from church members on Greek cultural events (which presumably is not the mission of the church…..or maybe it is…not sure yet)- People looking for a new church who are not Greek or have not heard of Orthodoxy may not be likely to consider our parish - cultural influences can prevent our Parish community unity and undermine the true mission

21- FACILITIES - Limited facilities: in general, not enough downstairs seating, space for choir, church seating, for Sunday School/Youth - no intercommunication between buildings - Inadequate parking - Inadequate recreational areas - Poor location of Church (unsecure location)- Facility to brand our Greek Festival and other church programs. (Development of our church property is crucial to begin that brand identification)

20 – CHURCH SERVICES - Liturgy is too long and repetitive and does not fully engage participants, Too much standing- Mired in old and ancient traditions that have developed over 2,000 years that do not bolster one's spirituality- Single service option with no earlier time option (vs. Catholic & others)- Lack of childcare and nursery during services.- People struggling to find a place to fit in may not assume such a traditional form of Christianity is accepting to them- Church attendance dominated by older demographic

15 – UNDERSTANDING ORTHODOXY - Lack of education and knowledge about the Orthodox Faith & Liturgy & Bible- Lack of excitement about the faith- Diverse Orthodox community where superstitions, cultural "beliefs," and ignorance of our true faith often infiltrates a kind of "peasant" religion results in lack of a true understanding of Orthodoxy- Assimilation into the "modern" American morality and culture- People want to change the Orthodox Church to fit their views and way of life

13 – YOUNG ADULT ENGAGEMENT - Lack of active young adults in the community.

12 – WELCOMING- NEWCOMER EXPERIENCE - Newcomer experience needs to be improved - Lack of inclusiveness and cliques – lack of inclusiveness- need better welcome information/packet with brief explanations of the elements of the service - Develop some talking points to share with others, when asked or given the opportunity to talk about our Orthodoxy and our church in order to ensure a consistent and impactful message to instill curiosity to learn more)

11 –MINISTRY - TRANSPARENCY, ACCOUNTABILITY and EFFECTIVENESS - Lack proper measurements on effectiveness and execution of ministries- Need for better organization and scheduling in ministries

11 – STAFFING - Inadequate staffing- Need a 2nd priest - high demands and responsibilities of the clergy/Priest stretched thin - Most administrative functions are performed by volunteers hence lack of consistency- Low number of those who pursued full time church ministry or missions. Is current clergy the only one?

8 – STEWARDSHIP – FINANCIAL SUPPORT - Parishioners do not have a culture of tithing- limited Stewardship/financial Resources (not a wealthy community) - Church minimally named in members' estate planning / wills- Fund raising activities have become excessive- 80/20 rule applies to financial support Stewardship and Capital Campaign - we have less families and this makes it difficult to raise the money for our new church.

6- YOUTH ISSUES - lack of mentoring of our young people in project oriented arts and crafts related to our Orthodox Greek culture- Teenage/youth activities- GOYANS should have more responsibilities and opportunity to lead and contribute to church and community. Vision for GOYA/JOY- Add sports program (soccer, flag football, basketball, baseball, softball) - Youth protection policies could be strengthened

5 – MEMBERSHIP DECLINES - Membership declining due to aging community, divorce and members relocating or growing minimally Lack of Transparency and accountability in decision making/Not open to suggestions

5- SUNDAY SCHOOL ISSUES - No SS curriculum- No teacher review & development - poor SS arrival & dismissal procedures - Use of Non-Orthodox religious materials in Bible Study and Sunday School- Poor commitment and engagement of parents in the Sunday School

5 – OUTREACH - Minimal external community outreach. One example, how to better engage business leaders in our parish onto City/State Boards/commissions Philanthropy vision & mission is segregated to Philoptochos & AHEPA vs. engaging the entire parish - Minimal community involvement with other Orthodox or community Churches

4 – FAMILIES ISSUES - Need to better address real problems families are having in our parish- Strengthen programs for mothers/children (Mommy and Me, Babysitter program comprised of young members of our church) - Lack of fun family activities- Compared to other churches in our community,

4 – RESISTANCE TO CHANGE - Parishioners resistance to change

4- NOT GREEK ENOUGH - Increased "distancing" from Greek culture.

3- CHOIR Issues - Spotty choir practice- Aging organists- few people worshipping singing- there is no inviting way to join in on church hymns

3 – LEADERSHIP DEVELOPMENT - Need more leaders- and ways to get new people to take on leadership roles

3- SENIORS - Elder care issues – not enough care programs for our own poor and old parishioners; lack of senior living facilities - lack of church transportation for those unable to drive or without a means of getting to church

3 – COMMUNICATIONS - Insufficient communication to parishioners.

3- TECHNOLOGY - Technology Limitations - limited technology content creators fewer number of people currently creating content and limited number of users publishing content - Website not mobile friendly

2 – EMAIL - Too much reliance on email.

Lack of broad based understanding and agreement of our why we exist, and what we envision for our future church

ONE-OFFS

- Identify ways to expose people in our city to Orthodoxy, and the sense of family our church offers.

- Inreach - We should look to help and improve our community before (or at least at the same time) we reach out to the larger community. Many in our community in need.

- Social media presence

- Sense of entitlement by descendants of the founders

- Unaudited Technologically Published Content - Our current content needs to be audited and updated to reflect the current state of the parish

- Membership spread out geographically throughout Jacksonville

Sport/Recreation programs interfere with church attendance/activities

- Vacation Bible School enrollment down

- Church luncheons are too frequent losing appeal to membership. Attendance is dropping

- We must revisit the ancient Greek adage "Everything in moderation"

- Lack of meaningful support when members are in crisis (e.g., death, divorce, addiction, etc.)

- Metropolis

-Tutoring unavailability to our young people in their academic subjects

-Philoptochos Charter clarification – many programs beyond just working on matters for the poor

- Distrust between laity and various positions held in our Hierarchical organization.

CORE VALUES

36 – CHRIST-CENTERED (FAITHFUL / SPIRITUAL) – guides us and is the basis for all our decisions; Orthodoxy – a commitment to the fundamentals of Orthodox teachings; Holy Tradition; The Gospel of Jesus Christ; The One, Holy, Catholic and Apostolic Church of Jesus Christ; attend service, pray to get closer to God; worship; Church is a Hospital for the sick in which we are all in

need of a physician Beliefs as outlined in the Nicene Creed; Biblical and spiritual doctrines and guidelines as a central thought and guide; Practices the lessons that Christ gave us; Historical presence; Evangelism; Everything we do is for the Glory of God; Maintain a high standard of excellence in all ministries and activities; Strengthening relationship with God; The opportunity to increase the knowledge of Orthodoxy and church history is being lost; All are working towards salvation; To help all on our shared journey toward salvation.

33 - LOVING and WELCOMING COMMUNITY - a healthy community based on strong family relationships, Greek culture and positive outreach – We are bound to each other and our community; Warm Fellowship; All feel included, engaged and part of community; forgiving community; Reach out to each other to work with love and harmony; Love everyone in spite of our sinful nature; Love all those who enter the Cathedral friendly/inviting/hospitable; Newcomers/visitors.

14 - COMMUNITY SERVICE – We are bound to each other and our community; servant leadership; volunteer; charity and helpfulness; committed to philanthropy; be a good example in the greater Atlanta community through our good works; We are here to help others; Support all kinds of Families; Embrace helping those in need; To be Good Samaritans.

13 - GOOD STEWARDS - contribute money, time and talents with purpose, passion and integrity; generous contributors; Excellent Planning and Fiscal Management.

11 - EDUCATION – a commitment to programs that support lifelong learning; educate non-orthodox as well as orthodox as to why things are done a certain way during the liturgy; educate our parish about Christianity; train and equip clergy, leaders, parish, and youth to develop into Christian individuals, families and parish; Educating our youth and all people about the Holy Trinity through Orthodoxy is crucial; Keep our youth engaged in our community; Youth education; Youth retention to foster Orthodoxy for life.

8 – INCLUSIVE / COLLABORATIVE –Create more opportunities to make our Cathedral "home to all", a place you want to come and be with family and friends. Non-judgmental – loving and accepting of everyone; Be more inclusive and not exclusive - We respect all backgrounds and potential contributions, no matter age, gender or income; Ecumenism; Working in a harmonious way to be a loving example to all people; Synergy.

6 - HONEST – To be good honest and respectful stewards of the faith and church; Truthful; Transparent; accountable.

5 - ENGAGING - Retaining our Parishioners and keeping them engaged; Increase participation to services, ministries, etc. Engaging our young adults (groups, activities, sports).

4 - FLEXIBLE - Change is good; and adaptable; Shift from generations of Greek immigrants, and children and grandchildren of immigrants with cradle commitments to Orthodoxy, to later and current, and future generations with much weaker ties to ethnic heritage and the Orthodox Faith.

2 - HELLENISM – should be used to enhance Orthodoxy and not supersede it; appreciate its relevance to our Orthodoxy.

2 - COMPASSIONATE – a commitment to help those less fortunate; service to others.

2 - FORGIVING

2 - HUMILITY

2 - FAMILY

ONE-OFFS

Passionate
Simplicity
Impact
Hopeful
Cultural and religious identity
We know all stages of life deserve equal consideration when determining where to put our time, effort and support.

<u>THREATS</u>

<u>24 – DEMOGRAPHIC SHIFTING TRENDS – CHURCHES LOSING YOUTH AND AGING POPULATION</u> - Adults-35 and younger not wanting to be a part of the church after getting married or the birth of their child; Dwindling newcomers and or growth in Orthodox faith; Dilution of traditions from generation to generation; The community is on the older side; and many of the children and grandchildren of the elder congregants do not participate in the community to the same extent as the elders; Youth leaving our church community; Millennials are less likely to attend church in general; similar to in the past; but likely more pervasive now. How do we capture and/or retain those people in our church; Young adult migration away from Orthodoxy; Weakening cultural ties; Losing young people after they to go to college; Losing the age bracket 35+; Once people become empty nester they pull away from the church; The major threat is the demographic shift from generations of Greek immigrants; and children and grandchildren of immigrants with cradle commitments to Orthodoxy; to later and current; and future generations; with much weaker ties to ethnic heritage and the Orthodox Faith. How we at our Cathedral (and even the Church nationally) manage this demographic shifting will determine how; and even whether; we survive and flourish in the future; Parishioners' age and health plus dedication vs. millennium youth and disinterest; We are losing our youth. We need to find ways to get young adults involved; We are losing older population – can we have something to learn from them about our faith and ancestry?; We are losing people. The youth are not coming. So we are fading out. This includes our religion and our culture; Church members declining; Church membership declining – seniors passing; GOYANs going to college (losing people; not gaining); Greek culture (as a whole) is dwindling; not enough representation exists within the Metropolis to share our ideas and culture/heritage with our parishioners to express our love for them (dance; language; food; clothing; etc.); festivals and competitions across the US are losing customers and participation to assist in creating/maintain these events; College; especially teaches our children relativism (that there is no real truth).

<u>21 - LIVING IN A SECULAR COUNTRY / WORLD</u>   - Societal continuation and emphasis on secularism; Religion itself is not important to more people now than before; Young church members exposed to and influenced by non-Orthodox norms; The growing secularization and anti-Christian attitudes in American society. Secularization of society; organized religion not relevant; parents working or not working; competition with other school/outside activities; Secularism gaining strength. Secular distractions; The world around us; People are looking for validation and do not want to be in a place that they feel guilt or shame; College and Outside influences on our youth; if they are not properly prepared and ready for challenges to their beliefs; they could be swayed or distracted (need to be prepared to deal with educated and persuasive arguments; Growing secularism; especially among the young; Friends that are not good role models; and don't attend church themselves; Overcoming Bias: With the current political climate there is a huge divide in the way folks react to things. Although this divide is mainly outside the walls of the church; it certainly effects the church as a whole. For some it has become acceptable to be less tolerant of people who are not like us. The idea that you can be a moderate has evaporated and both sides of the political spectrum seem to be embracing their extremes. Polarization has become the norm; it is not healthy; and if unchecked it will eventually creep into the way we pray; Political climate around immigration; Discord within our country over political and social issues; Xenophobia; Nationalism/tribalism; Consumerism; Homophobia; Fundamentalism; Complacency – Not moving further towards God with faith and/or losing sight of the big picture and focusing on minutia.

<u>19 – PEOPLE ARE TOO BUSY WITH OTHER PRIORITIES</u> -   Too many Outside activities vying for available time and attention; Younger adults do not have orthodoxy on their priority; Youth "travel" sports taking a priority over church on Sundays and Holy days; "Others" occupying our time and finances; Time and emotional demands upon our youth; Time constraints/over commitments; Husband/wife both working; Children involvement in school/other athletic activities; Diverse needs; time commitments; competing activities; Time Challenges (external youth activities; constraints of working families - both parents; single parent); Competition for peoples' time and attention (for getting involved with our parish activities.); 365/24/7 world – all days are the same morning; noon; and night; Youth sports (time factor); Dual working families; Unconventional working days and times; busy family activities; i.e. sports; clubs; and education; Too many choices of things to do in Atlanta; life is busy; people who don't have much hope in this crazy world; Both parents in family work.

<u>17 - CHANGING MORAL VALUES / CULTURE</u> - Changing moral values; Me culture/society; Change in family values; The envy and jealously that is growing in the world; Religious Apathy; Disinterest; Lack of Faith; and alternative sexual lifestyles conflict with our beliefs; The glamour and image that the world portrays ad says you must be that!; The role models that the world shows – rich; famous; foul mouthed; immoral; instead of humble; God loving saints; Erosion of Christian faith in society; Changing family values; Parents not setting example of importance of attending church; participating in church-related activities; Contemporary Moral Issues – might be losing people due to the face that we do not deal with today's issues; Younger generation – mixed marriages/life styles pulling our young people away from the church; Decline of the family unit and parent involvement. Societal shifts – self-image; instant satisfaction; etc.; "What's in it for me?" mentality; Family values/priorities have changed or shifted; Desire to conform - join forces of the mass.

<u>16 - OTHER CHURCHES/RELIGIONS</u> - There may be a potential threat from "Mega" churches & their youth programs that seem to be more engaging with its parishioners Look at what IHM and Oak Grove Methodist are doing to capture the attention of the members. If we are not able to meet the needs of our parish; including spiritually; they will find alternatives…new parish; religion or other coping mechanisms; Arianism with Jehovah's Witnesses (very fast-growing Christian sect. They are well organized – methodical); Islam (The lies and practical threats it presents to the Truth and life for other religions); A growing trend of anti-

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established religion; Other Christian and none Christian churches; Larger churches have more life-stage ministries and better "production" (A/V; communication; marketing assets); Outside religions/non-believers and other Christians. Do not know what we believe in; when I say I am Greek Orthodox; the most two common questions/comments I get are: "Are you Jewish?" and "Do you believe in the Greek Gods/Mythology as your deities?"; Other religions are more easily understood and taking away our youth from the church; Competition for Orthodox members from other Orthodox churches; Competing religious concepts (products) that may pull Orthodox Christians away from GOC; Other faiths or non-denominational appeal to mixed marriages or younger ages; Rise of mega churches; Competition from other churches; People are leaving the Church for other churches or nothing at all; Other churches are more easily accessible – satellite churches; bible studies; Are other Parishes in the metro area considered to be more attractive to families due to their programs and "Community?"; When people visit from out of town; a non-orthodox person would not attend an orthodox church; yet there are many churches for a non-orthodox Christian to attend; Modern theme churches appealing to younger generations.

11- POOR BRAND AWARENESS / LACK OF   KNOWLEDGE OF ORTHODOXY Very few people still know about or understand the Orthodox faith; – people not aware Orthodox church exists; Community misunderstanding/ignorance about what Christian Orthodoxy is; BRAND AWARENESS people in this city; state and country need to know that the Eastern Orthodox Church is a Christian Church whose parishioners are disciples of Jesus Christ with the same fever as the original apostles. This is threated everyday by our not showing gratitude to God for his unconditional love toward us. When we do not proclaim this message in some way we weaken the validity of the claims of the Eastern Orthodox Church to being the one true apostolic church. We become just another business whose employees are scrambling to make a buck and trying to get ahead in the world; The lack of Brand Awareness that we are a Church dedicated to the basic message of Jesus Christ that "God unconditionally loves everyone". I believe this is the greatest threat to the Eastern Orthodox Church in America; Lack of knowledge about the Orthodox faith; Limited access to positive media and news coverage of Christianity; Language and lack of knowledge of church history; traditions and mission; Christianity is *now associated* with rigid dogma that is counter to contemporary cultural norms; Political – correctness of new ideas and laws prevents people from saying what the church believes in and/or church against these peoples.

11- SOCIAL MEDIA - Threat to religious freedom from social media; the content not necessarily the form. Expose to the world can be a good thing but like the old saying goes. Too much of a good thing can be bad; influence toward children today; Outside world is a threat to the beliefs of our youth. Our youth is exposed to so much due to social media; Evil social media influences/preoccupation; The world and social media occupies everyone; but especially our youth; Media and drugs are a threat to our children.

6 – LOSS OF INTEGRITY - GOA FINANCIAL AND RELIGIOUS SCANDALS - Scandals and perceived ill-will in the Greek community and Archdiocese; Although this item isn't within our control; the lack of transparency with financial issues at both the Archdiocesan and Metropolis levels is eroding faith in our church in the big picture---we need to express our concerns as a community; Additional proof of financial mismanagement within official Diocese departments occurs and further destroys trust in leadership; Stewardship in jeopardy being part of the GOA and its problems; Financial exposure at Archdiocese may ultimately require increase in fair share contribution; squeezing limited resources.

5 – PERCEIVED GREEK ETHNICITY REQUIREMENT / CHALLENGES   - Too much emphasis on Greek makes it more difficult for potential converts; disconnect between being Greek vs Greek Orthodox; Use of Greek language use in liturgy; Complacency; bias; exclusive attitude; prejudice; perceptions by and of others. Being seen as a 'Greek' church; Cultural Preservation – need to focus more on Orthodoxy instead not just for Greeks; outside perception that you need to be Greek to come to this church.

5 - GOVERNMENTAL LAWS - Governmental laws and regulations dealing with human rights and equal treatment under the law can conflict with our dogma and beliefs; Recent Supreme Court case did not resolve collision of business vs. religious freedom and practice; Threat to religious freedom from government. Zoning; construction laws; permits if need to add on to existing structures/build vertical building structures/do renovations; New tax laws regarding tax deductibility (should be explained; maybe); Potential tax law change affecting churches.

 4 - VIOLENCE AGAINST CHRISTIANS - Safety; Overt hostility toward Christianity; Religion (publicized religion) is dangerous in today's society; Beliefs are being threatened all the time; We might experience an act of terrorism at the church; Need to consider pumping up our security systems on Sunday and when we have events on our property. Do we need an armed guard on duty?; Lack of night time security.

4 - COMMUNICATION - Changing Communication: I believe that communication problems are just beginning. There are no clear forms of communication available to any organization that would let them contact everyone throughout many generations; The systems in place are also constantly changing and communication in general is harder instead of easier; Changing communication habits between generations; Upper Management Clergy (Archbishop and Clergy at the Archdiocese) and Middle Management Clergy (Bishop and Clergy at the Diocese) who do not on a consistent basis proclaim the message in a straight forward assertive manner that "GOD unconditionally loves everyone."

3 - <u>ATHEISM</u> - Casual Atheism (i.e. Orthodox or others going through the motions; but not really believing). People leaving churches; in general; due to not believing in God etc.

INSERT PARISH LOGO OR PICTURE HERE

_____ Parish

Strategic Planning

Retreat #1 Handbook

_____ __, ___ & __, 20__

"*Where there is no vision, the people will perish.*" Proverbs 29:18

Bill Marianes

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Rules of Engagement for Strategic Planning Retreats

1. We will stay on schedule (unless modified by the Facilitator, who is OZ).

2. Titles, ranks, positions, and roles of participants are left outside the room. During the retreat, everyone is equal (except OZ – see rule 1).

3. We will speak and interact confidentially. There can be NO repercussions for - anything said. ("What happens in our meetings, stays in our meeting").

4. Ask questions if you don't understand because no idea or question is dumb (unless it has already been asked and answered).

5. Tangential/side issues will be parked.

6. No texting/emailing/tweeting/Facebooking/ private conversation/phone calls until after our retreats. We must all stay focused and be dedicated.

7. All decisions will be made by consensus. We will not be voting (except for consensus straw polls). Majority does not rule. Consensus will prevail.

8. OZ 3 Bucket Rule applies. Bucket 1 = things we control; Bucket 2 = things we can influence; Bucket 3 = things we can't do anything about. We will focus on Bucket 1 and 2 issues and spend no time on Bucket 3 issues.

9. Everyone MUST participate. ("Get in the game, or stay home")

10. Be honest and "no spin." No party lines. Think about what will really make a difference in the Church and not just what you want. It's all about Christ's Church.

11. No defensiveness. Disagree agreeably. Listen carefully before you object or agree. ("Seek first to understand, and then to be understood.")

12. Absolutely NO "Discussion Killers." (e.g., "we tried that once," "it won't work," "you don't know what you're talking about," etc.) Be positive/encouraging.

13. Think strategically, creatively, and outside the box. Think long (not short) term.

14. Speak precisely and make your point succinctly. (Save the long, funny, or personal stories for personal time discussions.)

15. We are all members of the Body of Christ, our Holy Orthodox Church, and made in the image and likeness of God. We will interact with each other as if we were interacting with our Creator. We will treat one another with love and respect and allow the Holy Spirit to participate freely.

Strategic Planning Retreat Schedule_____ __, __, & __, 20__

1. First Day 5:15 p.m. – 11:00 p.m.[1]

#	Time	Presenter	Activity
			<mark>A. The Opening</mark>
1	5:00 - 5:15	Fr. ____	Opening Prayer Service.
2	5:15 - 6:15	Full SPT	Dinner.
3	6:15 - 6:20	Fr.	Fr. _____'s opening remarks and welcome.
4	6:20 - 7:50	OZ	Review strategic planning process, goals, agenda, rules of engagement, facts and statistics, and Strategic Planning Team ("SPT") exercises.
			<mark>B. SWOT</mark>
5a	7:50 - 9:00	OZ then 4 SWOT Teams	SWOT explanation followed by each separate SWOT Team develops a consensus list of the parish's Strengths, Weaknesses, Opportunities, and Threats based on the results from the heat-mapped SWOT submissions depending on to which SWOT Team they have been assigned. *(See Team assignments on pages 7-8. SWOT instructions are on page 6. Your specific SWOT heat-mapped results will be given to you in your room. Summaries of heat-mapped suggested SWOT conclusions are on pages 14-15.)*
5b	7:50 - 9:00	OZ then Core Values Team	The Core Values Team develops a consensus list of the proposed Parish Core Values. *(See Team assignments on pages 7-8. Core Values instructions are on page 6. Summaries of heat-mapped SPT suggested Core Values are on page 15.)*
6	9:00 - 10:55	Full SPT	Each SWOT Team presents their specific consensus proposed Parish's Strengths, Weaknesses, Opportunities, or Threats. The full SPT will then discuss

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[1] Subject to change by OZ – See Rules of Engagement #1

			and reach a consensus agreement on the final Strengths, Weaknesses, Opportunities, and Threats.
7	10:55 - 11:00	Fr. _____	Closing comments, prayer, and dismissal.

2. Second Day 8:30 a.m. - 8:30 p.m.[2]

#	Time	Presenter	Activity
			<mark>C. Statement of WHY & Core Values</mark>
8	8:30 - 9:00	Full SPT	Opening Prayer and continental breakfast.
9	9:00 - 9:05	Fr. _____	Fr. _____'s opening remarks.
10	9:05 - 10:30	Full SPT	WHY Discovery.
11	10:30 - 11:15	Full SPT	Core Values Team presents their proposed list of parish Core Values, and the full SPT will discuss and reach a consensus on the final parish Core Values. *(Summaries of heat-mapped SPT suggested Core Values are on page 15.)*
12	11:15 - 11:30	Full SPT	Break.
13	11:30 - 12:30	OZ	Explanation of parish Mission Statement and Strategic Area of Focus and S.M.A.R.T. Goal development process.
14	12:30 - 1:10	Full SPT	Lunch.
			<mark>D. Mission Statement & Strategic Area of Focus (SAFs)</mark>
15a	1:10 - 2:15	Mission Teams 1 & 2	Mission Statement Teams 1 & 2 discuss and develop a Proposed Mission Statement by consensus. *(See instructions on pages 10-11. Your specific heat-mapped Mission Statement results will be given to you in your room. Summaries of heat-mapped Mission topics are on page 16.)*
15b	1:10 - 2:15	SAF Teams 3, 4 & 5	SAF Teams 3, 4 & 5 discuss and determine the proposed SAF by consensus. *(See instructions on pages 10-11. Your specific heat-mapped SAF results will be given to you in your room. Summaries of heat-mapped SPT suggested SAFs are on page 16.)*
16	2:15 - 3:30	Full SPT	Mission Teams 1 & 2 have up to 10 minutes each to present their proposed Mission Statement, followed by

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[2] Subject to change by OZ – See Rules of Engagement #1

#	Time	Presenter	Activity
			SPT discussion, development, and agreement on a consensus final parish Mission Statement.
17	3:30 – 3:45	Full SPT	Break.
			E. Strategic Areas of Focus (SAF)
18	3:45 – 4:55	Full SPT	SAF Teams 3, 4 & 5 have up to 5 minutes each to present their proposed consensus parish SAFs, followed by SPT discussion, development, and agreement on consensus parish final Strategic Areas of Focus. Each SPT member selects which Strategic Area of Focus Team on which they would like to work.
19	4:55 – 7:00	Full SPT	Prayer Service and dinner (5:00 - 7:00).
20	7:00 - 8:30	Full SPT	Discuss and explain the process for determining S.M.A.R.T. Goals, Interim Goals and Interim Actions, Accountability Scoreboard, and creating a comprehensive Action Plan.
21	8:30 - 8:35	OZ	Sunday Services homework assignment.
22	8:25 - 8:30	Fr. ____	Closing comments, prayer, and dismissal.

3. Third Day 10:00 p.m. - 3:30 p.m.[3]

#	Time	Presenter	Activity
23	10:00 - 11:45	Full SPT	Divine Liturgy
24	12:30 - 1:30	Full SPT	Opening Prayer and working lunch and discussion of Sunday Services homework assignment.
25	1:30 - 2:00	OZ and full SPT	Review and recommit to parish final SWOT, Statement of Why, Core Values, Mission, Vision, and Strategic Areas

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[3] Subject to change by OZ – See Rules of Engagement #1

			of Focus. Discussion of S.M.A.R.T. Goal development and next steps.
26	2:00 - 3:00	SAF Teams	SAF Teams are formed and: (i) select their Co-Chairs; (ii) identify the dates and times of their three meetings (subject to OZ availability); (iii) brainstorm any people who add value in their area of focus who can be on-ramped; and (iv) start brainstorming possible S.M.A.R.T. Goals in their Strategic Area of Focus *(See instructions on page 11.)*
27	3:00 - 3:55	OZ	Discuss the next steps, timetable, and final retreat on _____ __ 20__. *(See post-retreat instructions on pages 12-13.)*
28	3:55 - 4:00	Fr. _____	Fr. _____'s final comments, closing prayer, and dismissal.

SWOT and CORE VALUES Guidelines

1. You have until 9:00 p.m. to reach a consensus.

2. Use the Heat Mapped SWOT Document in your assigned room. The Heat Mapped SWOT Document lists verbatim submissions from everyone in the SPT and parish in the area in which your group is focusing.

3. The bold number in front of each group of comments represents the number of times that item was mentioned. Start with the items mentioned most frequently.

4. The bold word(s) after the number and before the listing of all verbatim comments is the short, suggested SUMMARY DESCRIPTION of those comments. You must decide if those short descriptive words need any editing to be clear, concise, and accurate.

5. Only the most important items can make the final list in your assigned area. You are deciding how far down the list you will "draw the line" of the most mentioned and most critical items. The most popular answers must make your final SWOT list.

6. Make your decisions by consensus based on the actual data in the Heat Mapped Document, and NOT your personal opinion. Thus, something you think is important may not make the final list.

7. Select a secretary (with good handwriting) who fills out a flip chart listing ONLY your final SUMMARY DESCRIPTION of the most important items in your area.

8. Don't take anything personally (especially if something you care about is mentioned, not mentioned, or criticized).

9 . Opportunities and/or Threats must be external to the parish.

10. Core Values are beliefs shared among an organization's stakeholders that drive its culture and priorities. They should be simple SINGLE words or very short several-word phrases. There should not be too many.

LAST NAME	FIRST NAME	FRIDAY	SATURDAY
		Core Values	SAF 3
		Strengths	Mission 1
		Strengths	Mission 2
		Strengths	Mission 1
		Opportunities	SAF 4
		Strengths	SAF 5
		Strengths	SAF 3
		Opportunities	SAF 4
		Strengths	SAF 5
		Weaknesses	Mission 2

		Weaknesses	SAF 3
		Weaknesses	SAF 4
		Weaknesses	SAF 5
		Weaknesses	SAF 3
		Opportunities	SAF 4
		Weaknesses	SAF 5
		Core Values	SAF 3
		Core Values	SAF 4
		Threats	SAF 5
		Core Values	Mission 1
		Core Values	SAF 4
		Strengths	SAF 5
		Threats	SAF 3
		Strengths	Mission 2
		Weaknesses	SAF 4
		Weaknesses	SAF 5
		Threats	Mission 1
		Threats	Mission 2
		Core Values	SAF 3
		Threats	Mission 1
		Opportunities	SAF 4
		Threats	Mission 2
		Strengths	Mission 1
		Core Values	SAF 5
		Core Values	Mission 1
		Core Values	Mission 2

All SPT activities place in

TEAM	ROOM
Strengths	_____ Room
Weaknesses	_____ Room
Opportunities	_____ Room
Threats	_____Room
Core Values	_____Room

full-group will take

TEAM	ROOM
Mission 1	_____ Room
Mission 2	_____Room
Strategic Area of Focus 3	_____Room
Strategic Area of Focus 4	_____Room
Strategic Area of Focus 5	_____Room

_____."

1. The WHY Statement is a compelling and inspirational reason the parish exists and why anyone should care or want to join us.

2. Our "Why" is the purpose, cause, or belief that inspires us to do what we do. When we think, act, and communicate, starting with Why we inspire others to join us.

3. A WHY Statement typically has two parts: (a) the "*TO*" part that identifies the Contribution and (b) the "*SO THAT*" part that identifies the Impact. You are not required to use this format.

4. You have ONLY 10 minutes to draft your proposed parish WHY Statement (either alone or with a partner).

5. Here are some modified partial Parish and ministry WHY Statement examples:

~ *To share love, spread joy, instill hope, and live with purpose.*

~ *To seek and share Christ's love so that all will find eternal life in Him.*

~ *To embrace all in Christ's church to share in the light, life, and love of God.*

~ *To receive and share unconditional love, mercy, healing, and peace so that life has greater meaning and purpose.*

~ *To bring people closer to Christ and each other.*

~ *To practice Christ's love through faith and service in a welcoming community so that we may reflect the image and likeness of God.*

~ *To welcome those seeking holiness and salvation through a loving and nurturing spiritual family so that we may manifest the presence of Christ on earth.*

~ *To provide an authentic experience of transformational love, healing, and peace so that we may find the fullness of truth and salvation through Jesus Christ.*

~ *To welcome all people seeking Love, Peace, Salvation, and Truth, so that we may bring ourselves and others closer to Christ.*

- *To practice Christ's love through faith and service in a welcoming community so that we may reflect the image and likeness of God.*

- *To be a welcoming and inspiring community of God so that we experience Christ's love with all seeking eternal life.*

~ To glorify God by growing in life, faith, and spiritual understanding.

~ To be transformed in Christ's joy, peace, and sacrificial love, so that all may become one with God and others.

~ To welcome all so that we may share Christ's love with one another.

~ To bring together all who want to serve and inspire others so that we can all be ready to enter a life with Christ.

~ To inspire everyone to discover their true purpose in life through the life and teachings of Jesus Christ so that we may lead everyone to salvation.

~ To spread God's living word to all so that souls are saved.

~ To be a beacon of Christ's love so that we may make disciples of all nations.

~ To create engaged disciples of Christ so that we may reflect the image and likeness of God in the world.

~ To guide all people to the love of Christ so that we may live eternally in heaven with God.

~ To be a warm, caring Christian environment so that faith, service, and community thrive.

_____

MISSION & SAF SESSIONS

INSTRUCTIONS FOR BOTH MISSION AND SAF TEAMS

1. You have ONLY about 65 minutes (subject to OZ's audible change) to reach a consensus.

2. Each team selects a secretary (with good handwriting) who fills out a flip chart and reports your team's consensus to the whole SPT.

INSTRUCTIONS FOR JUST MISSION STATEMENT TEAMS 1 & 2

1. Mission Statement Teams 1 & 2 will each develop one suggested parish Mission Statement.

2. Look at the Mission Statement examples in your assigned room, especially the heat-mapped key themes that should inform your final draft.

3. Draft by consensus <u>ONE</u> brief Mission Statement.

4. Remember that the Mission Statement explicitly says WHAT the parish's most critical activities are (not everything it does, or why or how it does them).

5. A good Mission Statement is the <u>shortest</u> description incorporating key themes. Ultimately, it should be easy to memorize.

<mark>INSTRUCTIONS FOR SAF TEAMS 3, 4, & 5</mark>

1. SAF Teams 3, 4 & 5 will each separately decide the fewest strategic areas on which the parish should focus to determine its fewest number of most critical S.M.A.R.T. Goals that can have the greatest Impact.

2. Use the Heat Mapped SAF Document in your assigned room. The bold number in front of each group of comments represents the number of times that item was mentioned.

3. The bold word(s) after the number and before the listing of all verbatim comments is the short, suggested SUMMARY DESCRIPTION of those comments. *(The Summary Description list is repeated on page 15)*.

4. Ultimately, SAF Teams 3, 4 & 5 must each reach a consensus on the fewest number of SAFs (no more than 3) upon which the parish will focus with disproportionate energy to make the greatest transformation and difference.

5. In determining these most critical Strategic Areas of Focus, start by first considering how to address the consensus biggest parish Weaknesses. The SAF MUST ADDRESS the biggest final Weaknesses of the parish. It is also great if they address any of the biggest Opportunities.

6. Three (or fewer) SAFs are the ideal target.

7. The SAFs should be concise phrases or single words (just like the Summary Description words). They should summarize the area where a separate team will develop the specific S.M.A.R.T. Goal.

8. You do NOT need to identify the specific S.M.A.R.T. Goals. Identify merely the strategic areas from which the specific Strategic S.M.A.R.T. Goals will eventually be developed.

_____

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1. SAF Teams in each Strategic Area of Focus will initially meet to identify their work plan and brainstorm possible Strategic S.M.A.R.T. Goals in their specific SAF.

2. Each SAF Team:

    (a) select 2 Co-Chairs (who will coordinate the meetings and work);

    (b) identify their meeting schedule and location (e.g., where in person and via ZOOM);

    (c) brainstorm people who add value to their SAF who can be on-ramped and added to their SAF Team, and

(d) start brainstorming possible specific S.M.A.R.T. Goals topics in their SAF.

_____

==PART TWO – (AFTER RETREAT #1)==

1. Each SAF Team must develop <u>1</u> (and only 1) SMART (<u>S</u>pecific, <u>M</u>easurable, <u>A</u>ttainable, <u>R</u>elevant with a <u>T</u>ime deadline) Goals, Interim Goals, Interim Actions, comprehensive implementation Action Plan, and Compelling Scoreboard.

2. Each SAF Team will have 2-3 meetings/ZOOM calls to finalize the S.M.A.R.T. Goal and Action   Plan. (<u>OZ will facilitate all meetings</u> for continuity and to help keep the entire process on   track.)

3. Each SAF Team should recruit and include any new key individuals who can add value to their Strategic Area of Focus.

4. Your SAF Team is <u>NOT</u> responsible for researching or determining the specific solution or way to achieve the SAF at this time. You are not to solve the problem. Your Action Plans will outline the steps a separate Implementation Team will use to determine the solution. <u>DO NOT RESEARCH OR DISCUSS SPECIFIC SOLUTIONS</u>. Simply provide the to-be-formed Implementation Team with the step-by-step roadmap they need to follow to research, develop, implement, and evaluate the new solution.

5. The Action Plan you will develop will <u>NOT</u> start now. The separate Implementation Team will choose a start date for implementation that is selected after the strategic plan is finalized.

6. Each Action Plan will list the Interim Goals and Interim Actions that will lead to its achievement. It will lay out the detailed work plan in 4 columns:

> ~ Column 1 = the specific action to be undertaken
>
> ~ Column 2 = who must do that action
>
> ~ Column 3 = the deadline (IN MONTHS) for completing that action
>
> ~ Column 4 = describes how someone will know when that action is completed

7. Each SAF Team should check with other parish constituencies/ministries affected by the topic they are focusing on and recruit the involvement of those people.

8. You <u>MUST</u> use the official S.M.A.R.T. Goal and Action Plan Template to develop your SAFS and Action Plans (https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/). OZ will help build this for you, so include OZ in your meetings.

9. Each SAF Team must <u>COMPLETE</u> all of their work by:

<u>NO LATER THAN <mark>   , 20   </mark></u>.

10. OZ will participate in your SAF Team meetings/calls to ensure you are on the right track, answer your questions, and help you finalize the specific wording. OZ will work with all the Task Forces and thus can help avoid overlaps or conflicts among the Task Forces

11. Examples of the correct format for SAFs, S.M.A.R.T. Goals, Interim Goals, Interim Actions, Action Plans, and Accountability Scoreboards can be found here: https://stewardshipcalling.com/sample-s-m-a-r-t-goal-action-plans/

12. If you have ANY questions, please don't guess; email OZ at Bill@stewardshipcalling.com.

13. Positively talk up this strategic planning process every chance you get among your friends, at the parish, and other events and activities. This is a critical part of the consensus-building and communications process.

14. This Handbook, the entire Retreat #1 PowerPoint presentation, the final consensus SWOT, Statement of Why, Core Values, Mission Statement, Strategic Areas of Focus, and SAF Teams (together with regular updates and information) will be available on the: <u>Stewardship Calling</u> website under the <u>Church Strategic Planning Tab</u> in the

_____parish page located at:
https://stewardshipcalling.com/_____

_____

==SECOND RETREAT==

1. Please reserve ==_____, 20___==on your calendar for our second and final retreat.

2. We will finalize the schedule once the SAF Teams finalize their work between retreats, but it will likely start at 9 a.m. and be finished before 4 p.m.

3. The entire SPT (PLUS any "on-ramped" new SAF Team members you recruit) will attend the 2nd retreat.

4. Each SAF Team will present their proposed S.M.A.R.T. Goal and Action Plan. The entire SPT will debate, revise, and reach a consensus on the exact wording of everything.

_____

If you have any questions, please email OZ at Bill@stewardshipcalling.com

_____

(# of mentions at the beginning)

34 - Strong Clergy Leadership
34 - Well-Rounded Close Community
25 - Strong History And Traditions
19 - Valuable Real Estate And Facilities
17 - Orthodox Faith
16 - Local Community
16 - Fundraisers
15 - Youth Ministries
12 - Endowment Fund
11 - Church Ministries
 9 - Volunteerism
 8 - Large Parish Size
 7 - Family Oriented
 6 - Greek Pride
 4 - Use Of Technology
 4 - Open To Potential Growth
 4 - New Members / Converts
 3 - Psalti
 2 - Office Staff
 2 - Bookstore

_____

44 - Stewardship & Engagement
42 - Unwelcoming & Divisive
35 - Apathy & Resistance To Change
32 - Facilities / Location/ Community Center/ Inadequate Youth Facilities
22 - Church Services & Engagement
14 - Leadership
12 - Youth & Young Adult Ministries
11 - Religious Understanding/Education
11 - Technology & Communications
 8 - Endowment
 6 - Lack Of Outreach & Philanthropy
 6 - Too Ethnic – Lack Of Diversity
 6 - Declining / Aging Community
 5 - No Choir
 4 - Changing Family Dynamics
 3 - Moving Away
 3 - Orthodox Religion Issues
 2 - Post Covid Attendance Declines

30 - Community/ Outreach
22 - Location
15 - Technology/Social Media
15 - Seekers /Non-Greek Converts
 2 - Funding/Local Economy
 2 - Youth

_____

38 - Antagonism Toward Religion / Decreasing Importance Of Church
25 - Economy
26 - Crime / Violence / Safety
14 - Social Media And Influence From Culture
13 - Other Religions
 8 - People Leaving Area
 7 - Changing Family Dynamics
 5 - Mental Health Issues
 3 - Covid

30 - Faith
19 - Worship
18 - Welcoming
16 - Love
15 - Tradition
14 - Outreach
14 - Integrity
12 - Generosity
 8 - Education
 9 - Service
 8 - Youth
 4 - Growing
 4 - Family
 3 - Team Oriented
 2 - Forgiving
 3 - Respect
 3 - Leadership
 3 - Unity
 2 - Humble
 2 - Communication
 2 - Innovative

31 - Welcoming/Accepting/Fellowship
28 - Spiritual Growth/Faith
22 - Orthodox Christianity
21 - Christ/God-Centered/Like
18 - Love
16 - Service/Philanthropy
14 - Educating/Learning
12 - Worship
 7 - Greek/Ethic Culture/Heritage
 6 - Evangelizing
 6 - Stewardship
 5 - Grow
 3 - Acceptance / Tolerance
 3 - Prayer
 3 - Outreach

_____

==SUMMARY HEAT MAPPED TOP STRATEGIC AREAS OF FOCUS==

(pre-retreat suggestions before consensus determination of SWOT, Why, Core Values, and Mission)

21 - Trust, Unity & Welcoming Community Open To Change
16 - Youth
15 - Liturgical/Religious Engagement & Education
12 - Stewardship & Engagement
 8 - Community Outreach & Philanthropy
 4 - Buildings & Facilities
 4 - Technology & Communications
 4 - Growth
 3 - Future Vision
 3 - Address Weaknesses

<mark>Exhibit H SMART Goals and Action Plan Samples</mark>

<u>Stewardship & Engagement S.M.A.R.T. Goal</u>

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 36 months:

(a) Transition the adult and youth parishioners to becoming percentage givers on their way to becoming tithers and filling out stewardship cards;

(b) The median annual stewardship contribution from adult parishioners increases by at least 50% within 2 years;

(c) Net increase of at least 15% adult stewards each year;

(d) Implement a youth stewardship and engagement program that includes 100% of our youth within 2 years;

(e)   Increase the adult and youth ministry engagement so that at least 50% of parishioners within two years are actively engaged in ministry through implementing pathways for parishioners to use their time and talents on our way to becoming a full participation parish;

(f) Consistently cover at least 100% of parish operating expenses solely through financial stewardship contributions plus at least an additional 10% of operating expenses to be given to parish-chosen external charities without negatively impacting any capital campaign; and

(g) Implement a planned giving campaign in which at least 10% of parishioners participate within two years.

Actions Steps	Responsible Party	Deadline	Completion Test
Interim Goal 1: Research the most effective stewardship and ministry engagement programs within 4 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	2 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**

Actions Steps	Responsible Party	Deadline	Completion Test
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 3 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	2 months after step 7	Ambassadors are trained

Actions Steps	Responsible Party	Deadline	Completion Test
Interim Goal 4: Implement the Stewardship & Engagement Ministry to achieve the Stewardship & Engagement Targets within 24 months			
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
Interim Goal 5: Compile and assess the results of the Stewardship & Engagement Ministry and make necessary improvements within 2 months			
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

Lead Measure Action	Deadline Date	% Complete and Date
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		

We will research, develop, and implement best practices and effective adult and youth "Welcoming & Church Culture Ministry" programs that will achieve the following "Welcoming & Culture Targets " within 23 months.

(a) Welcoming and Newcomer Ministry that ensures that 100% of adult and youth visitors, newcomers, and former parishioners in the area are fully welcomed by completing a comprehensive welcoming process;

(b) New or Enhanced Interpersonal Engagement Activity Semi-Annual Programs or Community Service Events in which a minimum of 20% of parishioners actively participate;

(c) Small Group Education and Engagement Ministry that will include at least 30 people within 12 months;

(d) 70% of parishioners after year one and 90% of parishioners after year two report in an evaluation that they feel the parish is a loving and   welcoming community;

(e) Increase our OCF actively engaged students to at least 25 students within 18 months.

Within 36 months, we will research, develop, and implement best practices and effective adult and youth "Religious Education Ministries" in each of the following six areas with a comprehensive communications plan where:

1. We will achieve the following "Religious Education Targets" for the Religious Education Ministries:

(a) At least 50% of parish youth in year 1, and at least 75% of parish youth in year 2, will complete a revamped full academic year "Youth Sunday School Ministry" and achieve measurable outcomes identified in step 2 of the Action Plan;

(b) At least an average of 15% of parishioners in year one, and at least 25% of parishioners in year 2, will participate in at least two new quarterly "Parish Life Education Ministry" dinner series with dynamic presenters and discussion groups (the "Parish Life Ministry");

(c) A new "Small Group Ministry" will actively engage at least 3 small groups of parishioners meeting at least monthly in year 1, and at least 10 small groups of parishioners meeting at least monthly in year 2, where they will discuss spiritual growth, religious education, and personal growth topics;

(d) A bi-weekly adult "Bible Study Ministry" will be offered each year over four distinct modules of sessions live, via Zoom, and recorded with at least 15% of parishioners completing at least half of the four modules in year one, and at least 25% of parishioners completing at least three of the four modules in year two;

(e) A parish "Religious Education Media Center" will be created that engages at least 50% of parishioners at least weekly by providing on the parish website, email, text messaging and social media and other platforms at least 90 items of religious education 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; and

(f) Within 12 months, the parish will implement a "Congregational Singing Ministry" to more fully engage parishioners in liturgical life by singing during the Divine Liturgy.

2. In addition to the above Religious Education Ministries, within 26 months, we will research and begin to implement some form of "Parochial School Ministry," which can include either creating a more engaging interactive partnership with the Holy Trinity Academy in Warren, Ohio, St. Constantine School in Houston, TX, some other Orthodox parochial school, or developing a separate parish plan for its own parochial school.

<mark>SAMPLE PARISH FACILITIES/BUILDING S.M.A.R.T. GOAL</mark>

Within 54 months, we will research, develop, and implement best practices and effective Parish Facilities Ministry with a comprehensive communications plan that will achieve the following "Parish Facilities Targets":

A new and comprehensive "Parish and Facilities Ministry" will:

(A) Within 6 months, finalize developing a detailed plan "Consensus Parish Facilities Plan" that addresses all present and future building and facilities needs   and desires of the parish in one campus location, including

   1. facilities improvements and additions priorities list,

   2. plans for sales or repurposing of existing property and purchase of alternative building or property, and

   3. creation of development budget for the Consensus Parish Facilities Plan;

(B) within 6 months after (A),

1. obtain all necessary parish approvals for the Consensus Parish Facilities Plan;

2. obtain Archdiocese and other governmental approvals for the Consensus Parish Facilities Plan approved by the parish;

(C) within 6 months after (B),

1. identify and contract with architects, general contractors, and other service providers necessary to execute the Consensus Parish Facilities Plan;

2. develop and begin executing a "Capital Campaign" process plan and methodology that includes using the parish Endowment (to the extent approved by the parish) plus three-year pledges to cover at least 80% of the aggregate budget for the Consensus Parish Facilities Plan ("Contributed Portion");

3. obtain funding commitments for a construction loan and, if necessary, mortgage loan and repayment plan (the "Borrowed Portion") for the Consensus Facilities Plan; and

(D) within 36 months after (C) completes the Consensus Parish Facilities Plan, including completion of the Capital Campaign by raising at least the Contributed Portion.