



# PARISH STRATEGIC PLANNING

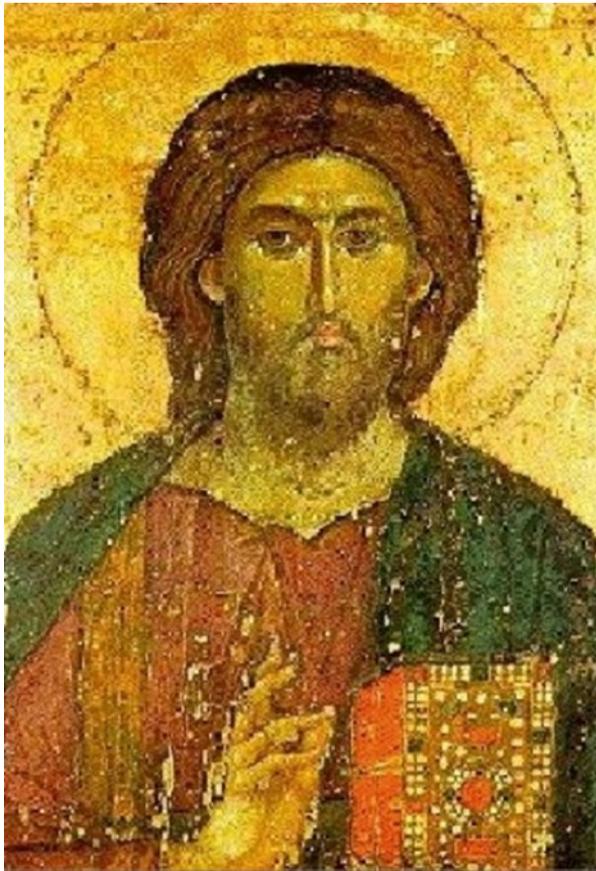
“VISIONING FOR THE FUTURE”

A GUIDEBOOK FOR OUR PARISHES



GREEK ORTHODOX METROPOLIS OF SAN FRANCISCO





## This Booklet

is provided as a guide to those parishes within the Greek Orthodox Metropolis of San Francisco wishing to develop a long-range plan for their respective parish. It has been developed with the blessing of His Eminence, Metropolitan Gerasimos and is based on the experiences and cooperation of our Metropolis' Reverend Clergy, parish leaders, parishioners and "friends of the Metropolis" who have previously participated in parish-level strategic planning.

“Commit your work  
to the Lord,  
and your plans  
will be established.”

Proverbs 16:3



My beloved co-workers in Christ,

As responsible stewards of God's many gifts, planning and discernment are needed at every level of ministry in order to use these gifts wisely to serve God's people. The Greek Orthodox Metropolis of San Francisco has undertaken an intensive Strategic Planning process with the same goal of using our God-given resources most effectively.

Many of the strategic goals of our Metropolis plan will result in programs that will directly benefit our parishes and our faithful. This Parish Strategic Planning Guidebook is one of those offerings. It has been developed as a complement to the Metropolis plan in order to assist our parishes in developing their own plans.

I encourage you to use the materials contained within this booklet to guide your local parish plans, programs and ministries in order to glorify God.

With Love in Christ,

Metropolitan Gerasimos of San Francisco



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## Prayers For Guidance

- ⌘ Lord Jesus Christ, our God, You have said, “Apart from Me you can do nothing.” In faith we embrace Your words, Lord, and we entreat Your goodness. Help us to carry out the work we are about to begin and to bring it to completion. To You do we give glory, to the Father, Son and Holy Spirit. Amen.
- ⌘ Almighty God, our Help and Refuge, who knows that we can do nothing right without Your guidance and help; direct us by Your wisdom and power, that we may accomplish this task and whatever we do according to Your divine will, so that it may be beneficial to us and others, and to the glory of Your Holy Name. Amen.
- ⌘ Our Lord and Savior, You became man and labored with Your hands until the time of Your ministry. Bless us as we begin this work. Help us to bring it to completion. Lord, enlighten our minds and strengthen our bodies, that we may accomplish our task according to Your will. Guide us to bring about works of goodness to Your service and glory. Amen.
- ⌘ Steer the ship of our life, good Lord, to your own quiet harbor, where we can be safe from the storms of sin and conflict. Show us the course we should take. Amen.
- ⌘ Renew in us the gift of discernment, so that we can always see the right direction in which we should go. And give us the strength and the courage to choose the right course, even when the sea is rough and the waves are high, in Your name we shall find comfort and peace. Amen.
- ⌘ Christ, the true light, who enlightens and sanctifies every person coming into the world, let the light of Your countenance shine upon us that we may see Your unapproachable light; and guide our steps in the way of Your commandments, through the intercessions of Your all-holy Mother and of all the Saints. Amen.

## Prayers After Work

- ⌘ Thank You, Lord, for Your strength and guidance in our work. You are the fulfillment of all good things. Fill also our souls with joy and gladness, that we may praise You always. Amen.



## What is a Strategic Plan?

Simply defined, a strategic plan enables a parish to get from where it is *today* to where it wants, or needs, to be *tomorrow*. The plan will define direction (strategy) and identify the resources, programs, ministries and services (goals) necessary to approach its vision.

The term “strategic plan” is frequently used interchangeably with other familiar terms such as “long range plan,” “vision plan,” and “parish plan.” All of these terms have a common denominator, however. They seek to define what is unique about the parish and to answer these key questions:

- ⌘ *Where are we today?*
- ⌘ *Where do we want to be?*
- ⌘ *How will we get there?*

## The Dynamics of the Planning Process

*Effective Strategic Planning will help a Parish achieve its mission and purpose as God’s promise draws us toward our future with compassion.*

As you formulate your plan, three key dynamics of planning will become evident:

- 1. It is diagnostic in nature.** Participants need to review the “today.”
- 2. It is strategic in its decisions.** As such, discussion and involvement are of paramount importance in order to provide full input and context into recommended decisions.
- 3. It is hopeful and courageous.** There is natural conflict in the planning process: Are the memories of the past stronger than the hope for the future? Will people be courageous enough to change?

❖ *Tip: Visit the Metropolis of San Francisco’s Strategic Plan Implementation website ([www.sfstrategicplan.net](http://www.sfstrategicplan.net)), where a variety of actual parish strategic plans, links and materials are provided to support your development efforts.*



## Insights to Development

Based upon the experiences of many who have both led, and participated in, developing a strategic plan, the following recommendations and insights are provided in order to help teams avoid potential planning pitfalls.

- ⌘ **Establish “Why” - the Rationale for Change:** Ensure that the rationale for change is established early, is clear and compelling, and explains why you are commencing with the development of a plan at this time.
- ⌘ **Eliminate “Fluff”:** Make sure your mission, vision and values are directional and important and are not viewed as ambiguous.
- ⌘ **Realize That It Will Take Six to 18 months:** This is typically the amount of time it will take to fully complete your plan; sometimes it will take longer, but rarely shorter than this.
- ⌘ **Appreciate That Semantics Do Vary:** Terminologies in the planning process vary widely from parish-to-parish. Some parishes use “strategic goals” with “supportive objectives”; others reverse that order; still others don’t use “goals” at all and prefer to use “action items.” Still others like to use “priorities.” For the sake of continuity, this planning guide will use these key terms: Mission Statement, Vision Statement, Value Statements, Strategic Objectives, Goals and Actions.
- ⌘ **Communicate Frequently:** Build communication plans and approaches in order to keep all internal stakeholders (church staff and parishioners) and external audiences (Metropolis, outside organizations, etc.) informed as to the status and content of the plan. Rule of thumb: Plan on sharing, and repeating, a key fact a minimum of three times to ensure understanding and recall.
- ⌘ **Seek Consensus:** Expand participation during the design process and reach a common agreement amongst parishioners during the decision and approval processes. By having “many hands” in the creation of the plan, the likelihood of support increases greatly as the plan is being approved and implemented.
- ⌘ **Narrow the Focus:** The nature of the planning process means teams will look at many aspects of parish life. Produce a plan that is easy to understand, is not overwhelming in its scope and limits itself to no more than 10 strategic objectives.
- ⌘ **Recognize That Plans Are Iterative:** Once the initial plan is created, conditions will shift, people will change and priorities will be modified, which means the plan will need regular review and modification over given time periods. That, you can plan on!

# Planning Model

The following strategic planning model will guide your plan development efforts. It has taken the major activities typically associated with a plan design process and placed them into the sequenced phases shown below. To also help your planning team, a Strategic Plan Development Checklist is provided on the next page.



- 1 Strategic Plan development phases designed to be performed in sequence
- 2 Guiding questions to answer before progressing to the next phase
- 3 Key activities to support each phase

# Strategic Plan Development Checklist

## 1 Begin

- Form a Planning Team
- Develop the Rationale for Commencing
- Determine your Planning Approach; using a 6 phase model or something else?

## 2 Assess

- Determine Assessment Methods you will use
  - Surveys (internal or external); Workshops/Retreats; Ministry Groups
- Conduct SWOT analysis
- Prioritize the opportunities which have become present

## 3 Envision

- Create a purpose-driven Mission Statement
- Write a compelling Vision Statement
- Craft Value Statements

## 4 Plan

- Identify the Key Strategic Objectives for your plan
- Develop SMART Goals
- Determine the overall Plan Costs

## 5 Implement

- Select an Implementation Program Leader
- Develop an overall Implementation Program Plan
- Develop and implement a Change Management plan

## 6 Manage

- Design ongoing program evaluations and status updates
- Provide Performance Support to Implementation Teams
- Conduct an Annual Plan Review Workshop



# BEGIN

*O Lord, Jesus Christ, our God, the true and living Way, be, O Master, our companion, guide, and guardian during our journey. For in You do we put our trust and hope, and to You, together with Your Eternal Father and the All-Holy Spirit, we ascribe all praise, honor, and glory, now and ever and unto the ages of ages. Amen.*

## Overview

Your strategic planning journey is about to begin. Prior to launching your planning activities broadly within your parish, careful consideration, and pre-planning, are recommended. Simply put, you need to be able to clearly state why you think it's important for the parish to embark on such a journey.

## Key Question: Should We Do This?

### Activities for This Phase

1. Form a Planning Team
2. Develop the Rationale for Commencing
3. Determine your Planning Approach



## Step One: Form a Planning Team

1	<b>Parish Priest identifies Strategic Plan Coordinator(s)</b> who will be tasked with moving the plan development process forward, coordinating the planning team, and monitoring and reporting progress.
2	<b>Strategic Plan Coordinator develops a high-level directional</b> statement describing the vision of the planning effort, and which can be shared with prospective planning team members.
3	<b>Planning team expands</b> to approximately ten members (which includes the Coordinator). The final size will depend upon the parish's size and complexity. During this time the Priest and the Parish Council President will determine their respective roles and levels of activity, which they will share with the team.
4	<b>Team decides if an outside resource will be beneficial</b> and, if so, what role the person will assume on the team (see diagram below).
5	<b>Conduct a team orientation.</b> The activity should be provided in order for the team to agree upon: the purpose of the strategic planning effort; roles and responsibilities; and the anticipated course of events facing them. Also, they will determine the team governance: meeting format, issue resolution, record keeping and team "culture."

If your team utilizes an external resource,  
what role should they play?



❖ *Tip: The Planning Team should be composed of committed Orthodox Christians who are well-connected to parish life and, ideally, have related business, communication or organizational skills which could help the team. These skills could vary from formal planning experience to strong computer, communication, financial or facilitation skills.*

## Step Two: Identify the Rationale for Developing a Plan

1. **Create a list of reasons why your parish should develop a strategic plan.** Below is an example of one Parish's rationale for proceeding with the planning process:



2. **Identify the plan's intent.** Is the driving purpose of your plan to:
  - ✓ *Be forward-thinking and broad in scope?* Then it is probably a strategic plan you are looking to develop.
  - ✓ *Fix a "today" problem?* If you are more narrowly focused on fixing a smaller number of defined issues, then your plan, although very important, could be considered more of an operational plan and may require a less complex development process.
  - ✓ *Launch a building or renovation program?* If the primary focus of the plan is to direct attention and engagement toward a capital campaign, then your plan is probably approaching a more operational, or campaign-oriented, format. While this approach could be considered "strategic" in nature, it will typically follow a more unique planning pattern which would not require some of the planning elements inherent in a conventional strategic planning process.
3. **Determine which programs might benefit.** Brainstorm to identify the programs, services, ministries and activities which, at first glance, could potentially benefit the most, or the least, from the planning process. It is not a commitment to proceed in these areas, but can be used as an early baseline of thinking.

## Step Three: Develop a High-Level Approach

- 1. Identify the approach/steps you will follow.** Using this booklet’s six-step process is a good start, but plan approaches will vary, somewhat, based upon resource availability, expertise, competing initiatives and time requirements.
- 2. Name the project.** Be creative. Don’t be limited to naming your plan a “Strategic Plan.” It could be your parish’s Vision Plan, Long-Range Plan, or any unique title you wish, as long as it can be easily understood. St. Paul’s, in Irvine, CA, called their plan “Vision 21” (see plan below).
- 3. Develop a high-level timeline.** When will you need the finished plan? Are there key dates to consider, such as an upcoming General Assembly, at which you would seek to have the plan approved?

- 4. Develop a high-level budget.** This will identify the need for, and confirm the availability of, funds required for the planning process.



- 5. Create a short-term communication plan (one to two months)** to describe and explain to the parish the rationale for initiating the planning process and the projected timeline of activities.

The plan should include presentations by the Priest and/or Lay Leaders, updates via the parish’s social media platforms, as well as articles in the weekly and monthly Church Bulletins.

- 6. Make a final Go-No/Go Decision to Proceed.** Are there sufficient and compelling reasons to begin the process?
- 7. Present Your Plan.** It is recommended to present the decision and rationale to the Parish Council to proceed with the development of a strategic plan in order to seek their “approval to proceed” and obtain their support before initiating the planning effort.
- 8. Inform the Parish.** Following approval by the Parish Council, share the exciting news with the parish.



# ASSESS

*“For I know the plans I have for you,” declares the Lord, “plans for well-being and not for trouble, to give you a future and a hope.”*

*Jeremiah 29:11*

## Overview

This phase allows the planning team to review all elements of parish life and identify the strengths and opportunities for the parish. It is diagnostic in nature. Thus, the direction of the plan should not be based solely on data analysis. It must be illuminated by a qualitative review through effective discussion and personal views. It will also provide occasions for the Planning Team to expand by inviting additional parishioners to join the review process. This phase will culminate with “Statements of Opportunity” which will help identify the highest potential areas for growth and improvement within the parish.

## Key Question: Where Are We today?

### Activities for This Phase

1. Determine Assessment Methods
  - ❖ Surveys
  - ❖ Planning Workshops/Retreats
  - ❖ Ministry Groups
2. Conduct SWOT Analysis
3. Prioritize Opportunities



## Step One: Determine Assessment Methods

Most successful plans expand their base of participation greatly during this phase in order to capture a wide variety of insights. To facilitate this information gathering, the most common methods used are: **Surveys, Workshops/Retreats and Ministry Group Planning Sessions.**

### ❖ Surveys

#### 1. Key Considerations

- **Determine why you want to use a survey.** Typically, it is to garner input from a wider-set of parishioners. Surveys can be designed to capture insights on either parish-wide topics or for specific groups or ministries. Surveying the parish up front in your plan development process will also have a very positive impact when you are recommending actions later. Showing how programs are linked directly to survey feedback will greatly increase support and “buy-in” to the plan.
- **Decide if you will be writing your own survey.** If yes, refer to the “Design Checklist” on page 16. External surveys generally enable a broad basis of comparison and are faster to produce, but questions may sometimes be viewed as too generic, and the survey itself may be cost prohibitive. In order to “get the best of both worlds,” a parish may elect to use both.
- **Establish how you will manage the survey process.** Will you be using an outside service to manage the survey process (sending of the survey and tabulation of the results)? If so, there are many online companies you may wish to consider using for this purpose.
- **Create a communication process.** The majority of the total responses to a survey within a parish typically occur within the first week after the survey is announced. To maximize participation you may want your Priest, Plan Coordinator, Parish Council President and/or respective Ministry Leaders to encourage participation through announcements on church flyers, in the church bulletin, via your parish email lists or social media. You may also want to set a target (“we want to have 200 responses”) and report against that number with weekly reminders through the lifecycle of the survey.

# ASSESS

## ❖ Surveys

### 2. Designing Your Survey

SURVEY DESIGN CHECKLIST	
	Scope: Parish-wide or used to study a specific topic?
	Development: Writing your own survey or using an external one?
	Language: English, Greek or both?
	Format: Paper-based, on-line, or both?
	Management: Using external service to distribute and tabulate results?
	Duration: How long will survey be held “open”?
	End: Will you extend beyond the “close date” to boost participation?
	Communication: How will the survey be introduced and the results shared?

#### ❖ *Tips on Using a Survey*

- ✓ *To boost participation and openness of feedback, keep surveys anonymous.*
- ✓ *A common mistake in creating questions is putting more than one variable in a question: “Do you like chocolate candy and strawberry ice cream?”*
- ✓ *If you ask a question, be ready to share its results; there is a general expectation from parishioners that if they participate they will see the survey results.*
- ✓ *Respect people, respect ministries. Avoid asking qualitative questions about specific ministry leadership or a ministry itself, as results (both positive and negative) may embarrass or distress those being identified.*
- ✓ *Prayerfully consider the best way to share information if comments are provided in the survey on a specific individual or program.*

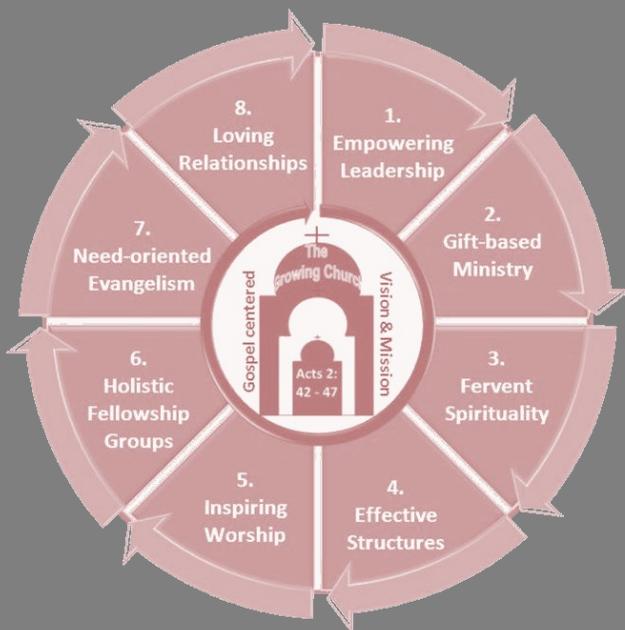
## ❖ Surveys

### 3. Using an External Company

A question often asked by planning teams is: “how do we compare with other Greek Orthodox parishes, or non-Orthodox churches, in general; do they have the same challenges we do?” Using an external, religion-based survey can help answer those questions.

To support our Metropolis parishes in their assessment activities, His Eminence, Metropolitan Gerasimos, has blessed a new, cooperative agreement between the Greek Orthodox Metropolis of San Francisco and Orthodox Natural Church Development (ONCD), in which ONCD will provide their proprietary assessment survey to our parishes for use in the parish’s Strategic Planning process or for a simple, periodic “health check.” This survey instrument could be used to supplement an internal survey by providing an “external viewpoint,” or it could be used as the sole survey tool.

#### Orthodox Natural Church Development Model



- At the heart of the ONCD process is a sophisticated diagnostic tool, the NCD Survey. It is based on the only comprehensive international research ever done into what causes churches to grow or decline.
- ONCD has conducted over 80,000 surveys internationally and 40,000 in the U.S. As of 2014, over 50 U.S. Orthodox parishes have taken the survey.
- In an effort to support our parishes in gaining a better understanding of their respective health, His Eminence, Metropolitan Gerasimos, has agreed to have the Metropolis of San Francisco provide the survey, free of charge, to any of its parishes through 2016.
- If you are interested in learning more about this tool, please go to [ocnd.us](http://ocnd.us) or contact Fr. James Retelas at [frjames@annunciationsac.org](mailto:frjames@annunciationsac.org) or the national leader for ONCD, Fr. Jonathan Ivanoff, at [frjonathan@hotmail.com](mailto:frjonathan@hotmail.com)

# ASSESS

## ❖ Planning Workshops/Retreats

How did they get to this point?



St. Nicholas, Northridge, CA, Strategic Planning Session

### Benefits of using a workshop approach:

- Efficient way to capture a great deal of input and participation.
- Expands “ownership” of the plan’s direction and recommendations.
- Allows discussion and dialogue on key topics and quick iteration of ideas.

❖ *Tip: Building consensus amongst ministry and group leaders within the parish is a critical element of a successful strategic planning process. Using a workshop format is an efficient and relatively easy way to promote agreement and to establish a forum for expanded ideas.*



## ❖ Planning Workshops/Retreats

### Keys to a successful workshop

#### 1. Participants

- Represent all ministries and groups of the parish.
- The total number of participants will vary depending on the size of the parish and number of ministries it offers. It is not uncommon to see planning sessions with as few as 10 to as many as 60 participants.
- Composed of committed Orthodox Christians, well-connected to parish life.
- Receptive to the idea and concept of Strategic Planning for their parish.

#### 2. Pre-Meeting Preparation

- Priest must be active in communication process, demonstrating full support of the undertaking.
- Participants are prepared prior to the meeting, regarding the goals and objectives of the meeting, and provided with pre-read materials on the planning effort.
- Facility is selected to comfortably accommodate the meeting and provides the necessary meeting equipment (white boards, flip charts, screen, projector, microphones, food service, etc.).
- Facilitator is selected and prepared. They may be from within the parish or an external resource. In either case, it will be very beneficial if they are Greek Orthodox (or have a strong familiarity) in order to ensure their understanding of our faith, ethnicity and the context of parish life.
- Adequate meeting notice and advance lead-time are provided.

❖ *Tip: Some teams opt to conduct parishioner personal interviews or focus groups in order to gain a better understanding of a situation before engaging in a larger group session, or to capture insights from those who may not be able to join the planning session.*



# ASSESS

## ❖ Planning Workshops

### Keys to a successful workshop (continued)

#### 3. Meeting Management

- Frequently, the scope and agenda for a particular session will be driven simply by participant availability. To maximize the opportunity to engage all participants and make faster progress, teams often opt for a longer, full-day session, typically held on a Saturday.
- In other cases, teams choose to split the meeting into two parts, holding the first half of the session on a Friday evening and finishing the following Saturday morning. This way, the session does not lose momentum and participants have time to reflect and refresh between meetings.
- In a third scenario, the planning team may find it more valuable to have two full-day sessions held months apart.

#### 4. Timing and Content

- Workshops are typically formed during the Assess phase in order to provide a variety of opinions and insights as to the current status of the parish.
- Following prayerful discussion centered around where potential lies for the parish, the Assess phase will culminate in the creation of a preliminary list of general ideas, ministry opportunities and potential focus areas.
- Following the completion of the Assess phase, some teams will end their session and resume again at a later time in order to begin the Envision phase. Other teams will choose to move directly into the Envision phase since they are already all together. Again, it depends on participant availability, commitment and the energy-level of the group.



## ❖ Ministry Groups

*A recent trend is to offer a modified, or distributed, workshop approach centered around ministries within the parish.*

### Concept

- Distribute planning across the parish by having each key ministry create their own “mini-strategic plan” which could then be incorporated into the broader parish planning effort.
- Although this option is provided within this Assess phase, Ministry Groups would typically gather to do this work during the Plan phase.

### How it Works

- The Ministry Leader would be an active participant in any large group workshops or planning sessions which occur during the Assess or Envision phases.
- The Ministry Leader then holds a planning meeting with his/her respective ministry team to share the overall direction of the parish plan to-date.
- The team, under the facilitation of the Ministry Leader or another team member, is guided to:
  - ⌘ Discuss the ministry’s strengths and weaknesses.
  - ⌘ Identify the overall vision, focus and priorities for the ministry.
  - ⌘ Create a list of the key ministry objectives/areas of focus.
  - ⌘ Establish a list of supportive goals and actions which would enable the attainment of the vision and objectives (see “SMART Goals”).
- Once completed, the outcomes of the ministry planning sessions are sent to the Strategic Plan Coordinator for inclusion into the Plan phase discussions.

### Benefits of This Approach

- Greatly expands basis of input.
- Moves Plan phase quickly.
- Generates greater ownership for ideas from within the ministry.

# ASSESS

## Step Two: Conduct SWOT Analysis

The SWOT analysis is a technique used during the Assess phase which identifies, categorizes and evaluates the internal areas within a parish's direct control (Strengths and Weaknesses) as well as those external areas over which it has less influence (Opportunities and Threats). SWOT analysis involves the collection of information and perceptions regarding the parish. It is not intended to be a problem-solving design session (which will come later).

- 1. Who should participate in a SWOT analysis?** A SWOT analysis could be completed by the core Planning Team, but frequently, it involves the participation of a wider group. Broadening the group, expands perspectives and magnifies the opportunity for evaluative dialogue.
- 2. In what setting is it most effective?** Since the analysis is most effective in an interactive format, it is best suited for a workshop setting.
- 3. What are the best steps in preparing for a session?**
  - **Clarify the objectives for the session.**
  - **Confirm a session leader.** Have either a parishioner or an external resource facilitate the session.
  - **Identify and prepare participants.**
  - **Determine what information you might need to collect prior to the meeting.**
    - ⌘ Parish Data: stewardship trends; survey analysis findings; ministry requests; financial statements; local community issues; outreach and evangelism, etc.
    - ⌘ Broader Orthodox Issues: Greek Orthodox Archdiocese and Metropolis of San Francisco research and trend reports on Orthodoxy in America, etc.

❖ *Tip: It is highly recommended to review the Metropolis of San Francisco's Strategic Plan to gain an appreciation of the direction and programs being planned at the Metropolis level and to review the excellent research provided on the status of the Greek Orthodox Church in America.*



## 4. SWOT Workshop Approach

Since it is an interactive format, the meeting will require a skilled facilitator to keep the group on topic. The session may be run as a single group identifying the SWOT elements, or sub-groups may be formed to address elements of the SWOT framework and then report back to the larger group for added input and discussion. Either way, personal agendas or personal, unsubstantiated opinion will need to be deftly re-directed by the facilitator in order to keep the session moving and not let it stagnate on unrelated items.

## 5. Create Your SWOT List

The ultimate purpose of a SWOT exercise is to provide the context for priority and direction-setting later in the session. To begin, however, SWOT lists must be created. Develop a SWOT list using the example below as a guide.

### Example SWOT List

	<b>Strengths</b> (Capitalize on)	<b>Weaknesses</b> (Shore-up)	<b>Opportunities</b> (Invest in)	<b>Threats</b> (Identify)
<b>Creating broad categories sometimes helps focus the discussion:</b>				
<b>Programs / Ministries</b>	Outreach: Helping Hand Kitchen Sunday School Youth programs	Catechumen Program Senior Adult support	Many pan-Orthodox opportunities for youth and ministry College ministry programs; many local colleges	Sophistication of non-profits actively seeking donors Economic uncertainty
<b>Financial Position</b>	Strong festival revenues and stewardship	Church interior needs refurbishment	High increase in new homes	Secularization within society
<b>Talent</b>	Existing buildings have extra space	More volunteers; Suffering from 90/10 (not 80/20) rule	Excellent weather	Change in local demographics in communities surrounding the church
<b>Facilities</b>	Experienced Parish Council	Need more, younger leaders		
<b>Leadership</b>	Greek School	Parish updates & communications		
	<b>Internal Controls</b>		<b>External Influences</b>	

## Step Three: Prioritize Opportunities

**How Best to Prioritize?** By itself, a SWOT listing is not actionable. But by integrating factors from one quadrant with factors in another, you can begin to identify potential opportunities.

*You've just arrived at one of the most critical points of the entire planning process.*

The team has discussed, analyzed and wrestled with identifying the parish's attributes. The perceptions have been listed neatly into boxes. And this step is where it all comes together: You are going to look at all of your data and say: "Here are our key priorities (or key objectives)."

*Don't skip this step,* stay focused on comparing the quadrants in your chart below and extract your potential. You are entering the "idea stage," and this is the fun part, this is where it gets "real" as direction begins to emerge!

### 1. Merge SWOT Lists

- On a flip-chart or white board, arrange the boxes in the following pattern.





## 2. Create Parish Statements of Opportunity

- Examine the SWOT listing on page 23 and begin to form positive statements of opportunity. In the following examples, statements are created as information is merged from adjoining boxes.
- Ideas as you merge the “Strengths” and “Opportunities” boxes might include:
  - ⌘ “Financial stability and strong outreach will allow us to host a local, pan-Orthodox youth event.” (This combines financial and youth program strengths with the opportunity to establish pan-Orthodox connections.)
  - ⌘ “Church festival committee will send direct mailings to new neighborhoods inviting them to visit.” (Strength of festival within the community can be capitalized on to introduce the parish in a fun way to new residents.)
- Ideas from the “Weaknesses” and “Opportunities” boxes might include:
  - ⌘ “Parish Council members will sponsor an ‘Emerging Leadership Program’ by creating a mentoring program and aligning experienced council members with young, potential leaders.” (This leans on the expertise of a strong Parish Council and uses that experience to develop younger parishioners.)

## 3. Prioritize Parish Statements of Opportunity

- Once all statements have been created, prioritize each quadrant’s listings in rank order of importance.
- Keep these lists! They will be very important to review during the Plan phase.



## ENVISION

*Trust in the Lord with all your heart, and do not rely on your own insight. In all your ways acknowledge him, and he will make straight your paths.”*

*Proverbs 3:5-6*

### Overview

At this point, the Planning Team has concluded the initial analytic and diagnostic activities used to determine the current state of the parish. This phase now begins to set direction by establishing the mission, vision and core values which will guide and represent the parish over the coming years. They will lay the foundation for decision-making, parish behavior and the ongoing prioritization of activities and resources.

### Key Question: Where Do We Want To Be?

#### Activities for This Phase

1. Create a purpose-driven Mission Statement
2. Write a compelling Vision Statement
3. Craft Value Statements



## Step One: Mission Statement

The mission statement includes the broadest and highest level of parish goals and objectives. In a mission statement, the parish simply states its fundamental reason for existing, its purpose, who it serves and what it does or provides. To enhance understanding of the statement, it's essential that it be written down and expressed clearly and concisely.

## Step Two: Vision Statement

Vision establishes a clear, challenging picture of the future of the ministry of the parish as you believe it can and must be. It is a bold and far-reaching statement. It is a courageous statement. It sets the "horizon line" and lets everyone know where the journey of the parish is directed.

## Mission or Vision - Which Comes First?

Strategic Planning Team members often ask whether they should develop the mission statement or the value statement first. Texts, facilitators and organizations offer varying opinions without consensus. Many organizations list mission first, while others prefer to begin by first establishing the vision. In reality, order is not as important as the content and ensuring that the definitions for each element are complementary. Since they are often developed concurrently as a result of a workshop or brainstorming session, personal preference can direct the sequencing of their development.

### Mission Statement Checklist

- ✓ Concise (less than 100 words)
- ✓ Establishes why the parish exists
- ✓ Defines scope
- ✓ Realistic
- ✓ Clear and easily understood
- ✓ States who it supports

### Vision Statement Checklist

- ✓ Very Concise (less than 50 words)
- ✓ Identifies the future
- ✓ Compelling
- ✓ Is the "North Star"
- ✓ Clear and easily understood
- ✓ Inspiring

# ENVISION

## Examples of Mission and Vision Statements

THE **MISSION** OF THE GREEK ORTHODOX ARCHDIOCESE OF AMERICA IS TO:

- ⌘ **PROCLAIM** the Gospel of Christ,
- ⌘ **TEACH** and spread the Orthodox Christian Faith,
- ⌘ **ENERGIZE, CULTIVATE and GUIDE** the life of the Church in the United States of America according to the Orthodox Christian Faith and Tradition.

*Our Greek Orthodox Metropolis of San Francisco embraces the Mission of the Greek Orthodox Archdiocese of America as the foundation for our efforts.*

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THE **VISION** OF THE GREEK ORTHODOX METROPOLIS OF SAN FRANCISCO:

We will grow the Greek Orthodox Christian Church  
in the Western United States Through Christ-Centered:

**Stewardship   Worship   Education   Evangelism   Philanthropic Outreach**





## Examples of Parish Mission Statements

- ⌘ **St. George, Media, PA:** To keep and proclaim, pure and undefiled, the Orthodox Christian Faith and Tradition in Conformity with the doctrine, canons, worship, discipline and customs of the church.
- ⌘ **St. Demetrios, Tucson, AZ:** To Worship and Glorify God, with love and caring for each other, by providing a safe, thriving, life-long home, from which we spread the teaching and good works of our Greek Orthodox Christian Faith.
- ⌘ **St. Nicholas, Northridge, CA:** St. Nicholas Greek Orthodox Church is the living witness of Jesus Christ, sanctifying the faithful by God's grace to grow in faith, fellowship, mission and numbers. (Acts 2:42-47)
- ⌘ **St. George, Bakersfield, CA:** To preserve, practice, and proclaim the Orthodox Christian Faith in order to grow and serve the parish and community.
- ⌘ **Holy Trinity, Pittsburgh, PA:** Proclaim and live the Orthodox Christian Faith in its fullness as faithful members of the Body of Christ.

## Examples of Parish Vision Statements

- ⌘ **Annunciation, Lancaster, PA:** Receive and Share the Light of Christ!
- ⌘ **St. Katherine, Naples, FL:** With the Grace of God, to provide a loving and caring Community where all belong to Christ, through worship (doxology), sacramental life (*mysteria*), everyday spiritual discipline (*ascesis*), sanctification (*theosis*), education (*paideia*), witness (*martyria*), fellowship (*koinonia*) and service (*diakonia*).
- ⌘ **St. Nicholas, San Jose, CA:** Build an Orthodox Community that reveres, maintains, and propagates the values, traditions, and ideals of Orthodoxy and Hellenic heritage.
- ⌘ **St. Paul's, Irvine, CA:** Build a Christ-centered, Spirit-filled community that is welcoming, loving, forgiving, encouraging and authentic, where people can "grow in grace and knowledge of our Lord and Savior, Jesus Christ" (2 Peter 3:18) and make love the aim of our lives. (1 Corinthians 14:1)

## Step Three: Value Statements

Typically the last step in completing the “big 3” (Mission, Vision and Values) is with the creation of value statements. Value statements (which are often referred to as “core values”) begin to examine the question, “Now that we know what we want to do and our aspirations, how do we want to *act*?” Simply, value statements, by shaping our behaviors, begin to re-shape the culture (beliefs and behaviors) of a parish. Planners will sometimes notice that some of their value statements may already be inferred, or actually stated, in their mission or vision statements. That is perfectly fine, since it is common to see the words and ideas of mission, vision and value statements converge.

### Tips for Developing Value Statements

1. **Try to limit them to seven statements.** Having too many statements will dilute their effectiveness.
2. **They are more than a single word.** To ensure understanding, provide a brief description.
3. **They are a shared set of values.** Planners must be cautious to take a parish-wide perspective when developing the statements. Since values may imply that personal behaviors need to change, these statements can sometimes elicit an emotional reaction.

### Examples of Parish Value Statements

- ⌘ Value ***Holy Scripture*** as the word of God
- ⌘ ***Grow*** in His likeness (Theosis)
- ⌘ Believe in the ***Sacredness of Life***
- ⌘ Actively participate in ***Evangelism***
- ⌘ Offer ***Forgiveness***
- ⌘ Foster ***Fellowship*** amongst ourselves and other Christians



## Additional Examples of Parish Value Statements

- **Worship** of the living God “in Spirit and in Truth” (*John 4:24*) as the heart and soul of our life together, the *essence* of what it means to *be* the Church; the committing “of ourselves and one another and our whole life to Christ our God” (*Liturgy of St. John Chrysostom*);
- **Education** that is intended to be transformational for people of all ages to nurture their relationship with Christ in the Holy Spirit, to learn the essentials of that “faith once delivered to the Saints” (*Jude 3*); *and*
- **Ministry**, loving and caring for one another within the Parish as brothers and sisters in Christ and actively serving others outside the Parish by sharing the Good News and doing philanthropic outreach, practicing the faith we teach and proclaim by living lives that are “worthy of the Gospel of Christ” (*Philippians 1:27*).

- 
- **We witness** the Orthodox faith by understanding the faith handed down by Christ to the Apostles, by living Orthodoxy as a way of life, by participating regularly in the Sacraments, and by offering Orthodoxy to others.
  - **We grow** our parish by attracting new members, by educating them about Orthodoxy, and by inspiring all members to continue the growth of Orthodoxy in the community.
  - **We foster involvement** in our parish life by developing ministries to serve and engage all age groups, including non-practicing Orthodox.
  - **We promote self-sufficiency** of our parish by developing a culture of gratitude for God’s blessings by offering our time, talents, and treasures to carry out the mission of the Orthodox Church.
  - **We foster an environment that promotes fellowship, honesty, and trust.**
  - **We warmly welcome all visitors** to our parish.
  - **We cherish and promote our Hellenic Heritage, yet at the same time we accept and embrace people of all backgrounds.**



# PLAN

*“Commit your work to the Lord, and your plans will be established.”*

*Proverbs 16:3*

## Overview

Strategic objectives are the general areas in which your efforts are directed to deliver against your statements of opportunity and your mission, vision and value statements. The parish now begins to move from the exploration of multiple possibilities to the claiming of a meaningful direction and its related actions.

## Key Question: How Do We Get There?

### Activities for This Phase

1. Identify the Key Strategic Objectives for the plan
2. Develop SMART Goals designed to convert the strategies into action
3. Determine the overall Program Costs



## Step One: Identity Key Strategic Objectives

### Guidelines

- The ideal target number of objectives is between six and ten; too many can dilute focus and reduce results.
- Each objective should be clearly relevant and important.
- Strategic objectives are directional in nature and form the structure for related, shorter-term goals. If strategic objectives are the “architects” of the plan, goals are the “builders.”
- Objectives will typically be attainable within a one to five-year timeframe. Goals will be structured to achieve quicker-term results, however.
- Each objective will have related goals, typically representing key activities, actions, programs or ministries which, in total, will support the attainment of the objective.

### Key Planning Inputs

- Utilize key inputs developed so far in the planning process when designing the strategic objectives.

Survey Findings; SWOT; Planning Session & Ministry Group Inputs



❖ *Tip: Objectives describe the specific areas in which the parish will work. Goals state how the parish will accomplish those objectives. They both address the question: “How do we get from the known present to the hoped-for future?”*

## Examples of Parish Strategic Objectives

### STRATEGIC OBJECTIVES WITH GOAL STATEMENTS

**FINANCIAL** Ensure a sustainable parish budget that supports our sacred mission and accomplishes our vision.

**PARISH MEMBERSHIP AND COMMUNITY** Increase the number of members who are active in the spiritual life of the parish, in social outreach, and in witness programs over the next five years.

**PROPERTY AND FACILITIES** Support the current and future needs of the parish by providing a physical environment for spiritual growth and witness.

**STEWARDSHIP** Educate and encourage parishioners to share their blessings through time, talent and treasury that best support the mission and goals of our church.

**WITNESS** Serve others and reach out to the community and world by knowing, living and sharing the Orthodox Faith.

### STRATEGIC OBJECTIVES / GOALS

#### 1. MINISTRY-BASED ORGANIZATION

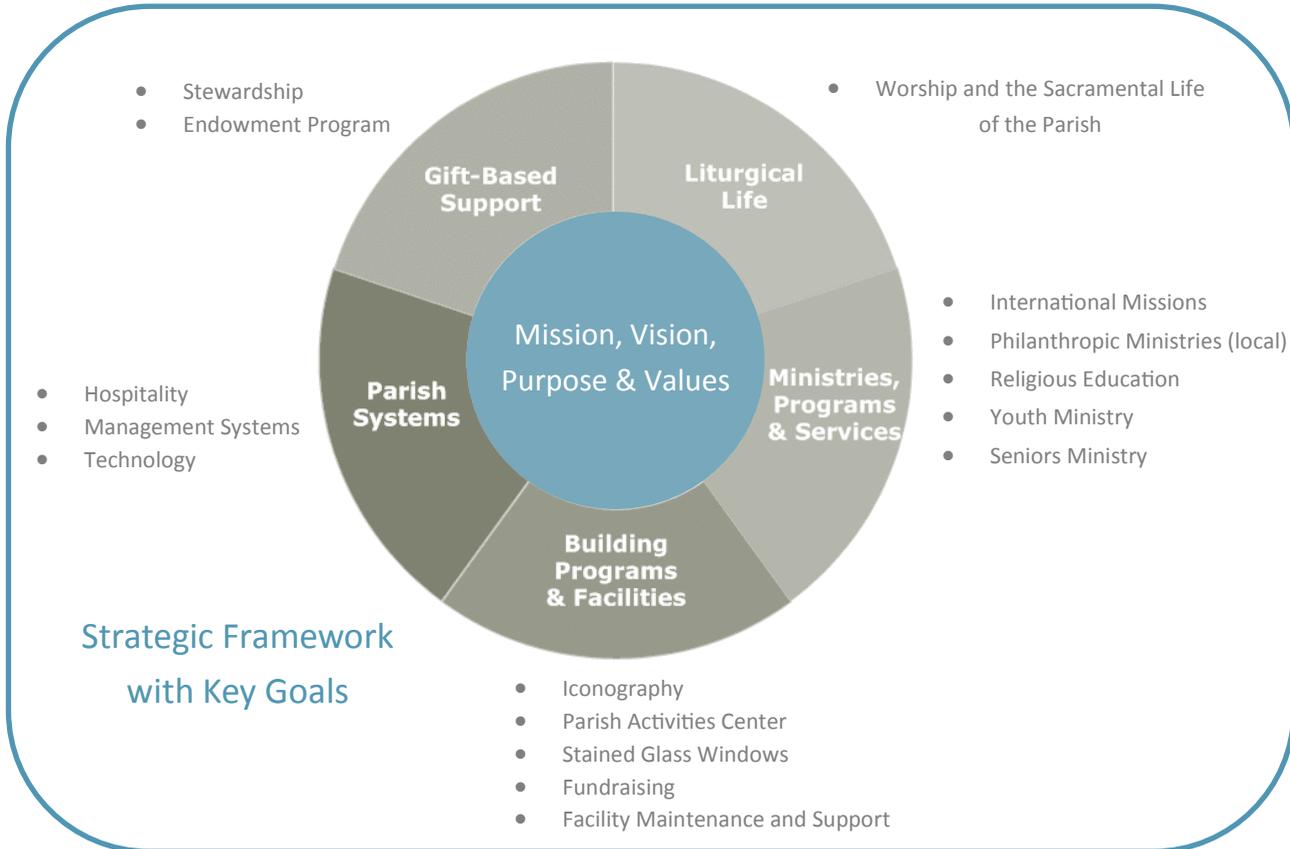
- 1.1 Develop a Council of Ministries
- 1.2 Provide more ministries/programs to impact more lives

#### 2. SUSTAIN PARISH THROUGH FULL PARISH PARTICIPATION

- 2.1 Become a self-sustained parish through stewardship participation
- 2.2 Improve communication of events, activities, ministries and needs
- 2.3 Increase youth stewardship programs and participation

#### 3. PHILANTHROPY

- 3.1 Enhance participation in current philanthropies which include MEND, Shoes for Orphan's Souls, Kids n' Cancer, Pennies and Prayers and Adopt-a-Priest



## STRATEGIC OBJECTIVES

1. DEVELOP AN OUTREACH MINISTRY
2. DEVELOP OUR PARISH MINISTRIES
3. RENEW PHYSICAL CHURCH STRUCTURE
4. INCREASE WORSHIP PARTICIPATION OUTREACH
5. BUILD SENIOR CENTER



# PLAN

## Step Two: Develop SMART Goals with Defined Timeline

Goals are often expressed as action items or action plans addressing who will do the work, what they will do and when they will do it.

### SMART Goals

When developing your action items, it is recommended that each goal follow the SMART model and be able to answer the associated questions:

- **Specific:** Is the goal providing enough clarity so that everyone will understand it?
- **Measurable:** What metrics will be used to gauge the success of each goal?
- **Attainable:** Is the goal achievable within the given constraints?
- **Relevant:** Is the goal linked to the strategic objective(s)?
- **Timely:** Is there a timeline associated to ensure completion?

❖ *Tip: Sometimes acronyms take on various meanings. For “SMART,” there is pretty wide agreement on what most of the letters represent - except for the “R,” which you may see defined as Relevant, Realistic, Responsibility or Result. Remember, select what works best for your parish and its planning efforts.*



## Creating an Action Plan

1. Assign Strategic Objective(s) to a Lead who could be a member of the overall Planning Team or a Ministry Lead (or other active participant).
2. The Lead then forms a sub-team(s) to develop key goals and actions which could be created to support the attainment of the strategic objective.
3. A strategic objective may have many goals associated with it (the example below shows only one goal per objective for illustration purposes only).
4. The sub-team prioritizes their goals and finalizes the overall list.
5. All goals are quality-checked against SMART goal criteria.
6. A plan (grid) is created and offered for inclusion into the overall strategic plan.

## Example Parish Action Plan

	Goal (strategic objective)	Measure	Due Date	Status
1	Develop Council of Ministries (Ministry-based organizations)	All Ministries represented at planning	January 2016	James Y.
2	Create blog and create weekly posts (Outreach)	Blog launched with relevant weekly posts	January 2016, Ongoing	Andreas M.
3	Participate in interfaith choir program (Music Ministry)	Participate in city choir program	April 2016	Dr. Eleni F.
4	Offer bi-weekly Youth Family Nights (Youth)	In the first six months, average 40 participants/event	October 2015 – March 2016	Stephen M.
5	Provide mentorship to emerging parish leaders	Program launched with minimum of six	March 2017	Nicholas F.

## Step Three: Determine the Overall Program Costs

The strategic planning process is built upon the premise of identification, assessment, analysis and repeated prioritization and dialogue as ideas, recommendations, objectives and goals are brought forth throughout the planning process. This requires a regular and frequent re-prioritization, which means that some recommendations will continue into the final plan, and some will be replaced or dropped from consideration. This iterative process continues here as the Planning Team, as well as the Parish Council and, eventually, the entire parish, must reconcile the costs associated with each strategic objective and its related goals.

### Can the parish afford to implement all of the ideas being presented in the plan?

To answer this question, the Planning Team will need to use its business skills as it evaluates the cost impact of each recommendation. The team will need to:

1. **Set a baseline** for the analysis by first projecting the anticipated income and expenses required to meet the parish's operating budget over the years of the plan.
2. **Ask the Ministry or Strategic Goal Lead to determine the projected costs** for each recommended item. What do they think it will cost, by year, to implement their recommendation? In many cases, there will be no related costs.
3. **Determine the costs associated with the management of the strategic plan in general.** Will there be "infrastructure" costs which will need to be budgeted, such as travel, printing or meeting materials?
4. **Develop a table or a spreadsheet** which can easily be used to track the results the various inputs.
5. **Summarize the data by implementation year** of in order to show the actual fiscal impact by year.
6. **Finalize the "cost picture"** and determine if any programs will need to be held, moved or removed from the plan. Changes, of course, should involve a number of team members to determine the appropriate course of action, or whether a re-prioritization of the plan's goals is required.
7. **The Planning Team should approve** the plan and proceed forward.
8. **Seek Parish Council and General Assembly** approval.



## What Should a Finished Strategic Plan Look Like?

- ⌘ The plan should be written and include enough detail that anyone could pick it up, read it and, without needing any explanation, know exactly the direction of the parish.
- ⌘ Whether the entire plan is placed into a three ring binder, bound into a booklet or parsed into a variety of documents, it really does not matter. The key for any plan is in its completeness and accessibility. Can people easily locate all of the plan components, and can they find the information they are seeking without difficulty? The cost of printing will also play a factor in your design direction, as will your decision to electronically distribute your plan (it's always easier to post or email a single document).
- ⌘ Most plans, regardless of length, are often reduced to an "executive summary" type of document, or to a brochure, for accessibility and easy reference.
- ⌘ It is recommended that the plan be posted on the parish website, if possible; however, make sure that no negative light has been cast onto any individual or group.
- ⌘ Posting of financial information (budgets, building program costs, etc.) on the website or in distributed print materials is often debated. Each case will need to be reviewed separately, but if transparency is a desired attribute of your parish, then sharing is probably in order.
- ⌘ Make sure the plan has a contact name associated with it in case of questions.



# IMPLEMENT

*“I planted, Apollos watered, but God gave the growth. So, neither the one who plants nor the one who waters is anything, but only God Who makes things grow.”*

*1 Corinthians 3: 6-7*

## Overview

Implementation is where visionary plans become reality. It is also where we stop discussing change and begin to embrace it. Once a plan has been written, refined and affirmed by the parish, the implementation process commences. Well-authored plans that do not generate the anticipated results sap the energy of the parish, and disillusionment can often result. Certainly, skepticism will be apparent if a plan implementation fails and a second attempt is launched in later years. A well-planned implementation along with active communications, energy, vibrant Clergy leadership and visible Parish Council support will facilitate progress and success. The implementation process requires planning and preparation before proceeding. If the implementation fails, you effectively have no strategic plan.

## Key Question: How Do We Lead Change?

### Activities for This Phase

1. Identify the Implementation Program Leader
2. Develop an overall Implementation Program Plan
3. Develop and implement a Change Management Plan

## Step One: Select an Implementation Leader

### Guidelines

- This phase of the Strategic Planning process is really the beginning of a new set of activities. It will require selecting a new Implementation Lead, who will oversee the plans and activities associated with taking all of the wonderful programs previously designed and coordinating and monitoring their implementation into the parish. It will require deft planning and visible leadership.
- To support the Implementation Lead, a parish may wish to consider forming an implementation Advisory Team composed of the Parish Priest, Parish Council President, Director of Ministries (if the parish has someone in this role) and the Strategic Plan Coordinator.
- The Implementation Lead role is typically filled by one person but could be a shared position with two co-leads. This role can be filled from a variety of sources:
  - ⌘ The Strategic Plan Coordinator could continue in this role.
  - ⌘ Another parishioner who has not been involved, to date, in the planning process.
  - ⌘ Another member of the original planning team could assume responsibility.
  - ⌘ The Parish Council President, or a member of the Parish Council, could also fill the role in order to ensure coordination between the Parish Council and the actions and activities being implemented as a part of the plan.
- Implementation Lead Qualities and Skills:
  - ⌘ Active in the life of the Church and the parish.
  - ⌘ Excellent planning, communication and collaboration skills.
  - ⌘ High ability to manage volunteer workforce.

#### ❖ *Tips Once selected, the Implementation Lead should:*

- ✓ *Confirm his/her role with the Priest, Parish Council President and Implementation Plan Coordinator, as well as everyone else's role, going forward.*
- ✓ *Clarify whether programs, which have already been approved as a part of the overall plan, will require a 2nd Parish Council approval prior to actual implementation.*
- ✓ *Confirm to whom they report and from whom they take direction.*

# IMPLEMENT

## Step Two: Develop Overall Program Plan

To keep the parish informed as to the implementation activities, an overall implementation plan and timetable should be developed and shared with the parish. It is recommended that the Program Plan should:

- Be developed in cooperation and with input from each goal lead.
- Use the dates identified within the action plans as a starting point when creating the timeline.
- Be actively communicated using the various communication methods of the parish.
- Be a standing agenda item on each month’s Parish Council meeting.
- Have a quarterly review session to enable the Parish Priest, Implementation Lead, Parish Council President, Strategic Plan Coordinator and key Ministry Leaders to review progress on the plan and make adjustments as necessary.

Below is a “snapshot” showing the projected implementation schedule of the goals/action items associated with the Strategic Objective of Leadership and Program Management.

### Example Parish Implementation Schedule

Strategic Objective: Leadership and Program Management	June	July	Aug.	Sept.	Oct.
1. Form Implementation Advisory Team	■				
2. Select Implementation Coordinator		■			
3. Form Council of Ministries (COM)			■		
4. COM Orientation and Kick-off Meeting			■		
5. Create & Communicate Program Master Calendar				■	
6. Provide Plan Quarterly Updates					■



## Step Three: Develop a Change Management Plan

Effective change management is really about helping parishioners understand, accept and use new programs being introduced. Based upon the experiences of numerous parishes, the following list has been compiled to show what successful parishes are doing to improve acceptance of new programs.

### What the best parishes are doing to lead and manage change:

- ⌘ Pray and ask God to guide, direct and help do His work
- ⌘ Provide visible, energetic and inspiring Clergy leadership
- ⌘ Listen and respond to parishioners' concerns, feelings and ideas
- ⌘ Address any issues quickly and directly, but always with love and understanding
- ⌘ Demonstrate unwavering support from the Parish Council and Ministry Leaders
- ⌘ Deliver frequent and effective communications
- ⌘ Organize and manage an effective implementation plan
- ⌘ Assign accountability for the implementation of programs, and report progress
- ⌘ Develop a plan to run programs well past their original implementation dates
- ⌘ Provide stellar project management

❖ *Tip: Meeting with a ministry lead, or members of a ministry, prior to implementing a program which will impact their respective area will improve their acceptance and reduce anxieties or concerns they may have.*



## MANAGE

*“For as in one body we have many members, and not all the members have the same function, so we, who are many, are one body in Christ, and individually we are members one of another. We have gifts that differ according to the grace given to us: prophecy, in proportion to faith; ministry, in ministering; the teacher, in teaching; the exhorter, in exhortation; the giver, in generosity; the leader, in diligence; the compassionate, in cheerfulness. Let love be genuine; hate what is evil, hold fast to what is good; love one another with mutual affection; outdo one another in showing honor.”*

*Romans 12: 4-8*

### Overview

At this point, you are well into making change happen at your parish through an effective implementation program. Hopefully, enthusiasm is continuing to grow toward the strategic plan as positive results are in evidence. By this time, also, it is assumed that your new mission, vision and value statements are continuing to steer decision-making and behaviors throughout the parish. So, what now? The process of monitoring (which is really a nicer way to say “evaluating”) the ongoing effectiveness of implementations will need to occur. Up to this point, many have worked hard to design, plan, discuss, debate, revise and implement programs. To support their efforts, it is important to keep a focus on the readiness of programs which have not yet been implemented, evaluate how previously implemented programs are doing and determine if a course change to the overall plan will be necessary.

### Key Question: How Are We Doing?

#### Activities for This Phase

1. Design ongoing program evaluations and status updates
2. Provide performance support
3. Conduct an annual planning workshop



## Step One: Design ongoing Program Evaluations and Updates

### Guidelines

- **Quarterly Review.** Set dates at the beginning of each year for a quarterly review of all strategic objectives and goals. While an “official” quarterly meeting is excellent to have, it should not preclude meeting with the Ministry Lead or the Strategic Goal Lead if situations, both positive and challenging, surface at any time during the year.
- **Meeting Agenda.** The Implementation Lead should work with the Implementation Advisory team to set the meeting agenda. The meeting should be a half-day session, but may vary depending on the number of programs being evaluated.
- **Evaluation Form.** Use the original Action Plan format for the review activity. You may simply supplement the format by adding a color: Green (all is good), Yellow (progress OK but could use some refinement) or Red (needs immediate attention). Or, you can use numbers to provide the same effect (shown below).
- **Measurements.** Use the measures originally identified in the original Action Plan as the basis for evaluation, discussion and re-direction (if needed). The better defined the measures are up front, the easier it will be to review and evaluate during this activity.
- **Parish Updates.** Once all Strategic Goals have been measured, they can then be summarized into a simple scorecard-type format that can be used to provide a status recap to the parish, the Parish Council or Ministry Leads.

⌘ General Assemblies should have a “Strategic Planning Update” for all meetings.

	Goal (strategic objective)	Measure	Due Date	Goal Lead
1	Participate in interfaith choir program (Music Ministry)	Participate in city choir program	April 2016	Dr. Eleni F.

## Step Two: Performance Support

Ministries, programs, services and events are provided by people. And in our parishes, the vast majority of the people working so hard to deliver these items are volunteers. So, to many, the idea of evaluating a volunteer or holding them accountable seems counter-intuitive. We are just happy to have them helping, right? Yes, we are! We are very happy to have them. We thank God for them each and every day. But programs also need to be delivered and coordinated. And, to do that, we need to have some degree of performance management. Remember, if the strategic plan's goals are not implemented, then we don't have a strategic plan. An extension to that phrase could also include: if the plan's goals are not delivered well, or if they are of low quality, then we still have not implemented the strategic plan.

Managing a volunteer workforce is very much the same as managing a team in a professional job environment. People, in both settings, appreciate and want the same things:

- **Good Use of Their Time.** Time is what volunteers give, and they want to make sure they are productive and that their time counts.
- **Clear Expectations.** What is it you want the person to do? This is especially important to communicate when asking an individual to lead the implementation of a strategic goal. Also, share up front how their program will be evaluated so they know what is expected.
- **Feedback.** People want to know how they are doing and will self-manage, in most cases, if they are receive regular input.
- **Training.** At the very least, ensure they have the proper context when receiving their assignment.
- **Appreciation.** A simple "thank you" is powerful.
- **Part of a Team.** People like a sense of belonging; it helps them identify with their work.
- **Care About Them as a Person.** People appreciate it when efforts are made to get to know them on a personal level and not just on a task level.
- **Honesty.** Adults can take bad news when it is delivered honestly. Many times it seems harder on the supervisor who is providing the negative feedback than on the person who is receiving it!
- **Communication.** Keeping everyone consistently in the know is fundamental to encouraging quality performance.



## Step Three: Conduct an Annual Planning Workshop

A Strategic Plan is an interesting study of contradiction. It possesses a number of highly defined processes and recommendations played out against an equally well-defined implementation schedule. And then, we take all of this definition and attempt to implement it into a highly dynamic, people-centric environment. This means, with high certainty, that some programs will hit their mark, while others will, indeed, skip off their intended landing sites. To measure progress, course correct, identify new opportunities or decide to postpone programs entirely, an annual planning workshop is recommended.

The workshop should:

- Review the SWOT analysis and determine if the current environment is consistent with the prior year's opinions.
- Review the mission, vision and value statements to determine relevancy, accuracy and importance.
- Review each strategic goal and, for each, determine if it's still:
  - ⌘ Relevant and important
  - ⌘ Attainable and on-schedule
  - ⌘ Resourced properly and led well
- As a result of the workshop findings, develop a plan update which provides status on:
  - ⌘ What's been accomplished over the past year
  - ⌘ What was done well
  - ⌘ What could be improved
  - ⌘ Recommendations for the upcoming year
- Present the revised plan to the Parish Council and the General Assembly for re-affirmation or to approve new recommendations.
- Repeat annually.



## For More Information

Should you wish to learn more on the topic of Strategic Planning for your parish, the following resources are recommended:

### Books:

- *Advanced Strategic Planning: A 21st Century Model for Church and Ministry Leaders.* Aubrey Malphurs (2013)
- *Holy Conversations: Strategic Planning as a Spiritual Practice for Congregations.* Alice Mann and Gil Rendle (2003)
- *SMART Volunteer Management.* Patricia Lotich (2012)
- *Twelve Keys to an Effective Church.* Kennon L. Callahan (1983)

### Internet:

- Greek Orthodox Archdiocese of America: <http://www.goarch.org>
- “Orthodox Natural Church Development,” Fr. Jonathan Ivanhoff: <http://oncd.us>
- “Stewardship Calling,” Bill Marianes: <http://stewardshipcalling.com>



## Accomplishing God's purposes through strategic planning

God's purpose is the element in strategic planning for the Church that is vastly different from secular strategic planning models. Without question, it is God's plan we want, not our own. The book of Proverbs has a number of clear practical principles regarding strategy and planning:

"Many are the plans in a man's heart, but it is the Lord's purpose that prevails." - Proverbs 19:21

"A simple man believes anything, but a prudent man gives thought to his steps." - Proverbs 14:15

"Plans fail for lack of counsel, but with many advisers they succeed." - Proverbs 15:22

"In his heart a man plans his course, but the Lord determines his steps." - Proverbs 16:9







