

**PARISH**

**STRATEGIC PLANNING**

**“VISIONING FOR THE FUTURE”**

**A GUIDEBOOK FOR OUR PARISHES**



GREEK ORTHODOX METROPOLIS OF ATLANTA

Section I. Introduction .....	2
Section II. Strategic Planning Defined .....	6
Section III. Our Planning Model	
Step 1. Launch The Process .....	10
Step 2. Assess Current Situation .....	18
Step 3. Set Strategic Direction .....	23
Step 4. Develop Strategies and Tactics .....	25
Step 5. Implementation Work Plans .....	28
Step 6. Develop Evaluation Process .....	31
Templates: Useful Resources	
Template 1: Planning Checklist .....	34
Template 2: Mission Statement and Core Values .....	35
Template 3: Sample Announcement Letter to Community .....	36
Template 4: Sample Agenda for Community Workshop .....	37
Template 5: SWOT Analysis .....	38
Template 6: Sample SurveyMonkey .....	39
Template 7: Vision Statement .....	40
Template 8: S.M.A.R.T.E.R. Goals .....	41
Template 9: Share Goals with Community .....	42
Template 10: Implementation Program .....	43

## **“WHERE THERE IS NO VISION, THE PEOPLE WILL PERISH.”**

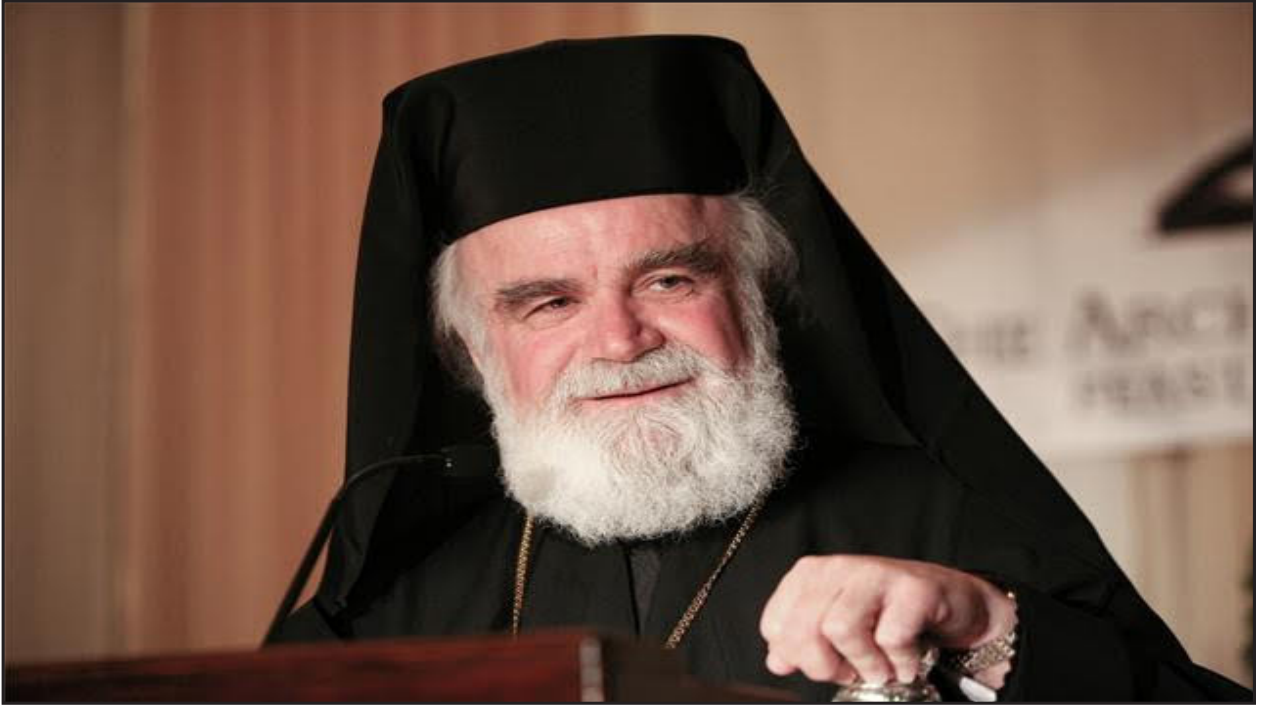
The mission of the Metropolis of Atlanta is to encourage, cultivate and guide the faithful in the Southeastern United States by proclaiming the Faith and Gospel of Christ, and teaching and spreading the Orthodox Faith.

This Strategic Planning Manual has been prepared with all parishes within the Greek Orthodox Metropolis of Atlanta in mind. We recognize that there are those who wish to create and develop a long-term plan for your local parish. Our goal is to provide you with the tools and the templates that you can modify to meet the unique circumstances of your parish and its needs.

This Manual has been developed with you and your local church in mind. Our team has consisted of a number of committed parish leaders under the pastoral guidance of His Eminence, Metropolitan Alexios, and several Reverend Clergy.

**WELCOME**

# WELCOME



My Dear Brothers and Sisters in Christ,

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

I greet you with love and joy in the Name of our Lord and Savior Jesus Christ!

You hold in your hands the fruits of nearly two years' worth of diligent labor, undertaken by the Metropolis of Atlanta Strategic Plan for the benefit of all the parishes of our Holy and God Protected Metropolis.

The Strategic Plan seeks to find creative and intelligent ways to further the mission of the Orthodox Church here in 21st Century America. One of these goals is to help our parishes create their own uniform, simple and effective local Strategic Plans, as outlined in this guidebook.

Using many of the same logical steps that strengthen other charitable organizations and businesses, we encourage all of our parishes to take the lessons of the proverb to the heart. Those who have crafted this guidebook as a part of the Metropolis Strategic Plan are Orthodox Christians who love the Church, and who have come together, inspired by an exciting vision for its future. However, we recognize that if these best practices are meant to succeed, they must not simply "come from on high" at the Metropolis level; they must be implemented and nurtured locally, among all the parishes.

Remember our Lord's parable of the house built on rock: how on the firm foundation, it could not be swept away. The Parish Strategic Planning Guidebook seeks to give every parish in our Metropolis the foundation with which we can secure our communities in the ever changing waves of society.

I am indebted to each member of the team, clergy and laity, who worked so hard to assemble this beautiful text. I hope and pray that each of our parishes will prayerfully read and consider this book in order to understand the greater vision. And then, having understood, take the vision, and thrive. I remain,

With paternal blessings and with much love in our Lord,

**+ALEXIOS**  
Metropolitan of Atlanta



## ‡ 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 what ever 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.

I thank You, Lord our God, that again on this occasion You have opened my eyes to the light of Your wisdom. You have gladdened my heart with the knowledge of truth. I entreat You, Lord, help me always to do Your will. Bless my soul and body, my words and deeds. Enable me to grow in grace, virtue and good habits, that Your name may be glorified, Father, Son and Holy Spirit, now and forever. Amen.

WELCOME

## ‡ PURPOSE AND NATURE OF STRATEGIC PLANNING

Strategic planning is vital to the future health of our parishes. As the world changes around us, it is imperative that we reflect on the mission of our faith and explore how to best ensure we have prepared for the changes we will face. In addition to ensuring your parish is in the best possible place for future success, there are several other benefits to developing and implementing a strategic plan.

The strategic planning team (SPT) is the group that is responsible with preparing the overall strategic plan of the parish. By involving your community in the process and in the conversations of strategic thinking, you will be strengthening its members' commitment to the parish and to their faith. Those strategic planning team members most involved in the process will develop leadership skills and learn new ways of engaging and serving their communities. A well-prepared strategic planning process will greatly strengthen the overall health of your parish.

## ‡ PROCESS OF PLANNING

A strategic plan enables a parish to put itself in the place of most potential for the long-term future given the resources and constraints of the situation.

It may be easier to understand strategic planning by defining the other types of planning common in effective parishes that differ from strategic planning. These include:

- Tactical:** Reactive planning that seeks to satisfy the immediate needs of a member or address unexpected problems. Effective parishes react to and put in place procedures to respond to the ongoing needs of the community.
- Operational:** Proactive and with a short-term focus, operational planning ensures the operations of the parish are meeting the needs of the community and maintaining stability, control and continuous improvement of the various ministries (i.e. budgeting).
- Program:** Proactive and with a slightly longer 2-4 year view, program planning seeks to create new programs, modify existing programs, and ensure that programs maintain relevance to the mission of the parish (i.e. Sunday School Curriculum).

Strategic planning differs from these types of planning as it seeks to explore long-term significant goals that will ensure a successful future of the community. In doing so, it seeks 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?

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

- ☑ **It is strategic.** Your work will be focused on identifying a small list of goals that will have the greatest influence on the future of the parish
- ☑ **It is data driven.** An effective plan is grounded in careful diagnosis of the realities of the current situation and the external forces that may affect the future success of your community.
- ☑ **It is inclusive.** The process will involve and engage your entire community in multiple conversations and discussions.
- ☑ **It is futuristic and transformational.** The outcomes of your work will be significant and will require effort over many years. They will result in transformational changes that strengthens the future of the parish.
- ☑ **It is knowledge generating.** The community will experience shared learning on the strengths, challenges, and hopes of your parish.
- ☑ **It is courageous and dynamic.** There is natural conflict in the planning process between the memories of the past and the hope of the future. Will your community be courageous enough to change?

## ‡ EFFECTIVE STRATEGIC PLANNING PRINCIPLES

The intent of these recommendations and insights for effective strategic planning is to help teams become successful in leading the strategic planning process.

- ☑ **Establish “Why” – the Rational for Change.** Ensure that you establish the rationale for change early, that it is clear and compelling, and that it explains why you are commencing with the development of a plan at this time.
- ☑ **Enable a “Sense of Urgency”.** Humans are built to respond to those things that give us a sense of urgency to change. Foster understanding that helps your community sense the urgency.
- ☑ **Determine the “Who”.** Within your community, there are both formal and informal leaders who influence and shape the passions of your parish. Ensuring a strong and influential planning team is critical to success.
- ☑ **Clarity of “Roles”.** Defining and communicating the roles of the priest, planning team members, staff, and congregation early in the process will strengthen each person’s ability to participate.
- ☑ **“Process” Matters.** The process and approach you use can both be inclusive and build ownership of the plan, or it can exclude input and ensure failure. Pay attention to how the process increases input and a sense of involvement from members of your community.
- ☑ **Seek “Consensus” over voting.** Use methods that allow your entire planning team to come to decisions that are acceptable to all. Avoid the dangerous path of voting for one alternative over another and by blending multiple right answers, seek those solutions that everyone can live.
- ☑ **“Communicate” frequently.** Put in place communication habits that ensure internal (church staff and parishioners) and external (Metropolis, others) stakeholders are informed as to the status of the process and plan. Over communicate using multiple approaches so that you ensure awareness.

# STRATEGIC PLANNING

- ☑ **Narrow your “Focus”.** The nature of the planning process means teams will look at many aspects of parish life. Successfully developing and implementing a plan that can be successful will require you to be focus its scope and limit its focus to no more than 6 strategic goals.
- ☑ **Reasonable “Timelines”.** Realize that while it may take only six months for your planning team to complete a situational analysis and identify strategic goals for your community, implementation and successful completion of a meaningful strategic plan may take as long as 4 to 8 years. Your goals should stretch your community to a long-term future and not just address tactical needs.
- ☑ **Short Term Win.** Since it takes time to implement meaningful goals in a parish, it is important that you set meaningful short-term goals by which you can celebrate accomplishments on the path to success.
- ☑ **Be “Flexible”.** Once you create the initial plan, conditions and opportunities may change and new opportunities may present themselves of which you can take advantage in order to strengthen the parish. Implementation plans will need regular review and modification over set time periods to ensure the effort remains responsive to the changing situation.

## ‡ A PLANNING MODEL DEFINED

The following strategic planning model will guide your plan development efforts. You can complete the bulk of planning process in as little as 10 months with your parish moving to implementation within a year's time of starting. The model represents the major activities and lists them in sequenced phases. The model can be found on the next page. Refer to Template 1 for Planning Checklist.



In track and field, a runner can lose the race easily by not having a good start. It requires preparation and attention to the launch of the race. A failure to prepare or launch in the right way influences the Strategic planning processes in a non-effective way. Therefore, the first step in preparing is to determine your leadership.

### ‡ IDENTIFY LEADERSHIP

To ensure an effective strategic planning process, you must first put in place leadership for the process. Leadership for an effective process will include:

#### **Co-Chair Persons**

You should seek out two or more individuals who will provide leadership for the process. This co-chair approach ensures a well lead process.

The team of co-chairs should have the following qualities:

- ☒ Respected by the community
- ☒ Represent the various stakeholder groups in the community
- ☒ Active in the community
- ☒ Practicing Orthodox Christian
- ☒ Members in Good Standing with Church
- ☒ Possess Leadership Skills
- ☒ Team Players
- ☒ Intelligent, Articulate, & Honest
- ☒ Optimistic and Confident
- ☒ Strategic and Futuristic Thinkers

In addition to guiding the process, the Co-Chairs with assistance from the facilitator must lay the foundation for the planning process by performing three major tasks:

1. Establish Guidelines and Rules for Operating;
2. Identify the sub-groups of stakeholders within the community; and
3. Select and recruit Planning Team Members.

#### **Facilitator**

A person who can ensure the following best facilitates strategic planning efforts:

- ☒ Good process methods and practices
- ☒ Maintain schedules
- ☒ Keep teams on task
- ☒ Clarity on what has been shared
- ☒ Encourage participation
- ☒ Neutral/Objective (external facilitation may be needed)
- ☒ Enforce Guidelines and Rules for Operating

## ‡ SETTING GUIDELINES FOR OPERATING

The process guidelines consist of both Process “Rules of Engagement” and “Meeting Guidelines.” Both are equally important.

### Rules of Engagement

Rules of Engagement are guiding principles for ensuring strong engagement of everyone in the community.

The process will focus on those things we can control and influence, and not those things that are beyond our ability to do anything about.

- ☒ We are committed to what is best for all and will not put our self-interests or own needs ahead of the needs of the parish.
- ☒ We will be honest and will not spin the truth.
- ☒ We will seek multiple right answers to the challenges we find.
- ☒ We will spend time learning and reflecting on other’s thoughts and ideas.
- ☒ We will express support for the strategic planning process both publicly and privately within the community.
- ☒ We will support others who doubt and dissent in constructive ways.
- ☒ We will reframe from being defensive; we can disagree in a respectful way.
- ☒ We will avoid killing discussions with negative phrases (for example: It will not work; We have tried that before; You don’t know what you’re talking about.)
- ☒ We will think strategically, creatively, and futuristically taking a long-term view that might result in us getting outside of our traditional ways.
- ☒ We will act in a manner consistent our faith, treating each other as we would our Lord, with love and respect.
- ☒ We will care for each other.

### Guidelines for Meetings and Retreats

Meeting Guidelines are strategies that help ensure meetings and retreats are well functioning.

- ☒ Stay on Task and Schedule.
- ☒ No titles, roles, rank, or positions in our meetings.
- ☒ We will interact confidentially.
- ☒ Seek to understand first.
- ☒ One speaks – All listen.
- ☒ All decisions are made by consensus.
- ☒ Everyone Participates.
- ☒ Be concise and on point.
- ☒ Side issues will be parked.
- ☒ Stay engaged or leave the meeting/retreat.
- ☒ Absence from meeting/retreat concurs to the group’s consensus.



## ‡ IDENTIFICATION OF STAKEHOLDERS

Stakeholders include those that will be at the planning table as well as those influenced by the decisions made at the planning table.

For most parish communities, stakeholders can be represented by sub-groups who are engaged in many different activities. As a result of the varying interests and needs within the sub-groups of a community, the goals and actions of a strategic plan process is a blending of the interests of those involved in the process.

In forming an effective planning team, the Leadership of the process, must first identify the major stakeholder groups within your community. This is done along with the support from the facilitator and your Church Council.

The Identification of major stakeholder groups will be important in the formation of your planning team. It will also ensure that assessment methods collect input from all groups within your community. Examples of sub-groups include but are not limited to seniors, parents, non-Greek descent members, teachers, etc.

There are many ways to identify sub-groups within your community that will ensure you have planning teams and assessments methods that involve everyone.

## ‡ SELECTION OF PLANNING TEAM

Once you have identified your stakeholder groups, you are ready to begin identifying the members of your Planning Team.

Looking within each of your stakeholder groups, begin identifying those informal and formal leaders who will represent each of the constituencies and who are:

- ☒ Respected by the community.
- ☒ Active in the community.
- ☒ Practicing Orthodox Christian.
- ☒ Members in Good Standing with Church.
- ☒ Team Players.
- ☒ Intelligent, Articulate, & Honest.
- ☒ Optimistic and Confident.
- ☒ Authentic, Humble and Modest.
- ☒ Learning Oriented.
- ☒ Strategic and Futuristic Thinkers.

In cooperation with your Church Council, the leadership team should begin inviting members to join the planning team who embody the membership criteria enumerated above.

Avoid placing individuals on the planning team who exhibit any of the following qualities:

- Have private agendas.
- Complainers.
- Dishonest or insincere.
- Know-it-all mentality.
- Change resistant.



As part of the invitation, consider asking new planning team members to commit to the rules and guidelines discussed in this section.

Effective planning teams range in size between 15 and 25 members.

### ‡ PLAN FIRST TEAM MEETING

- ☒ The first major task in launching the process is to hold the first planning team meeting.
- ☒ At this meeting, you should accomplish the following:
- ☒ Establish commitment to the Rules and Guidelines for the process.
- ☒ Reaffirm the purpose of the parish (Mission).
- ☒ Establish Core Values.
- ☒ Develop a plan for how your planning team will perform an Assessment of the Current Situation.

### ‡ AFFIRMATION OF MISSION AND SETTING CORE VALUES

The mission statement includes the broadest and highest level of parish goals and objectives. In a mission statement, the parish simply states its fundamental purpose and reason for existing. The mission statement is clear and concise (less than 125 words), is realistic, defines the church, and states the stakeholders it supports. Refer to Template 2 for Mission Statement and Core Values.

#### THE IMPORTANCE OF “WHY”

The question of “WHY” described above is often overlooked by groups writing mission statements even though it is the most important part of the mission statement.

“WHY” defines the ultimate outcome of the work of your parish. It is what transforms a Mission Statement from a list of activities to something both inspirational and motivational in driving behavior toward success.

An effective mission statement includes the answers to the following four questions in order to be clear and understandable to the faithful:

## STEP 1

Who are you?

The name of your church and community. (i.e. St Johns..)

What does the Church do?

Describe the various activities and action that are carried on to fulfil the purpose of the church. (ie. worship, educate, fellowship, etc.)

For whom do you do it?

Describe who the above activities and actions are taken. (i.e the faithful, the unchurched, the inactive, etc.)

Why does the church do it?

Describe why the church performs the actions and activities above. What is the grand purpose for why the church exists. (ie growth of church, salvation of faithful, etc.)

## EXAMPLES OF PARISH MISSION STATEMENTS:

### EXAMPLE 1: HOLY TRINITY, CHARLOTTE, NC

Our Mission is to become faithful followers of Christ and thus active Greek Orthodox Christians by accepting and submitting to the Will of our Lord so that we may realize salvation and enter into the Kingdom of God.

### EXAMPLE 2: ST. ATHANASIOS, GULF SHORES, AL

Our mission is to reach out and welcome all people who seek the saving grace of Jesus Christ, and blend them together into one Eucharistic community, through the worship and the beliefs of the Greek Orthodox Archdiocese.

### EXAMPLE 3: ST. KATHERINE, NAPLES, FL

We exist to worship the Holy Trinity and to be transfigured into the image and likeness of God by becoming faithful followers of Jesus Christ according to the Christian Orthodox way of life by acquiring His grace, His mind, His love and His mercy, so that we may realize salvation and enter into the Kingdom of God.

### EXAMPLE 4: ST. KATHERINE, MELBOURNE, FL

Our Mission (job) is to grow our faith in Christ through love and respect, with humility and forgiveness.

## ‡ SET CORE VALUES

Once your planning team has come to consensus on a mission statement, the next step will be setting core values.

Core values inform your mission and all you do, but defining how we will act or behave in achieving our Church's mission. Core values, simply put, by shaping our behaviors, shape the culture of a parish.

Strong value statements have the following characteristics:

- ☒ Beliefs That Drive Behaviors. A core value, as an example, such as Stewardship suggests to the community that we contribute our time and resources to supporting the mission of the church. A core value such as Efficiency would suggest we use our resources wisely. Yet, a core value such as Philanthropy would drive a community to do more for the less fortunate.
- ☒ Focus and Limited. Strong values statements list four or five core values. While we operate on many values in our communities, the purpose of the Core Value Statement is to focus behavior around a narrow few that are most important to the successful fulfillment of the church mission.
- ☒ They are Shared. Strong values statements represent a parish-wide perspective. Since values imply a certain behaviors, these statements should be community felt and supported. This does not mean that there will not be other values emphasized by sub-groups within the church. For example, the youth dance group or sports teams may emphasize competition as a team value even those it is not a core value of the church.
- ☒ Provide Framework for Decision Making. Core value statements provide a framework for leader and group decision-making. Choose values that inform the judgment of your leadership in ways that translate to effective decisions.

## ‡ COMMUNICATE PROCESS LAUNCH: ANNOUNCEMENT TO COMMUNITY

Present the decision and rationale to the Parish Council to proceed with the development of a strategic plan. Before initiating the planning effort, seek the Parish Council's "approval to proceed" and obtain its support. Share the news with the parish after approval by the Parish Council.

Conduct the appropriate communications and public relations campaigns to properly and to present widely the Strategic Plan to everyone throughout the parish.

Seek to build an even broader consensus of commitment and support by being transparent and communicative with the parish community. This will need to be a parish-wide activity, and involve many different parts to a proper communications and public relations program. Ultimately, inspirational, comprehensive and participatory presentations at appropriate whole parish gatherings are critical. Refer to Template 3 for a sample letter.

In addition to sending a letter to the community, make proper announcements during appropriate times when the community is meeting. Encourage participation through announcements in church flyers, in the church bulletin, via your parish email lists or social media.

This planning phase, the Assess Phase, allows the team to review all elements of the parish life and identify the strengths, weaknesses, opportunities and threats in order to chart the best path toward reaching the desired future state of the church.

In this phase necessitates the planning team to reach out to the community ministry leaders and parishioners. Collect their responses to questions that are specific to your parish and designed to produce the essential feedback needed for a comprehensive assessment of your parish's current state. This assessment will help determine how best to plan for your parish's envisioned future.

The first step is to determine the method best suited for your parish to make your assessment.

The following assessment approaches are recommended:

- Plan Workshops or Retreats. Refer to Template 4 for sample agenda.
- Conduct a SWOT Analysis. Refer to Template 5 for SWOT Analysis.
- Construct a Survey (Monkey). Refer to Template 6 for sample questionnaire.

### ‡ PLAN WORKSHOPS OR RETREATS

A workshop or a retreat is an efficient way to capture a great deal of input and participation as it expands “ownership” of the plan's directions and recommendations. The purpose of this is to get parish feedback that will be a key input into the SWOT Analysis. The highest and best quality method is to have a trained parish facilitator or outside professional lead in person workshops or retreats to engage the parishioners for their feedback.

#### Participants

- ☒ Represent all ministries, constituencies (seniors, youth, converts, ethnic), 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 and as many as 75 participants.
- ☒ Composed of committed parish members, well connected to parish life.
- ☒ Receptive to the idea and concept of Strategic Planning for their parish.

#### Pre- Meeting Preparation

- ☒ Priest must be active in the communication process, demonstrating full support to the undertaking
- ☒ Participants are prepared prior to the meeting, regarding the goals and objective of the meeting, and provided with the pre-read materials on the planning effort
- ☒ Facility is selected to comfortably accommodate the meeting and provides the necessary meeting equipment
- ☒ Facilitator is selected and prepared. They may be from within the parish or an external resource. In either case, it will be necessary that the leader is a skilled facilitator and has had training as provided through the Metropolis, or has established competencies in facilitation from outside the church.

### Meeting Management

- ☒ The scope and agenda for a particular session frequently is 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.

### 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 on 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.
- ☒ Once all responses at workshops have been captured, the Strategic Planning Team will prioritize them in rank of the number of similar statements in preparation for the upcoming Strategic Planning retreat.

### Potential Workshop/Retreat Questions

- ☒ Please describe emerging social issues that you and your church community may face in the next 4-8 years (i.e. more texting instead of face-to-face meetings).
- ☒ Please describe emerging political issues that you and your church community may face in the next 4-8 years.
- ☒ Please describe emerging economic issues that you and your church community may face in the next 4- 8 years.
- ☒ Please describe emerging technological issues that you and your church community may face in the next 4- 8 years.
- ☒ When you consider our church health, what are the strategies and actions that you think are working very well?
- ☒ What do you think are the most important characteristics of an effective church community?
- ☒ When you consider our church community, what are the strategies and actions that you think are not working so well?
- ☒ If our church could be known for only one thing in ten years from today, what would that one thing be?

Refer to Template 7 in the Appendix for a Sample Agenda.

## ‡ SWOT ANALYSIS

The SWOT Analysis is put together by the parish strategic planning team (SPT). The SWOT analysis is a technique used during the Assess phase. It identifies, categorizes and evaluates the:

**Strengths and Weaknesses:** the internal areas within a parish's direct control.

*AND*

**Opportunities and Threats:** the external areas over which a parish has less influence.

		<u>SWOT ANALYSIS</u>	
		<i>External</i>	
		OPPORTUNITIES	THREATS
<i>Internal</i>	STRENGTHS	How do you leverage your strengths to benefit from opportunities?	How do you use your strengths to minimize the impact of threats?
	WEAKNESSES	How do you ensure your weaknesses will not stop you from opportunities?	How will you fix weaknesses that can make threats have no real impact?

SWOT analysis involves collecting information and perceptions regarding the parish.

Broadening the participation is the essential step toward defining the current state of the parish, its envisioned future, and how it can get there effectively and efficiently.

Canvass the SPT to capture specific views of the community's Strengths, Weaknesses, Opportunities and Threats. Include the information obtained through parish feedback solicitations and events.

Gather the SPT for a facilitator-led session to conduct the team SWOT exercise, which will yield high quality and timely feedback. The facilitator is required to keep the group on topic, keeping the session moving and not distracted by unrelated items. The facilitator also deflects any personal agendas or personal, unsubstantiated opinions.



If time and a facilitator are not available for such a session, the SPT can facilitate feedback by mail, email, or other preferred communication methods.

Following is an excerpt from the Team letter that articulates the goal and form of a SWOT:

“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) in order to maximize the benefits of this evaluation and help us develop proper strategies. As you think about the parish’s SWOT items, please focus on the bigger strategic issues and make sure to think about our programs, ministries, talent, parishioners, finances and other key areas on which we should focus. Eventually, we will take the S, W, O, and T we agree by consensus face us to form some strategies using questions like those below.”

### ‡ CONSTRUCT A SURVEY (MONKEY)

#### Survey Key Considerations

- ☑ **Determine why you want to use a survey.** A survey typically is used to garner input from a wider set of parishioners. Surveys can be designed to capture insights on either parish-wide topics or targeted for specific groups or ministries. Surveying the parish up front in your plan development process will 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.** 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.** Determine whom you want to oversee and facilitate the process, which involves the sending of the survey and the tabulation of the results. If you use an outside service to manage the survey process, there are many online companies you may wish to consider (i.e., Survey-Monkey.com is a vendor that provides those services).
- ☑ **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 (i.e., “we want to have 100 responses”) and report against that number with weekly reminders through the lifecycle of the survey.

### Design Your Survey

- ☒ Scope. Parish-wide or used to study a specific topic?  
Will you be 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 the survey be held open?
- ☒ End. How long will the survey be held open?
- ☒ Communication. How will the survey be introduced and the results shared?

### Tips on Using a Survey:

- ☒ **Keep surveys anonymous.** This anonymity will boost participation and openness of feedback.
- ☒ **Keep questions simple and concise.** A common mistake in creating questions is putting more than one variable in a question. An example of this mistake would be: "Do you like chocolate candy and strawberry ice cream?"
- ☒ **Share results.** 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.
- ☒ **Comment Information.** Prayerfully consider the best way to share information if comments are provided in the survey on a specific program or individual.

At this point, the Strategic Planning Team has concluded the initial analytic and diagnostic activities used to determine the current state of the parish and has established a clear statement of mission.

This phase, the Set Strategic Direction, begins the process to create that the desired future state of the parish is achieved within a reasonable timeframe. In this phase, the determination is: "Where do we want to be?"

### ‡ VISION

Vision establishes a clear, challenging picture of the future of the ministry of the parish. **A Vision must:**

- ☒ Be clear, concise and be easy to understand and share
- ☒ Be compelling and inspiring
- ☒ Paint a picture of where you're going
- ☒ Be about the future of the Parish or ministry
- ☒ Be possible.

### ‡ VISION STATEMENT

A vision statement is bold and far-reaching statement. It sets the "horizon line" and lets everyone know where the journey of the parish is directed.

**A Vision Statement:**

- ☒ Defines what the organization hopes to do in the future.
- ☒ A vision statement is a long-term view.
- ☒ Vision focuses on: What do we want to accomplish? Where are we going?
- ☒ Inspires people to accomplish the goal.
- ☒ Comes from the heart (whereas Mission comes from the head).
- ☒ Supplies Passion.
- ☒ Has narrow focus.
- ☒ Has to "caught" (whereas a Mission can be taught).

Refer to Template 7 to help you write your vision statement.

## ‡ VISION STATEMENTS ARE BIBLICAL

The Great Commission - Mathew 28:18-20

*"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."*

Acts 1:8

*"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."*

## ‡ EXAMPLE VISION STATEMENTS

*Example 1: Metropolis of Atlanta Vision*

We will grow the Metropolis of Atlanta, and personally grow in Christ and make disciples, by living as witnesses of our faith through loving faithful and purposeful Orthodox Christian communities focused on:

- Worship
- Education
- Stewardship
- Philanthropy
- Fellowship

*Example 2: Holy Trinity, Charlotte, NC*

With the Grace of God, to provide a loving and caring Community where all belong to Christ, through worship, sacramental life, everyday spiritual discipline, sanctification, education, witness and fellowship.

*Example 3: Saint Mark, Boca Raton, FL*

Join us, the committed believers of Saint Mark, in living and sharing the love of the Holy Trinity and becoming the Kingdom of God on earth. We accomplish our mission through worship, fellowship, service to others, partaking of the Sacraments and witnessing the Truth revealed through the person of Jesus Christ, handed down unchanged from the Apostles and Church Fathers. We glorify God by loving one another as Christ loves us.

*Example 4: 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).

Once you know where you are in relation to where you would like to be, it is important to understand how you can get there. Up to this point, the process has been on a broader, base with longer term goals. This next step brings the process down to a shorter timeframe with more specific goals.

### ‡ SMART GOALS

Each one to three year goal should be designed to be an actionable item and, ideally, should have all of the components of a SMART goal.

SMART goals, by their design, provide guidance and structure to the strategic planning process and are generally approach as a series of questions.

**S=Specific:** The goal should be clear and unambiguous. This means that you should be able to answer:

- ☒ Who needs to be involved?
- ☒ What are you specifically trying to accomplish?
- ☒ When will this be accomplished?
- ☒ Why is it important that the goal be reached?
- ☒ Where will it occur?
- ☒ Which ministries and programs will be impacted?
- ☒ Will anything else need to be accomplished prior to obtaining this goal?

**M=Measurable:** You should be able to answer:

- ☒ How will the goal be measured?
- ☒ What will it be measured with?  
(i.e. how many volunteer hours, how much money, number of giggles on the playground)

**A=Attainable/Achievable:** To assess if the goal is attainable, it will be necessary to consider how the goal will be accomplished. When considering if the goal is obtainable, it is reasonable to have some goals, which are somewhat of a stretch for your community as long as it is not extreme. It is important that the goals are not made too easy in an attempt to satisfy this characteristic. In addition, the effort that is required to meet the goal should be related to the goal that is achieved. This means you should be able to answer:

- ☒ Is the goal realistic?
- ☒ Do you have the tools/skills/resources that you need to reach your goal?
- ☒ If not, then what would be involved with assembling the tools/skills/resources that are necessary?

**R=Relevant:** You should be able to answer:

- ☒ Is this shorter-term goal relevant to your Macro Goals, Vision Statement, and Mission?
- ☒ Is this the right time to address this goal?
- ☒ Are we being reasonably patient and taking into consideration where our organization is?

**T=Time-Bound:** Having a timeline in place helps to reduce the tendency for goals to take a backseat to daily urgent matters. You should be able to answer:

- ☒ What is the timeline for this goal including each step along the process?
- ☒ Is this timeline realistic considering other factors that are important to your community such as annual events, holidays, concurrent commitments, etc.?
- ☒ When will the goal be achieved?

SMARTER goals will help you to be successful so keep positive as you work through the answers to the guiding questions. Ideally you will want to write SMARTER goals which also include”

**E=Evaluate:** Evaluation should be ongoing and should assess the progress in meeting the goal. In addition, evaluation should determine if anything changed since you began the process that will influence the timeline or relevancy of the goal.

**R=Revise:** The evaluation process may determine that change has occurred and that the goal should be revised to take this change into account.

See Template 8 to build your own.

### ‡ DETERMINE COSTS

In order to know whether a goal is Attainable/Achievable, it is critical to have a realistic estimate of the costs associated with meeting the goal. In addition, the cost of meeting the goal may also effect the priority that the community places on meeting that goal or in including the goal in the final implemented Strategic Plan.

Setting the SMARTER goals included answering a number of questions about how they will be reached with will allow for the estimation of the costs of implementing the goals.

The following steps will assist you to estimate the ability of the community to afford each goal:

- ☒ Estimate the annual or by event cost of implementing each goal.
- ☒ Estimate when these costs would occur on the timeline and if these costs would be one-time or ongoing expenditures.
- ☒ As much as reasonably possible, stagger one-time costs in a pattern that is most appropriate for the community.
- ☒ Reevaluate these costs for any possible savings or added expenses that may be dependent on such factors as combining services; time of day month or year that outlays are made; need for obtaining loans; etc.
- ☒ Parish Council and General Assembly approvals.

### ‡ SHARE GOALS WITH THE COMMUNITY

There are a number of avenues for sharing the Goals with the community including:

- ☒ Social media for  
(flicker photo share account, YouTube video channel, blog, electronic newsletter, twitter for Q and A, etc.)
- ☒ Website and emails
- ☒ Open meetings, General Assemblies, Community Listening Sessions and Coffee Hour Activities
- ☒ Ministry meetings and Council of Ministries
- ☒ Committee and Board meetings
- ☒ Online and downloadable fillable feedback forms (with categories)
- ☒ Bulletin boards, flyers, bulletins, newsletters

It is important to share the following information:

- ☒ Timeline for the process
- ☒ Micro Goals
- ☒ SMART Goals
- ☒ Committee and Administrative Structure
- ☒ Contact Information
- ☒ Minutes of Meetings
- ☒ Cost and Budgets

See Template 9: Share Goals with Community.

Implementation is where theory becomes reality. This occurs after the planning and approval process and involves its own careful planning, as any goals that are not implemented effectively do not exist.

#### ‡ IMPLEMENTATION PRINCIPLES

- ☒ We are Brothers and Sisters in Christ who Love one another.
- ☒ Make use of and expand upon Metropolis Strategic Planning resources.
- ☒ Leadership should include the Priest, Parish Council, Council of Ministries/Ministry Leaders and other lay members of the community.
- ☒ Redefine and clarify the role that each individual or group will have in the implementation process. Make it explicit that the individuals who made up the planning team may or may not be involved on the implementation team and that new individuals may be involved on the implementation team that were not involved on the planning team.
- ☒ The Process should be open and as inclusive as possible. Everyone in the community and in the Church leadership will be kept in the loop through multiple forms of communication.
- ☒ Focus on the positive and rejoice as goals or sub-goals are obtained.
- ☒ Build in ways to remind the team and community of the timeline without making the timeline the goal. If you do not have to do it correctly, you will not have time to do it over.
- ☒ Evaluate the progress without second-guessing the process.
- ☒ Do not let the great be the enemy of the good. Sometimes good is good enough and it is important to be flexible and realistic about how change may influence your goals.

#### ‡ DETERMINE ROLE CLARITY

The implementation structure will be very similar to the planning structure excepting that it will be organized around the identified plan.

The following will carry out implementation:

1. Priests
2. Parish Council
3. Council of Ministries/Ministry Leaders
4. Implementation Program Leaders
5. Implementation Teams

The implementation phase should have the same leadership structure as the planning phase including:

**Two or more Co-Chairs and a Facilitator:** Depending on the situation and size of your community, these may be the same individuals who Co-Chaired the planning phase. However, it is ideal to select new leaders for this next phase in order to reduce the effect of personalities in the process and to allow individuals who demonstrated excellent leadership in the first phase to take on a greater leadership role. This phase is entirely separate from the planning phase and requires a leader who is visible and very detailed oriented.



The Co-Chairs and Facilitator should have the following characteristics:

- ☒ Active in the life of the Church and practicing Orthodox Christian.
- ☒ Active in the Parish and member in good standing with the parish.
- ☒ Detailed oriented with exceptional planning and communication skills.
- ☒ Works and plays well with others.
- ☒ Exceptional ability to manage volunteers.
- ☒ Honest and forthright.
- ☒ Has good sense of time management and able to stay on task.

The Parish Council, Council of Ministries, and the members of the community, along with the leadership for the implementation phase need to clarify the following issues:

- ☒ Will programs that were approved as part of the plan require Parish Council and/or General Assembly approval prior to implementation?
- ☒ Whom will they report to and whom will they take direction from?
- ☒ What will their specific responsibilities be?
- ☒ Who will choose the Goal leads (Depending on the community, they may be appointed by the priest, the Parish Council, or the General Assembly)?

Best practices during implementation include:

- ☒ Development of an Implementation Timeline based on the action plan for each goal (see Implementation Program Template).
- ☒ Active Communication with the community.
- ☒ Monthly reporting to the Parish Council.
- ☒ Quarterly review to ensure progress is made and that changes are incorporated.
- ☒ Cooperation between Implementation leaders and Goal leaders.
- ☒ Develop a Change Management Plan.

Change Management helps maximize utilization of new programing and facilitates acceptance of modification or removal of existing programing.

A number of best practices for change management include:

- Pray and ask God for guidance.
- Visible, energetic and inspiring Clergy leadership.
- Effective communication from the parishioners and to the parishioners so that their concerns and ideas are heard and addressed.
- Regular meetings with ministry leaders and members prior to implementing changes with impact them.
- Deal with conflict quickly and directly with love and understanding.
- Support of Parish Council and Ministry Leaders.
- Proper management of implementation plan and plan timeline that extends beyond implementation.
- Report progress.

## ‡ SHARE IMPLEMENTATION PLAN WITH COMMUNITY

There are a number of avenues for sharing the Implementation Plan with the community including:

- Social media for (flicker photo share account, YouTube video channel, blog, electronic newsletter, twitter for Q and A, etc.)
- Website and emails
- Open meetings, General Assemblies, Community Listening Sessions and Coffee Hour Activities
- Ministry meetings and Council of Ministries
- Committee and Board meetings
- Online and downloadable fillable feedback forms (with categories)
- Bulletin boards, flyers, bulletins, newsletters

It is important to share the following information:

- Timeline for the process
- Micro Goals
- SMART Goals
- Committee and Administrative Structure
- Contact Information
- Minutes of Meetings
- Cost and Budgets

See Template 10: Implementation Program.

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, 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 needs to occur. Up to this point, many team members 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 that have not been implemented, evaluate how previously implemented programs are doing, and determine if a course change to the overall plan will be necessary.

## Key Focus: How Are We Doing?

### Evaluation Process Steps

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

## ‡ STEP 1: DESIGN ONGOING PROGRAM EVALUATIONS AND UPDATES

Guidelines for types of reviews:

- ☒ **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 are measured, they can 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 general assembly meetings.

## ‡ STEP 2: PERFORMANCE SUPPORT

People provide ministries, programs, services and events. In our parishes, the vast majority of the people working so hard to deliver these items are volunteers. Therefore, to many, the idea of evaluating a volunteer or holding them accountable seems counter-intuitive.

We are just happy to have volunteers helping, right?

Yes, we are! We are very happy to have them. We thank God for them each and every day. However, the programs need to be coordinated and delivered. To accomplish that, we need to have some degree of performance management.

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. 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, especially if they receive regular input.
- ☒ Training. Ensure they have the proper context and resources needed when receiving their assignment.
- ☒ Appreciation. A simple "thank you" is powerful.
- ☒ Part of a Team. People like a sense of belonging and working collaboratively; it helps them identify with their work they gain something important from their involvement.
- ☒ 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. It gives them a good feeling about their task progress and accomplishments.
- ☒ Honesty. Adults can take "bad news" when it is communicated honestly and with soft language. 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 3: 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, we recommend conducting an annual planning workshop.

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 is 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 has been accomplished over the past year.
- What was done well.
- What could be improved.

Make 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.

## TEMPLATE 1: Planning Checklist

Refer to Page 9

- ☐ LAUNCH THE PLANNING PROCESS - 2 months
  - ☐ Identify Leadership
  - ☐ Set Guidelines for Opportunity
  - ☐ Identify Stakeholders
  - ☐ Select Planning Team
  - ☐ Reaffirm Mission
  - ☐ Set Core Values
  - ☐ Communicate Process
- ☐ ASSESS THE CURRENT SITUATION - 3 months
  - ☐ Determine Assessment Methods
  - ☐ Anticipate External Forces
  - ☐ SWOT (?) Analysis
  - ☐ Communicate Findings
- ☐ SET STRATEGIC DIRECTION – 1 month
  - ☐ Vision
  - ☐ Vision Statement
  - ☐ Create Your Vision Statement
- ☐ DEVELOP STRATEGY AND TACTICS – 1 month
  - ☐ Micro (SMART) Goals
- ☐ IMPLEMENT PLAN – 3 months
  - ☐ Implementation Principles
  - ☐ Role Clarity
  - ☐ Share Implementation Plan
- ☐ MANAGE PROCESS - Quarterly
  - ☐ Design Ongoing Program Evaluation and Updates
  - ☐ Performance Support
  - ☐ Annual Planning Workshop

## TEMPLATE 2: Mission Statement & Core Values

Refer to Page 13

### MISSION STATEMENT:

Considerations:

- ☐ Name of Your Church
- ☐ Description of Actions the Fulfill Purpose of the Church
- ☐ Describe Who Church Serves
- ☐ Describe Why these Actions Are Taken

Notes:

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### CORE VALUES:

Considerations:

- ☐ Define Values Group Operates by
- ☐ Concise – ¾ Significant Values
- ☐ Describe Who Church Serves
- ☐ Describe Why these Actions Are Taken

Value 1: 

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Value 2: 

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Value 3: 

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Value 4: 

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## TEMPLATE 3: Sample Announcement

### Letter to the Community

Refer to Page 17



#### THE GREEK ORTHODOX CATHEDRAL OF THE ANNUNCIATION

2500 Clairmont Road N.E., Atlanta, GA 30329 • Tel.: (404) 633-5870 • Fax: (404) 633-6018

Web: [www.atlgoc.org](http://www.atlgoc.org) • E-mail: [office@atlgoc.org](mailto:office@atlgoc.org)

Rev. Fr. Paul A. Kaplanis  
Dean

Rev. Fr. Christos P. Mars  
Presbyter

Dear Fellow Parishioners,

*A man's mind plans his way, but the LORD directs his steps.*  
Proverbs 16:9

Where are we going as a parish? What are our goals as we continue to move forward? How should we best accomplish these goals and how do we prioritize them? These are very important questions. How we answer them will have a profound impact on our community both today as well as for generations to come. To better answer these questions, the Future Planning Committee of the Parish Council has begun the task of creating a comprehensive Strategic Plan. We call this plan our **Faith Map**.

What is the Faith Map? Simply put, it will be our guide for growth. It is a strategic plan that outlines overarching goals and accompanying initiatives for the parish. Furthermore, it is a plan that will not only identify these goals, but also prioritize them. The Faith Map will be a document that everyone in the community will have a hand in crafting.

Over the past few months, the Future Planning Committee has been working on a preliminary analysis of the community's strengths and opportunities as well as an honest assessment of areas that still need work. Based on this analysis, we are ready to move forward and begin the creation of the Faith Map. We will create this map together in three phases. We are trying to provide as many avenues as possible for your participation! Through a questionnaire and various in-person meetings, we will be asking you for your thoughts and ideas about the future of our community. What would you like to see us accomplish? What is important to you? The three phases are:

Phase One	Phase Two	Phase Three
<i>Winter/Spring 2013</i>	<i>Summer 2013</i>	<i>Fall 2013</i>
Gather information via all forms of media including mailings, and online questionnaire	Committee will go through all responses and organize them	Present our findings and set priorities to complete the Faith Map
Members will visit parish and cultural organizations for their feedback and personal reflections		
Two town hall style meetings to give another opportunity to share information		

More detailed information will be forthcoming after the holidays including dates for all of our meetings and where you can access the questionnaire. We look forward to your participation in this important endeavor! As we plan our way, may our Lord and Savior Jesus Christ continue to direct our steps.

In Christ's Service,

*Rev. Fr. Paul A. Kaplanis*

Rev. Fr. Paul A. Kaplanis  
Dean

*Rev. Fr. Christos P. Mars*

Rev. Fr. Christos P. Mars  
Presbyter

*Stephen Georgeson*

Stephen Georgeson  
Parish Council President

*Nickitas Demos*

Nickitas Demos  
Committee Chair



## TEMPLATE 4: Sample (Question) Agenda for Community Worship

Refer to Page 18

### QUESTION 1:

“Now faith is the assurance of things hoped for, the evidence of things not seen” (Hebrews 11:1)

What are your ideas for our community to better WITNESS our Faith through Service, Outreach and Fellowship?

### QUESTION 2:

“Worship him who made heaven and earth, the sea and the fountains of water” (Revelation 14:7b)

What are your ideas for our parish to grow spiritually closer to Christ through WORSHIP?

### QUESTION 3:

“So then brethren, stand firm, hold to the traditions which you were taught by us, either by word of mouth or by letter” (2 Thessalonians 2:15)

What are your ideas to provide continuing EDUCATION at the highest level?

### QUESTION 4:

“For every house is built by someone, but the builder of all things is God” (Hebrews 3:4)

What are your ideas to create new and improve existing FACILITIES to better serve our community?

### QUESTION 5:

“Your sons and daughters shall prophesy and your young men shall see visions and your old men [and women] shall dream dreams.” (Joel 2:28)

What OTHER ideas would you like to recommend?

## TEMPLATE 5: SWOT Analysis

Refer to Page 18

☐ Strengths & Weaknesses are Internal Areas within Parish Control

Top Strengths

- 1.
- 2.
- 3.
- 4.
- 5.

Top Weaknesses

- 1.
- 2.
- 3.
- 4.
- 5.

☐ Opportunities & Threats are External Areas a Parish has Less Influence

Top Strengths

- 1.
- 2.
- 3.

Top Weaknesses

- 1.
- 2.
- 3.

	Opportunities	Threats
Weaknesses		
Strengths		

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## TEMPLATE 6: Sample Survey Monkey

Refer to Page 18

As you answer the following questions, think about this in the context of the next five to eleven years.

1. What should our church be known for?

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2. What are the most important characteristics of an Orthodox Church and its community?

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3. As you think about our church, what's working well? (Strategies, Methods, Programs, Action, Attitudes, Skills, Etc.) [Ministries, Programs, Services]

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As you think about our church, what's not working well? (Strategies, Methods, Programs, Actions, Attitudes, Skills, Etc.)

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## TEMPLATE 7: Vision Statement

Refer to Page 23

### VISION STATEMENT:

#### Considerations:

- ☐ Keep it Short
- ☐ Focus on the Future
- ☐ Use Powerful Action Oriented Words
- ☐ Create a Picture of the Future that Stirs Passion in Others

#### Notes:

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## TEMPLATE 8: S.M.A.R.T.E.R. Goals

Refer to Page 26

Using the S.M.A.R.T.E.R. Goal structure helps you specify goals that can be met. SMARTER goals will help you to be successful so keep positive as you work through the answers to the guiding questions.

Initial Goal (Draft goal that you want to develop):

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1. Specific (who needs to be involved, what are you specifically trying to accomplish, when will this be accomplished, why is it important that the goal be reached, where will it occur, and will anything else need to be accomplished prior to obtaining this goal?)

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2. Measurable (How will the goal be measured? What will it be measured with?):

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3. Achievable (Do you have the tools/skills/resources that you need to reach your goal? If not, then what would be involved with assembling the tools/skills/resources that are necessary?):

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4. Relevant (What is the motivation for this goal? Is this shorter term goal relevant to your Macro Goals, Vision Statement, and Mission? Is this the right time to address this goal? ):

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5. Time-bound (What is the timeline for this goal including each step along the process? Is this timeline realistic considering other factors that are important to your community such as annual events, holidays, concurrent commitments, etc.? When will the goal be achieved?):

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## TEMPLATE 9: Goal Sharer

Refer to Page 27

**WHY** would you use this template?

Use this template to identify key audiences who need to be aware of your strategic and implementation plan, and define the tools, formats, timelines, and content for each.

**WHEN** would you use this template? When you are preparing for the launch of your strategic or annual plan and to manage ongoing communications

Intended Audience	Communications process				Content to be covered		
	Communications tool	Date	Format	Lead	Goal 1	Goal 2	Goal 3
Priest and Hierarchy	List type of communications tool (e.g., meeting, email, forum, etc.)	MM/YYYY	Describe form and venue of delivery	Designate leader for each communication	List issues to be covered within each related goal		
Parish Council							
Council of Ministries/ Ministry Leaders			Example: In-person presentation		Review outcomes and objectives		
General Assembly	meeting		Example Video and powerpoint		Launch strategy		
			In-person discussion		Detailed work planning		
All of Community	EXAMPLE: Monthly newsletter with stories on progress	Monthly, starting	Email and website		Monitoring, performance measurement, and recognition of progress		

## TEMPLATE 10: Vision Statement

Refer to Page 30

WHY would you use this template?

For each goal, use this implementation template to assign roles, and estimate anticipated outcomes, milestones, and resources required, and interdependencies with other goals

WHEN would you use this template?

After SMART goals have been determined

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1. GOAL # : *Name of Goal*
  
  2. EXPECTED RESULTS: *Answer*
  
  3. TEAM:
    - Goal Leader: *Name, Title, Role*
  
    - Goal Team Member: *Name, Title, Role*  
*Name, Title, Role*  
*Name, Title, Role*
  
    - Proposed Start Date: *MM/DD/YY*
    - Proposed End Date: *MM/DD/YY*
  
  4. RESOURCES REQUIRED:
    - Financial/Other Implications: *Describe staff and volunteer time associated with implementing goal*  
*Describe other financial needs or resources associated with implementing goal*
  
  5. INITIATIVE WORK PLANS AND INTERDEPENDENCIES:
    - Objectives: *List sub-goals in chronological order of estimated completion*
    - Outcomes: *List the expected outcomes for each sub-goals*
    - Lead: *Designate the person who will own the sub-goal*
    - Due Date/ Milestone: *MM/YY*
    - Resources: *List requirements (i.e. Fundraising, training, staff, volunteers, education, etc.) needed to achieve each sub-goal*  
*Include any interdependencies with other goals needed to achieve this goal*