

2024 BI-MONTHLY MINISTRY SERIES



ORTHODOX
PARISH LEADERSHIP



Strategic Planning Parish Leadership Development

Monday, September 16, 2024

For Tonight

Plan

Lead



For Tonight





"For I know the plans I
have for you, declares
the LORD, plans for
welfare and not for
evil, to give you a
future and a hope."

Jeremiah 29:11

PARISH STRATEGIC PLANNING

"VISIONING FOR THE FUTURE"

A GUIDEBOOK FOR OUR PARISHES



GREEK ORTHODOX METROPOLIS OF SAN FRANCISCO

GREEK ORTHODOX CHURCH OF THE ASSUMPTION
STRATEGIC PLAN
2022-2026



Growing
in Faith and Love
through Christ

HOLY TRINITY
GREEK ORTHODOX
CATHEDRAL
PARISH
Revitalization
PLAN
2021-2024

Saint Basil Strategic Plan



Growing
TOGETHER IN CHRIST
Romans 12:3-13



Holy Apostles
Greek Orthodox
Church
Shoreline, Washington

"Growing Christ's Church,
Nourishing a Community of Love"
Strategic Ministry Plan 2018 - 2022



SAINT PAUL'S
GREEK ORTHODOX CHURCH
PARISH STRATEGIC PLAN
2024-2026

Approved by St. Paul's
General Assembly
November 19, 2023

Used by over 100 ministries &
parishes across Metropolises and
Jurisdictions

What is Strategic Planning ?



Systematic - Respectful - Open - Inclusive - Transparent



Transactional

“...we are experiencing an increase in church attendance; parishioners participating in ministry; and growth in stewardship.”

Fr. Dean Kouldukis

“... the process culminated in the approval of a defined plan, embraced by our parish in unity, to successfully relocate and rebuild our church campus.”

Billy Anastopoulos - PC President

“...we are seeing results in parish growth, ministry growth and are embarking on a plan for overall site development.” Fr. Paul Paris

Transformative

“ the planning process created a safe place to discuss painful and difficult issues so we could creatively discover our purpose, values and strategic goals. ” - Fr. Tom Tsagalakis

Unity

Consensus

Common Journey

Accountability & Transparency

Cultural Redefinition

Re-Awakening to the WHY

Plan Types

Strategic

Revitalization

Capital Campaign

Annual Parish Plan

Rationale & Context

Rationale

Early Indicators ... Late Adoption

Parish Readiness

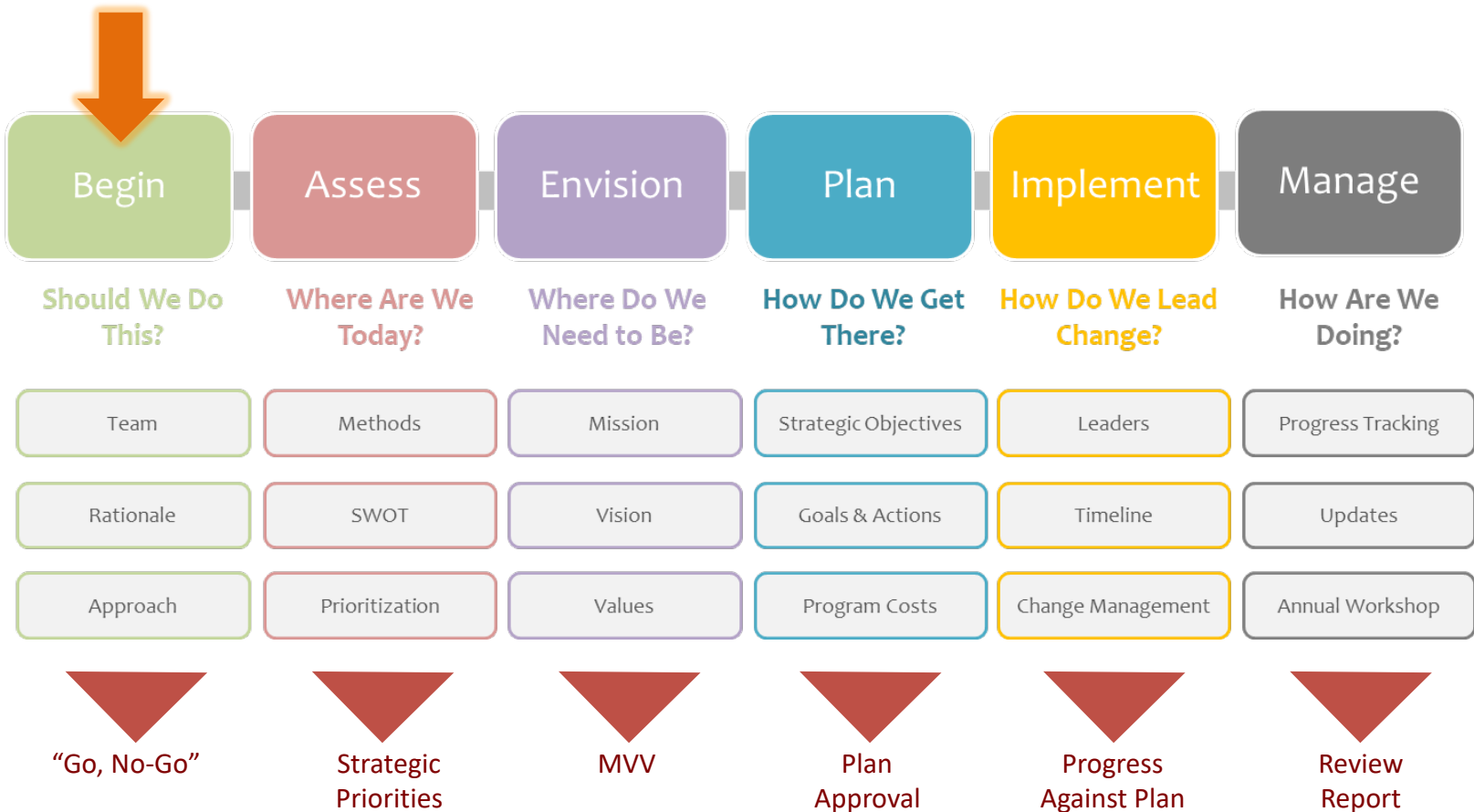
History of Planning

Process vs Plan

Change & Status Quo

Approach

Begin



Team Organization

Begin



Getting Started

Begin

01

Form 4 person
Strategic Planning
Leadership Team
(SPL)

02

SPL Develops
Scope, Rationale &
Approach

03

Parish Council &
General Assembly
Approves to
Proceed

04

Form 12 - 20 person
Strategic Plan Team
(SPT)

05

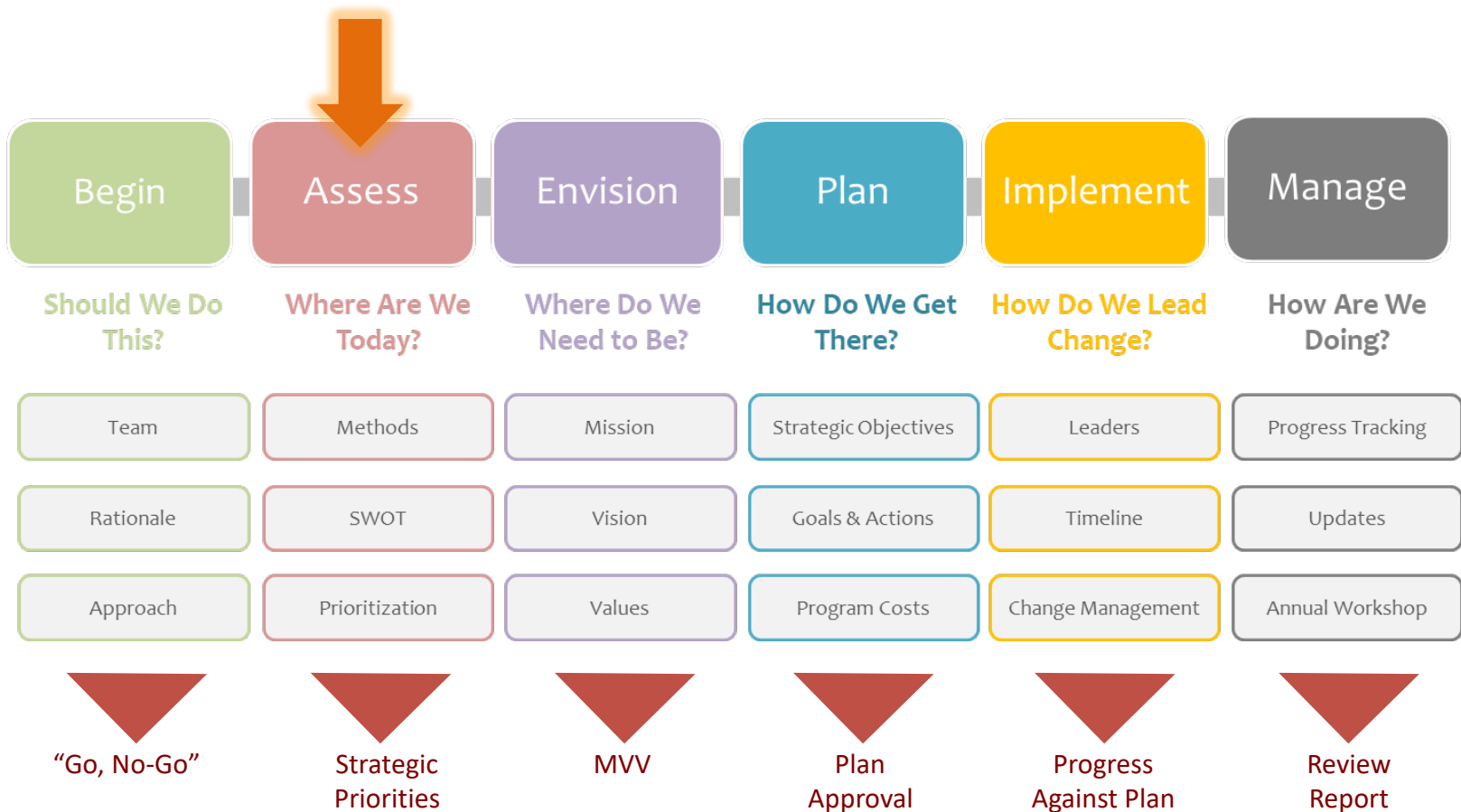
SPT Orientation &
Launch

06

Parish
Assessments
Begin

Approach

Begin



Data & Assessments

Assess



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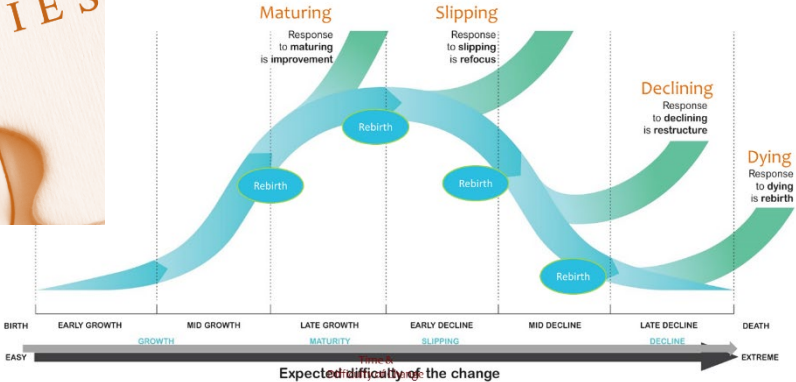
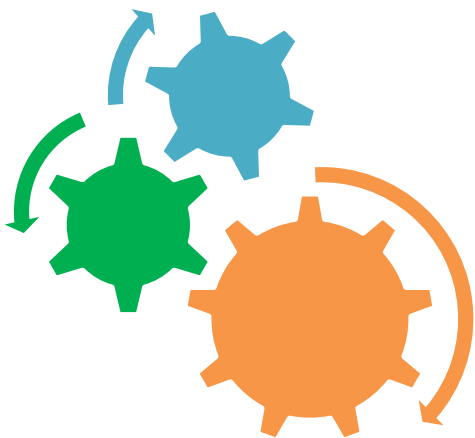
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Data & Assessments

Assess



Full Participation

Assess



“The way of a fool is right in his own eyes, but a wise man listens to advice.” Proverbs 12:15

A Special Word On Parish Surveys

Assess

- ✓ Recommended
- ✓ Expanded Insights
- ✓ Greater “Buy-In”
- ✓ “Process of Discovery”



“The way of a fool is right in his own eyes, but a wise man listens to advice.” Proverbs 12:15

Parish “Dashboard”

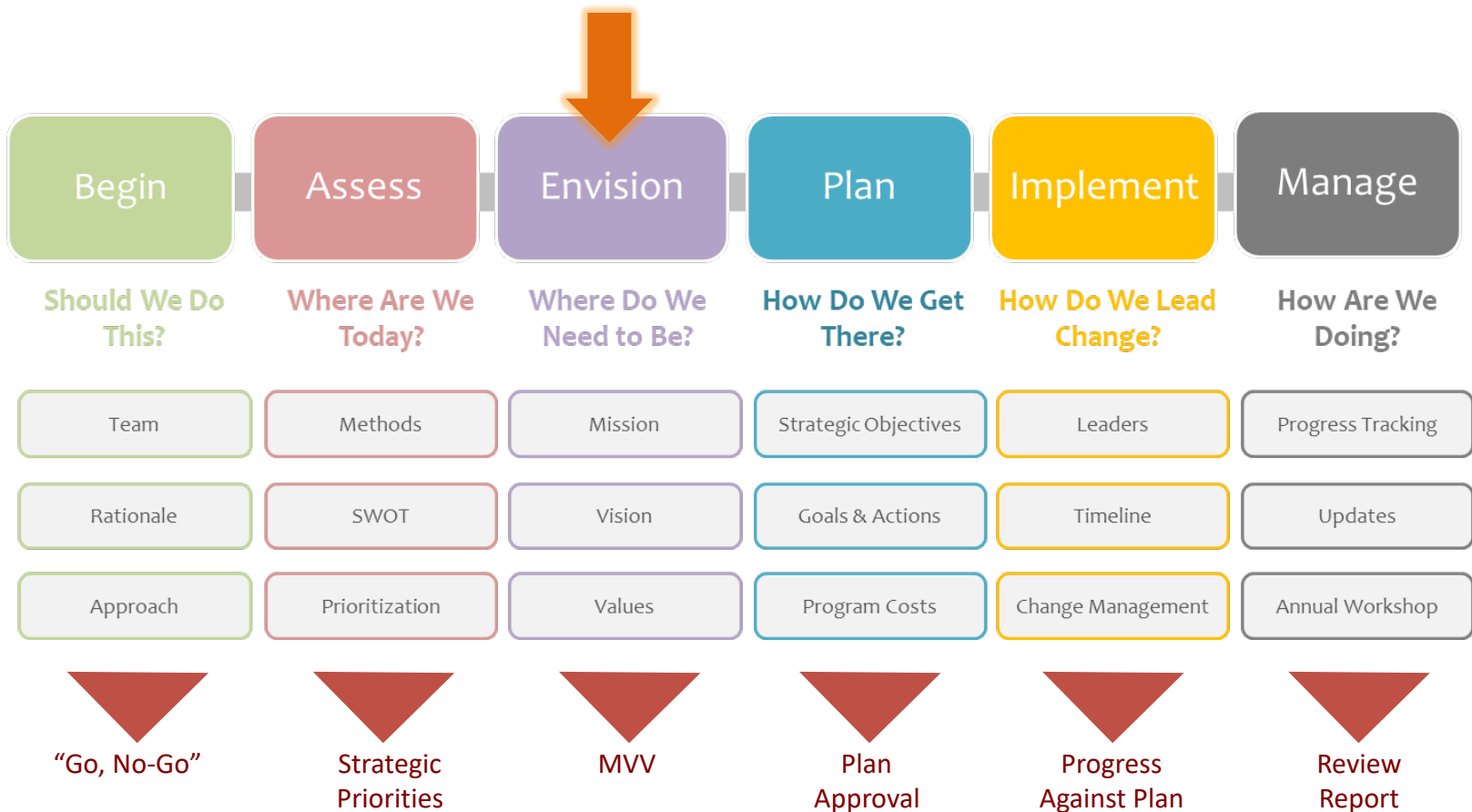
Assess

- Doing Well
- OK, but could do better
- Needs improvement
- Unrated

PARISH CONDITION GREEK ORTHODOX CHURCH 10.1.24

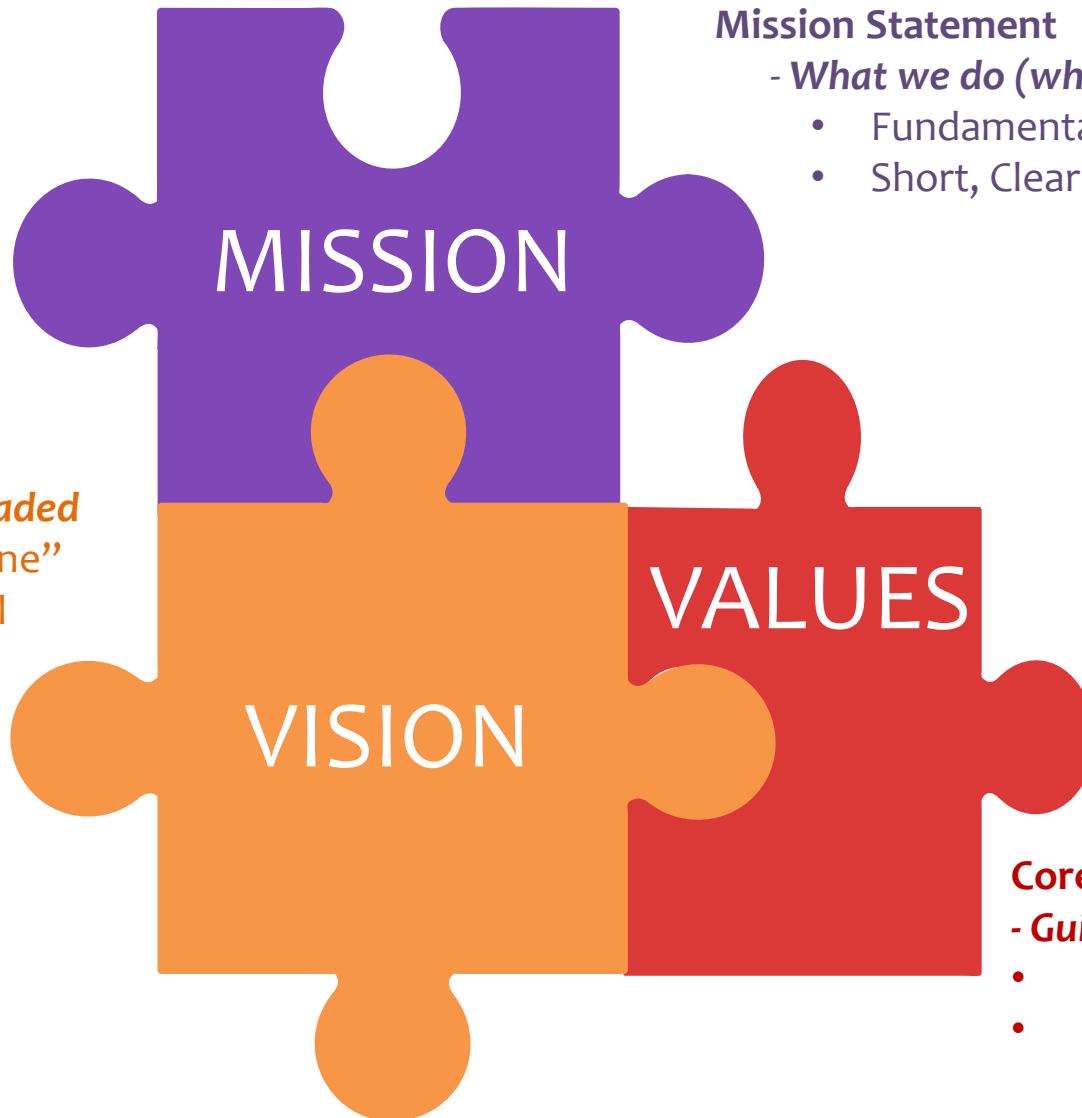
CONVERTS / SEEKERS	FINANCIAL MANAGEMENT	FUND RAISING	OPERATING FOCUS
PARISH EFFECTIVENESS	PARISH HEALTH	PARISH LIFECYCLE	PARISH OPPORTUNITIES
PARISH PRIORITIES	REGISTRY TRENDS	STEWARDSHIP	SUNDAY ATTENDANCE

Our Approach



Setting the Course

Envision



Mission Statement

- *What we do (why)*

- Fundamental Reason For Existing
- Short, Clear & Concise

MISSION

Vision Statement

- *Where we're headed*

- “Horizon Line”
- Aspirational
- Inspiring

VISION

VALUES

Core Values

- *Guide our actions*

- Traits we most value
- Provides a framework

Vision Casting



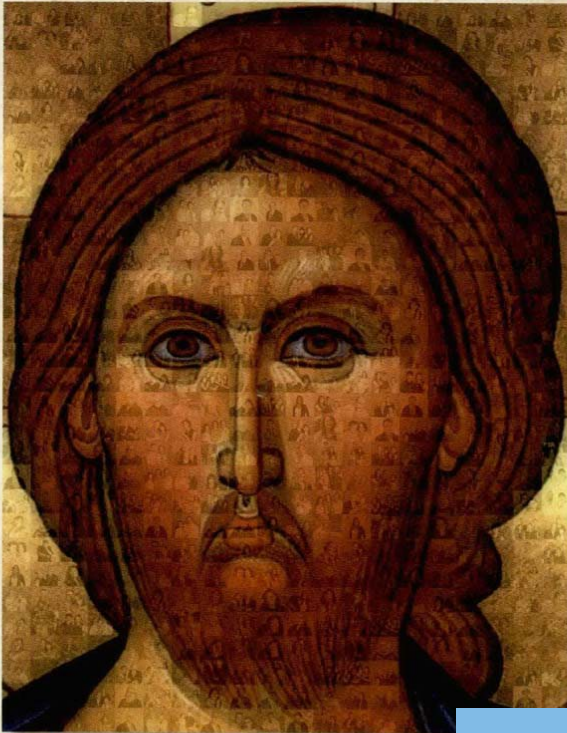
& / or



TRENDING: SLOGAN – BASED MISSION STATEMENTS

SAINT BARBARA
GREEK ORTHODOX CHURCH

†One in Christ†



Holy Apostles
Shoreline, WA

“Growing
Christ’s Church,
Nourishing a
Community of
Love”

Saint Basil Strategic Plan



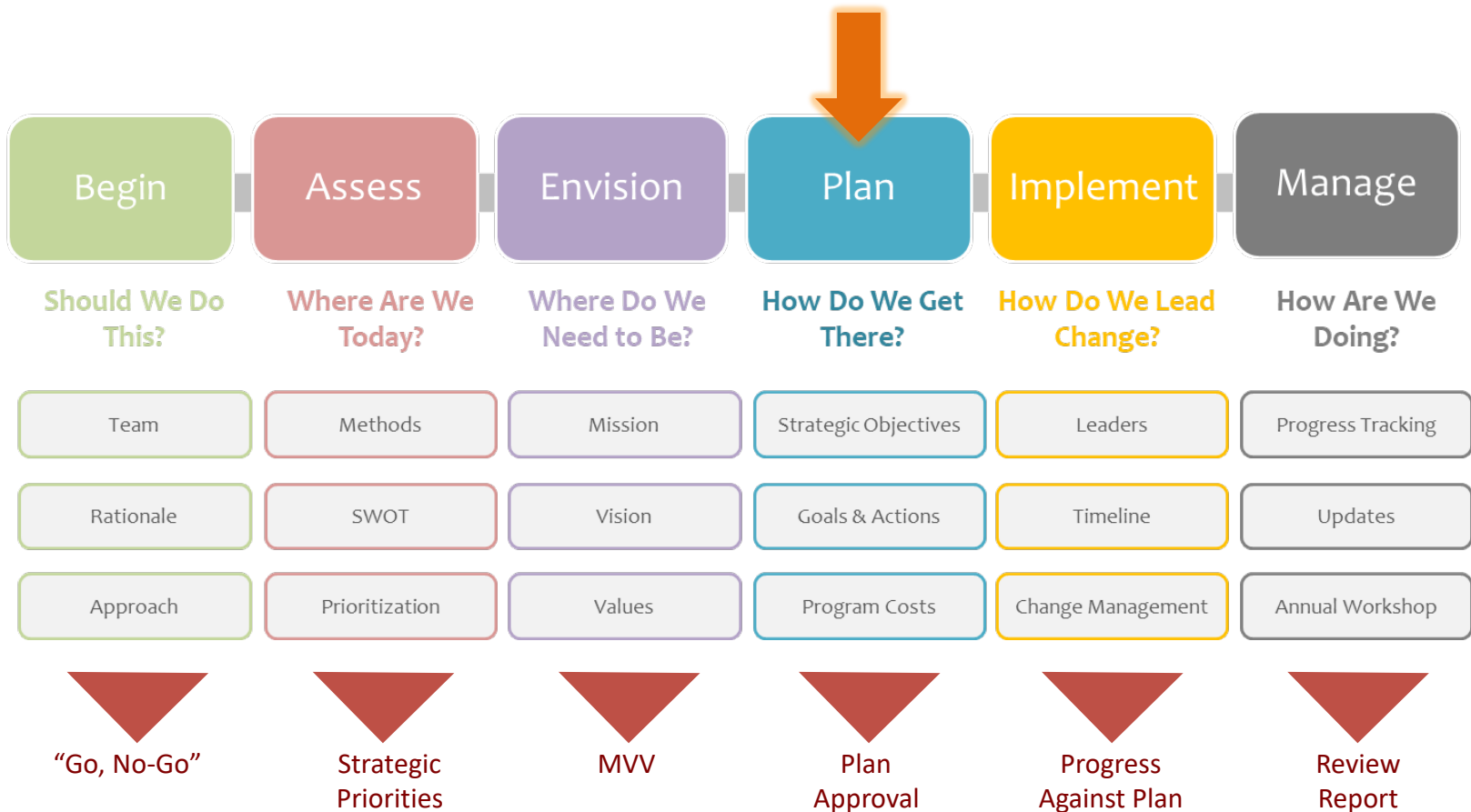
Growing
TOGETHER IN CHRIST

Romans 12:3-13

St. Basil – San Jose
*Being Disciples, Making Disciples,
and Growing Disciples of Jesus Christ.*

St. Paul’s – Irvine, CA
“Make Love Your Aim”

Our Approach



Framing the Plan

Plan

KEY STRATEGIC AREAS



Building the Plan

Plan



use your
development
template

Building the Plan

Plan

EACH VISION TEAM WILL CREATE A UNIQUE PLAN TO MEET THEIR STRATEGIC OBJECTIVE

- ✓ TEAM LEAD & ~ 8 MEMBERS
- ✓ GUIDING SCRIPTURE
- ✓ KEY QUESTIONS
- ✓ STRATEGIC OBJECTIVE (CONFIRM)
- ✓ GOALS (TO SUPPORT OBJECTIVE)
- ✓ ACTIONS (TO MEET GOALS)

PLANNING TEMPLATE

THIS IS THE ACTUAL TEMPLATE YOU WILL BE USING TO COMPLETE YOUR PLAN.

ONCE COMPLETED, PLEASE SEND TO:
Fr. Ciprian: frciprianasas@annunciation.org
Victor Frangopoulos: sp@annunciation.org
Steve Tibbs: stibbs@bluevase.com

Vision Team Title:

Date Submitted:

Guiding Scripture:

Team Members:

Strategic Questions Addressed:

Strategic Objective:

Goals (list numerically):

Key Action, Measures and Timing (for each goal):

Goal #

Key Action	Measure	Timing

Please add as many pages and additional rows to your table as necessary.

Building the Plan

Plan

ST. ANTHONY GREEK ORTHODOX CHURCH

PARISHIONER ENGAGEMENT

"And let us consider one another in order to stir up love and good works." - Hebrews 10:24

Date Submitted: April 30, 2023

Team Members:

George & Karen Pappas (Co-Leads), Jeff Levine, Dorothea Love, Jennifer Mitchell, and Paul Stubb

Strategic Objective:

Create and maintain an inclusive and positive parish environment that fosters increased participation and parish unity.

Strategic Questions Addressed:

- How can we make visitors feel more welcome and transitioned into the life of our church?
- How do we connect our parishioners to our ministries?
- How can we increase volunteer participation in our parish?
- How do we create interest-based fellowship?
- How can we reach out to our parishioners and show that we care about them?
- How do we ensure the implementation of parishioner engagement "Key Action" items?

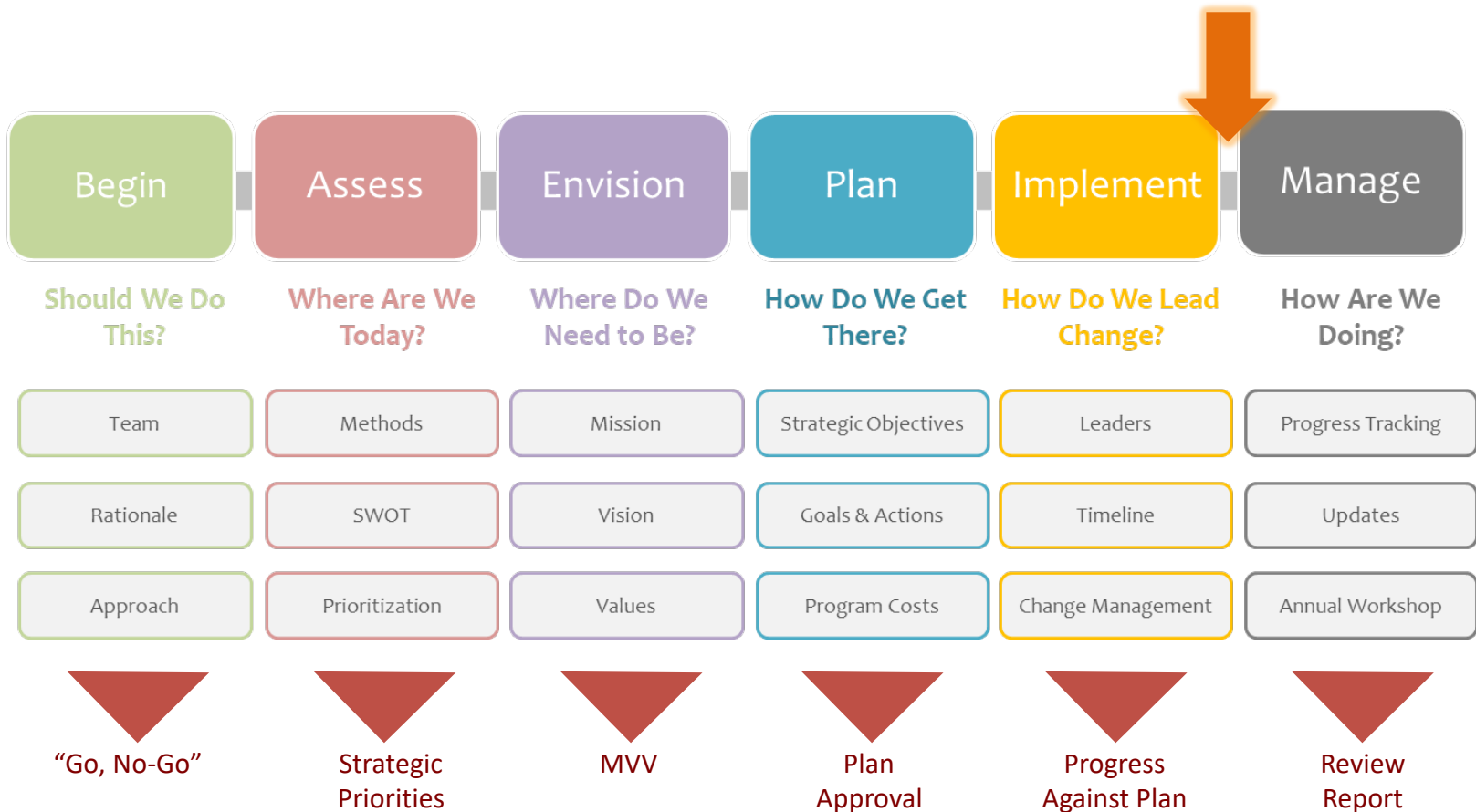
Goals:

1. Develop a Welcome Ministry Program
2. Develop a platform to more effectively communicate our ministries to our parishioners
3. Identify and leverage parishioner talents
4. Define, coordinate, and schedule activities, events, and workshops based on parishioner interests
5. Initiate a formal process for parishioners to communicate their needs and have "Care Ministry" individuals respond to them
6. Establish an ongoing Parishioner Engagement Team (PET)

Goal 1: Develop a Welcome Ministry Program

	Key Action	Measure	Timing
1	Select Welcome Committee liaisons to PET	Liaisons selected and responsibilities documented	August 2023
2	Review and update Welcome Team procedures	Welcome Team procedures documented	September 2023
3	Define and document usher integration with Welcome Team	Usher Team procedures updated to include Welcome Team integration	September 2023
4	Document new visitor initial and follow-up procedures	Procedures documented	September 2023
5	Identify key visitor "touch points" to ensure every point of interaction is welcoming	Touch points identified and hospitable interaction strategies developed and documented for each touch point	October 2023
6	Review and update welcome materials	Materials developed	November 2023
7	Define and communicate vision of "welcoming parish"	Vision defined and method of communication selected and scheduled	November 2023
8	Set up and record Welcome Team Training Module	Training module completed and recorded, including methods & scripts	January 2024
9	Develop format and set up twice yearly "Getting to know St. Paul's" sessions with priest and ministry heads	Format developed and times scheduled	March 2024
10	Identify ways to use key parish events (such as the Greek Festival, retreats, etc.) to welcome and educate visitors about St. Paul's	Events identified where Welcome Ministry will have a presence	May 2024
11	Set up a "Welcome Pavilion"	Pavilion set up	January 2025

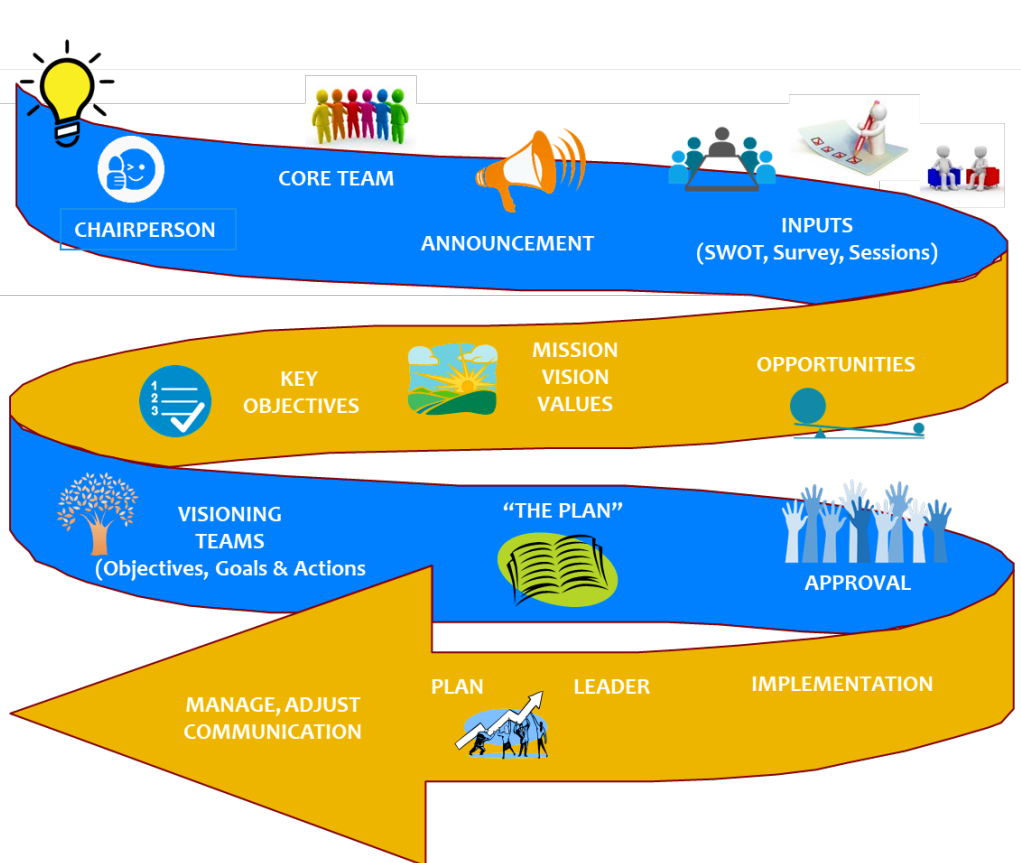
Our Approach



The Journey

Implement

Manage



- ❖ Implementation is KEY
- ❖ Identify Implementation Lead
- ❖ Track and Report Status
- ❖ Migrate to Ministries
- ❖ Report @ Every General Assembly
- ❖ Annual "Tune-Up" / PC Review

Questions



Part 2 Leadership Development

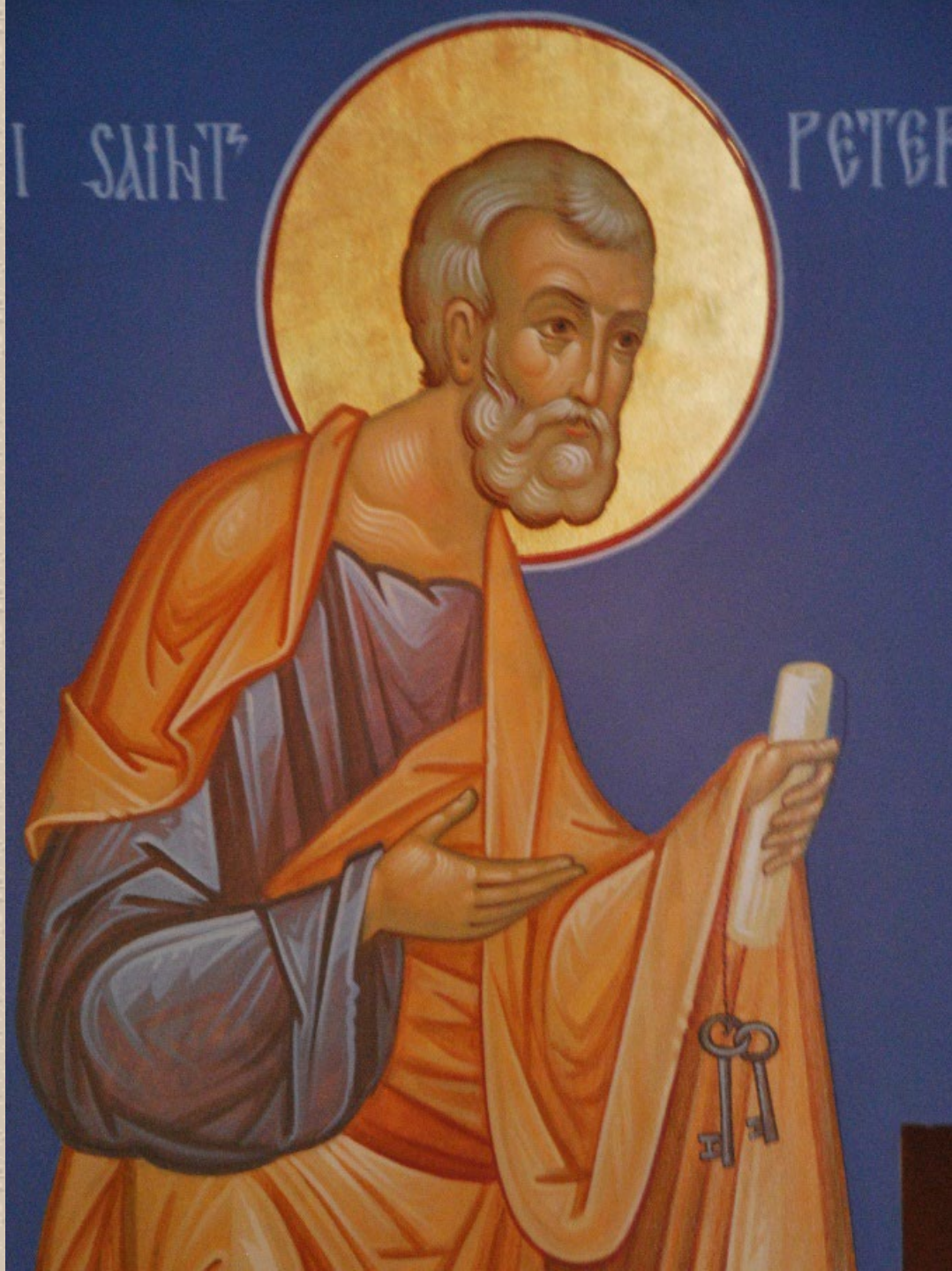


For Tonight

Define

Attributes

Development Considerations



"Shepherd the flock of God that is among you, exercising oversight, not under compulsion, but willingly, as God would have you; not for shameful gain, but eagerly; not domineering over those in your charge, but being examples to the flock."

1 Peter 5:2-3

Leadership Defined

- ✦ *A ministry of the Church shared by all who are in Christ*
- ✦ *Not limited to a special, professional class, nor solely the Priest*
- ✦ *Encourages “followership” exercising influence, not power (neither positional, financial, experiential nor personality)*
- ✦ *Adaptable in style to meet differing situations or contexts*
- ✦ *Realizes that Defining Moments shape the parish culture*
- ✦ *Embodies values into the practices which shape the parish or a ministry through its worship, witness, ministries and culture*



You Were NOT
Called Merely To
Lead Your Parish,
But Were Called To:

Bring People Closer To Christ
and Foster a Connection to
His Church

Harmonized Parish Leadership

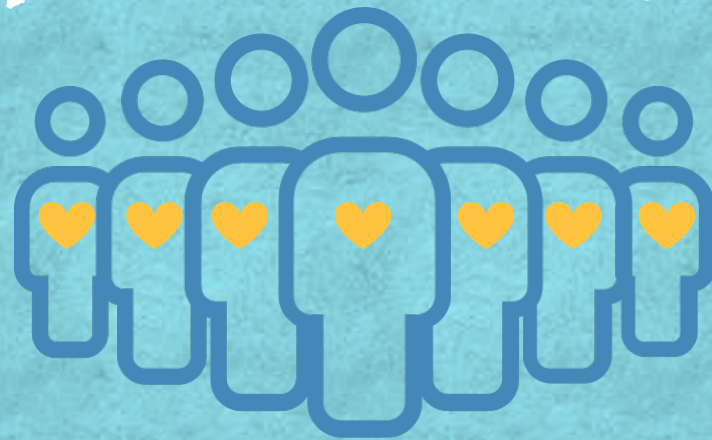
“The Priest, as head of the Parish, by virtue of the ecclesiastical authority vested in him, shall guide and oversee the Parish.”



“To serve on a Parish Council is a ministry, and all those who serve are called to represent Christ and the Orthodox Faith to all whom they meet in all aspects of life.”

WHY

Health



Leadership

For Tonight

Define

Attributes

Development Considerations

“The most basic task of the Church leader is to **discern** the spiritual gifts of all those under his authority, and to encourage those gifts to be used to their fullest, for the benefit of all.”

“The leader must be dignified, yet modest, impressive yet kindly, masterful yet approachable, impartial yet courteous, humble but not servile, vehement yet gentle....”



Effective Leader Attributes

40 CLERGY, PARISH COUNCIL PRESIDENTS & MINISTRY LEADERS WITHIN THE METROPOLIS OF SAN FRANCISCO, LISTED THE KEY ATTRIBUTES FOR AN EFFECTIVE PARISH LEADER.

- ❖ Loves Christ and His Church Matthew 22:37
- ❖ Lives the Life and Practices of the Church 1 Corinthians 12:27-13:13
- ❖ Works in “active partnership” with the Parish Priest 1 Corinthians 4:15
- ❖ Responsible steward of the church's gifts 2 Corinthians 8:1-5
- ❖ Maintains appropriate confidentiality whenever necessary Mark 7:31-37
- ❖ Servant Leader John 15:1-17
- ❖ Member in Good Standing of Parish John 17:1-26
- ❖ Conciliar in Decision Making Acts 15:6-21
- ❖ Ministry Focused: Creates synergy, with Parish Ministries Acts 15:22-31
- ❖ Action-Oriented; “Gets Stuff Done” Colossians 1:24-29
- ❖ Can explain the beliefs of the Greek Orthodox Church Nicean Creed
- ❖ Carries oneself as an "Ambassador of Orthodoxy” at all times 1 Corinthians 1:1-9
- ❖ Transparent, and trustworthy, in all communications and actions Colossians 2:6-23
- ❖ Provides unconditional love 1 John 4:7-11

Leader Pyramid Of Attributes



- + Action-Oriented; “Gets Stuff Done”
- + Ministry Focused Creating synergy amongst all Parish Ministries
- + Conciliar in Decision Making

Servant Leader

- + Carries oneself as an "Ambassador of Orthodoxy" at all times
- + Transparent, and Trustworthy, in communications & actions
- + Maintains appropriate confidentiality

Christian Commitment

- + Loves Christ and His Church
- + Provides Unconditional Love
- + Lives the Life and Practices of the Church
- + Can explain the beliefs of the Greek Orthodox Church

- + Works in “active partnership” with the Parish Priest
- + Responsible Steward of the Church’s Gifts
- + Member in Good Standing of Parish

SERVANT LEADERSHIP



“For even the Son of Man did not come to be served,
but to serve” *Mark 10:45*

MULTI-DIMENSIONAL ROLES



Self

Self Readiness

“how will I prepare myself to be a positive role-model and effective member of my ministry?”



Ministry

Ministry Team

“how will the ministry behave and operate in order to become an effective Christian leadership team?”



Parish

Parish Connection

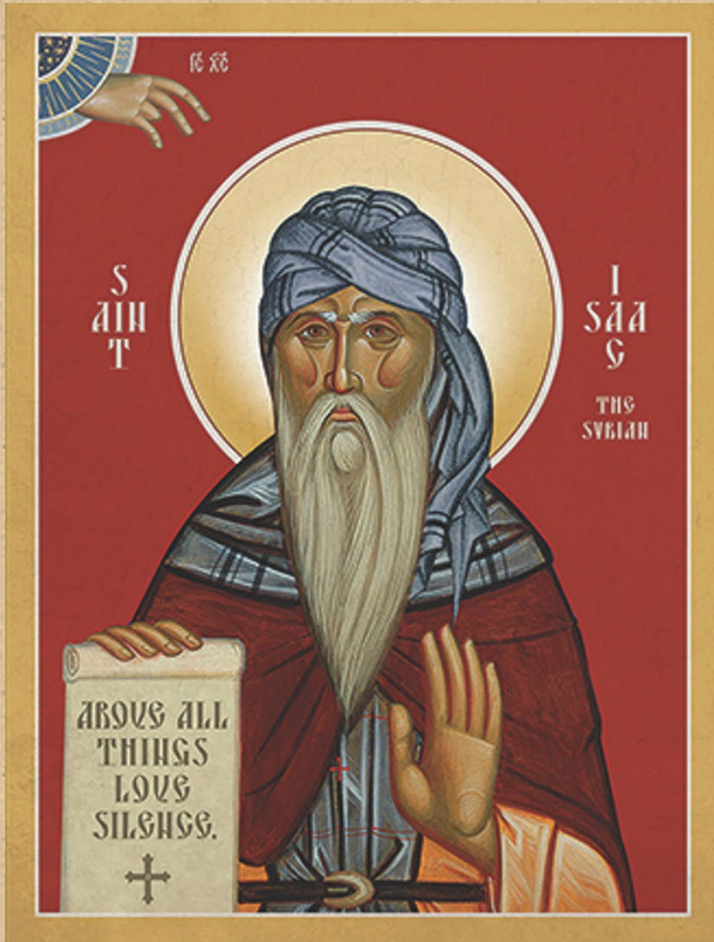
“how will the ministry connect with the parish at-large and with other ministries within the Parish and the Metropolis?”

For Tonight

Define

Attributes

Development Considerations



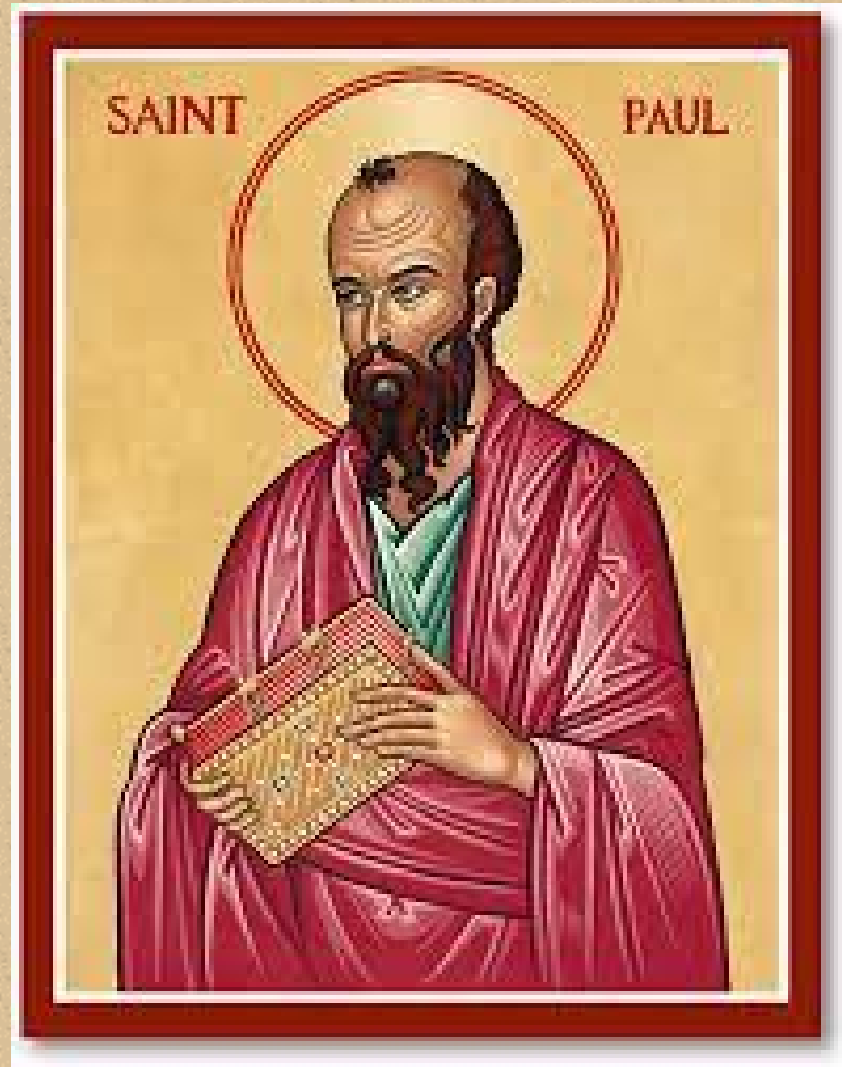
“Always consider yourself as needing instruction so that you may be found wise throughout your life.”

- St Isaac the Syrian

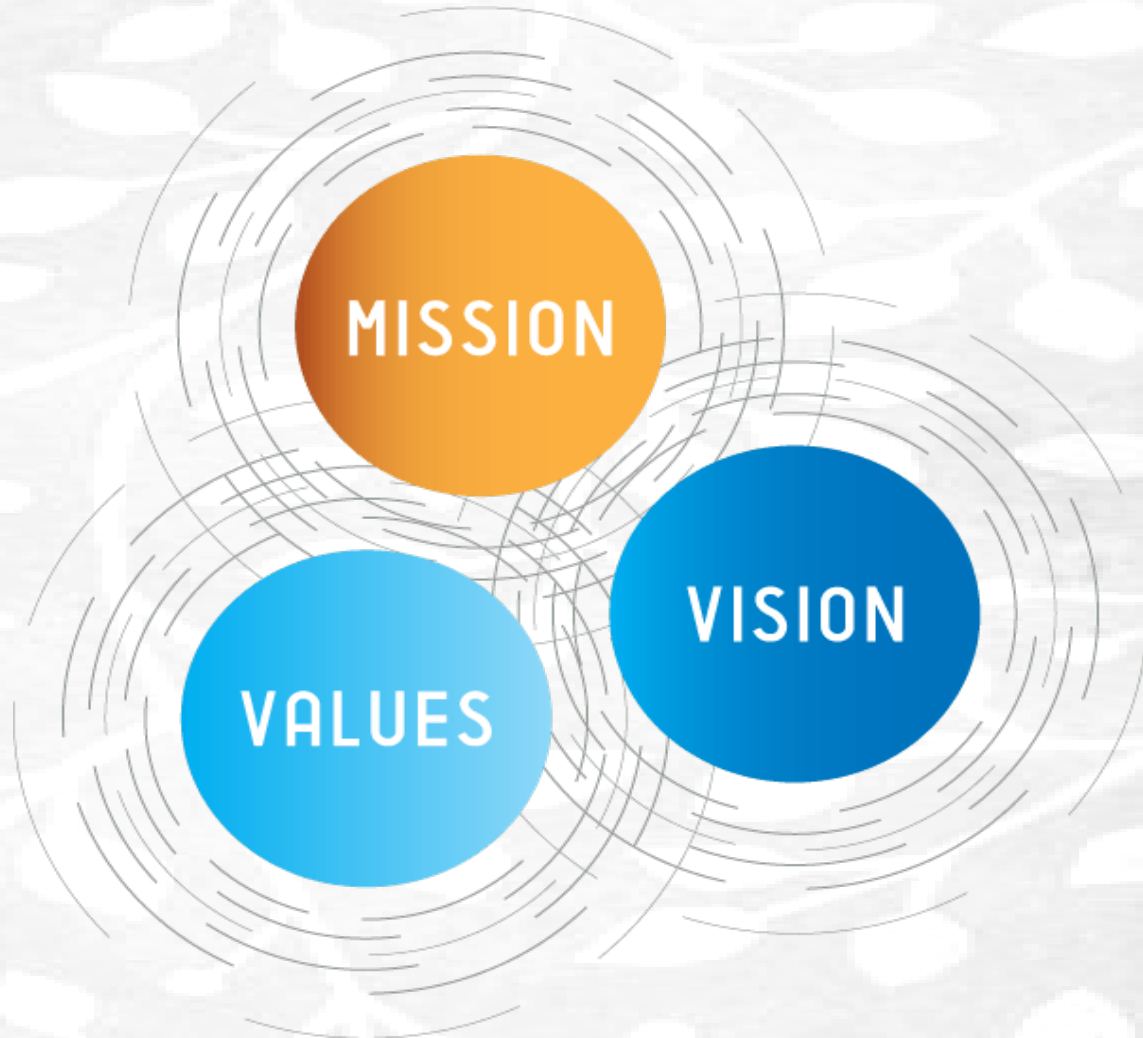
Designing the Leadership Development Plan

1. Pray and Seek Spiritual Discernment
2. Clarify the Church's Vision and Mission
3. Assess Current (and future) Leadership Needs
4. Define Leadership Qualities and Competencies
5. Develop Training and Equipping Programs
6. Create a Leadership Pipeline or Succession Plan
7. Review and Adjust Annually

"And this is my prayer: that your love may abound more and more in knowledge and depth of insight, so that you may be able to discern what is best and may be pure and blameless for the day of Christ" Philippians 1:9-10



Supporting the WHY





“Optimal Convergence”

“Parish Needs - Next 18 Months” (July)

Highest Rated

	No need	Low Importance	Moderate	Important	Very Important	Average
Leadership Development	2	7	41	79	73	4.06
Parish Council Effectiveness	7	11	52	67	65	3.85
Stewardship & Generosity	3	14	55	75	55	3.82
Ministry Effectiveness	7	11	55	70	59	3.81
Financial Health	4	12	63	66	57	3.79
3+ Year Strategic Plan	10	18	41	76	57	3.75
Welcome Ministry	6	19	60	64	53	3.69
Annual Parish Planning	7	19	60	74	42	3.62
Overall Parish Health	6	26	61	57	52	3.61
Capital Campaign Support	11	28	61	52	50	3.50
Planned (Estate) Giving	7	40	76	52	27	3.26

“Parish Health Check” (August)

	Total Score	Green	Yellow	Red
Is loving.	360	175	10	3
Is trustworthy.	350	165	20	3
Centers itself around a cycle of worship and spiritual growth.	348	163	22	3
Is welcoming and friendly to visitors.	346	162	22	4
Is financially responsible.	344	160	24	4
Recognizes the essential task of caring for one another.	341	158	25	5
Sees the good in people and assumes the best in others.	340	155	30	3
Embraces diversity—building bridges with people of different backgrounds.	305	126	53	9
Has a clear vision and mission.	280	115	50	23
Implements programs that serve others outside of the parish.	261	94	73	21
Empowers parishioners to effect change as decision-making and power are s	256	93	70	25
Continually develops great leaders.	244	86	72	30

Lowest Rated

September

Sufficient # of Leaders?

- 2 Yes
- 24 OK and No

Conduct Annual Development?

- 6 Yes
- 20 No

Who Should Participate?

- PC and Ministry Leaders
- Clergy

Preferred Delivery?

- Parish Saturday Seminars
- Micro Topics





RESULTS - ALL "2 X 2" PARISHES

How important is it to include these topics in a leadership development program for your parish?

	Critical	Very Important	Important	Nice to Have	Not Important	Average
Becoming a servant leader	13	9	3	1	0	4.3
Embracing the attributes of an effective Christian leader	10	11	4	1	0	4.2
Leading change	12	7	6	0	1	4.1
Achieving trust	9	12	3	2	0	4.1
Managing difficult discussions & conflict management	10	9	6	1	0	4.1
Ensuring decision-making & consensus building	10	9	5	2	0	4.0
Achieving financial health	11	6	8	0	1	4.0
Ensuring ministry effectiveness & coordination	7	12	7	0	0	4.0
Energizing outreach & evangelism	9	9	7	0	1	4.0
Becoming a healthier parish	7	13	5	0	1	4.0
Ensuring effective managerial skills	9	9	5	3	0	3.9
Delivering a stellar communications program	8	9	8	1	0	3.9
Expanding stewardship & creating a culture of generosity	8	12	3	2	1	3.9
Creating & living the parish "WHY" statement	9	8	7	1	1	3.9
Managing volunteers	9	8	7	1	1	3.9
Establishing faith formation programs & approaches	8	10	5	2	1	3.9
Improving team building & effectiveness	5	14	5	2	0	3.9
Cultivating the parish culture	7	10	5	3	1	3.7
Creating the parish (or ministry) mission & vision	6	12	3	4	1	3.7
Creating the annual parish plan	6	9	8	2	1	3.7
Understanding church governance & the "UPRs"	4	6	11	5	0	3.4



Shortage Of Leaders?



System Issue - No Pathway

No Call for Leaders - People Don't Realize (or know) There's a Need

Pool To Draw From Is Too Small

Not Offering "Ministry of Interest"

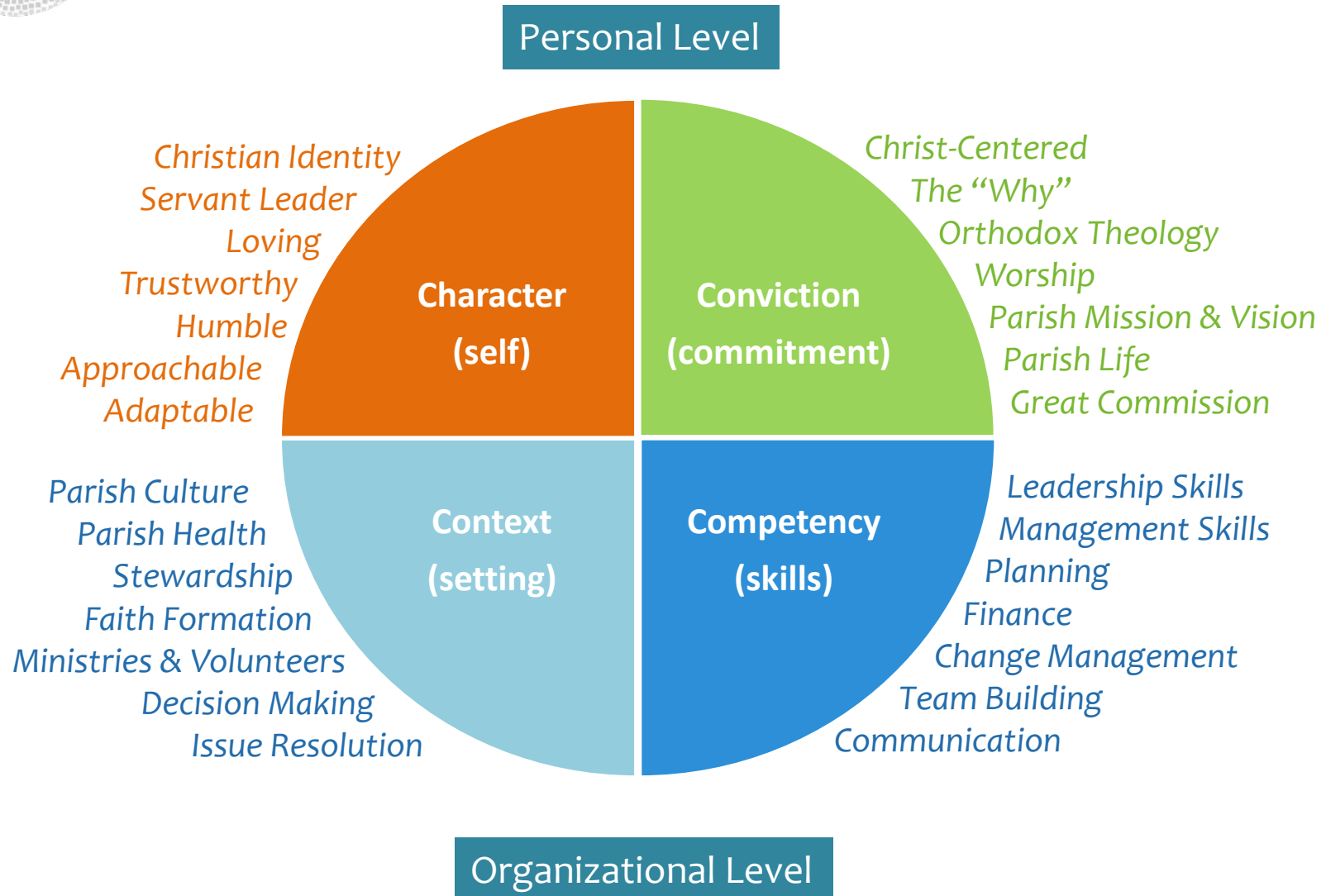
"Worker Bee" Culture - Focused on Tasks and Not Development

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4 C's Of Leadership Development Model



Manager or Leader?



Development Needs Analysis

In which areas would it most beneficial for the Parish Council to receive development support in its efforts to become more effective as a leadership body, improve the parish's overall health and to bring people closer to Christ and His Church?	
Parish Development Series	Rank 1 - 7
Establishing & Living the Parish Vision	
Creating the Parish Plan	
Achieving Operating Excellence	
Becoming a Healthier Parish	
Understanding Church Governance, Hierarchy & UPRs	
Ensuring Effective Ministry Management & Coordination	
Energizing Outreach & Evangelism	
Parish Leadership Series	Rank 1 - 7
Developing Leadership Attributes, Roles and Styles	
Managing Difficult Discussions & Conflict Management	
Utilizing Effective Decision-Making & Building Consensus	
Improving Parish Council Effectiveness	
Achieving Trust Through Communication & Transparency	
Expanding Stewardship & a Culture of Generosity	
Expanding Parishioner Engagement	

Development Approaches



Workshops



Mentoring (Emerging Leaders)



Succession Planning



Leadership Training

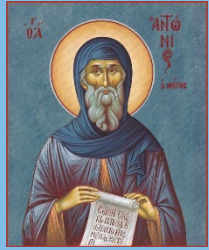


Content Delivery

A Few Words On Mentoring, Succession And Emerging Leaders...



SMALL STEPS
are **OKAY**



St. Anthony, Reno, NV. Development Plan & Schedule

1. Development Session #1 (4 hours – Oct 1 & Oct 8)

1. Agreement on Financial Condition of the Parish
2. “Faith and Light” Fundraising Update
3. “Basic” meeting governance elements: Agendas & Minutes
4. Behavioral Covenants

2. Development Session #2 (3 hours - Week of October 12)

1. Long-Term Vision and Values – Laying the Foundation
2. Role of the Church & the Priest
3. Health Attributes, Assessment, Roadblocks
4. Leading in a Church Setting (intro level only)

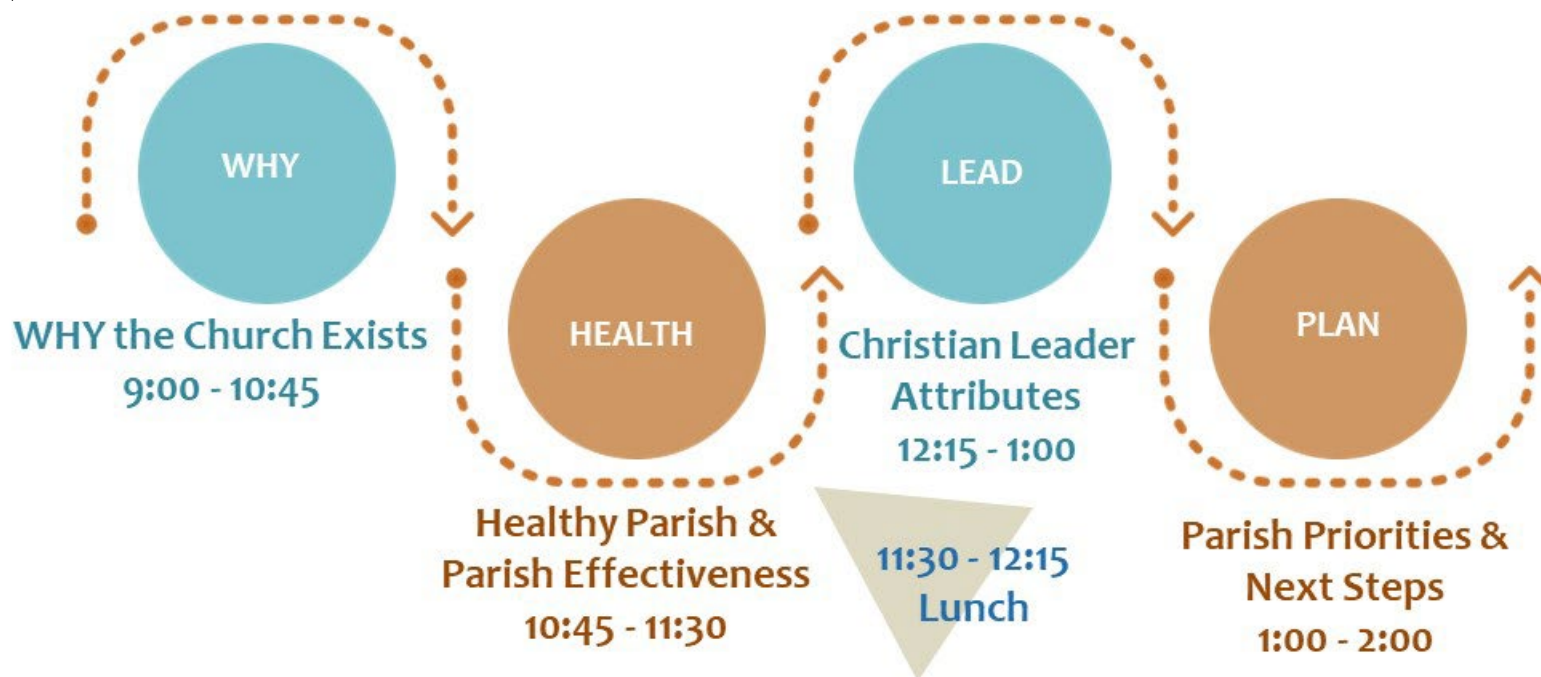
3. Development Session #3 (3 hours – Week of October 26)

1. Vision setting for 2021
2. 2021 Planning & Priorities
3. 2021 Budgeting Integration



St. Demetrios Greek Orthodox Church Tucson, Arizona

Parish Leadership Retreat 1.28.23



TOPICS FOR TODAY

Resurrection Greek Orthodox Church Leadership Seminar

Themes		Agenda	Activities
Healthy Parish		10:00 – 12:30	Opening Prayer / Welcome Ice Breaker Healthy Parish
Preparing Self		12:30 – 1:15 1:15 – 2:15	Lunch (with Discussion Questions) Leadership Attributes
Preparing Team			Parish Council & Ministry Effectiveness
Guiding the Parish		2:15 – 2:30 2:30 – 4:00	Break Intentionality - Mission & Goals Conciliarity - Engagement / Consensus Building Planning & Communications

ST. DEMETRIOS, CONCORD, CA

LEADERSHIP RETREAT

JANUARY 26 & 27 2024

WHY

WHY the Church Exists
Friday, January 26
6:30 - 9:00

HEALTH

Parish Health &
Effectiveness
10:00 - 11:30

LEADER

Saturday, January 27

Christian Leader
Attributes
12:30 - 1:30

MINISTRY

Linking Leadership &
Parish Effectiveness
1:30 - 3:00

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BARRIERS

Time

Talent

Treasures

Priority

QUESTIONS/COMMENTS?

