Strategic Planning

Holy Trinity & St. Nicholas Greek Orthodox Church

November 2017
Thank You …

Strategic Planning Committee

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What do you think we need to have accomplished at the end of the Strategic Planning exercise?
Individual Expectations

• Our plan, our vision in the next 5 years, look backwards and see what we need to do to accomplish it.
• Short, mid, long term direction for the parish, roadmap, action, plan and steps in those buckets that we need to complete.
• Tangible goals that we set and actionable strategy how to achieve.
• Currently planning by crisis. We had 15 year horizon and work backwards to achieve. Need to work our way back into our long term horizon.
• Grow our ministries and increase our membership, our outreach, involve more people.
Individual Expectations

• Power in having the conversation, having everybody on the same page, convey the vision to the wider community. Be more specific in the near term 2-3 years, cast vision for the long term.

• Strategic thinking, on paper, guiding the mission, the purpose of the board, having the measures in that strategic planning, including what we want to do, but specify what we don’t want to do.

• Need the buy-in of other community members, more ownership, the more ownership they feel we will grow more. Stop waiting for the same people of the community to do the work.

• Create a definitive mission statement and vision statement that people can coalesce around, otherwise it would be more challenging to get there. All the ministries and organizations can see and relate. How does it fit? (citing an example of a mission from St. George Greek Orthodox Church).
Where is our future?

VISION
What is our Roadmap?
How do we get there?

PROJECTS
Mission … Vision … Strategy … Tactics

Mission
- Establish a sense of urgency
- Get the right people, guiding coalition on-board, LRPC
- Articulate Vision in writing, communicate and clarify, get buy-In

Vision
- e.g. Education, Orthodoxy, Growth, preservation, personal development, outreach leader, etc.

Strategy
- e.g. Ministries, Sunday School, Youth Programs, Greek School, Chanting School, etc.
- Clearly define the specific areas of change
- Clarify the change elements that we want
- Confirm the sum satisfies vision

Tactics
- e.g. fund raisers, family events, classes, forums, additional clergy, etc.
- Specific activities and initiatives
- Identify interdependencies
- Confirm the sum of all satisfies strategy

Owners, Execution
- Clearly identify who and when
- Ensure guiding coalition is involved, maintains focus
- Continue communicating and clarifying Vision

Who/When?
Step 1 … Mission and Vision

Mission

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Owners, Execution

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Who/When?
What is a Vision

• It is a statement
• It creates sense of urgency and calls for action
• It is an inspirational, clear, concise, and resonating
• It is easily understood and memorable
• It connects with world realities and identifies opportunities
• It reinvigorates, compels and empowers
Let’s now pull together and craft our own …
Mission Statement

To proclaim, preserve and practice the Orthodox Christian faith, to glorify God, serve our community, and grow our Parish, for the salvation of all.
Vision Statement (Final)

- The vision for Holy Trinity-St. Nicholas Greek Orthodox Church is to be a devoted Parish where we:
  - Create a spiritual atmosphere of worship, engagement, fulfillment and inspiration.
  - Promote the word of God within our families and our communities.
  - Positively impact each other, knowing that God Himself set an example of love, service and giving.
Step 2 ... Strategy (Strategic Pillars)

- Establish a sense of urgency
- Get the right people, guiding coalition on-board, LRPC
- Articulate Vision in writing, communicate and clarify, get buy-in

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- Confirm the sum satisfies vision

- Specific activities and initiatives
- Identify interdependencies
- Confirm the sum satisfies strategy

- Clearly identify who and when
- Ensure guiding coalition is involved, maintains focus
- Continue communicating and clarifying Vision

- e.g. Ministries, Sunday School, Youth Programs, Greek School, Chanting School, etc.
- e.g. fund raisers, family events, classes, forums, additional clergy, etc.
- e.g. Education, Orthodoxy, Growth, preservation, personal development, outreach leader, etc.
What is a Strategy

- It is derived from Greek ... from a military context ... “Στρατηγός” (Stratigos), which means “General”.
- It is a specific plan to achieve a specific goal or a future state ... like in a battle.
- It is well thought, purposeful, deliberate, and comprehensive.
- It is NOT impulsive.
- Specifies the areas (pillars) we want to play and win.
- Excludes anything not required for the future state.
- It implies the capabilities we have or we need.
- It maximizes productivity and efficiency of resources.
- It is measurable.
Vision Statement (Final)

- The vision for Holy Trinity–St. Nicholas Greek Orthodox Church is to be a devoted Parish where we:
  - Create a spiritual atmosphere of **worship, engagement, fulfillment and inspiration**.
  - **Promote** the word of God within our families and our communities.
  - **Positively impact each other**, knowing that God Himself set an example of love, service and giving.
Our House of Strategy

To proclaim, preserve and practice the Orthodox Christian faith, to glorify God, serve our community, and grow our Parish, for the salvation of all.

The vision for Holy Trinity–St. Nicholas Greek Orthodox Church is to be a devoted Parish where we:
- Create a spiritual atmosphere of worship, engagement, fulfillment and inspiration.
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- Positively impact each other, knowing that God Himself set an example of love, service and giving.

Engagement
Create a spiritual atmosphere of worship, engagement, fulfillment and inspiration

Education
Promote the word of God within our families and our communities.

Outreach
Positively impact each other, knowing that God Himself set an example of love, service and giving.
Step 3 … Strategic Projects/Tactics

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- Articulate Vision in writing, communicate and clarify, get buy-In

Vision
- e.g. Education, Orthodoxy, Growth, preservation, personal development, outreach leader, etc.

Strategy
- e.g. Ministries, Sunday School, Youth Programs, Greek School, Charitίng School, etc.
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Tactics
- Specific activities and initiatives
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- Ensure guiding coalition is involved, maintains focus
- Continue communicating and clarifying Vision

Owners, Execution
- e.g. fund raisers, family events, classes, forums, additional clergy, etc.
What are Tactics

- A specific set or projects that fulfill the purpose and they are directly linked to each Strategic pillar.
- They are NOT random, or “spur of the moment ideas”.
- The sum fulfills the strategy.
- They are S.M.A.R.T. (Specific, Measurable, Attainable, Relevant, Time-bound) ... just like a Goal or an Objective.
- They are complimentary with each other and consistent.
- They have specific owner(s).
- They have a specific scope.
- They have specific time-bound deliverables.
- They are measurable.

The fewer the better ... pick the ones with the highest value-add and impact.
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“Engagement”

Purpose

• What is the Purpose of Strategic Pillar “Engagement”?
  o Sense of ownership/belonging (Family, faith)
  o Understand target audience
  o Continuous involvement
  o Answering “How”, “What”, “Why” … do people disengage
  o Showing the life lived in Christ/Spiritual fulfillment
  o Social connections/Sense of community
  o Engagement w/each encounter
  o Sustainable “Services”
  o Maximize ‘success’ … why people engage … strengths
  o Fellowship to motivate participation
  o Honor, respect the ‘past’, … Tradition, Culture, Heritage
“Engagement”

Strategic Projects/Tactics

• Engagement through Cultural Events/Activities
  o Family Nights (themes)
  o Outings (Golf, Sports) … cross-functional events ... off campus ... e.g. HTSN day
  o Dances, parties ... youth focused
  o Reach/touch Orthodox college students ... care packages ... campus connection ... nameday cards
  o Financial seminars/Career fair
  o Social Media (Facebook, Instagram)
  o Kids activities
  o Speakers, retreats, excursions (w/ other Parishes)

• Engagement through Liturgical/PC Activities
  o Year round engagement with the church
  o Youth ushers, helping with PC Sunday duties
  o Teaching Liturgy
  o Youth participation in Liturgy, e.g. Sunday Prayer, Epistle Readings
“Education”

Purpose

• What is the Purpose of Strategic Pillar “Education”?
  o Knowledge promotes the word of God
  o Why we believe what we believe
  o Raise awareness of our faith externally
  o Replenish the well to feed the others
  o Merit begets confidence, confidence begets enthusiasm, enthusiasm conquers
  o Share/Promote our Christian faith
  o Experiential/engagement/fulfillment
  o Feel connected
  o Carry on teachings in own personal lives for personal growth
  o Understanding who we are, what brings us together
  o Unity - understanding the binding element … Christ
  o Guiding principles/impact on own lives … spiritual and physical
“Education”
Strategic Projects/Tactics

• Theological
  o Teaching liturgy … in segments … in its entirety
  o Adult religious education
  o Community fellowship events with liturgical/theological topics
  o SCS handbook
  o Youth focus events

• Community Awareness
  o E-touchpoints about significant events/reminders
  o University engagement
  o Connect with other churches, offer assistance to potential students/residents coming in the area
  o B.A.N.G.C.
“Outreach”

Purpose

• What is the Purpose of Strategic Pillar “Outreach”?
  o Unite the Parish
  o Putting teachings into practice
    • The core of Christianity
    • Help others
    • Community inclusiveness
  o Increase involvement
  o Increase size/grow Parish
  o Help define/clarify/establish sense of purpose
  o Create meaning and retain our youth / inclusiveness
  o Recognize/make visible the value of outreach
“Outreach”

Strategic Projects/Tactics

• Outreach through Cultural Events/Activities
  o Trips to Holy Land, Greece, religious site
  o Mission Trips
    • IOCC
    • Back-2-Back Ministries
  o Travel Tips guides
  o Capture Panegyri audience – Call to Action
    • Booth communication, direct guests inside

• Outreach Through Internal Community Events
  o Parishioners business directory
  o Prayer List
  o Visit/Comfort the sick at home/hospital
  o Food Train … sick, new mothers, etc.
  o Promote/Celebrate Parishioners’ successes internally/externally
  o Educate Parish on meaning/importance of General Assembly
    • Needs to be “We need you”
    • Could it be on a day other than Sunday?

• Outreach Through External Community Events
  o External community event participation, Volunteer Days, “Saved by the Greeks”
    • Partner with other orthodox parishes
  o Welcome Back Day/Newcomer’s Day
    • Informal Open House … Cincinnati-wide, Greek Orthodox
  o Food pantry utilization
    • Broadcast List
Step 4 … Owners

**Mission**
- Establish a sense of urgency
- Get the right people, guiding coalition on-board, LRPC
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- e.g. fund raisers, family events, classes, forums, additional clergy, etc.
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- Confirm the sum satisfies strategy
- Clearly identify who and when
- Ensure guiding coalition is involved, maintains focus
- Continue communicating and clarifying Vision

**Owners, Execution**
- Ensure the right people are on board
- Get buy-in
- Communicate and clarify
- Identify interdependencies
- Confirm the sum satisfies strategy
- Clearly define the specific areas of change
- Clarify the change elements that we want
- Ensure guiding coalition is involved, maintains focus
- Continue communicating and clarifying Vision

**Who/When?**
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Outreach
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Strategic Planning Committee

- Ensures that overall Strategy progress per plan.
- Periodically assesses Strategy and determines if pivoting, or an update, is needed in order to ensure consistency with Vision.
- Partners with the Strategic Pillar Owners and discusses Strategic Plan status on a quarterly basis.
- Provide coaching, leadership and mentorship to the team as needed.
- Actively recruits strategic pillar chairs ensures the team is well resourced.
- Partners with the Strategic Committee and discusses Strategic Plan status on a quarterly basis.

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Strategic Pillar Chair

- Ensures that chosen strategy with strategic pillars are purposeful, deliberate and consistent with our Vision.
- Owns the specific strategic planning, complete with milestones and deliverables.
- Acts as a coach, leader and a mentor for the strategic tactics owners ensuring the team performs according to the plan.
- Actively recruits pillar team members and ensures the team is well resourced.
- Partners with the Strategic Committee and discusses Strategic Plan status on a quarterly basis.
Strategic Project Leader

- Ensures that chosen activities within the project are consistent with the overall strategy pillar.
- Owns the specific planning, complete with milestones and deliverables.
- Acts as a coach, leader and a mentor for the team ensuring the team performs according to the plan.
- Actively recruits project team members and ensures the team is well resourced.
- Partners with the Strategic Pillar Chair and discusses project plan status on a frequent basis.
Engagement Roadmap

Liturgical
- XXX

Social/Cultural
- XXX

Parish Council
- XXX

1Q18 | 2Q18 | 3Q18 | 4Q18 | Deliverable

Liturgal Engagement
- XXX
- XXX
- XXX
- XXX

Social/Cultural
- XXX
- XXX
- XXX

Parish Council
- XXX
- XXX
- XXX
- XXX

3 year outlook
- XXX
- XXX
- XXX

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Education Roadmap

Theological

• XXX:

Community Awareness

• XXX:

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3 year outlook

XXX

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