

# The Order of St. Ignatius of Antioch

Archdiocese Department Head Meetings

April 6-7 2017

## Mission

To serve and financially support The Antiochian Orthodox Christian Archdiocese, its departments and projects as well as other Orthodox and non-Orthodox charitable organizations domestically and abroad.

## Exact Nature of The Order's Work.

1. To educate members and non-members regarding the activities and financial commitments of the Order and communicate the importance of the work of The Order of St. Ignatius of Antioch through various media forms.
2. Recruit new members and bring back previous members into the Order.
3. Develop alternative funding options/programs to help generate revenue required to meet the needs of the Archdiocese and other Orthodox and non-Orthodox organizations.

## Department Changes & Developments Since Last Year

The Order of St. Ignatius of Antioch began many of its changes at the end of 2015 and beginning of 2016. The 2016 meeting was helpful to the Order to better understand the work of the departments we support. We have focused on many areas of assessment, development and improvement which are listed below:

### 1. New Governing Principle & 3 Tenets of The Order:

Let no man's place, or dignity, or riches, puff him up; and let no man's low condition or poverty abase him. For the chief points are faith towards God, hope towards Christ, the enjoyment of those good things for which we look, and love towards God and our neighbor.

- Saint Ignatius of Antioch

**Act of Faith:** Rooted in Love & Compassion

**A Sacrifice:** Immeasurable in Its Capacity

**Infinite in Effect:** Making a Difference Together

2. **Actuarial Assessment:** Conducted and completed an actuarial assessment of the Order membership to determine potential changes in expected revenue given the aging demographic of the active membership. From study, we determined a potential 30%-35% revenue reduction in membership just from mortality projections.
3. **Comprehensive Survey:** Conducted and completed a month-long survey of active members to determine areas of deficiencies and areas of excellence. We gained a better understanding of specific areas of improvement desired in areas of but not limited to communication, and financial transparency.
4. **New membership levels Developed:** We developed 2 new membership levels to help counteract the effects of the aging membership base to attract both a more mature and affluent existing member as well as new level to attract a generation of younger members. These new membership levels will be informally introduced at The Archdiocese Board meeting in May 2017. Anne Thomas is developing the necessary by-law and constitution changes for final approval at the Order General Assembly meeting in Miami, FL. Once approved, the new levels will be formally introduced to the Archdiocese, existing membership and general public in September 2017.

5. **New Website Completed & Social Media Presence:** We developed a new website and introduced a social media presence through Facebook. We are currently realizing 2-3 views on Facebook per day which we will work to improve.
6. **Quarterly Email Newsletter:** We developed a new quarterly email newsletter highlighting departments and projects we fund, Governing Council and Ambassador recruitment and financial reporting.
7. **Communication with Board Members & Hierarchs:** Beginning in the summer of 2016, we began and will continue to copy all Order communications to our Hierarchs as well as Archdiocese Board members.
8. **Initial Database Cleanup:** We have worked with the Archdiocese office, specifically Marlene Ayoub, to clean up a very inaccurate and somewhat outdated database. This will take a couple of years and increased staff to accomplish.
9. **Loss & Rehire of Administrative Person:** We lost our main administrative support person in Joanne Hakim last May and have recently committed to hiring a full-time person and relocating the Order administrative staff to the Village Conference Center under the guidance/management of Amy Stiffler. Unlike years past, The Order Governing Council has taken a lead role in hiring the next administrative person that has a skill set beyond secretarial tasks to help us accomplish many initiatives for the future organization and growth of The Order. (This is by no means taking away from the dedication and work of our previous, part-time administrative assistants)
10. **New Marketing Materials & Poster:** We just completed new marketing and communication materials being introduced to the Governing Council for approval by the Governing Council in May.
11. **New Organizational Structure:** We have also begun to slowly introduce a new organizational structure to better recruit new people and utilize existing members according to their unique talents. This has been a slow process since last June but we are going to formally review this new structure in our May 2017 Governing Council meeting for final approval at the General Assembly meeting in 2017 in Miami, FL. Anne Thomas is developing the necessary by-law and constitution changes to affect this change.
12. **Conference Calls & Web Meetings:** We have conducted 8, 1- 1 ½ hour long web meetings/conference calls in addition to our semi-annual meetings in the Spring and Fall. These conferences serve as meetings of the Governing Council Executive Committee and the entire Governing Council to discuss our many initiatives which are too many to only address at 2 meetings per year. We have also conducted these meetings to coordinate the activities of Diocesan Chairs as well as the activities of other Governing Council members.
13. **Membership Demographic Analysis (By Parish) & Strategic Plan for Order Visits:** We have analyzed The Order membership data (although somewhat inaccurate) to determine which parishes possess the strongest memberships. This analysis is broken down by parish according to Life Members and by members of all ranks. In the past two months, we distributed this analysis to all Governing Council members and will begin a strategy for visitation that will not necessarily coordinate with Hierarchal visits. We feel a necessity to visit parishes and better communicate the direction, core values and initiatives of The Order. We are also conducting this campaign to thank and educate existing members and educate non-members about the Order. This initiative has been slow going but we anticipate activity to increase in the coming months. Many times, during Hierarchal visits, there are not formal banquets or events that provide a speaking opportunity for Order member recruitment. This is possibly due to the increased frequency of Hierarchal visits from 10-15 years ago. Therefore, we feel it is better to visit a parish prior to a Hierarchal visit to avoid the last minute, chaotic recruitment of members

on Sunday morning which may place The Order in a bad light. This strategy also offers us more time to interact with parishioners without many of the necessary formalities when a Hierarchy is present.

14. **Consistent Financial Reporting:** We continue to work very closely with the Archdiocese CFO and Comptroller to be able to provide up to date income statements and balance sheets to be shared with membership. For the very first time in a long time, we will provide these financial reports to our membership in our newsletters. The first will be posted to our website this month. Our newsletter will highlight this and provide a direct link to be able to view these reports. This was one of the main requests and concerns we learned of in our survey of June 2016. It has taken us about 10 months to pull off, but it is done. We are also working on a system with the Archdiocese CFO and Comptroller to provide The Order Governing Council monthly financial reports reflecting our YTD financial condition to better allow us to adapt to changes and conditions affecting The Order.

### Goals Assessment in Past Year – Short & Long Term Goals

1. 2016: Assess the perception of The Order and develop a communication and education system to help address concerns of its members and non-members as well as promote the positive aspects that drive people to become part of the Order.
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
2. 2016: Complete membership survey. (95% Completed)
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
3. 2016: Complete new communication and marketing campaign in several media forms. A program that is tailored toward the older generation with a focus on the numbers but is also integrated with the emotional or intangible attributes that the Order provides to others through its works.
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
4. 2016: Increase The Order Endowment by 5% annually (\$250,000 in organic growth)
  - a. 15 New Life Members (\$15,000) or 10 Metropolitan members (\$25,000) to be discussed yet with His Eminence Metropolitan Joseph and the Order Governing Council.
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
5. 2016: Increase regular membership revenue by 4% annually in various membership levels which would equate to approximately 150 new members annually.
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
6. 2016: Complete 2 service projects annually (non-revenue based) approved by His Eminence Metropolitan Joseph and the Order's Governing Council.
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------
7. 2016: Develop a new website for better interaction and education for members and non-members
 

0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
----	-----	-----	-----	-----	-----	-----	-----	-----	-----	------

## Goals Assessment In Past Year – Short & Long Term Goals

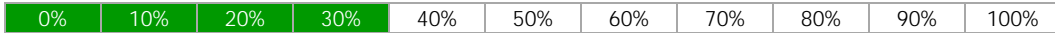
8. 2016 Develop a social media campaign/strategy and proper logistics to ensure its consistency and proper target audience exposure.



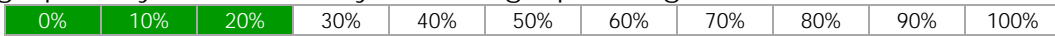
9. 2016: Meet with governing council 1x per month via web/phone conference to coordinate activities and strategic visits to parishes.



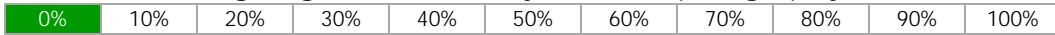
10. 2016: Schedule parish visits by the governing council membership that do not necessarily coordinate with Bishop visits. They may be prior to Hierarchal visits.



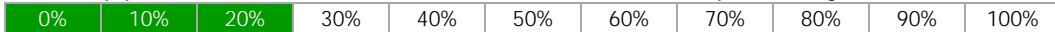
11. 2018: Update membership database and organize useful data geographically, demographically and financially for strategic planning.



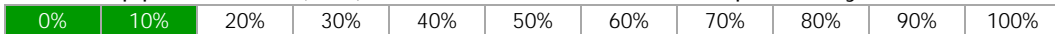
12. 2018: Facilitate on-line giving and eventually member pledge payment.



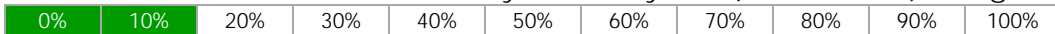
13. 2017: A 50% appointment (120) of Ambassadors at each parish by the end of 2017.



14. 2019: An 80% appointment (240) of Ambassadors at each parish by the end of 2019.

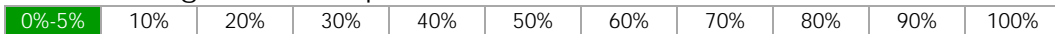


15. 4 years: Increase The Order Endowment by 25% in 4 years (\$1.25 million) in organic growth.



16. 7 years: Increase The Order Endowment by 50% in 7 years (\$2.5 million)

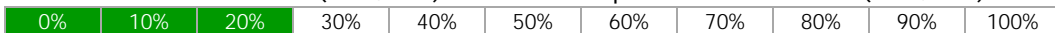
- a. This to overcome the potential 30% reduction in membership revenue due to mortality of our existing membership.



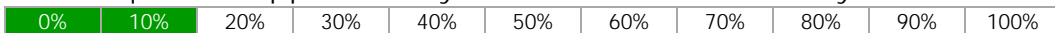
## 2017 Goals

1. 2017: Increase the Order Endowment by 5% annually (\$250,000 in organic growth)

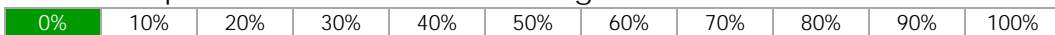
- a. 15 New Life Members (\$15,000) or 10 Metropolitan members (\$25,000)



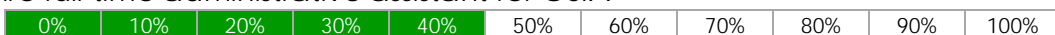
2. 2017: Increase regular membership revenue by 4% annually in various membership levels which would equate to approximately 150 new members annually.



3. 2017: Complete 2 service projects annually (non-revenue based) approved by His Eminence Metropolitan Joseph and the Order's Governing Council.

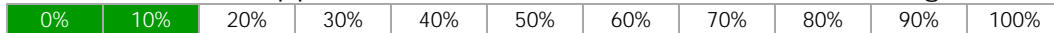


4. 2017 Hire full-time administrative assistant for OSIA

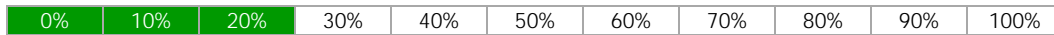


## 2017 Goals (cont'd)

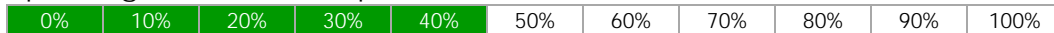
5. Move all administrative support staff and materials for The Order to Village Conference Center



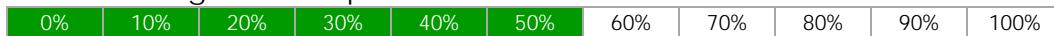
6. 2017: Develop a systematized process to maintain consistent content and updates for The Order website



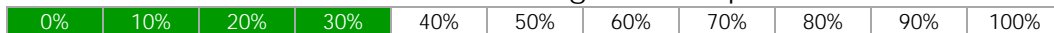
7. 2017: Develop a social media campaign/strategy and proper logistics to ensure its consistency and proper target audience exposure.



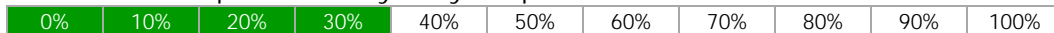
8. 2017: Meet with governing council 1x per quarter via web/phone conference to coordinate activities and strategic visits to parishes.



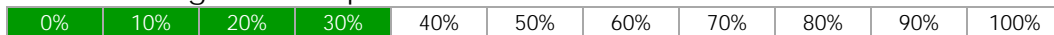
9. 2017: Meet with governing council executive committee 6x per year via web/phone conference to coordinate activities and strategic visits to parishes.



10. 2017: Schedule parish visits by the governing council membership that do not necessarily coordinate with Bishop visits. They may be prior to Hierarchal visits.



11. 2017: Meet with governing council 1x per quarter via web/phone conference to coordinate activities and strategic visits to parishes.



## Greatest Challenge

1. An aging membership base. In 2016 we completed an analysis of our membership database that reveal the average age of our membership in 64 years old. Actuarially that means we could lose 1/3 of our revenue in 10 years. Through a new campaign to appeal to a younger generation as well as the introduction of a new Junior Knight/Dame level, we hope to grow our regular membership levels of \$500, \$1,000 and \$15,000. We also will attempt to increase endowment gifts with the addition of a new membership level of \$30,000 (Metropolitan Level). This is being done in an effort to grow The Order Endowment to help overcome the inevitable drop due to mortality in the next 10 years.
2. Recruiting new and younger members to the Governing Council.

## Action Plan to Achieve Financial Goals

Our plan of action to accomplish our short-term, mid-term and long-term goals is reflected in the following bullet points:

1. Change bylaws and establish new Junior (\$300) and Metropolitan (\$30,000) membership levels to attract younger members (Junior Level) and provide upgrade possibilities for existing Life Members that have the ability to give more. Introduce new levels (informally at May 2017 Archdiocese Board meeting), formally approve bylaw change during Miami General Assembly and induct first new Metropolitan members at the Convention in Miami in Sayedna Antoun's potentially final act before retirement.

2. Change bylaws to affect new organization structure. Finalize structure in May 2017 Governing Council meeting and begin recruiting people with specific skills and implementing the activities within the new structure by September 2017.
3. Send 3 more email newsletters before year end 2017.
4. Write an article for the Word reflecting the new governing principle and 3 main tenets of The Order as developed in 2016. Include new initiatives of new membership levels and descriptions of the departments and projects we fund.
5. Visit 50 parishes according to new strategic plan outlining new initiatives including new membership levels and volunteer opportunities.
6. Continue regular web conferences to gather ideas and coordinate governing council member activities.
  - a. Executive Committee: Monthly
  - b. Governing Council: Every 2 months
7. Continue providing all communications for The Order to key members of Archdiocese Board as well as Hierarchs.
8. Other goals listed in prior pages, including 5 completed.

In His Service,  
Roger J. David  
North American Chairperson  
The Order of St. Ignatius of Antioch