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ST VLADIMIR'S ORTHODOX THEOLOGICAL SEMINARY

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January 17, 2013

Mr. Alex Machaskee
Board Executive Chair
St. Vladimir's Orthodox Theological Seminary
575 Scarsdale Road
Crestwood, NY 10707

Dear Alex:

It is my privilege to present to the Board of Trustees of the St. Vladimir's Orthodox Theological Seminary this strategic planning report.

This report is the culmination of 20 months of work on the part of the Board and staff of the Seminary, and it takes into account feedback from students, alumni, staff, hierarchs, and major donors. I am honored to have been chosen to coordinate this process, and to have worked with the Very Rev. John Behr, the Very Rev. Chad Hatfield, and you (and before your election as Board Executive Chair, Mrs. Anne Glynn Mackoul) as part of the Steering Committee for this process.

The recommendations listed in this report constitute the Strategic Plan for the Seminary over the next decade as it seeks to fulfill its vision for the future. The implementation of these recommendations, I feel, will position the Seminary at the forefront of Orthodox seminary education, and will reflect the desires of its various stakeholders.

I therefore submit this report to the Board of Trustees for adoption. To this end, I look forward to discussing the findings with you and your board colleagues.

Yours in Christ,

Tony Kireopoulos

Dr. Antonios Kireopoulos
SVS 2020 Coordinator

Report

Introduction

A Board of Trustees is charged with many responsibilities to ensure the well being of an institution. At their core, all of these responsibilities are meant to enable the institution to live out its mission. And among these responsibilities are to periodically assess the progress of the institution in living out its mission and to determine what is necessary for the institution to continue to do so into the future.

In May 2011, the Board of Trustees of St. Vladimir's Orthodox Theological Seminary embarked upon a strategic planning process in order to accomplish these tasks for this institution. The Board secured the services of Dr. Antonios Kireopoulos, an Orthodox theologian with an extensive background in organizational management, to coordinate the plan, and it remained closely involved throughout the entire planning process. The process was overseen by a steering committee that, in addition to Dr. Kireopoulos, included: the Board Executive Chair, first Mrs. Anne Glynn Mackoul and then Mr. Alex Machaskee; the Dean, the Very Rev. John Behr; and the Chancellor, the Very Rev. Chad Hatfield.

With effective mission front-and-center, at every meeting where the strategic planning process was discussed, we began with a reading of the institution's mission statement:

St. Vladimir's Orthodox Theological Seminary serves Christ, his Church, and the world through Orthodox Christian theological education, research, and scholarship, and the promotion of inter-Orthodox cooperation. In this way, the Seminary prepares students for ministry as bishops, priests, deacons, lay leaders, and scholars so that they may build up Orthodox communities, foster Church growth through mission and evangelism, teach the Orthodox faith, and care for those in need.

We then asked ourselves this guiding question: "What must the Seminary do over the next decade to position itself to effectively fulfill its mission during this time period and beyond?"

The final recommendations that are the outcome of this process seek to answer this question. It is the consensus of the Board of Trustees that they provide a guide as together — hierarchs and clergy and laity, faculty and staff and students and alumni, benefactors and board members, and indeed all who love this institution — we continue to enable St. Vladimir's Seminary to accomplish its mission, which ultimately is to proclaim the Gospel of our Lord and Savior, Jesus Christ.

Process

The SVS 2020 strategic planning process began with the approval of the process and timeline as presented by Dr. Kireopoulos at the meeting of the Board of Trustees on May 19, 2011 (Appendix 1). At this meeting ecclesiastical, financial, and enrollment challenges, and the Seminary's strengths foundational to meeting these challenges were discussed. Questions inherently asked by the Strategic Plan would focus on how these challenges impact the Seminary's ability to live out its mission.

At that May 2011 meeting seven board committees were composed to drive each area related to these challenges:

- Pastoral Formation
Goal: to understand the Church's pastoral needs and the Seminary's progress in meeting these needs
Members: Metropolitan Savas (chair), Rev. Philip LeMasters, Mrs. Anne van den Berg
- Further Educational Opportunities
Goal: to address the issue of declining enrollment
Members: Mr. Leon Lysaght (chair), Bishop Maxim, Dr. Donald J. Tamulonis, Jr.
- Campus Life
Goal: to optimize the health of the Seminary community and its families
Members: Mr. Ivan Rudolph-Shabinsky (chair), Mr. James G. Bach, Mr. Thomas S. Zedlovich
- Board Development
Goal: to evaluate optimal board configuration and related matters
Members: Mr. Eric S. Namee (chair), Mr. Michael Bress, Dr. Glenn R. Kubina, Mrs. Anne Glynn Mackoul
- Campus Configuration
Goal: to analyze options with regard to campus matters
Members: Protodeacon Peter M. Danilchick (chair), Mr. Anthony Kasmer, Mrs. Anne Glynn Mackoul, Dr. Nicholas Pandelidis
- Communications
Goal: to discover methods to enhance external communication of the Seminary's mission and internal communication within the Seminary community
Members: Mr. Alex Machaskee (chair), V. Rev. David G. Barr, Deacon David Daumit
- Financial Stability and Opportunities
Goal: to propose development strategies that lead to financial stability

Members: Mr. Brian Gerich (chair), Dr. Albert Foundos, Dr. Nicholas Pandelidis

The board committees met in the summer of 2011, and their findings made their way into discussions with stakeholders, student and alumni surveys, and recommendations (Appendix 2). Key learnings of these committees are noted in the next section of this report.

At its meeting in November 2011, the Board of Trustees discussed the findings of the board committees and how they were reflected in the draft student and alumni surveys and/or in the current work of the seminary administration (Appendix 3). The draft surveys were then reviewed, and recommendations were made by the Board for the editing of the surveys.

Stakeholder discussions took place in the spring and summer of 2012 (Appendix 4). Discussions were held with Orthodox hierarchs within the Orthodox Church in America, the Antiochian Orthodox Christian Archdiocese of North America, the Greek Orthodox Archdiocese of America, the Serbian Orthodox Church in the USA and Canada, the Romanian Orthodox Archdiocese in the Americas, and the Moscow Patriarchate. These hierarchs were:

OCA: Metropolitan Jonah (Paffhausen), Archbishop Benjamin (Peterson), Archbishop Tikhon (Mollard), Bishop Irénée (Rochon), Bishop Michael (Dahulich), Bishop Melchisedek (Pleska), Bishop Matthias (Moriak), and Bishop Alexander (Golitzin)
AOCANA: Metropolitan Philip (Saliba), Bishop Basil (Essey), Bishop Nicholas (Ozone)
GOA: Metropolitan Savas (Zembillas)
SOC: Bishop Longin (Krcó), Bishop Maxim (Vasiljevic)
ROA: Archbishop Nicolae (Condrea)
MP, Diocese of Sourozh: Archbishop Elisey (Ganaba)

Discussions were also held with major donors to the Seminary. Due to concerns for anonymity, they are not listed in this report. They include, however, seven major donors and foundations (with thirteen more to be included in the next couple of months). Discussions were also held with faculty members, staff members, and students. Key learnings of the discussions with all of these stakeholders are noted in the next section of this report.

In the fall of 2011, Mr. Alexei Krindatch, a respected Orthodox researcher and statistician, was contracted to design the student and alumni surveys, to conduct the surveys, and to analyze their results. The surveys were sent to current students (Appendix 6) and all alumni (Appendix 7) of the Seminary in the spring of 2012, and responses were analyzed in the summer of 2012 (Appendix 8). Key learnings of these surveys are noted in the next section of this report.

At the Board of Trustees meeting in May 2012, initial findings from stakeholder discussions were reviewed, as were anecdotal responses from the surveys (Appendix 5). In addition, preliminary decisions were made as appropriate with regard to inclusion in the Strategic Plan.

Based on the key learnings listed below, recommendations for action on the part of the Seminary were formulated in the summer and fall of 2012. These recommendations are found in the subsequent "Recommendations" section of this report.

The Strategic Plan was presented and adopted at the January 2013 Board of Trustees' meeting.

Key Learnings

The board committees, discussions with stakeholders, and student and alumni surveys yielded key learnings that must be taken into account as the Seminary seeks to fulfill its mission. These learnings in turn yield recommendations that, if implemented, will help the Seminary to respond to current challenges and likewise to meet related needs of the Orthodox Church. The key learnings in each of these areas are listed below, and the resulting recommendations are listed in the next section.

- Pastoral Formation
 - Need to expand Good Pastor curriculum characteristics as appropriate based on changing contextual realities
 - Need for clergy and laity in non-traditional ministry areas
 - Need for attention to pastoral concerns in multiple jurisdictions
 - Need for improved parish management skills
 - Need for enhanced practical fieldwork
 - Need to give attention to relationships with hierarchs and alumni (clergy and lay) so as to foster new vocations
- Further Educational Opportunities
 - Need to explore ways to enhance current degree programs
 - Need to be attentive to varying life (age, previous vocations) and faith experiences of students, as represented in the differences between those who are born into the Orthodox faith and those who convert to it
 - Need to consider the creation of additional degree programs
 - Need to establish non-degree study programs
 - Need for a focus on specialized areas of study
 - Need to offer students connections for lay leadership in the Church and related ministries, for both women and men
- Campus Life
 - Need to give attention to spouse, children, and all-around family well-being
 - Need to attend to the physical, mental, and spiritual health needs of students and seminary community
 - Need to foster healthy internal community relationships
 - Need to address campus security and safety issues
 - Need to address physical plant issues
 - Need for the presence on campus, including among the faculty, of persons with direct pastoral experience
- Board Development
 - Need to give attention to board recruitment, committee, and related matters

- Need to consider the question of term limits, the creation of a category of advisers, and related matters
 - Need to attend to the regular assessment of board performance
- Campus Configuration
 - Need to evaluate pluses and minuses of current physical location
 - Need to upgrade older buildings
- Communications
 - Need to foster openness with regard to internal communications
 - Need to assess outside attitudes toward the Seminary
 - Need to analyze communications staffing, database, and infrastructure needs
 - Need to increase use of social networking and web-based marketing
 - Need to give attention to publication concerns
- Financial Stability and Opportunities
 - Need to reduce financial burden of studying at Seminary
 - Need to increase endowment and annual giving
 - Need to explore all possibilities for creative collaborations and economies of scale among the OCA seminaries in order to serve the best interests of the Orthodox Christians in North America and the Orthodox Church in America, including institutional, academic, and practical concerns

Final Recommendations

The key learnings noted above reveal opportunities to strengthen the life, curriculum, and impact of the Seminary in the life of the Church. These opportunities were confirmed through the interview and survey processes. To maximize these opportunities, specific recommendations are necessary in order for the Seminary to plan its course over the next decade. The direct correlation of the key learnings to these recommendations were illustrated during the discussion with Board of Trustees at its meeting on January 17, 2013 (Appendix 9). These recommendations are:

- Pastoral Formation
 - Review and refine curriculum on a regular basis
 - Offer flexible timelines to complete degree programs in order to allow for parallel career preparation
 - Give attention to real or perceived gaps in pastoral theological education, in terms of general ministry, youth ministry, parish administration, ecumenical and interfaith relationships, mission, and community outreach
 - Offer opportunities to serve in various ministries in local Westchester community
 - Give attention to personal spiritual formation of students, and provide such formation as a resource after graduation
 - Offer continuing education and pastoral formation opportunities for alumni
- Further Educational Opportunities
 - Offer hybrid degrees (D.Min., M.A.) and other degrees (Ph.D.), as well as degrees with particular foci (Missiology, Orthodox Studies).
 - Offer opportunities for specialized study (from liturgy and canon law to palliative care and urban ministry)
 - Offer opportunities for regional, distance, online, and short-term immersion certificate programs of study
 - Offer opportunities for continuing education of clergy and others, in conjunction with various jurisdictions
 - Offer opportunities for global engagement with other Orthodox academic institutions and U.S. ethnically identified jurisdictions
 - Offer opportunities for students and graduates to work with U.S. and global Orthodox, ecumenical, interfaith, mission and other organizations, with possibilities of placement
 - Offer opportunities for exchange with other Orthodox seminaries
- Campus Life
 - Expand role of Office of Student Affairs, with continued attention to mental and emotional health, and other counseling needs, of students through access to counseling on campus and to off-campus counseling professionals — in process
 - Give continued attention to spiritual health of students

- Give continued attention to family needs (spouse and children support, day care) while at the Seminary
- Give continued attention to the preparation of families for the parish ministry of ordained clergy while at the Seminary
- Build Student Center to enhance social interaction opportunities, both on and off the campus
- Develop health and fitness facility — completed
- Address further facilities needs (dormitory, refectory)
- Look for ways to lessen extracurricular obligations to the Seminary
- Give 24-hour access to the library
- Board Development
 - Conduct overall board assessment
 - Undertake periodic board education initiatives
 - Refine Trustee Committee mandate to better reflect recruitment, term definition, succession, and committee structures
 - Maintain relationships between the Seminary and retired trustees, including, as appropriate, some retired trustees with specific needed expertise as advisers to committees of the Board
- Campus Configuration
 - Stay in current location, while staying open to other configurations for cooperation with other Orthodox institutions regarding facilities in the future
 - Create master campus plan
 - Continue to monitor Woodner II property as only expansion option available
 - Undergo radical maintenance of current buildings
- Communications
 - Implement the Communications Plan (long-term / multi-year)
 - Hire appropriate staff — completed
 - Address infrastructure needs
 - Continue to address internal communications concerns
 - Continue to address outside views of the Seminary
- Financial Stability and Opportunities
 - Administration
 - Create Institutional Advancement Plan
 - Hire appropriate staff — in process
 - Engage in consultations at all appropriate levels of OCA leadership, and with leaders of other Orthodox seminaries, so as to discern how best to steward resources for Orthodox seminary education, and thus best serve

the needs of Orthodox Christians in North America and the Orthodox Church in America

- Underwriting of communications /technology infrastructure needs: \$250,000 annually
- Underwriting of expanded Office of Student Affairs — to be determined

Events

- Underwriting of 75th anniversary banquet: \$55,000

Scholarships

- Endow scholarships to cover tuition for all students — to be determined

Facilities

- Retire debt from existing buildings so Seminary is debt free: \$2.2 million
- North Dormitory renovation: \$500,000
- Purchase Woodner II property: \$3 million

Programs

- Underwriting of certificate and degree programs: \$132,500 annually
- Establishment of Office of Continuing Education, for clergy and lay, to provide training and certification programs — in process
- Underwriting of counseling programs: \$10,000 annually

New Centers

- International House of Orthodox Study, which would build on connections with other Orthodox academic centers and, through visiting scholars and focused learning, would better serve the full range of Orthodox traditions in the U.S. There are naming opportunities connected to this initiative. A grant for \$50,000 has already been discussed with, and is being considered by, a donor to conduct a feasibility study to convert the Germack Building by October 2013; full funding or a campaign would be announced at the 75th Anniversary celebration in October 2013. Total funding required: \$20 million (\$5 million for building, \$12 million endowment, \$3 million maintenance endowment).
- Center for Liturgical Art and Sacred Music (now termed, The Institute of Sacred Arts), the funding of which has been combined to include an anticipated legacy gift designated for liturgical arts and a matching gift proposal to The Arthur Vining Davis Foundation with already existing sacred music funding. The latter includes a \$1.7 million gift received to establish The Peter Prokofieff Chair in Liturgical Music and an additional yet-to-be obtained \$240,000 for the Bishop Basil Program in Byzantine Music. Part of the legacy gift, for which a donor has been identified, will establish a Chair in Liturgical Arts. The Arvo Pärt Center in Estonia and the Metropolitan Museum of Art in New York have expressed interest in

cooperation with this initiative. Total additional funding required: \$4-5 million.

- Center for Practical Theology, which would develop specialized programs in such areas as palliative care, addictions, family dysfunction, and youth ministry, and offer certificates for specialized chaplaincies, through the engagement of adjunct faculty who are experts in these fields. There are naming opportunities connected to this initiative. Total funding required: \$3-4 million.
- Center for Seminary and Service, which would direct Seminary engagement with Orthodox mission and humanitarian organizations, as well as ecumenical and interfaith institutions, for education in these areas and placement after graduation. The program would include training and experience in ecumenical and interfaith dialogue, as well as human rights (especially religious freedom) and related training. It would also include internship and short-term work opportunities, J-term and summer study and work abroad opportunities in other Orthodox contexts, and fieldwork and studies in urban and other ministries. It would further include sponsored delegations to various regions for various Seminary stakeholders, as well as public lectures. This center would be directed by an endowed faculty position. There are naming opportunities connected to this initiative. Total funding required: \$3-4 million.

Conclusion

If implemented, the above recommendations will position the Seminary to better fulfill its mission into the future. These recommendations also reflect needs expressed by various stakeholders, including students and alumni, and thus offer the Seminary the opportunity to align its ministry in a way that meets these needs while honoring its legacy as a premier academic center in world Orthodoxy.

Over the years, observations of the Seminary have noted its difficulty in meeting the twin needs of academic excellence and pastoral competence. This Strategic Plan responds to this challenge with specific suggestions of ways to meet it.

Of course, the financial challenge that comes with implementing these recommendations will be great. Nevertheless, the recommendations themselves offer creative opportunities to raise money for the Seminary. Some of the recommendations will require no additional funding, only the will of the Board, administration, and faculty to implement them. But those that do require funding represent the opportunity to take the Seminary from its already respected position in global theological circles to even greater heights.