

CSLP Organizational Design Model (ODM)

Spiritual Director ↔ Leadership Council

<i>Senior Minister</i>	<i>Assistant Minister</i>	<i>Assistant Minister</i>	<i>President</i>	<i>Vice President</i>	<i>Treasurer</i>	<i>Secretary</i>
Spiritual Director	Ecclesiastical	Operations	Infrastructure	Education	Financial	Community Engagement
Staff	Ecclesiastical Council	Marketing	Leadership Council	Leadership Training	Financial Statement	Service Projects
Sunday Service	Practitioners	Strategy Implementation	Wisdom Council	Certificated classes	Fundraising	Community Events
Counselling / Mentoring	Youth/Family Ministry	IT/Fellowship One	Onboarding new board members	Workshops	Intentional Giving Campaign	Membership
Retreats	Pastoral Care	Merchandise	Facilities Management	Non-certificated classes	Tax Filings	Volunteers
Social Justice / Engaged Spirituality	Rites of Passage		5-Year Strategy			

Senior Minister / Spiritual Director

Spiritual Director

Staff

- Hiring/Firing/Promotion
- Counseling
- Work Direction
- New Positions
- Team Building
- Training
- Roles and Responsibilities creation

Spiritual Director

Sunday Service

- Provide direction to Sunday Service Coordinator (SSC)
- Provide direction to Music Director
- Create Order of Service
- Arrange guest ministers or speakers
- Coordinate with Youth program(s)
- Meet & Greet before and after service
- In the event of disaster, direct congregation to safety

Spiritual Director

Sunday Service Coordinator

- Manage team of Coordinators
 - Altar decorations
 - Announcements
 - Chairs set up/take down
 - Flowers
 - Greeters
 - Hospitality
 - Insight speaker
 - Practitioner / High Watch
 - Audio/Video Technical Team
 - Ushers
 - Create bulletins

- Ensure book of the month is ordered
- Support Spiritual Director as needed
- Pay musicians and speakers
- Arrange for Center to be opened/closed

Spiritual Director

Counselling/Mentoring

- Mentor Ministers as requested
- Mentor Practitioners as requested
 - inside and outside of CSLP Community
- Provide Spiritual Counselling to congregation as requested

Spiritual Director

Social Justice / Engaged Spirituality

- Arrange for Leadership training of Social Justice
- Oversight for Social Justice events (Parades, Seeds of Peace etc..)
- Participate with Diversity Commission from Home Office
- Participate with Spiritually Motivated Social Engagement (SMSE) committee from Home Office
- Bring awareness of social issues to the community
 - (sermons, workshops etc..)
- Cultivate connections with key members of Social Justice based organizations
- Incorporate social justice into the overall strategy of the Center

Spiritual Director

Retreats

- Forming and managing the leadership / planning team
 - Provide direction for key roles like registration, volunteers, workshop leaders, craft leaders, facilities management, AV, liaison to retreat center, etc..)
- Planning Retreat Events
- Oversight and Facilitation of Sessions
- Oversight of contracts
 - music, speakers, retreat center, sweat lodge Team Building
- Fund Raising
- Budget
- Transportation & storage of supplies

Spiritual Director

Travel Ministry

- Determine location and timeframe of travel
- Provide direction to Travel Minister
- Oversight of the opening & closing ceremony
- Service Projects away from home

Assistant Minister / Ecclesiastical

Assistant Minister / Ecclesiastical

Ecclesiastical Team / Council

- Coordinate annual ecclesiastical retreat
- Plan and lead ecclesiastical team meeting & visioning meeting
- Responsible for procedures for Ministers
 - i.e.: availability in both presence and consciousness during events
- Determine strategic direction with input from Spiritual Director
- Schedule periodic educational sessions
- Oversight for monthly Minister's Blog
- Coordinate special prayer services i.e. taize, prayer for peace etc.

Assistant Minister / Ecclesiastical Practitioner

- Responsible for procedures for Practitioner
- Oversight for scheduling of all CSLP licensed Practitioners
- Support for visiting Practitioners on duty at CSLP
- Onboarding new Practitioners
- Oversight for Prayer List
 - Emailed prayers and forward responses
- Ongoing education of Practitioners
- Licensing reminders and follow-up
- Special Practitioner-led services
 - Sunday Service, World Prayer for Peace, etc.

Assistant Minister / Ecclesiastical

Pastoral Care

- Oversight for:
 - Hospital visits
 - Arranging meals for those in need
 - Calls to community to check in
 - Update of congregational notes in Fellowship One
 - Gratitude team
 - Special occasion recognition team
 - Care Workshops: CPR, Advanced Directives, Estate Planning etc.

Assistant Minister / Ecclesiastical

Youth and Family

- Recruit and train youth advisors
- Conduct background checks on all advisors
- Create/locate curriculum for Sunday services
- Arrange video/audio/books for Youth programs
- Arrange support for kids to go to camp
- Create family friendly events
- Arrange youth-directed services
- Include youth & family in the Sunday service

Assistant Minister / Ecclesiastical

Rites of Passage

- Manage services for annual special occasions such as:
 - Chinese New Year, Christmas, New Year's, Mother's Day, Fathers Day, Brigit's Feast Day etc.
- Arrange for special ceremonies such as:
 - Baby Blessings, House Blessing, Pet Blessing, Car Blessing, Memorials, Weddings/Commitment Ceremonies
- Provide marketing information to all marketing channels
- Provide oversight to ceremony leaders
 - Other Assistant Ministers, Practitioners and Laity

Assistant Minister / Operations

Assistant Minister—Operations

Marketing

- Provide oversight for event/service communications
 - Meet up, Facebook, Website, Bulletin, Announcements, Newsletter
- Determine new avenues for marketing
- Community engagement as speakers
 - Blog, local newspapers, New Age Bookstores, etc.
- Create / maintain Public Relations package
- Provide content as needed for Newsletter

Assistant Minister—Operations

Strategy Implementation

- Select key areas needed to align with overall annual strategy
 - IT, Process Improvement, new programs etc.
- Drive the implementation of annual strategic projects
 - Identify volunteer, Practitioner or Minister to lead the implementation
 - Create key milestones to be achieved throughout the year
 - Follow up to ensure completion of milestones
 - Provide status to Leadership Council

Assistant Minister—Operations

IT/Fellowship One

- Ensure web site is kept current in content and design
 - Plan and schedule quarterly releases of new design elements as needed
 - Lead Web Team meetings to come up with quarterly content for each release
 - Follow up on progress of new content and design elements
 - Monitor web site to ensure content is current
 - Provide oversight to Web team as needed
- Ensure that web service costs are providing the highest value for lowest cost
- Provide oversight for Fellowship One engagements
 - Work with central F1 team as needed for any problems
 - Develop strategy for new functionality / releases
 - Provide oversight to local F1 team on new strategies
 - Develop rollout plans for new functionality / release

Assistant Minister—Operations

Merchandise

- Provide oversight for Bookstore purchases
- Work with Service Coordinator to stock book of the month
- Ensure clothing and other apparel has sufficient inventory
- Investigate new and innovative products to be offered for sale
- Ensure physical location of merchandise is kept free from clutter

President / Infrastructure

President / Infrastructure

Facility Management

- Leasing to others

- Bookstore

- Building management

- Landlord Relations

- Lease negotiations

Council Responsibilities

- Annual Meeting facilitation

- Monthly Leadership Meeting / Wisdom council

Facilitations

- Meeting minutes

- Annual

President / Infrastructure

Leadership Council

- Provide agenda for quarterly Leadership only Council meetings
- Review financials monthly and provide copies and instruction to other Leadership Council members to conduct monthly review
- Coordinate annual Leadership retreat
- Manage and host the CSLP Annual meeting
- Work with Minister of Operations on status updates of Strategic Plan

President / Infrastructure

Wisdom Council

- Approve appointed Wisdom Council members
- Create agenda for meetings
- Schedule Wisdom council Leadership Training sessions
- Assign strategic objectives to be accomplished by the Council
- Communicate results to congregation during President's message

President/Infrastructure

Onboarding new Council members

- Provide instruction and guidance to new Council Members
 - Google Drive
 - Policies and Procedures
 - Expectations
- Establish open communications for ongoing questions and concerns
- Mentor new council members as needed

President/Infrastructure

Facilities

- Sub- Leasing to others
- Bookstore Oversight
- Building management
- Landlord Relations
- Lease negotiations
- Point of Contact for Landlord interactions

Vice President / Education

Education / Vice President Responsibilities

Leadership Training and Administration

- Develop Leadership Training
 - Every quarter with Wisdom Council
 - Annual with Leadership Council
- Course Administration
 - Certificated Classes
 - Non-Certificated Classes / Lifelong Learning
 - Workshops
 - Negotiate payment terms with workshop leaders
 - 50/50 split Instructor/CSLP
 - Negotiations other than standard rate requires Spiritual Director blessing
 - Provide oversight for the registrar's duties

Education / Vice President Responsibilities

Education Team

- Education Team
 - Prepare Agenda & Facilitate meetings
 - Ensure meeting minutes are captured and placed on the Google Drive
 - Determine curriculum for each year
 - Coordinate CSLP event calendar with courses
 - Ensure marketing is completed and distributed quarterly
 - Identify instructors for each course
 - Approve workshop packages
 - Develop education pathway for CSLP Practitioner and Minister training
 - Train Instructors on CSLP educational processes

Treasurer / Financial Responsibilities

General Finance

- Maintains abundance consciousness
- Oversight for the Intentional giving campaign
 - Prepare intentional giving cards annually
 - Send thank you notes to all who have completed a giving card
 - Establish and maintain intentional giving timeline
 - Cultivate testimonials for giving
- Financial Statement / Annual Budget
 - Monthly review of bookkeeper's financial reports
 - Review all financial statements for accuracy and consistency
 - Works with budgeting team to create annual budget
 - Provides suggestions for corrections as needed
 - Creates five year forecast with input from Leadership Council

Treasurer / Financial Responsibilities

Fundraising

- Oversight for Fundraising
 - Establish annual calendar of fundraising events
 - Identifies event owners
 - sets intentions for each fundraiser
 - Maintains an abundance consciousness
 - Explores new fundraising opportunities
 - Aligns fundraising strategy with annual Center theme

Financial / Treasurer Responsibilities

Financial Reporting

- Fellowship One Reports
 - QuickBooks reports
 - Check signing
 - Oversight for Sunday count team
 - Maintain Policy and Procedures for managing money
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- Tax Filings
 - Ensures completions of all filings

Secretary/ Community Engagement

Secretary/Community Engagement

- Service Projects
 - Identify service projects for the annual calendar
 - Coordinate with minister for service project needs
 - Contact or arrange contact the service organizations
 - Oversee the work necessary for the service project
 - Bring service needs to the Leadership council for discussion
- Volunteers
 - Identify volunteer roles and team directors
 - Recruit attendees to fill roles
 - Training of volunteers

Secretary

Membership

- **Membership** (Kathy to check by-laws)
 - Roles for legal aspects
- Membership 101 meeting
- Advertising membership, what does it mean
- Fellowship One data entry
- Pathway to membership
- Asking people to join
- Retention of existing members
- Oversight of a membership team
- Kathy: Include membership rules in ODM

Secretary

Community Events

- Create/maintain process for capturing data of events
- Event oversight for community events
 - Spiritual Cinema, camp trips, travel etc.
- Meeting minutes oversight
 - Ensure meeting minutes are uploaded to Google Drive

ODM Committee

Rev Abigail Schairer

Rev Kathy Scharmer

Rev Linda Anson

Lucy Witt, RScP Minister in Training (contributed until November)

Marylyn Kirk, RScP in training

Jana Rickerson, Laity Goddess

Elliotte Mao, Laity Goddess -- Contributor for Secretary role

Version Control

Date	Version	Content	Created/ Updated by:
12/19/2017	1.0	Initial Document	Kathy Scharmer