# CSLP Organizational Design Model (ODM)

## Spiritual Director ↔ Leadership Council

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### 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
- Workshops
- Intentional Giving Campaign
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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
  Agendas
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
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

- 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

- 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)
Marilyn Kirk, RScP in training
Jana Rickerson, Laity Goddess

Elliotte Mao, Laity Goddess -- Contributor for Secretary role
## Version Control

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