



Parish Mission Planning 9 Step Planning Workbook



Parish Mission Planning
pastserv@gbdioc.org



Disciples on the Way PARISH MISSION PLANNING



NINE STEPS TO A SUCCESSFUL PARISH MISSION PLAN

As we enter into the prayerful, intentional, parish mission planning process, be comforted by

Bishop Ricken's exhortation and prayer:

"Remember friends, God is faithful, and will complete the good work He has begun in you, your families and within your parishes. You remain in my daily prayers as I continually entrust this and all of our diocesan efforts for the Kingdom to the care of our Blessed Mother, the Queen of Heaven and Our Lady of Good Help. As you go forward with your parish mission planning, I extend my apostolic blessing to your parish planning team.

-In the name of the Father and of the Son and of the Holy Spirit. Amen."

Introduction

Thank you for your participation on your parish's and school's Parish Mission Planning (PMP) team. Your active involvement in this planning process is extremely important towards the success of the plan; both in its development and in its implementation.

Those of us who are members of the Curia Parish Mission Planning Team realize that taking on a project like this can be somewhat overwhelming. With this in mind, this manual has been developed in order to eliminate any sense of being overwhelmed by this project. This manual has been prepared in an easy to understand and straight forward manner. As a result, it is our hope that you will find it user friendly. As you will see, it is designed in a step by step process making it easy to define the scope of the work to be done at each planning session. It will also help you in scheduling out the work needed to complete the plan.

As you look through the manual and begin your planning process work, you will notice in the first five steps ways to retain information, ideas, and priorities for future planning purposes. Thus, this is a tool that the parish and school PMP team can use year after year. This manual also provides an easy process of converting and distilling down a lot of statistical and anecdotal data into ultimately a manageable set of three (3) to five (5) goals supported by action steps. The necessary planning forms are included in this manual for ease of use.

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Summary of Nine Steps of a Successful Parish Mission Plan

STEP 1 ASSESSMENT – HEALTH OF LEADERSHIP SURVEY

All ministry leaders, parish and school staff, board members, council members, committee members, and the PMP team members complete the Health of Leadership Survey regarding their perception of the parish's, the school's, and their own efforts in reference to evangelization, discipleship, leadership, and community impact. A list of the ten (10) or eleven (11) major areas for improvement will be made by the planning team.

STEP 2 ASSESSMENT – OPERATIONAL AND MINISTRY CHECKLISTS

Appropriate personnel and school personnel are assigned the duty of filling out various checklists associated with parish and school operations and ministry areas. A list of the ten (10) major areas for improvement will be made by the planning team.

STEP 3 ASSESSMENT – PARISH AND COMMUNITY DATA SHEETS

The PMP team will review their community and parish demographics and school and religious education enrollment. The team will identify observations in areas of youthfulness, faithfulness, contributions, and activity. A list of five (5) recommendations/strategies for improvement will be made by the planning team.

STEP 4 ASSESSMENT – STRATEGIC PLAN FOR CATHOLIC SCHOOLS

The PMP team will review the *School and Parish Planning: Key Recommendations* document and determine which goals in this plan will be a focus in the development of the Parish Mission Plan. No more than five (5) goals that stress collaboration and cooperation between the parish and school should be identified by the planning team as a major focus.

STEP 5 OBSERVATIONS/ANALYSIS

The PMP team compiles the lists developed in steps 1 through 4. This list should be no longer than twenty (20) items.

STEP 6 PRIORITIZATION, CLASSIFICATION, ALIGNMENT, AND MOBILIZATION TO MISSION

The items listed in Step 5 are prioritized. The top three (3) to five (5) priority items are assigned under the following categories by the planning team: Enabling Evangelization, Empowering Collaborative Leadership, Expressing Abundant Sundays, and Equipping Spiritual Maturity.

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STEP 7 SET GOALS

The PMP team takes the list developed in Step 6 and transforms the three (3) to five (5) priority items into goal statements. The goals are concise statements of what the parish and/or school will do over the next one (1) to three (3) years to accomplish evangelizing, forming disciples, and impacting the community in which the parish and school are located. The goals and corresponding action steps are to be SMART: Specific, Measurable, Achievable, Results-Focused, and Time-Bound. The goals are put into the appropriate categories of GROWTH, ENGAGEMENT, and COMMUNITY IMPACT. It is recommended that no more than three (3) to five (5) goals be identified.

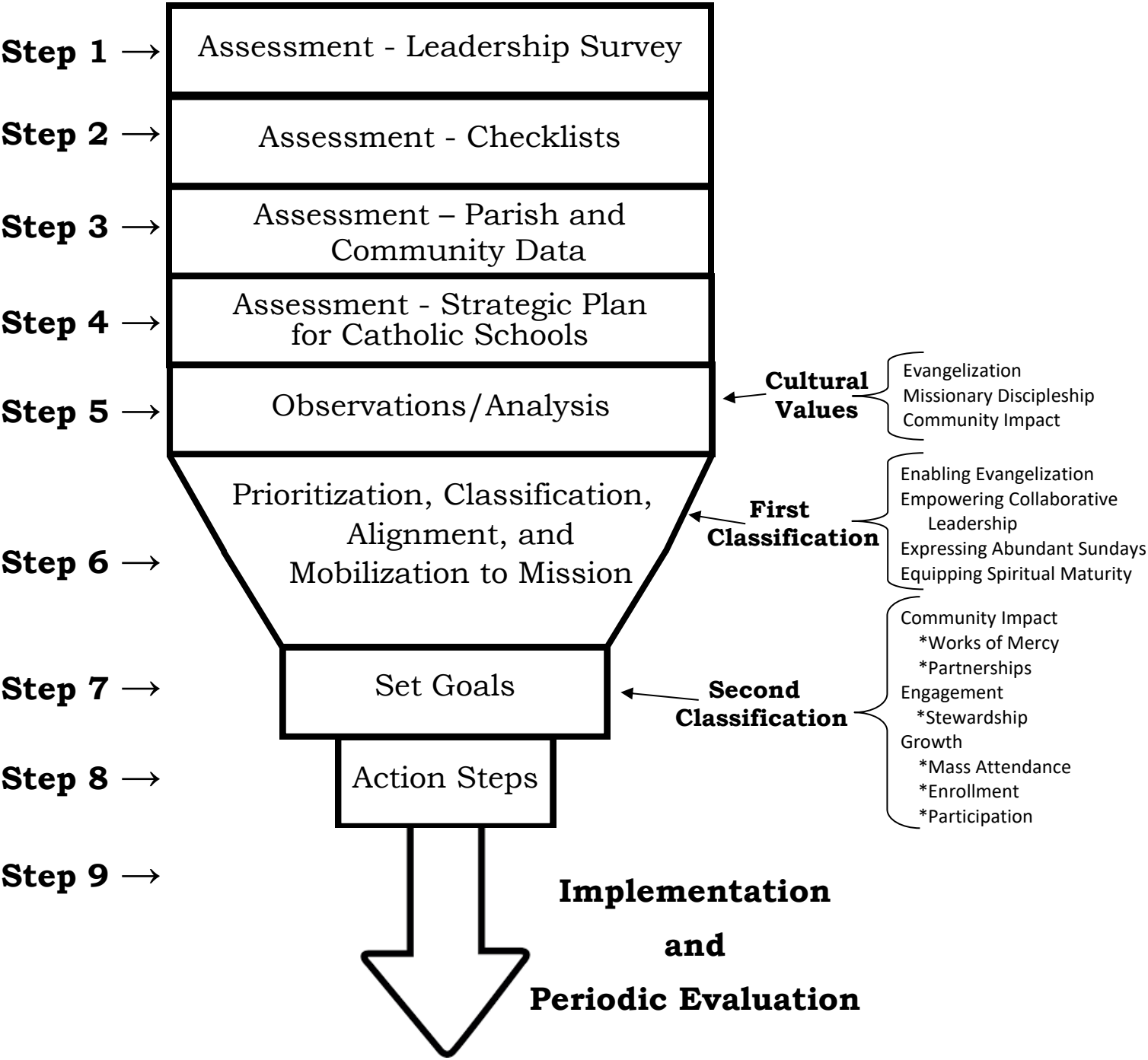
STEP 8 ACTION STEPS

The PMP team defines a set of action steps for each of the goals identified by: clearly stating each step, identifying the metric or evidence that will be used to show completion of the step, identifying the person(s) responsible for carrying out the step, identifying the human and financial resources necessary to complete each step, and defining the start and completion date for each step.

STEP 9 IMPLEMENTATION AND PERIODIC EVALUATION

First, set the date to implement the plan according to the plan's action steps. Make sure those responsible for the steps actually start work implementing the steps when they are scheduled. Communicate the start of the action step(s) to the appropriate oversight body and/or constituents. Second, establish a plan evaluation process and schedule. Third, report the progress made toward the plan's implementation to the appropriate oversight body and/or constituents according to the agreed upon schedule.

NINE STEPS TO A SUCCESSFUL PARISH MISSION PLAN - CHART



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PMP: STEP 1 ASSESSMENT – HEALTH OF LEADERSHIP SURVEY

- Ministry leaders, parish and school staff, board members, council members, and committee members complete the online Health of Leadership Survey regarding their perception of the parish's, the school's, and their own efforts in reference to Evangelization, Leadership, Discipleship and Community Impact.
- The Leadership Survey is completed online by all members of the PMP team by the deadline set by the Curia Parish Mission Planning Team.
- The results of the survey will be shared with the entire PMP team and will point out areas for improvement in the four areas mentioned above.
- The PMP team will review and discuss the results of the survey.
- The PMP team will then list the areas that need improvement.
- The PMP team will decide on the top ten (10) or eleven (11) areas that need improvement based on the survey results.
- Those ten (10) or eleven (11) items are then listed below by the PMP team and retained for future processing and synthesizing (Step 5).

List

1. Evangelization - _____
2. Evangelization - _____
3. Evangelization - _____
4. Leadership - _____
5. Leadership - _____
6. Leadership - _____
7. Discipleship - _____
8. Discipleship - _____
9. Discipleship - _____
10. Community - _____
11. Community - _____

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PMP: STEP 2 ASSESSMENT – OPERATIONAL & MINISTRY CHECKLISTS

- The appropriate personnel and school personnel fill out various checklists associated with parish and school operations.
- These checklists will point out areas for improvement in various areas of parish and school ministries and operations.
- The PMP team will review and discuss the results of all the checklists.
- The PMP team will then list the areas that need improvement.
- The PMP team will decide on the top ten (10) areas that need improvement.
- The list of the ten (10) major areas for improvement will be made by the PMP team and retained for future processing and synthesizing (Step 5).

List

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

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PMP: STEP 3 ASSESSMENT – PARISH AND COMMUNITY DATA SHEETS

- The parish and school PMP team will review their parish and community data sheets regarding demographics, school and religious education enrollment as well as the youthfulness, faithfulness, contributions, and activity of the parish.
- The PMP team will look at trends between 2008 and 2017 regarding registered households, Mass attendance, the reception of the sacraments of initiation and marriage, community and parish economic and demographic data, contributed units, community values, non-participation in religion, and the average contribution per contributor.
- The PMP team will look for and identify connections between the various trends they observe utilizing the questions provided along with the parish data sheet.
- The PMP team will list up to five (5) recommendations for improvement in youthfulness, faithfulness, contributions, active membership, as well as community involvement based on their analysis of the parish data sheets.
- The PMP team will then retain their list of no more than five (5) items for future processing and synthesizing (Step 5).

List

1. Youthfulness

2. Faithfulness

3. Contributions

4. Active Membership

5. Community Involvement

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PMP: STEP 4 ASSESSMENT – STRATEGIC CATHOLIC SCHOOL PLAN

- If the PMP team has responsibility for mission planning for a Catholic school or system, the parish and school PMP team will utilize copies of the *School and Parish Planning: Key Recommendations* document for this step.
- The PMP team will review *School and Parish Planning: Key Recommendations* document and determine which goals in this plan will be integrated into the development of their common parish/school Parish Mission Plan.
- No more than five (5) goals that stress formation in evangelization, collaboration, discipleship and cooperation between the parish and school as well as community impact should be identified by the planning team as a major parish/school collaborative focus.
- The PMP team will list no more than five (5) goals they have identified in this step and retain the list for future processing and synthesizing (Step 5).

Note: it is recommended that parishes that do not have an association with a school might still review the recommendations for ideas, especially relating to Evangelization and Community Impact.

List

1. _____
2. _____
3. _____
4. _____
5. _____

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PMP: STEP 5 OBSERVATIONS / ANALYSIS

- The PMP team compiles all of the lists developed in Steps 1 through 4 into one list. The list should be no longer than twenty (20) items.

| List | Cultural Value (PRIORITY) 1. Evangelization 2. Missionary Discipleship 3. Community Impact | Categorize 1. Enabling Evangelization 2. Empowering Collab. Leadership 3. Expressing Abundant Sundays 4. Equipping Spiritual Maturity | Capital Campaign Applicable |
|------|--|---|-----------------------------------|
| 1. | | | <input type="checkbox"/> |
| 2. | | | <input type="checkbox"/> |
| 3. | | | <input type="checkbox"/> |
| 4. | | | <input type="checkbox"/> |
| 5. | | | <input type="checkbox"/> |
| 6. | | | <input type="checkbox"/> |
| 7. | | | <input type="checkbox"/> |
| 8. | | | <input type="checkbox"/> |
| 9. | | | <input type="checkbox"/> |
| 10. | | | <input type="checkbox"/> |
| 11. | | | <input type="checkbox"/> |
| 12. | | | <input type="checkbox"/> |
| 13. | | | <input type="checkbox"/> |
| 14. | | | <input type="checkbox"/> |
| 15. | | | <input type="checkbox"/> |
| 16. | | | <input type="checkbox"/> |
| 17. | | | <input type="checkbox"/> |
| 18. | | | <input type="checkbox"/> |
| 19. | | | <input type="checkbox"/> |
| 20. | | | <input type="checkbox"/> |

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PMP: STEP 6 PRIORITIZATION, CLASSIFICATION, ALIGNMENT, AND MOBILIZATION TO MISSION

- The PMP team uses the list developed in Step 5 and determines the top three (3) to five (5) priorities for the Parish Mission Plan. These priorities will become the focus of the Parish Mission Plan.
- Next, the PMP team, utilizing the various possible mission areas of focus as aids, classifies the items into the following categories below: Enabling Evangelization, Empowering Collaborative Leadership, Expressing Abundant Sundays, and Equipping Spiritual Maturity.

Note: There needs to be at least one item listed under Community Impact.

ENABLING EVANGELIZATION

1. _____
2. _____
3. _____

EMPOWERING COLLABORATIVE LEADERSHIP

1. _____
2. _____
3. _____

EXPRESSING ABUNDANT SUNDAYS

1. _____
2. _____
3. _____

EQUIPPING SPIRITUAL MATURITY

1. _____
2. _____
3. _____

COMMUNITY IMPACT

1. _____
2. _____
3. _____

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PMP: STEP 7 SET GOALS

- The PMP team uses the list of priorities listed in Step 6 and transforms the three (3) to five (5) priorities into goal statements. Goal Statements generally start with the infinitive verb (i.e. **To develop, To increase, To provide ...**)
- The goals are concise statements of what the parish and/or school will do over the next one (1) to three (3) years to accomplish evangelizing, collaborative leadership, abundant Sundays, spiritual maturity, and community impact.
- **Note:** It is alright if the PMP team assigns more than one (1) item under any one of the five (5) goal categories. However, each plan must have at least one (1) Community Impact goal.

ENABLING EVANGELIZATION

GROWTH - Enrollment (e.g. increase enrollment in Catholic School, Faith Formation, and Youth Ministry)

1. _____
2. _____

EMPOWERING COLLABORATIVE LEADERSHIP

ENGAGEMENT (e.g. school/parish collaborative projects, stewardship, capital campaign, boards, councils, committees, etc.)

1. _____
2. _____

EXPRESSING ABUNDANT SUNDAYS

GROWTH - Attendance (e.g. increase Mass attendance, reception of the sacraments, etc.)

1. _____
2. _____

EQUIPPING SPIRITUAL MATURITY

GROWTH - Participation (e.g. sacramental prep, RCIA, boards, councils, committees, etc.)

1. _____
2. _____

COMMUNITY IMPACT

(e.g. community Works of Mercy, partnerships with agencies and other churches, social services, etc.)

1. _____
2. _____

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PMP: STEP 8 ACTION STEPS

The action steps are those actions that will be taken in logical and chronological order to ensure the identified goal is achieved.

- With this step, the PMP team develops a set of action steps for each of the goals identified in Step 7 using the templates provided at the back of this manual.
- These templates are designed for goals and corresponding action steps pertaining to Attendance, Enrollment, Engagement, Participation, and Community Impact.
- Under each goal list the supporting incremental action steps in chronological order by action step start date (see the worksheet provided).
- Start by clearly identifying each step in easy to understand language.
- Next, you will indicate the metric or evidence that will be used to show completion of the step. Examples of metrics are meeting minutes, e-mail, posters, pictures, written testimonials, reports, etc.
- Next, it is extremely important to indicate the person(s) responsible for carrying out each step. This should be the person who will be held accountable for completion of the step.
- Then indicate separately the human and financial resources necessary to complete each step. Human resources could refer to a committee, task force, an outsourced entity, or an individual.
- Finally, indicate both the start and completion date for each step. Once again, please put the steps in chronological order according to the start date.

Goal and Steps Worksheet Template

| GOAL: | | | | | |
|----------|------------------------------------|---|--|--|----------|
| PROJECT: | | | | | |
| STEP | METRIC (evidence of completion) | POINT PERSON (person overseeing action step) | HUMAN RESOURCE (person or committee handling action step) | FINANCIAL RESOURCE (funds required) | TIMELINE |
| 1. | | | | | Start: |
| | | | | | End: |
| 2 | | | | | Start: |
| | | | | | End: |
| 3. | | | | | Start: |
| | | | | | End: |
| 4. | | | | | Start: |
| | | | | | End: |
| 5. | | | | | Start: |
| | | | | | End: |

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PMP: STEP 9 IMPLEMENTATION AND PERIODIC EVALUATION

- The PMP team, with the pastor's or pastoral leader's approval, needs to set the date for implementing the plan according to the plan's action steps.
- That action step that has the earliest start date within the plan is the date the plan's implementation begins.
- It is imperative that those responsible for the steps actually start work implementing the steps when they are scheduled.
- It is very important to communicate the start of the action step(s) to the appropriate oversight body and/or constituents. The pastor or pastoral leader along with the PMP team determine in collaborative fashion the proper oversight body and/or constituents.
- The PMP team will establish a plan evaluation process and schedule.
- The schedule for evaluating the plan's progress will appear at the end of the Parish Mission Plan.
- They will also identify who will be involved in the evaluation process (i.e. Pastor, Pastoral Council, School Board, Parish Mission Planning team, etc.).
- It is recommended that the progress on the plan be evaluated quarterly, if not monthly.
- It is also recommended that a chart or report regarding the plan's progress be prepared and made available to the appropriate oversight body and/or constituents according to the agreed upon schedule.

Example:

The three (3) year Parish Mission Plan (July 1, 2018 – June 30, 2021), its implementation, and its results will be evaluated by (the appropriate person or group) according to the following schedule.

| 2018 | 2019 | 2020 | 2021 |
|-------------|--------------|--------------|----------|
| | March 31 | March 31 | March 31 |
| | June 30 | June 30 | June 30 |
| | September 30 | September 30 | |
| December 31 | December 31 | December 31 | |

Depending on the results of the quarterly evaluation, the timeline for certain action steps may be altered (i.e. pushed forward or backwards). Please complete the PMP Final Report; the template is located on the Parish Mission Planning webpage at <http://www.gbdioc.org/teammeetings>.

A brief oral overview of the PMP Final Report will be given by (the person or organization) responsible for the implementation of the Parish Mission Plan. A copy of the PMP Final Report will be given to the Pastor/Pastoral Leader, Councils, and Committees and sent to the Curia Parish Planning Mission Team at the Diocese of Green Bay via email at pastserv@gbdioc.org.

