

# **PASTORAL PLANNING PLAYBOOK**

**A Step-by-Step Guide  
to Building Church  
and Community**

with accompanying  
**Website/Blog**  
**Help Line**  
**FaceBook Page**  
**Twitter Feed**

by Walter Coddington



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# Introduction

## Signs that you need pastoral planning

Declining Sunday attendance.

Uneven commitment to the church.

Uncertainty that RCIA and CCD are doing the job.

Young people disengaging from the church.

Donations/contributions going down.

Inability to keep up with changing community demographics.

## Can you answer these questions?

*If your Director of Religious Education suddenly took ill and was unable to perform his/her duties, would a successor immediately be able to pick up where his/her predecessor left off?*

*If your HVAC (heating, ventilation and air conditioning) system shut down and was beyond repair, would you have the money in your budget to replace it?*

*Do you have a protocol in place for handling the media should they come knocking on your door?*

*Are you aware that your parish demographics are changing and, if so, have you figured out how you're going to meet the spiritual and service needs of the new people?*

If you're struggling with these questions, you and your parish will benefit greatly from this Pastoral Planning Playbook.

## What is Pastoral Planning?

Pastoral planning is the process of praying and thinking together about actions of the Body of Christ in a particular place and time.

Breaking it down ...

process = a proven successful methodology, set of activities

praying = discernment

thinking = strategic planning

together = a collaborative effort

Body of Christ = your church

particular place and time = here and now!

The result of pastoral planning is you and your colleagues will know

**where your church is now,**

**where you want it to be,**

**how you are going to get it there.**

The Playbook is written and designed to walk you, step-by-step, through the pastoral planning process. It also provides you with tools that will help you identify, evaluate and execute your goals.



# Executive Summary

*Failing to plan is planning to fail.* – Benjamin Franklin

Strategic pastoral planning should be seen as a vital, flexible and collaborative activity that never really ends. To make what might seem a daunting exercise more ‘management-friendly’ the strategic planning process can be organized in blocks of specific stages and activities referred to as the “Pastoral Planning Framework:”

**Define:** the goal/deliverables/team/time-frame

**Assess:** research/the church today/demographics

**Create:** assimilation/brainstorming

**Execute:** next steps/implementation

**Measure:** what went right/wrong

Using the Pastoral Planning Framework as a jumping off point, the *Pastoral Planning Playbook* organizes the activities in the planning process in nine, easy to follow steps:

**Steps 1 and 2** address planning preparation, including who should be on the planning team and meeting strategy. They stress the importance of inclusion, transparency and process.

**Step 3** focuses on the importance of knowing where your church stands today and identifying and evaluating organizational needs.

**Step 4** covers the development of church mission and vision statements, including some ‘best-practice’ tips.

**Step 5** looks at elements of a strategic plan, goal setting and operationalizing your strategies.

**Step 6** advocates use of the “Performance Management Dashboard.”

**Step 7** is about project management -- you can’t implement your strategic pastoral plan without it!

**Step 8** offer tips on communicating with your church and community stakeholders.

**Step 9** stresses the importance of succession planning and recommends ways to go about it.

## Pastoral Planning Playbook Credits

The *Playbook* follows closely the pastoral planning course instruction of Villanova University Business Fellow, author and consultant **Michael Castrilli**.

Credit must also be given to the Roman Catholic Archdiocese of New York for its role in making the Villanova Church Management course available and affordable to all clergy and laity concerned about the professional and ethical management of the Church.



## Step 1 Assemble the players

No one should do pastoral planning alone, especially if others are needed to execute the plan. So, who should be on the planning team?

The team needs a leader. While it is common for the pastor to be the leader, it's not necessary as long his opinions are invited and he is kept in the planning loop. In addition to providing authoritative [but compassionate] leadership of all key components of the pastoral plan, it's the leader's role to make sure the goals, objectives and activities of the plan are realistic and consistent with the core values of your church.

To ensure that you are considering the needs and interests of all of your internal stakeholders, it's advisable to have at least one representative of each administrative and pastoral department and church social group on the planning team, including but not limited to your Board of Trustees, your Parish Council and your Finance Council! While you may or may not want external stakeholder representatives on your planning team, you'll certainly want to include them in your surveys.

### Key areas of pastoral concern and planning

In selecting people for the team, keep in mind these four key areas of your pastoral work:

**the Word,**  
**worship,**  
**community service,**  
**temporalities.**

### Make sure everyone knows why you are planning:

1. To examine critical operational and pastoral issues.
2. To establish guidelines for direction and decision-making.
3. To be proactive versus reactive.
4. To create a sense of ownership in the planning.
5. To clearly establish the mission and vision of the church.

### Rules of the Game

1. Collaboration!
2. All team members must be in agreement with and supportive of the church's mission statement and vision of the future.
3. All team members should be assigned tasks and pull their weight.
4. All team members should respect the planning process, including meeting deadlines and deliverables.

### Leadership Team

Consider appointing a 4-member core group within the planning team to assist the team leader: a **Secretary** to handle meeting logistics/minutes; a **Project Manager** to coordinate sub-committee initiatives; a **Communications Manager** to keep the parish informed/updated; and a **Financial Manager** to track planning-related budgets/expenses.



## Step 2 The Meeting: Getting off to a great start!

### Be professional

The first major pastoral planning team meeting may set the tone for the whole planning process. The team leader and leadership team must establish themselves as smart, prayerful and really concerned about the future of the church – its staff, its volunteers, its parishioners and the parish community. All team planning members should be gratefully acknowledged for adding this planning responsibility to their already heavy work load.

### Meeting Logistics

**The LED projector will fail. Count on it!** If you expect this from the start, you'll have a back-up projector or plan. There are few things more annoying than listening to a presenter apologizing for presentation equipment failure and/or failing to have a back-up plan. Other logistical considerations:

- Meeting Agenda - circulate this in advance ... list attendees, purpose and expected deliverables of the meeting.
- Meeting room set up - comfortable, directions to restrooms, refreshments.
- Opening prayer/mediation/discernment - specific to the meeting/agenda/attendees, not a Mass.
- Establish meeting protocols, Robert's Rules of Order and Castrilli's meeting tips (see side bar).
- Limit presentations to 5 minutes, allow plenty of time for feedback/interaction.

### Castrilli's Meeting Ground Rules

Use a 'parking lot' for any issues that cannot be resolved in a reasonable amount of time or that may require escalation.

Be courteous, do not engage in side conversations.

Return on time from meeting breaks.

Stay on topic, no storytelling.

Ask "are there any additional ground rules from the group? Did we miss anything?"

Get agreement, "Even though the result(s) may or may not be your most preferred personal choice, it is one that you can live with, support, and not work to undermine.



## Step 3 Conduct Needs Assessment and Evaluation

While opinions vary on this, I recommend you perform your church needs assessments and evaluations before you develop your new mission and vision statements. New community demographic information, for example, might influence your future objectives.

As indicated in the Introduction, needs assessment involves:

- determining where your church is today;
- determining where your church wants to be;
- determining what it will take to get it there.

The difference between where you are and where you want to be is called your Performance Gap. The strategic planning process is designed to bridge that gap and take you where you want to be.

One common tool for visualizing where you are and what you need is a S.W.O.T. (Strengths, Weaknesses, Opportunities, Threats) analysis. The S.W.O.T. below indicates questions the planning team might ask about the church.

Strengths	Weaknesses
What do we do well as a church? What is growing? Where do people seem particularly fulfilled? Which community needs are we meeting? What are the resources within our church community? What / Who do we thank God for here?	What do we do less well? What appears to be declining? Which areas of church seem tired? Or too busy? Which community needs are we not meeting? What are the needs within our church community? What / Who most needs our prayers?
Opportunities	Threats
What gifts / people / resources are under-used? Do we have strengths that can be built upon? Are there people / situations in the community where we could make a	Are any of our weaknesses becoming serious? What changes in society are affecting us? Are changes in the community affecting us? Is a lack of resources jeopardising our future? As we look at church life, does anything cause us to be afraid?

### Survey Design Tips

Clearly define the purpose of the survey.

Clearly determine the audience.

Keep the survey short and focused.

Keep the questions simple.

Keep rating scale questions consistent.

Ask the tough questions.

Pre-test your survey.

Send reminders [to take the survey].

Consider offering an incentive.

Quantitative questions should clearly indicate that you are looking for a specific number or other metric.

Qualitative questions start with "How" or "Why" or "Complete this sentence" or "If."

### Survey Services

#### Survey Monkey

<https://www.surveymonkey.com>

#### Survey Gizmo

<https://www.surveygizmo.com>

#### Google Forms

<https://www.google.com/forms/about/>

### Always ...

share the results of the survey with those surveyed. If you don't, they will be less likely to complete another survey from you.



## Step 4 Develop Mission and Vision Statements

*Every organization exists to do something in order to achieve some ultimate end or goal. A mission statement describes that something and that goal.*

– William L. Pickett

### A good mission statement

1. [Cause] makes clear the core work of the church. This should be consistent with the mission of Jesus Christ.
2. [Action] distinguishes among other churches that do the same work, perhaps by being community or target audience specific or in a particular way the work is performed.
3. [Result] indicates what happens because of the church's work.

### A sample mission statement

*The Roman Catholic Church of the Transfiguration serves the spiritual and transitional needs of the immigrant population of New York City in order to realize a harmonious and God-fearing community.*

### The vision statement

The difference between a mission statement and a vision statement:

A mission statement says what an organization does.

A vision statement describes where the organization sees itself in the future. OR it describes the long-term desired change resulting from an organization's work.

### Sample vision statements

*A world without Alzheimer's disease.* – Alzheimer's Association

*The world's most loved, most flown, and most profitable airline.* – Southwest Air

*A radically inclusive, just and loving community mobilized to alleviate suffering and break the cycles of poverty and marginalization.* – Glide, San Francisco, CA

### Mission Statement Writing Tips

1. Shorter is generally better.
2. Should not be a laundry list of everything the church does.
3. Uses language the parishioners use.
4. Is actionable/operational.
5. Is specific.
6. [Peter Drucker says] reflects opportunities, competence and commitment.

### Vision Statement Writing Tips\*

**Future focused** - clearly describes what the organization will be like in several years.

**Directional** - serves as guide for future plans, strategies and decision-making.

**Relevant/purpose-driven** - reflects the organization's response to the challenges of the day.

**Values-based** - implies the set of values that are required to support the organization.

**Challenging** - inspires members to do great things and achieve a higher level of standards.

**Unique and memorable** - why the organization matters.

**Inspiring** - engages people to commit to a cause.

\* Source: Abi Orenica, staff writer at Fit Small Business



# Step 5 Strategic Pastoral Planning

Up until now, you have been preparing for strategic planning. Actually, even the preparation you have been doing is part of the strategic planning process.

Speaking of preparation, the *Playbook* assumes you have certain basic administrative documents and policies already in order. If not, make sure that they are included in this round of planning and action steps. They include, but are not limited to: job descriptions for all employees and volunteers, updated employee records, an employee handbook, a fire and lock-down safety plan, and updated parishioner/member data.

## Basic elements of a pastoral plan

As mentioned before, the pastoral planning process must be based on how things are now and where you want to be. Our pastoral planning process has five basic elements: mission, vision, goals, objectives, and action steps as set forth below.

Element	Brief Description	Timeframe	Key Questions	Number
Mission Statement	The purpose of the faith community: what it does, how it does it, and what difference it makes	Relatively stable over many years	1. Is it still vital for the community? 2. Do members know it and use it?	One
Vision Statement	What the future will be like if the mission is fully or more fully achieved; stated in present tense	Likely to be changed in a ten-year period and certainly with any change in leadership	1. Is it compelling for members? 2. Does it speak to both head and heart?	One
Goals	The major initiatives required to move toward the vision; investment of discretionary resources with some reallocation	Five years	1. Is this the next best step toward the vision? 2. Who is accountable?	No more than five
Objectives	The major activities required to achieve goals	Multi-year but no more than five	1. Are these efficient and effective means to achieve objective? 2. Who is accountable?	Three to five per goal
Action Steps	What needs to be done each year to meet the objectives and thus achieve the goals	Annual	1. What needs to be done next year to advance the objective? 2. Who is accountable?	Varies

## Keep the Plan Strategic

Follow the planning process.  
Know where you stand today.  
Establish a realistic time-frame.  
Envision alternative futures.  
Have a common sense of direction.  
Set realistic goals and objectives.  
Define milestones.  
Establish qualitative and quantitative evaluation and performance measures/metrics.  
Keep the big picture in mind.  
Avoid “scope creep.” Keep on track.  
Anticipate and manage risks.

## Keep the Plan Pastoral

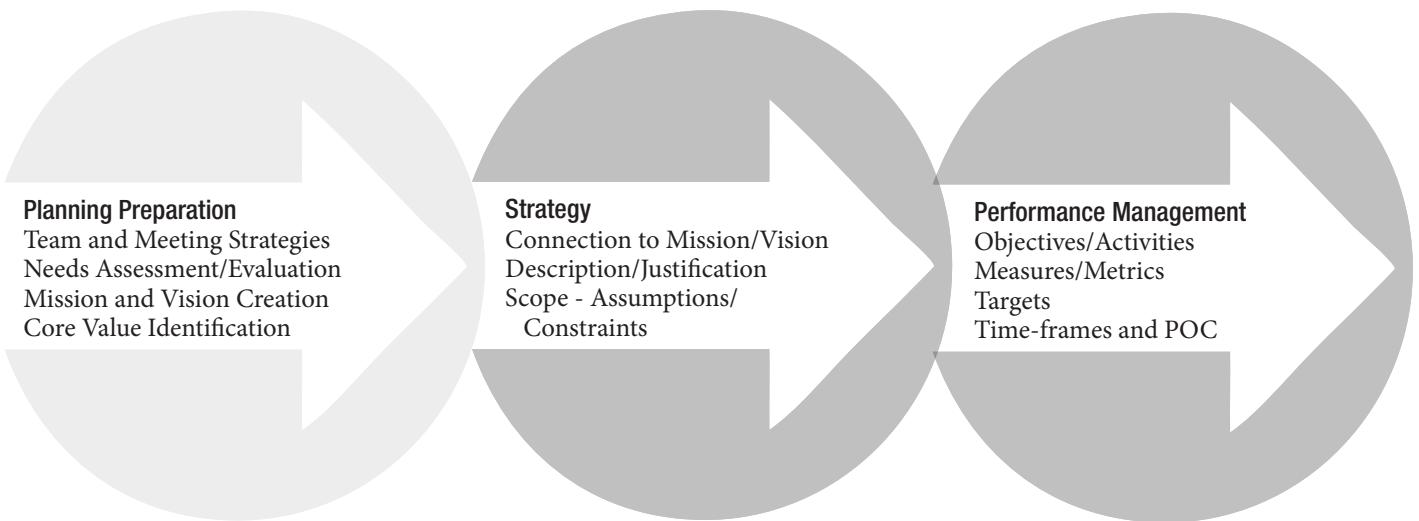
Faith-based  
Discernment focused  
Prayerful  
Scriptural  
Communal

## Keep the Plan Real

Agree on the present  
Clear and workable  
Flexible  
Dynamic (the community is not static)  
Collaborative



## Step 5 The Strategic Pastoral Planning Process



### Preparation check list

#### Three pointer:

1. **Brainstorm** - develop ideas, there are no 'bad' ideas at this stage.
2. **Cluster** - group the ideas.
3. **Define** - Describe the meaning/significance of each idea.



You've established your planning team and agreed upon a strategic planning process.



You've done your SWOT analysis and identified your church's strengths and weaknesses. You know where your organization stands presently.



You've surveyed your staff, volunteers, parishioners and community stakeholders and identified what they expect of/from your church. You know where you need to be.



You've written your mission and vision statements in line with your church's core values.



You've thanked parishioners and other stakeholders for their input/feedback to date and promised to keep them posted as planning progresses.

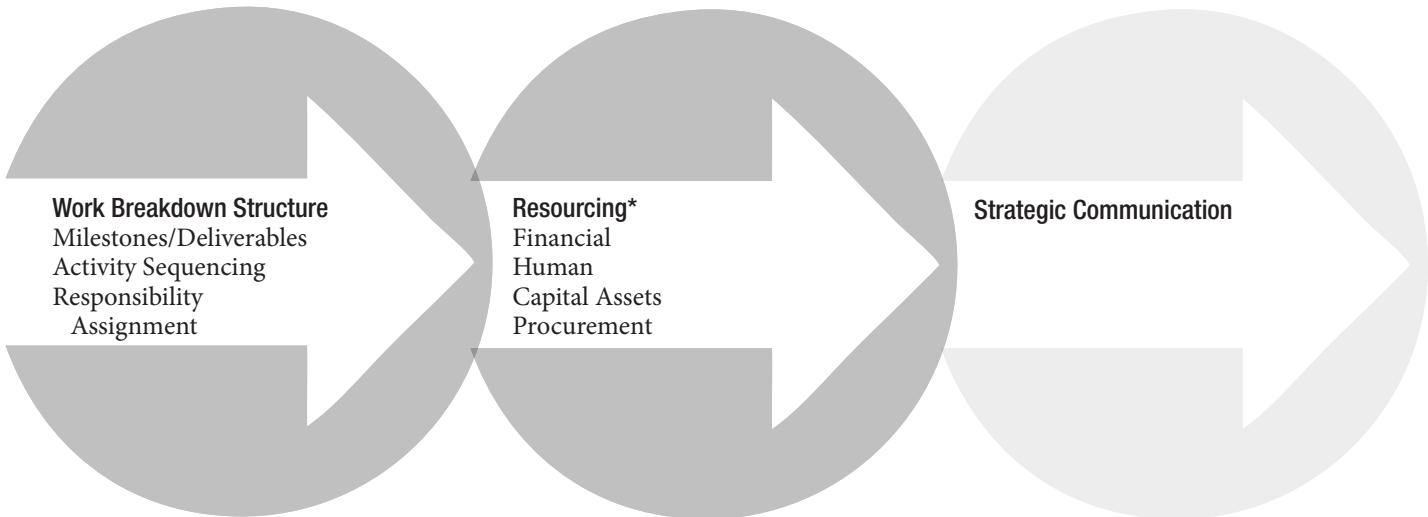
#### On collaboration:

*Groups are remarkably intelligent, and are often smarter than the smartest people in them. – James Surowiecki, The Wisdom of Crowds*

It's time to figure out how you are going to get where you want to be!



**Note:** the strategic planning process is not always linear.



## Choose the approach to goal setting that works best for you

The **Direct Approach** is best if there is no agreement on the goals. Planners go directly from a review of mandates, mission, and SWOT analysis to the identification of goals, objectives and action steps.

In the **Goals Approach**, goals and objectives have been pre-established or imposed by the organization, planners focus on how best to achieve the goals.

Using the **Vision of Success Approach**, planners develop a best picture of the organization in the future, and, working backwards, define the goals, objectives and actions required to achieve the vision.

The **Indirect Approach** works well when a major strategical redirection is necessary and members of the planning team and/or the organization cannot sense where the changes will lead.

The **Action Oriented Strategic Mapping Approach** utilizes word and arrow diagrams and is useful when planning participants have trouble making sense of complex issue areas and/or time is running short.

The **Alignment Approach** helps clarify where there are gaps or conflicts among various elements of the organization's management and operating policies.

The **Issue Tensions Approach** requires that planners frame issues using four tensions: human resources, innovation and change, maintenance of tradition, productivity improvement [and various combinations of all].

The **Systems Analysis Approach** finds planners weighing issues that may be conceptualized as systems.

### Prioritizing your goals

Make sure your goals connect back to your mission and vision.

Make the goals measurable.

Establish a realistic time-frame in which to accomplish the goals.

Make sure you have enough/the right people to carry out the action steps related to the goals.

\* Addressed in *Pastoral Planning Playbook II: The Hard Part*



The ball is in your court!

## Step 5 Strategic Pastoral Planning (continued)

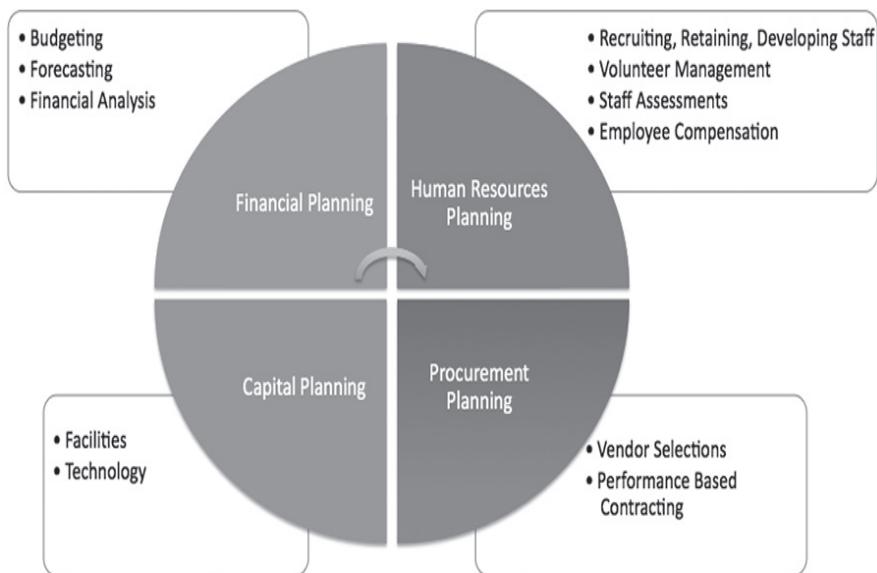
### Next steps

1. Prioritize church issues as your **goals**.
2. Formulate strategies/**objectives** to meet the goals.
3. All agree to adopt the strategic plan/**action steps**.
4. **Implement** the plan/engage the community.
5. Monitor/**assess** performance and course correct.

### Operationalize your strategies

Strategic planning becomes actionable or operational as Tactical Plans, Operational Plans and Contingency Plans.

It's important that your strategic goals tie back to your mission and vision and that your goals and objectives and activities tie to your church's operational planning: including financial planning, human resources planning, capital planning and procurement planning (chart below).



### Violation!

One team member can sour a plan. Make sure that all team members agree (or agree to disagree) with each new step/activity in the planning process.

The same holds true for your staff and parishioners. Keep taking their temperature by keeping them in the loop and allowing for feedback/input.

### Here is an example of aligning your activities to operations:

1. Connect resources to parish priorities.
2. Allocate money coming in to parish expenses.
3. Ensure that all plans stay on budget/track.
4. Empower effective financial decisions.
5. Bring collaboration, communication and buy-in.
6. Consider strategies for the future.

**Note:** Sometimes strategies and tactics are confused. A strategy is the framework or plan, but it provides no tangible results on its own. Tactics are steps for implementing your strategies, are actionable and have a purpose and a measurable result.

Make it count!



## Step 6 Performance Tracking and Evaluation

### Performance Management

Performance management helps make your plan operational. It also:

- provides a clear notion of success;
- provides performance information to management;
- creates a consistent way to communicate success;
- builds ownership and accountability; and
- motivates continual improvement.

Below is a performance management dashboard or matrix. As an Excel spreadsheet, use it for each one of your goals. Keep it simple.

### Performance Management Dashboard

Goal	Objective / Activity	Performance Measure/Metric	Target	Timeframe	POC	Status/Results
<i>What is the purpose and outcome you are looking to achieve?</i>	<i>What are the objectives and activities you plan to deploy to achieve the goal?</i>	<i>What is the measure and metric to determine success?</i>	<i>What is the anticipated performance target?</i>	<i>When will progress be reported and/or results achieved?</i>	<i>Who is the individual responsible?</i>	<i>What is/are the current status of goal achievement?</i>

### Reminder: align goals, outcomes, objectives and activities

Goals not only need to be aligned to your mission and vision, goals should also be tied to outcomes that serve the pastoral, programmatic, operational and financial ares of your church.



## Step 7 Project Management

### Tips for developing and using WBS

Include the entire project life cycle.

Clearly articulate activity milestones/deliverables.

Sequence project elements/activities in proper order.

Assign responsibility for all activities/tasks.

Keep time-frames realistic.

Be consistent in use of units of measure/time.

*Projects are naturally chaotic. The primary business function of project management is organizing and planning projects to tame this chaos.*

- 20|20 Business Insight, Ltd.

There are many different project management methods. It's most important that your team use one in order to ensure that realistic expectations are set around what can be delivered, whose going to deliver it and by when. One such method is Work Breakdown Structure (WBS).

WBS provides the framework for planning, cost estimation, responsibility assignment, and reporting. It's a deliverable-oriented grouping of project elements that organizes and defines the total work scope of the project or plan.

The key to using a WBS worksheet (sample below) is to break down each activity in your strategic plan to the lowest level needed for properly controlling the project.

#	Element	Start Date	End Date	Duration	Milestone/Deliverable	Accountable POC
1	Project Plan	1-Jun	15-Jun	14	<i>Project Plan Completed</i>	Mike
1.1	Gather Core Team	1-Jun	10-Jun	9	Meeting Notes	Mike
1.2	Project Plan Developed	1-Jun	15-Jun	14	Project Plan	
2.0	Teacher/Volunteer Recruitment	1-Jul	20-Jul	19	<i>Recruitment Plan</i>	
2.1	Assess Needs	15-Jun	20-Jun	5	Needs Assessment Doc	
2.2	Create Volunteer Recruitment Strategy	20-Jun	25-Jun	5	Plan	
2.3	Recruit Volunteers	25-Jun	20-Jul	25	Performance Dashboard	
3.0	VBS Program Publicity (Attendance)	15-Jun	5-Aug	50	<i>Advertisement Plan</i>	
3.1	Develop Advertising Plan	15-Jun	1-Jul	16		
3.2	Prepare announcements for Church Bulletin	30-Jun	10-Sep	70	Scripted Announcements	
3.3	Student Sign up	10-Jul	5-Aug	25	Performance Dashboard Updates	
4.0	Program Delivery & Eval	1-Jul	25-Aug	774	<i>Full Schedule</i>	
4.1	Logistics/Schedule	15-Jun	15-Jul	30	Listed Times/Topics	
4.2	Food/Beverage	15-Jul	8-Aug	23	Listed Needs	
4.3	Handouts	5-Aug	10-Aug	5	Printed Handouts	
4.4	Deliver Program	10-Aug	15-Aug	5	Student Attendance	
4.5	Evaluate Program	17-Aug	25-Aug	8	One page SWOT Analysis	



## Step 8 Strategic Communications

### Communication Tips

Be truthful.

Be transparent.

During times of change, over communicate.

Repetition is good.

Small bites of information, better than large.

Look for opportunities to reinforce message.

Engage the internal influencer(s).

Don't surprise people.

Be authentic.

Encourage feedback.

*...our every word and gesture, ought to express God's compassion, tenderness and forgiveness for all.*

- Pope Francis

Planning team members need to communicate plan-related information, initiatives and progress to other parish stakeholders. It's important to get all stakeholders to buy-into the pastoral plan and to encourage their on-going support. Be thoughtful, intentional and professional about communications. It shouldn't be the last thing you hurriedly do and only if you have the time.

### Strategic communication begins with defining the ...

**Key audience(s)** - among your internal and external stakeholders.

**Key messages** - for example, the why and benefits of strategic pastoral planning.

**Transmission** - among the variety of traditional and social media outlets and services.

### Getting the word out to the public

News and other media companies are always looking for content/news stories. Here are four tips for working with the media:

1. Put your story/information in the context of the larger picture, e.g., how it might impact the community.
2. Be honest, clear, brief and specific; use numbers or statistical data when appropriate.
3. Send clear, reproducible pictures along with your story.
4. Don't send info/stories to the press too far in advance; two weeks lead time is usually appropriate.



Pass the ball.

## Step 9 Succession Planning

*[Succession planning is] a way to ensure that the strategic pastoral plan continues to bear fruit in the future.*

– Michael Castrilli

### ‘Blocks’ to succession planning

Everyone in an organization can do something in advance to prepare for his/her departure and make life easier for his/her replacement. It is, however, the responsibility of leader/managers in the organization to call for and oversee succession planning. Those that don’t may be:

unwilling to let go;  
fearful of losing their job;  
unable to share authority;  
threatened by the next  
generation of talent;  
technically challenged;  
convinced only they can  
do the job.

Succession planning is not only concerned with people, it concerns church policies and practices as well. Succession planning should be done for every major position, operation, service, policy and ministry in the church.

Succession planning:

- develops internal talent;
- creates a leadership culture;
- ensures knowledge/best practices are carried forward;
- maintains ministry and program continuity;
- minimizes transition-related risks;
- covers for emergency and unplanned absences or departures; and
- ensures organization viability.

### Types of succession planning

**Leadership Development** - focuses on the development/preparation of internal talent.

**Emergency Succession** - is planning/architecture for unexpected departures and ensuring the organization will be viable [at least in the short term] no matter who assumes vacated positions.

**Departure-defined Succession** - is planning for departures that you know about in advance.

**Note:** In all cases, leaders/managers already in place should not be made to feel threatened by succession planning.



## Conclusion

*[We also have to] be out there recognizing the world as it's changed and the world as it is, not the world as it was.*

— Tony Blair, former Prime Minister of the U.K., Keynote Address: “Leadership and Effective Communication,” National Leadership Roundtable on Church Management, Annual Conference at the Wharton School, 2009

### Consider hiring a consultant

*In today's fast-paced, every-changing world ... Strategic-minded churches ... are increasingly turning to ministry consultants to help them fill in the knowledge and time gap for the many special situations that arise. These consultants [have] years of ministry experience gained from other projects and ... organizations.*

— Aubry Malphurs

*Pastoral Planning Playbook* is a ‘how-to’ guide for church leaders and managers who don’t want to see their church “chopped,” but would prefer to see it successfully meet the challenges of the future.

Much of the content of the *Playbook* is taken from course work developed by Michael Castrilli. In addition to his own extensive experience, he has drawn upon the work of other instructors, pastoral planners, and business and theological writers. Here is a partial list for your reference:

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# Addendum

## The 2011-16 Strategic Pastoral Plan for the Archdiocese of Chicago



### Introduction

All authority in heaven on earth has been given to me. Go, therefore, and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything that I have commanded you. And remember, I am with you always, to the end of the age.

— Matthew 28:18-20

### Introduction

This Strategic Pastoral Plan supports our holy mission of evangelization. It is the result of a process of discernment and reflection that:

- **Listened** carefully to pastoral realities
- **Collected** research on the faith life of Catholics in the Archdiocese of Chicago
- **Drew** from the most effective principles of good-functioning systems and organization
- Most importantly, tried to **detect** where God is leading us in this moment

### Introduction

This Strategic Pastoral Plan is:

- **Pastoral** – because it is framed by pastoral realities
- **Strategic** – because it approaches a renewal of mission for the Church in the Archdiocese of Chicago in a series of organized and related steps
- **Planning** – because it offers not a set of detailed prescriptions or a fully elaborated blueprint but rather because it indicates important pastoral directions with some specific initiatives

### Pastoral Phenomena that Led to the Planning Process

#### Evangelization

- A perceived drift among many from practice of the faith, e.g., Sunday attendance
- Uneven commitment to the Church in general and to the parish in particular
- A growing perception among many that the parish is more a service delivery system than a community of faith

#### Formation

- An uncertainty that a new generation or even the previous one has the tools to express and live out the faith, including: knowledge of doctrine or teaching, knowing the ways of prayer, and familiarity with principles of morality that direct decisions and behavior
- There is a move to younger and younger people in the Church; there is a proportionate decrease in the ecclesial socialization or a sense of belonging to the Church

#### Parish Vitality/Finance

- Fewer and fewer people are supporting an increasingly aging infrastructure
- Although there are shifting demographic needs, we do not have a corresponding capacity to shift our material resources for maximum efficiency
- The most visible, active, and supportive population in the Church is aging rapidly and is not being replaced by younger people

Catholic education issues are being addressed simultaneously by the Office of Catholic Schools and the Archdiocesan School Board.

Issues deferred for future study:  
Vocations / Leadership Development and Social Justice

### Research Findings and Imperatives – Evangelization

#### What We Found

- Most Catholics who leave regular practice of their faith do so by age 24
- Most of the **majority of Catholics who do not attend Mass regularly** are there on occasion and **want their children to receive sacraments**
- That said, many Catholics **undervalue the sacraments**
- Catholics have **mixed pride** in the Catholic Church

#### What This Means We Should Do

- Focus on evangelization of **teens**
- Focus on evangelization of **parents**, especially when children are being presented for sacraments
- Build understanding of the **meaning and value of the sacraments**
- **Rebuild pride** in the Catholic Church (address detractors from pride; address moderate pride in fundamental aspects)

# Addendum

## The 2011-16 Strategic Pastoral Plan for the Archdiocese of Chicago

<p><b>Research Findings and Imperatives – Parish Vitality / Finance</b></p> <p><b>What We Found</b></p> <ul style="list-style-type: none"> <li><b>The majority of parishes struggle financially</b> – &gt;60% of parishes ran cumulative deficits from 2005-09</li> <li><b>There is an urgent need for action</b> – the deficit parishes are creating a solvency threat as parishes spend down their savings</li> <li><b>There is real basis for hope</b> – high variability of results among like parishes suggests significant improvement opportunity</li> </ul> <p><b>What This Means We Should Do</b></p> <ul style="list-style-type: none"> <li>Roll out parish turnaround program, known as “Parish Transformation Initiative”</li> <li>Do more centralized purchasing and shared services</li> <li>Improve accountability for parish results</li> <li>Improve visibility into parish finances</li> </ul>	<p><b>Governing Theme of the Strategic Pastoral Plan</b></p> <p><b>Governing theme</b> – Over the next five years, more deeply incorporate baptized Catholics into the Catholic Church, as the body of Christ, and do so over the entire course of their lives</p> <p><b>What We Plan to Do: Involve and Help Parishes with</b></p> <ul style="list-style-type: none"> <li><b>Evangelization</b> <ul style="list-style-type: none"> <li>Teens</li> <li>18 to 24 year-olds</li> </ul> </li> <li><b>Formation</b> <ul style="list-style-type: none"> <li>Parents</li> </ul> </li> <li><b>Parish Vitality</b> <ul style="list-style-type: none"> <li>Renewed sense of mission and stable financials</li> </ul> </li> </ul> <p><b>Overarching goal</b> – Improve total Archdiocese October count by 20% in each parish by 2016</p>												
<p><b>Strategic Initiatives – “Years of” Series to Launch Full Archdiocesan Focus and Support</b></p> <table border="1"> <thead> <tr> <th colspan="2">Launch Dates</th> </tr> </thead> <tbody> <tr> <td><b>Ongoing</b></td> <td>Parish Transformation/Financial Stability</td> </tr> <tr> <td><b>July 2011</b></td> <td>Year of <ul style="list-style-type: none"> <li>Teens</li> <li>18 to 24 year-olds</li> </ul> </td> </tr> <tr> <td><b>July 2012</b></td> <td>Year of Sunday Mass</td> </tr> <tr> <td><b>July 2013</b></td> <td>Year of Parent Formation</td> </tr> <tr> <td><b>July 2014</b></td> <td>Year of the Sacraments</td> </tr> </tbody> </table>	Launch Dates		<b>Ongoing</b>	Parish Transformation/Financial Stability	<b>July 2011</b>	Year of <ul style="list-style-type: none"> <li>Teens</li> <li>18 to 24 year-olds</li> </ul>	<b>July 2012</b>	Year of Sunday Mass	<b>July 2013</b>	Year of Parent Formation	<b>July 2014</b>	Year of the Sacraments	<p><b>Principles to Guide Specific Initiatives</b></p> <ul style="list-style-type: none"> <li>Aspirational in vision</li> <li>Bias toward local implementation, although with central support and guidance where relevant</li> <li>Focus on incorporating lay and ecclesial ministry in a very active way, with a bias toward approaches that could go viral where possible</li> <li>Respect diversity and ensure that approaches reflect changing demographic composition</li> <li>Employ empirical measures to gauge impact as well as gathering narratives</li> </ul>
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Source: <http://legacy.archchicago.org/StrategicPastoralPlan/pdf/StrategicPastoralPlan.pdf>

**Coming soon ...**

Pastoral Planning  
Website/Blog

Pastoral Planning  
Help-line

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Planning  
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