

ST. MONICA PARISH
ISPD Assessment
May 2010

CONTENTS

	Page
I. INTRODUCTION	
<hr/>	
Background	2
Scope of Analysis	2
Appreciation	2
Development as the Frame of Reference	3
ISPD	4
II. KEY INPUT	
<hr/>	
Materials Gathered	5
Key Persons Interviewed	7
Interview Question Compilation	8
III. ASSESSMENT HIGHLIGHTS	20
<hr/>	
IV. AREAS OF ASSESSMENT	24
<hr/>	
Programs/Activities/Personnel	
ISPD Perspective	
V. RECOMMENDATIONS	44
<hr/>	
VI. BENCHMARK: GREAT PARISHES	48
<hr/>	

I. Introduction

Background

As part of the development and planning work, St. Monica Parish and the Institute of School and Parish Development (ISPD) have entered into a process designed to invite and involve people from the parish in building a long-range plan for the future.

As agreed, one of the steps of this process is to conduct an initial Assessment. The associate working with St. Monica on this Assessment is Frank Donaldson. Mr. Donaldson conducted interviews on March 30 and 31, 2010. The initial Assessment is scheduled to be presented to the leadership in May.

Scope of Analysis

The initial Assessment is a look at the parish in general and, more specifically, in the areas of leadership and planning, development, communications, organization and fundraising. Much of the emphasis is internal, seeking to understand the base of operations of development, the critical issues the parish faces regarding development, and offering strategic recommendations in order for development to flourish in the future. In essence, ISPD is taking a development “snapshot” of the inner circle of St. Monica Parish and assessing the strength of the development infrastructure.

Input for this analysis was received in the following manner:

- Interviews with various parish and school personnel;
- Initial phone conversations and small group meetings with parish Leaders;
- Assessment binder questions that were answered by the parish Administration;
- Gathering of materials requested by ISPD.

Appreciation

The staff of the Institute of School and Parish Development wishes to thank the many individuals who took the time to meet with Mr. Donaldson in an effort to share their concerns, opinions and hopes for St. Monica. Special thanks go to Father Todd and all who helped in preparation with this report. The materials that were requested and the answers to the questions in the Assessment binder were outstanding in terms of format, organization and quality. Thank you!

Development as the Frame of Reference

One of the major challenges Catholic parish leaders face is educating the key internal constituencies about the meaning of the words Catholic Development. Closely associated with the meaning is the understanding that development is a process, not a program, to be plugged in only at specific times when money is needed.

Development is defined as **the meaningful involvement of people in your mission and vision for the future**. The model that the Institute of School and Parish Development teaches throughout the country is called “The Seven I’s of Development.”

The Seven I’s of Development

- Identify:** Specifically the people, processes, values and goals that will be the keys to the development process.
- Inform:** Reach out to the key publics, informing them of the development process and the essential elements of your parish.
- Invite:** Invite key publics to take a close look at you as you look at them.
- Involve:** Involve people in the development process in meaningful ways.
- Implement:** Put into action, strategic plans that have been created through the involvement of people.
- Invest:** Arrange for involved people to invest in the future of their parish and their own personal future.
- Improve:** Implement an evaluative process to ensure longevity of your development process.

The Institute of School and Parish Development will be viewing St. Monica from this particular frame of reference, that is, from the context of the “Seven I” approach to development.

ISPD

The Institute of School and Parish Development is a national Catholic consulting firm headquartered in New Orleans, Louisiana. The president of the firm is Frank Donaldson, who has a background as a Catholic school administrator, development director and teacher for more than 20 years. There are eight associates — full and part-time — working with ISPD, along with a staff of two full-time team members.

ISPD works exclusively with Catholic schools, parishes and dioceses across the country through on-site consulting and workshops.

The company is twenty-one years old and concentrates its consulting services in the following areas:

- † Present Situation Analysis
- † Long-Range Strategic Planning
- † Development Office Set-Up
- † Development Director Hire and Train
- † Building the Development Core Team
- † Strategic Plan for Development Efforts
- † Annual Funds
- † Major Gift Process
- † Endowment Programs
- † Board Development
- † Faculty, Parent and Board Unity
- † Mission and Vision Formation
- † Recruitment and Marketing
- † Publications
- † Capital Campaigns
- † Planned Giving
- † Total Quality for Catholic Parishes and Schools
- † Catholic School Management

In our work with many schools, parishes, and dioceses, we are pleased that for the past twenty-one years, our efforts have been successful.

With the experience of working with many Catholic parishes throughout the country, and understanding what is working well and what is not, ISPD is pleased to present this Assessment to St. Monica Parish.

II. Key Input

Materials Gathered

1. Parish and school budget
 - a. Parish 2009 – 2010 budget
 - b. School 2009 – 2010 budget
2. Recent publications and communications
 - a. Weekly Bulletin – March 28, 2010
 - b. Three recent pastor letters
 - c. Newsletters
 - i. Three Youth Ministry
 - ii. School Daily e-mail news
 - iii. School staff weekly newsletter
 - iv. School Parent Weekly newsletter
 - d. Brochures
 - i. RCIA
 - ii. RCIA Sponsor
 - iii. SCC
 - e. Other
 - i. 2010 Parish Directory
3. Evaluations and marketing research
 - a. PEP Evaluation Project, 1997
 - b. Mission Enhancement Initiative, 2004 – 2005
 - c. Stats/Stars/Struggles Summary – February 2010 Conclave
4. Long-range plans in any area
 - a. Property Master Plan – June 2005
 - b. RCIA 2010 – 2011 Annual Plan
 - c. Small Church Community 2010 – 2011 Annual Plan
 - d. Adult Faith Formation -- 2010 Plan
 - e. Adult Faith Formation – Planning Cycle
 - f. Adult Faith Formation – 2009 Formation Team Building Plan
 - g. Adult Faith Formation – Event Coordination Contacts
 - h. Adult Faith Formation – Program-Planning Template
 - i. Adult Faith Formation – Best Practices
 - j. Adult Faith Formation – A Pastoral Plan in the US, November 1999
5. Job descriptions of staff, ministry leaders, and people working in development
 - a. Staff
 - b. Volunteers

6. Parish welcoming materials
 - a. None provided
7. Recruiting materials for the school
 - a. Store flyer
 - b. Inquiry folder
8. Stewardship literature
 - a. None provided
9. Annual Fund literature for the school
 - a. Last *Share the Vision* brochure
10. Special event fund-raising literature
 - a. None provided
11. Parent/faculty bulletins
 - a. None provided
12. Parish Mission Statement
13. School Mission Statement
14. Parish Organizational Chart

Key Persons Providing Input

1. Bacon, Barb
2. Baker, Bill
3. Beals, Paula
4. Berg, Pam
5. Beyke, Bob
6. Burris, Susan
7. Chua, Christine
8. Connelly, Joe
9. Corcoran, Anne
10. Corydon, Kevin
11. Delaney, John
12. Dimas, Gerardo
13. Dottery, Gene
14. Exline, Steve
15. Glennon, Bill
16. Good, Debbie
17. Goodson, Father Todd
18. Gries, Father Jeremy
19. Griggs, Rick
20. Hittle, Marge
21. Kern, Bob
22. Langham, John
23. Leipa, Andra
24. Lents, Gary
25. Megel, Sister Anna Marie
26. Pimentel-Gannon, Maria
27. Pitcher, Linda
28. Roudebush, Claire
29. Schommer, Eric
30. Schulz, Steve
31. Seitz, Christine
32. Sherer, Julie
33. Solis, Margie
34. Starkey, Kevin
35. Sullivan, Mary
36. Thomas-Day, Mary Jo
37. Weaver, Tim

Interview Question Compilation

Note: A number denotes the number of times a response was given.

1. What most impresses you about St. Monica's Parish and School?

- Diversity – 17
- Welcoming – 14
- Liturgy– 8
- People feel at home. – 7
- Variety of ministries – 7
- Technology in the school – 6
- CHRP – 6
- SCC – 5
- Good parish staff – 4
- Size – 4
- School – 4
- Leadership – 4
- Friendly – 4
- Energy – 4
- Spiritual – 3
- Extra-curricular activities – opportunities – 3
- RCIA – 3
- People – 2
- Strong curriculum in school – 2
- High quality education – 2
- Does not judge others – 2
- Strong pastors – 2
- Desire to do things – make things happen – 2
- Vibrant
- Motivated
- Good relationships
- Youth minister, CYO – leaders
- Focus of prayer
- Not terribly impressed
- Good interior
- Talent
- Great volunteers
- Feeling togetherness
- Good heart
- Mary Jo Thomas Day is wonderful.

- First to do a lot of things – new programs, ministries, etc.
- Catechists and their dedication
- Prepares students well for high school
- Energy of school faculty and staff
- Tim Weaver
- Flexible parish
- Parents step up.
- Positives and negatives
- Facilities
- Personality of parish
- Relaxed atmosphere where people can learn
- Open door policy with administration – principal and pastor
- Growing school
- Priest presence in school
- Ability to adapt – not a stagnant parish
- Parish and school working together
- Communal parish
- Ministries give parish ownership – but they need direction.
- Easy to work with people – can express yourself openly to them
- Sense of vitality / connectedness
- Just faith
- Struggle is to make us one community.
- People have been receptive.
- People are giving and want to be involved.
- Family
- Engage people – belonging
- Provides ownership in parish
- Very active frontier – school side
- Very supportive parent base
- Test scores – academics
- Blue Ribbon School
- Willingness to support each other
- School has good Christian values.
- Inclusiveness
- Environment
- Smooth transition
- Sense of community – can converse with people
- Able to grow and adapt with the changes in the community.
- Parish has valued the school and always made provisions to keep it alive even during the years of lower enrollment.

2. *What, in your opinion, is the reputation of the parish in the wider community?*

- Good reputation – 23
- Diverse – 9
- Active, loving parish – 4
- Elitist with some – 4
- Very positive in Catholic community – 2
- People come from far and wide. – 2
- Good youth ministry – 2
- Welcoming – 2
- Friendly – 2
- Not welcoming
- They have a false image.
- Parish that has everything.
- In the neighborhood, it is a double-edge sword.
- Feel at home
- Not much, no children in school from immediate neighborhood.
- Just establishing the school's brand
- The parish that gets things done.
- Can be intimidating
- Hard to come to when you don't know anyone.
- Known for new gym – great
- Sports program is good.
- Parish is seen as a leader.
- Cutting edge
- "I believe it is."
- Positive association
- Hospitable
- Filled with resources
- Always referred to as the parish doing it the right way.
- Spiritual not presentation
- Spanish parish
- Do they have English classes?
- People envy parish.
- Accepting of different ways of expressing the faith
- Strong growing school
- Active CYO
- Open to all
- Academically challenging
- Dangerous neighborhood – security
- Adult formation – RCIA

- Sunday Religion Education
- Community
- Left of center – Theologically
- Changing because of new pastor
- Why does St. Monica work so well?
- School families are impressed.
- Strives to be like St. Monica
- Wonderful model
- Thriving parish
- Was not always that great.
- Large parish – continual growth
- Proud
- Energetic
- Driving
- Ecumenical
- Service to local community
- I believe that with strong pastoral leadership that St. Monica has enjoyed that the parish is well respected.
- Providing opportunities for program growth seems to be important to parish leadership and has allowed a wide variety of outreach in the community.

3. *What are the areas of the parish that you feel need the most improvement?*

- Communication – 18
- Website – 3
- How do you get the 2nd ripple/3rd ripple of people to experience CHRP, SCC, and RCIA? – 3
- Announcements – poor process – 3
- Safety / security – 3
- Language communication – 3
- One community is needed. – 3
- Anglo – Hispanic communities – 2
- Stewardship – 2
- Bilingual presence in the front office. – 2
- Youth ministry – 2
- Some ministries duplicate each other. – 2
- Coming together as one community
- Common vision
- Too many cliques
- Too much guarded
- Parish vs. school – somewhat

- Governance – commission structure is not working.
- Well established ministries are guarded and not welcome.
- They don't take guidance very well. "We are the trend setters – the cutting edge."
- These strong leaders go straight to pastor instead of working through an organized structure.
- Relationship are built around small groups.
- Spanish – English must respect each other.
- Liturgy committee needs to be one.
- Ministries are all over the place – some are nothing but clubs.
- Same people do it all.
- Been impressed with everything thus far.
- School marketing – need a "brand."
- More open to Hispanic population
- Too many guarded kingdoms
- School – used to subsidize 42% - we should make Catholic Education available for all families.
- Parish – Audio speakers are awful – been that way since 1990.
- Not a strong infrastructure
- Pastoral staff needs to be more of a team.
- New ideas are put down.
- Too many ministries
- Be more receptive of the two languages – have more Spanish in English Masses and vice versa.
- Improve on spirituality.
- Upcoming events – announce more often.
- PA system is awful.
- Need the Parish Festival to return
- Need more social events for all
- Need to connect more with two new pastors.
- Too much disconnect between school and parish.
- More exposure to the ministries we do have
- Fr. Todd needs to express himself more.
- Personnel – needs to have a more welcoming environment in the parish office.
- Strengthen and build relationships between staff and community.
- Bigger library
- Need to market internally – school
- Not a lot of Hispanic students in school
- Need to get parish better organized
- Financial issues

- Bulletin needs improvement.
- We want this to be primarily an English-speaking community that supports the Hispanic community.
- Bigger cry room
- More open to people outside of the parish
- Reinvigorated
- Anglo – Hispanic issue
- Traffic after Mass is horrible.
- Parish is huge – need to “feel” smaller.
- People do not realize how much we have here and to appreciate it.
- With major committees that exist, there is not a consistency on how they are run – parish.
- Finance committee (no term limits, no process to cycle people through)
- School Friend Committee (non-existent for past few years)
- Welcoming
- Interaction between Hispanics and Anglican communities need education and process of change.
- Size makes it difficult. Have done two conclaves with representatives from each ministry.
- Need greater sense of vision with all areas.
- Increase leadership base – approximately 200 people as leaders – need more.
- School needs to tighten up dress code at school Masses.
- Not just a “private” school – we are Catholic.
- Spanish ministry – undermanned – fast growing
- Building takes a beating,
- Many volunteers – seem to take over
- More opportunities to develop the Hispanic community
- Foundation needs to be put in plan to make Hispanic/Anglo communities work
- Build Hispanic leadership.
- Simultaneous translation
- Pastor needs to be more flexible (i.e. announcements at Mass).
- New parishioner welcome
- Need to care for poor and needy
- Improve on our faith life.
- Understand that we can learn from the Hispanic community.
- Do pastors really understand this parish?
- Trampled on customs/traditions – i.e. washing feet
- RCIA program – 50 people in the past – 14 now
- Integration between Hispanic/Anglo communities

- School – providing consistency in academically at all levels
- School – communication between school and parish
- School – administration in classrooms
- Staff members – some need to work harder.
- Ministries – people only focused on their ministry
- “A bunch of separate ministries under one roof”
- Doing alright
- Church needs to be more pro-life.
- Ministry competition – space
- Liturgy – take it up a notch.
- More people in the pews involved
- Adult catechesis
- Need ESL classes
- Organization / structure
- Greater connection between school and parish
- Engagement beyond core group
- Majority of people have never been invited
- Stronger connection to local community – can do more.
- Not allowing small groups of individuals to control parish and school policy – certain times it seems as if some group can push their agenda to the detriment of the community.

4. *If you could snap your fingers and change any 2 to 3 things today, what would they be?*

- One community – 4
- “Share the Vision” – 3
- Communicate – 3
- Need better security. – 3
- Full school – 3
- Better structure/organization – 3
- More families contributing money – 2
- Youth programs – 2
- Full integration of Hispanic – Anglo communities – 2
- Quality of youth ministry – 2
- Need more volunteers – 2
- More people should be in music. – 2
- Increased unity
- Team work needs to be more systemic.
- Coherent liturgy / Eucharist are common denominator.
- People need to understand “Stewardship.”
- Ministry – need to market more.

- Personally, very happy
- Born again
- Streamline personnel
- Have people of color on staff – need to be more representations.
- Alumni Association
- Have a Spanish bulletin
- Have a English bulletin
- More support people for staff
- That people would accept change and know who we are
- Be more bible focused
- Putting God first
- Transportation to the school for students
- PA system
- Need to tutor more of the Spanish speaking kids.
- Keep tuition affordable.
- More technology
- Give our new pastors a chance.
- There is a disconnect between Hispanic and English communities – need an understanding – education.
- Larger church
- More integrated parish but not sure on how to get there.
- Need more land
- Bulletin
- Parish Fair that would celebrate cultures
- More events
- “Church” is more than Mass.
- Bible classes
- Planned giving
- Level of engagement – 70 %
- Governance
- Would make diversity of parish look like the diversity of a school
- Make Catholic school financially affordable.
- Bilingual personnel
- School balances budget on too many fundraisers – need a better financial plan.
- What about north side of property? What are the plans?
- Football field on north side of campus
- Phones – reception needs improvement.
- Disconnect between faith and life
- Lighting in the church
- More parents taking advantage of school

- 2nd Spanish Mass – huge number who want to participate
- Leadership and skills training - long term
- Not a lot instantly that needs to be done
- Bi-lingual – too much focus
- More adult programs in all areas
- Everyone feels loved and welcomed.
- Let traditions continue.
- Quit ignoring the people.
- Real sensitivity to Hispanic community, but what about Anglo traditions?
- Parish office very unwelcoming
- Money to pay for everything in school
- 75% of people involved in ministry
- Snap away any financial concerns
- Any child that wanted to come to St. Monica School could come
- Young people more involved
- More people involved
- Greater feeling of community
- Channel our skills in growing the parish.
- Balancing faith of parishioners between heart and mind
- Too many ministries – talents are spread all over.
- Have revised organization with designated decision making – Fr. Paul made all decisions.
- More parishioners attend Mass on weekends.
- More technologically advanced for school and parish

5. *As you look to the future, what would you like to see happen over the next 1 to 3 to 5 years and beyond?*

- One parish – 5
- Purchase more land to the north. – 3
- Stewardship – evangelization working together – 2
- We all need to communicate. – 2
- Better understanding between languages – 2
- Need space – 2
- Overall visionary Site Master Plan – 2
- Family and faith values – 2
- Social ministries – need to be one commission – 2
- Religious education, Catechesis
- School is a ministry of the parish.
- Mission based
- Engaging the neighborhood
- School more welcoming to Hispanic families

- More ministries combined – instead of 91
- Restructure commission that works.
- More welcoming
- Need to educate Hispanic leaders.
- Establishment of need of marketing alumni group
- Parish and school Development Director
- Have school population reflect the parish population.
- A bit more vocation – conscience
- Find a way to be more inclusive – be intentional about engaging people
- Better organization and use of space
- Education is critical.
- This area is changing – connection between Hispanic and English speaking community.
- Be an example of a place where people can go to be fed spiritually.
- Be a place where people feel they can come and receive social support – more outreach to those in need – “We have the resources.”
- Open communication – (i.e. tough to get an announcement in – process not well managed)
- Is the school going to get lost in all of this?
- Pro-active or re-active?
- I wish there was some way we could connect the dots between all of the ministries.
- Better place for retreats
- Young people activities
- More Spanish Masses
- Facility issues
- Engaging the youth and young adults – poor youth minister
- Diversity in school
- Long-Range Plan to make it possible
- Continuing Education for teachers – technology and discipline (behavioral issues)
- Change in socio-economic make-up of parents – what are we going to be about it?
- Collections are doomed to: economy, more Hispanics, new priest, white flight
- More blended community – for all ethnicities – where somehow everyone is invited and involved
- School providing classes in ESL for students.
- Football and soccer field
- Common vision – everyone with same focus
- Better blend of Hispanic / Anglo communities

- More integration where people are connected
- Two seminarians
- Two priests come out of St. Monica
- One building will be refurbished this summer.
- Security
- Spanish community needs to follow guidelines.
- Build opportunity for communication
- Have stronger social justice conscience – activities that are productive
- Bring communities together.
- Parish cultural banquet
- Training and education
- We will all live our faith.
- Willingness to grow
- Share abundance with those in need.
- Humble service be that of Christ – i.e. washing feet
- Build on tradition.
- Pastor became connected to us.
- Open up this parish to others – too protective
- Be more welcoming
- Use gifts.
- Pastor needs to challenge us.
- Pastor needs to grow with us.
- Community coming behind new leaders
- Continuous teacher improvements
- Keep moving forward staying on cutting edge of technology – school.
- Involvement of people
- Systemic look is needed – dots to be connected.
- Continued growth of school
- Youth ministry emphasis
- Involvement in ministries
- Program for lapsed Catholics.
- Hispanics/Anglo – more reaching out
- School to be self-sufficient
- Structure is shaky.
- Two conclaves have been successful
- Get survey – stats, stars, and struggles from conclave -Got Fr. Todd closer to people
- Adult catechesis
- Lose 60% of kids from first communion (2nd grade) and confirmation (10th grade)
- Confirmation numbers match the first communion.

- Having a vision of what multi-cultural parish will look like in the future
- Demographic is changing dramatically.
- Designated boundaries vs. all boundaries
- Parish funds for youth ministry
- Be pro-active in transition to more Hispanic families
- Growth in school enrollment
- More technology education in school

III. Assessment Highlights

Area #1: Transition of New Leadership

- There is a history of strong leadership at St. Monica Parish; that fact is acknowledged by parishioners. It is clearly evident that Father Todd and Father Jeremy are respected and have been working hard to build an objective transition as the leadership has changed. Some parishioners have been able to adjust well, and others are still in that transition period.
- Because of the nature of this planning process, ISPD believes this is an ideal time to undertake this project which will seek to invite and involve parishioners from all ripples.

Area #2: Parish Ministries: Separate Ministries Under One Roof?

- There are many ministries and programs that are available to parishioners at St. Monica. ISPD commends the parish for the development of these opportunities to engage people into the life of the parish. However, one of the most repeated comments was how organized and healthy these ministries are. Are there too many guarded kingdoms? Are the same people still leading? Are there open doors for new opinions and new ideas?

Area #3: Family Oriented Community and Welcome Environment

- It is noted that St. Monica strives to promote a family atmosphere to all parish families. Because of the size of the parish, this does become a major challenge that must be factored into any planning process for the future.
- This feeling of welcoming and warmth begins when people walk through the front door or make a call to the parish office. Are they welcomed? Do they feel that their opinion or perspective matters? Are they treated with utmost respect?

Area #4: Need for Greater Participation and Engagement

- Although, St. Monica does boast a core group of volunteers who support the ministries of the parish; there was consensus that more parishioners need to become involved.
- During the next several months, ISPD will work directly with parish leaders and the Core Team to implement key strategies that will successfully identify, invite and involve those who are currently uninvolved, and create some new “people-fuel” for the St. Monica community.

Area #5: Parish Diversity

- The one comment that permeated most every conversation during the interview process was: “We need to be ONE community.”
- The challenges that the parish faces around this topic are:
 - How do we bring the differing cultures together so we can share a common vision and mission?
 - How can we better educate our parishioners on the differing cultures?
 - How do we get a grip on the changing demographics that have taken place, are taking place and will take place?
 - How do we adjust our planning to include rather than exclude?
 - With past giving to St. Monica strong, will this continue in the future with our changing demographic?
 - Not being a neighborhood parish, how can we educate the various types of parish families that come to St. Monica?

Area #6: St. Monica School

- St. Monica is blessed to have a team of talented, committed, and caring administration and staff. Our interviews found that many are pleased and impressed with the academic standards and success of the students.
- The main three comments about the school we heard in the interviews were:
 - The school needs to represent the parish in terms of demographics.
 - The school needs to be more affordable for all of our parish families.
 - The school needs to identify its *brand* better and market it.

Area #7: Need for Improved Communication

- As with many Catholic parishes, communication is always a challenge. For years, there have been three major principles that parishes have operated with:
 - The “Yes, Father” syndrome
 - The parish bulletin as being the main (and sometimes only) means of communication;
 - A parish needs only to communicate with those sitting in the pews on the weekends.
- With vibrant Catholic parishes across the country today, the above do not hold true. Many pastors see themselves as the conductor and the lightning rod for spiritual growth and parish organization, and they strongly feel that it is the people’s parish. The pastor, by the very nature of the structure of the church, will always have the final say-so; however, collaboration and shared decision-making have vaulted many Catholic parishes into greater priest-parishioner understanding.
- Secondly, written communication (parish bulletin, parish newsletter, and parish letters) is not the most effective ways to communicate. Research data

shows that real understanding takes place when communication is done “eyeball to eyeball” in small or large groups or one-on-one situations.

- Lastly, every Catholic parish has many people who do not sit in the pews on the weekends; they are uninvolved or actively disengaged. This group usually can represent between 60% - 70% of the parish roster. Often, parishes make the mistake of bemoaning this fact or trying to blame these folks for not participating or not contributing money. The real question is this: Does a Catholic parish really seek to invite, involve and engage this group? It is ISPD’s opinion that work needs to take place in this arena of parish communication. This planning process will obviously address many solutions.

Area #8: Need for a Long-Range Advancement Plan (LRAP)

- One of the areas of concern is the fact that the parish does not have a clear vision and mission. A plan is necessary in giving the parish direction and focus. The parish leadership is to be commended for taking the first step in beginning to look at the long-term viability of the parish and its role in the community.
- St. Monica Parish is to be commended for the holding the two conclaves that evidently, according to parishioner input, produced excellent information and good dialogue. That spirit needs to continue.
- The LRAP will identify both strengths and weaknesses to create a “vision” for everyone in the parish to embrace.

Area #9: Strengths of the Parish

- There were a number of areas mentioned as being strong points of St. Monica:
 - Motivated parishioners
 - Expertise of parish leadership
 - Welcoming/comfortable atmosphere
 - St. Monica School
 - Many ministries
 - Willingness to improve
 - Image of St. Monica in the community
 - Strong liturgies
 - Small Church Communities/Christ Renews His Parish/CCD

Area #10: Improvements of the Parish

- There were a number of areas mentioned, not so much as challenges, but as areas that need some improvement:
 - More youth involvement
 - Building ONE parish with all cultures
 - Better communication
 - More volunteer participation

- Personal invitation
- More activities and events for the young adults and families
- More openness from ministry leaders
- Sound system in church
- Safety
- More welcoming in parish office
- Clearer organization

IV. Areas of Assessment

AREA # 1: GOVERNANCE

1. Please describe the present governance structure of the parish.

- There is a pastor, associate pastor, and a 7 person administrative staff that currently includes a business manager, music director, school principal, director of youth ministry, pastoral associate of Spanish ministry, pastoral associate of adult faith formation, director of religious education (birth through 6th grade plus adult education of parents whose children are preparing for reception of sacraments).
- We have a Parish Pastoral Council (PPC) composed of elected and appointed members. In the past we have had a commission structure. The commission structure grew out of the Parish Evaluation Project (PEP) which was conducted at St. Monica's from 1994-1997 under the leadership of Carol Holden and Tom Sweetser.
- The commission structure worked reasonably well in the early years when the staff was smaller and our ministries were fewer in number. A Hispanic Commission was added when the Hispanic population increased.
- There is a finance council that assists and advises the business manager and pastor

2. Please describe the present governance structure of the school.

- The School Commission is made up of ten members voted on by the parish at large and up to nine members selected by the pastor. The maximum number of school commission members is 19. The term of service is 2 years; five members' terms expire every year. At this time we have 13 members with 3 appointed by Father Todd. Officers of the School Commission are the president, vice-president and secretary-treasurer. The executive committee is composed of the officers and the principal. The School Commission meets monthly. The executive committee meets 2 weeks prior to the monthly meeting to formulate the agenda.
- The School Commission president and the school finance commission assist the principal in preparing the yearly budget. The parish finance council selects the finance committee members.

● ISPD Perspective

- † The governance structure of St. Monica Parish appears to have worked well; however, with the many changes that have taken place over the past few years, now would be an excellent time to revisit its effectiveness.

AREA # 2: PLANNING AND INTERNAL COMMUNICATION

1. **Please describe what method(s) the parish and school use to strategically plan for the future. Is there a long-range plan in place for the parish? For the school? An organizational chart?**
 - There is a long-range physical plan for the parish/school. St. Monica has space challenges; we are land-locked. Unless our neighbor to the north agrees to sell us her property/home, we have nowhere to grow. Prior to our last capital campaign, we had a master plan done for the property (2005). The majority of our potential expansion was completed with our 2007 campaign. The master plan provides a footprint of our additional, build-out potential.
 - There is no long-range financial plan for the parish/school. One-year budgets are done annually for both. The school does not operate under a strategic plan at this time.
 - Last update of our organizational chart is from 2008-2009. This is included in accompanying materials.

2. Does the parish have a mission statement? How was it created?

- 1997 PEP mission statement: *The mission of St. Monica is to be a visible sign of God's love. This multi-cultural Christian community seeks to provide service and education to its parishioners and persons in the surrounding area. Involvement from the entire parish across all age-spans is the hallmark of St. Monica Catholic Church. The focus is on implementing the word of God through prayers, liturgy and religious education. A personal relationship with God through the sacraments as well as a communal relationship with fellow parishioners is the foundation from which St. Monica will grow to be a true witness of God's love.*
- 2010: *A Catholic community advancing Christian faith by living the Word of God through prayer, liturgy, learning and service.* The 2010 parish directory adds the following: "The mission statement describes the common bond and purpose for St. Monica parish. The common bond is our Catholic faith. As a community we provide an inclusive and welcoming environment to come together and share that common bond. Our purpose is to advance Christian faith partnering with other Catholics and Christians. In living the Word of God our faith is seen by all through authentic and genuine actions, not just words. In coming together and sharing prayer, liturgy, learning and service we grow with and support each other in our faith-based journey. Through experience and service, we commit to share God's blessings with others in our surrounding area and around the world."

3. Does the school have a mission statement? How was it created?

- **Our Vision:** the vision of St. Monica School is to aid each student in the development of moral values, academic potential, self-discipline and spiritual growth in order that they might be visible signs of God's love.
- **Our Mission:** St. Monica School, as a diverse Catholic community of staff, students, parents, and church will provide the best possible religious and academic education in a disciplined and caring environment. The students will develop sound moral values, discover their potential for life-long learning, and grow spiritually to become visible signs of God's love.

4. When was the last parish census? What were the results?

- *No information provided*

5. Please describe the process that presently exists that allows for those working with development/public relations/marketing to communicate with each other.

- Parish: no specific process for this other than bulletins and websites.
- School: Presently no one is designated to work in the areas of development/public relations/marketing. The principal is responsible for these areas in consultation with the school commission.

● ISPD Perspective

- † ISPD commends St. Monica for seeing the need for a formal plan for the future and an updated Mission Statement.
- † ISPD commends St. Monica on having an organizational chart, which does need updating but is at least in place.
- † It is of utmost importance to keep parishioners informed on a regular basis of parish planning and development efforts.
- † It would be extremely beneficial for St. Monica to create an annual system for gathering input from all of its community members. This should include a variety of input strategies where the focus is on personally inviting people to participate and help create and live-out the vision. Some strategies could include:
 - † Input sessions
 - † Written surveys
 - † SWOT analysis
 - † Cup-of coffee meetings
 - † One-on-one visits
 - † Telephone interviews

- † Advisory Boards
- † Individual input forms
- † Quarterly Pastor's dinner
- † Annual Pastor's Cabinet

AREA # 3: MARKETING RESEARCH

Please describe any survey work done within the past 1-5 years. Be sure and attach the results of the research.

- *No information provided*

● ISPD Perspective

- † The parish should consistently seek small group input where personal interaction is utilized, in addition to paper surveys. By continually inviting and involving parishioners, their ownership of the parish is strengthened.

AREA # 4: PAST BUILDING EFFORTS

Please describe the past building plans and efforts of the parish and/or the school.

- 1957 Church and School
- 1992 New Church. Renovation of old church to gym
- 1995 Parish Youth Center built
- 1999 New rectory built. Renovation of old rectory to meeting space
- 2001 New education wing in School, new church/school offices
New main entrance (rotunda), new cafeteria/gathering space (Emmaus Center)
- 2005 Commissioned a Master Plan for the property. Created an Our Lady of Guadalupe shrine in church, Added permanent choir space in church, renovated the baptismal font
- 2006 Parking lot expansion, playground relocation
- 2007 New Parish Life Center (gym), new classrooms, renovation of the old gym to meeting space/nursery/library and storage, renovation of school cafeteria kitchen

● ISPD Perspective

- † ISPD commends the parish for continuing to work over a period of years on a Site Master Plan.

- † Great effort needs to be expended by parish leaders to continue to pursue adjoining property in order to offset the land-locked situation of the parish.

AREA # 5: INTERNAL DEVELOPMENT

1. Please describe what method(s) are used to communicate with the following groups on what the development effort is doing:

- **Parish:** Bulletin, website, parish conclaves, variety of newsletters, Mass announcements.
- **Faculty:** Each Friday afternoon the administration publishes a day-by-day schedule of all events for the coming week in the Staff Notes.
- **Administrative Team:** Weekly meetings
- **Parents:** The school produces a weekly newsletter that is attached to the webpage each Friday afternoon. Daily email updates are sent to each parent throughout the year.
- **Students:** The school produces a live daily TV show that is anchored by eighth grade students and the principal. Each show is saved on the school website. There is a Gospel reading, a prayer, Pledge of Allegiance, along with everything happening at the school for the day.
- **Governing/Advisory Boards:** Monthly PPC meeting, quarterly conclaves of ministry chairpersons
- **Alumni:** There is no alumni association.
- There is limited communication between the parish and the school.

2. Which of the above groups do you feel have a good understanding of Catholic parish and school development and marketing?

- **Parish:** this is a work area. Internal communication and external evangelization frequently come up as areas in need of improvement.
- **School:** All aspects of development and marketing are left to the two administrators which means that little time is allotted for these essential elements of school success.

● ISPD Perspective

- † It will be important for both parish and the school leaders to become better educated on the true meaning of Catholic Development, People Engagement, and Total Stewardship and how a formal, organized process could greatly benefit St. Monica Parish in the future.
- † This is one area (Development and Stewardship) that needs attention in the long-range planning process.

AREA # 6: PUBLIC RELATIONS

Please describe the present public relations efforts at the parish and school.

- Adult Faith Formation: RCIA and Small Church Communities (SCC) brochures appear in pamphlet racks in the narthex and are distributed with other materials at new parishioner orientation. A quarterly calendar of adult faith formation events is inserted in the bulletin and posted on bulletin board and website. Content of monthly SCC Pastoral Facilitators' meeting is posted on website. Outdoor sign is occasionally used to promote activities.

- Religious Education: the public relations is done through the bulletin, website and by the people. All the programs, Sunday school, liturgy of the word, OCIC (Order of Christian Initiation for Children), SPRED (special religious education for developmentally disabled adults), sacrament preparation, VBS (vacation Bible school) are 'respected' by the people and the attendance is always increasing.

- School: Public relations for the school are left up to the school secretary and the two administrators. The bulk of the work is person-to-person via email or direct conversation.

● ISPD Perspective

- † It will be important for both the parish and the school to develop an overall Public Relations plan for both internal and external audiences. This plan should be coordinated and directed by one person with other individuals and groups assisting in the implementation of the plan. It is important to have one person ultimately responsible for the consistency, accuracy and quality of the information that is presented to parishioners, school families and the community-at-large.
- † ISPD commends St. Monica for having an improved website. This is a great tool that is free but can do a great deal of promotion of the parish and school and all ministries.
- † St. Monica Parish also needs to explore the many possibilities of social media, possibly beginning with their own Fan Page.
- † ISPD recommends St. Monica to focus on promoting through personal contact. Ongoing personal invitation is what will allow people to feel a real part of this parish.

AREA # 7: PUBLICATIONS

Please list and briefly describe all publications that the parish and school are presently releasing. Is there any publication that accounts for what is done with the money that is raised?

- Parish: Bulletin, website, individual ministries and staff members will run newsletters, for example:
 - Business Manager: During our last capital campaign we published a “state of the parish” bulletin insert. We report collection information (actual versus budget Sunday collections and special mission collections) in the weekly bulletin.
 - Youth Ministry: Newsletter goes out to those involved with youth programs
 - Religious Education: Sunday school catechists send letters home to the parents, some weekly others monthly, and when needed in both Spanish and English. Communication is sent frequently to Sacrament preparation classes. Catechists receive weekly newsletter on what is happening or needs to happen in the future. Transition to more ‘paperless’ communication is not feasible as over half our participants do not have computers at home.
 - Adult Faith Formation: Small Church Communities mails a quarterly newsletter to all SCC members. RCIA and SCC brochures mentioned above might be considered informational “publications.”
 - School:
 - Weekly newsletter contains a weekly update of money received from the Share the Vision annual appeal
 - Daily emails from parish secretary
 - *Share the Vision* brochure sent to each St. Monica School family and stuffed in the parish bulleting weekend of March 20-21, 2010.
 - Recruitment postcard inviting everyone to our annual Open House is sent to all current school families and all families who have made inquiries within the past 12 months.
 - End-of-year report to all current school families.
- **ISPD Perspective**
- † ISPD commends St. Monica for utilizing mostly paper communication vehicles.
 - † Paper communication is a good way to communicate with parishioners, but cannot be used as the sole method of communication.
 - † An annual report is an excellent tool to consider.

- † A publication “audit” with present parishioners is an excellent way to evaluate present publications and also to get input into new and creative methods to communicate with parishioners.
- † St. Monica Parish needs to explore more ways to involve the use of technology in their communication and publication efforts.

AREA # 8: NEW PARISHIONERS

In what way(s) are new parishioners welcomed into the parish?

- We have a monthly “New Parishioner Orientation” in English and in Spanish. Once a month there is parish registration available in the Narthex. We have greeters at the doors of the narthex before Mass. Some of our program is oriented towards making people feel more involved and welcome (Christ Renews His Parish, Small Church Groups, RCIA, etc.)
- New parishioners are welcomed into the parish in several ways:
 - Through the bulletin
 - From-the-pulpit invitation to register at all Masses on the second Sunday of each month
 - Face-to-face interactions during the registration process which occurs after all Masses on the second Sunday of each month
 - In the parish office for walk-in registrants
 - At the monthly New Parishioner Orientation meeting
- The most inclusive and comprehensive “welcoming” occurs at the New Parishioner Orientation (NPO) meeting, held the 3rd Wednesday of every month, except July. At the NPO meeting, new parishioners:
 - Are introduced to the NPO team and to each other
 - Receive historical information about St. Monica Church
 - Hear first-hand experiences from a current parishioner(s)
 - Have informal table discussions with an NPO table leader
 - Learn parishioner responsibilities from our Pastor or Associate Pastor
 - Hear about current ministry/volunteer opportunities
 - Receive NPO Team contact information in case of future questions
 - Receive a welcome gift of bread and wine
 - Are offered an optional building tour with the Pastor at the conclusion of the meeting

● ISPD Perspective

- † Our question is this: At what point are new parish families asked to share information on two questions:
 - What are **your** needs?
 - What gifts would you enjoy sharing here at St. Monica Parish?
- † Although many do feel that the parish is welcoming, it is necessary to always improve in this area. St. Monica may look at establishing a formalized welcoming process for all new parishioners. This plan would include follow-up phone calls and a follow-up home visit made by parish volunteers.
- † The parish should create a survey that is given to new parishioners within the first year or two asking about their orientation into the parish. This could provide some valuable information as to the needs and wants of newcomers.
- † It may also be beneficial to develop a “buddy system” where new parishioners are paired with current parishioners to allow new parishioners to ask questions to experienced parishioners.

AREA #9: RECRUITING/RETENTION AT THE SCHOOL

1. Please describe all recruiting activities presently in effect.

- Consistently follow up on all inquiries from phone calls and website activity
- Open House to kick off Catholic Schools Week
- Multiple personal tours
- Multiple shadowing by prospective students
- Student-led school tours

2. Please describe any retention activities or programs that you presently have.

- A process of continuous improvement is the best route to retention. We feel a strong curriculum that challenges each student at his or her level of learning will directly affect retention.
- We provide a complete Resource Program that can be adapted to the specific needs of each student.
- Additional tuition assistance has been creatively given when specific needs are communicated to the principal.

● ISPD Perspective

- † St. Monica School needs a formal marketing plan with attractive materials that can focus on the benefits of Catholic education and especially on the mission of St. Monica.

- † The school needs to become more aggressive in their outreach, and in their invitation to families from throughout the area. With a parish that attracts families from miles away, the school needs to focus on parishioner resources and connections in order to market better.
- † Good ideas and strategies have begun, but the effort must continue to advance.

AREA # 10: PARISH/SCHOOL FUNDRAISING

Please list all fundraisers that were conducted during the past year. How much money did each raise? Please label as parish, school or both.

- Parish: no current fundraisers
- School:
 - Sally Foster sale run by 2 parent volunteers \$20,000
 - Market Day *no accurate \$ info available*
 - PTO auction \$62,000
 - *Share the Vision* Campaign \$14,000 to date; continuing

● ISPD Perspective

- † ISPD finds that Catholic parishes and schools do best when they concentrate on the following:
 - School Annual Fund
 - Major parish fund-raiser
 - 3-4 school fund-raisers that do three things:
 - Raise good net dollars
 - Build community
 - Surface new leadership
 - Total Stewardship
 - Planned and Memorial Giving
- † Parish leadership needs a clear understanding of the difference between fundraising and development.

AREA # 11: INVOLVEMENT OF PEOPLE

Please list and briefly describe all activities and programs of the parish and school that meaningfully involve people?

- Adult Faith Formation: Historically, RCIA, SCC, and CRHP (Christ Renews His Parish) created very meaningful involvement and tended to feed into each other. Numbers of Anglo participants in RCIA and CRHP have diminished in recent years.

- Religious Education: Weekly Sunday school involves 70 volunteers as catechists and assistants. Liturgy of the Word involves 16 volunteers. SPRED involves 8 volunteers. Combined programs serve over 650 students.

● **ISPD Perspective**

- † St. Monica is commended for the many opportunities available for involvement. The key to this involvement will be continually informing people about the opportunities and inviting new people – *personally* - to become involved on an on-going basis.
- † Meaningful involvement is the key phrase here. Believe it or not, there are thousands of ministries, programs, organizations, and activities where the involvement level is not meaningful. It is rote; it is automatic; it is stagnant; the wheel may be turning but the gears are not meshed; people are burned out on doing the same thing over and over again; there is no new blood, and there are barricades that have been put up that do not allow people to permeate that guarded kingdom. Most of the involvement level in these areas is not meaningful. It is divisive and antagonistic to change.
- † Meaningful involvement is all about people being excited and motivated to make a difference. There is affirmation and joy in what they are doing, and in many case THEY ARE DOING WHAT THEY DO BEST. Simply because someone took the time to find out that information.
- † We recommend a "*Volunteer of the Month*" who could be showcased in the weekly parish bulletin, in the school newsletter, and on the school and parish website. This recognizes those volunteers who are so dedicated to the parish or school.
- † The parish should conduct periodic surveys to be sure that all factions of the parish are having their needs and interests met.
- † It is important for the parish to continue to create avenues, vehicles, and roadways to invite and involve parishioners (new and old) in the parish.
- † Volunteers need to be shown that their efforts are appreciated. A plan to honor volunteers at least once a year should be created.
- † Quite possibly, St. Monica needs to explore the possibility of having a Director of Volunteers.

AREA # 12: SCHOOL ALUMNI

Please list and briefly describe all alumni activities and programs.

- There is a great need in this area but thus far nothing has been accomplished.

- **ISPD Perspective**

- † Work must begin in this area. ISPD will be glad to offer direction.

AREA # 13: TOTAL STEWARDSHIP

Please describe your present total stewardship effort. How is it communicated? How do people get involved? What are your present Sunday collections?

- Background: Fr. Todd asked the Finance and Stewardship Committees to get together for a brainstorming session regarding Stewardship at St Monica. Below is information discussed at that meeting. (January 2010)
- Stewardship Education initiatives resulted in Stewardship Pulpit Talks. Jim Polak gave Fr. Paul about 15 potential Stewardship talks that he felt would be appropriate. Fr. Paul gave approximately 3 Stewardship sermons.
- Based on benchmarking with other (non-Catholic) churches in the city. It was determined that Crown Ministries could be a very useful vehicle for Stewardship Education and increasing Stewardship in the parish. Pilot groups have been conducted with good success. Rollout to the larger parish is planned for later in 2010 (www.crown.org).
- New Parishioner Orientation initiative resulted in creation of a monthly New Parishioner Orientation evening which encourages parishioners to get involved and sets expectations for financial support. (Pastor or Associate is involved at this meeting).
- Ministry Support and Appreciation initiative resulted in annual retreats and ministry appreciation events
- Stewardship has met with Archdiocese several times to understand any useful initiatives that may be happening at the Archdiocesan level.
- Finance committee is promoting ACH giving
- Finance committee is sending out letters with yearend giving statements to parishioners receiving envelopes (different letters based on giving status – i.e., "givers" get one letter, "non-givers" get a different letter)
- The group also decided that the same message needed to be communicated to the Hispanic Community through a handout at the Hispanic Masses.
- John Delaney (Finance) has agreed to track giving data from 2006 - 2009 to determine if there are any data trends that could be used for planning. John also discussed a program from several years ago that informed school families of the amount of subsidy (roughly \$ 1,500) that the parish provided for each student.

- The group discussed the importance of beginning to identify individuals/families that could give a Stewardship witness at Sunday Masses. Fr Todd encouraged the group to think about specific people who could do this. No further action has been taken on this.

Other miscellaneous ideas discussed:

- Begin incorporating Stewardship teaching for St. Monica children and Sunday school children
- Fr. Clem effectively provided a visible example of Stewardship through placing an envelope in the collection basket each Sunday
- Strategic Plan would most likely contain a Stewardship element
- Parish should move forward with Crown Ministries
- The "power of the pulpit" is very significant at St. Monica.
- St. Barnabas has studied an effective Stewardship model in Kansas City
- Put ACH forms in New Parishioner Orientation packet
- Include tear off ACH document in bulletin.

Collection Data:

For Week 41 (April 10th and 11th)

Weekly Budget Goal for April	\$36,295
Weekly Collections	\$41,558

July 1 - April 11 Budget Goal	\$1,669,519
July 1 - April 11 Collections	<u>\$1,534,220</u>
Deficit	(\$135,299)

April Mission Collections

St Vincent de Paul (4/1)	\$4,693
Holy Places (4/2)	\$3,258
Catholic Home Missions (4/25)	\$5

● ISPD Perspective

- † The development and implementation of a Total Stewardship process will be important to the future of St. Monica Parish. This effort should be a year-round process that concentrates on:
 - † Stewardship of Prayer
 - † Stewardship of Ministry
 - Time
 - Talent
 - † Stewardship of Offering

- † The existing Stewardship Committee can play a major role in establishing a stronger stewardship approach.
- † ISPD will be glad to discuss this in further detail.

AREA # 14: DONOR/DATA MANAGEMENT

1. Please describe how you keep track of the people who give money to the parish and school.

- Parish:
 - Regular Sunday collections and special collections are gathered by ushers during Mass. Volunteer counters sort the collection by envelopes, loose cash, loose checks (which are copied), tally the collection(s) and prepare a summary. On Monday the office staff retrieves counters' data and collection from the safe, makes the bank deposit, and posts envelopes and checks to ACS (parish database).
- School:
 - The school business manager maintains a complete running total of each dollar contributed for the 2009-2010 school year. School contributions are posted to ACS in the parish office (as of 2010).

2. How is this information updated? How often?

- Parish:
 - The goal is to keep the information current. Occasionally we get behind on posting Sunday collections. However, we are now sharing this duty between accounting and the parish secretary so we are up to date.
- School:
 - Donations are updated twice per week throughout the year.

3. What is your present computer set-up?

- The church and school have separate servers. The church has about 14 users; the school has 380 computers which are networked and managed by our technology director. All computers are PCs.

4. What software are you presently using?

- Parish: We use Microsoft Windows XP Professional Version 2002 Service Pack 3.
 - We use ACS for database and for financial recording.

- School: Microsoft XP, Harmony for student services, ALEKS for math enrichment, Easy Tech for K-* technology curriculum.

5. Is there any networking of computers?

- All desktop units are networked via cable.
- Three portable computer labs are networked via wireless air ports. Wireless connectivity is available throughout the facility.

● ISPD Perspective

- † It is important to be sure all files are clean and as comprehensive as possible before beginning formal development efforts – if the parish moves in that direction. It may also be necessary to review computer hardware and software periodically to evaluate its effectiveness for parish needs.
- † Be sure that the parish database can respond to the growing development effort:
 - Donor classification
 - Donor recognition
 - Gift history and tracking
 - Hardware and software upgrades

AREA # 15: ANNUAL SCHOOL GIVING DRIVE

Please describe how the school's most recent Annual Giving Drive was organized and run. What goals were set? Were they reached?

- *Share the Vision* Annual Giving Drive
 - *Share the Vision* was begun in January 2010 from directions provided by the school commission. The school administrators created the brochure and distributed the materials to school families.
- *Share the Vision* was used in the past as an annual fund. To date we have collected \$14,000. The president of the school commission is contacting selected school families in an effort to raise additional funds.
- Brochures were recently stuffed in all parish bulletins.

AREA # 16: MAJOR GIFTS

- None

- **ISPD Perspective**

- † A formal Major Gifts process through expanded identification, invitation and involvement process should be created. There should be an emphasis on identification and cultivation.
- † Based upon past campaign efforts, and Stewardship of Finance, there should be excellent data in this area.

AREA # 17: ENDOWMENT

Please describe your present endowment efforts.

- Parish: we have existing endowments but there is no effort to create additional ones.
- School: no response

- **ISPD Perspective**

- † To ensure the future of St. Monica, the parish should research the possibility of building their present Endowment Fund. The resources of the Diocese, parishioners, parents, alumni, and past parents should be utilized—an abundance of expertise exists here.
- † Once the endowment fund has been jump-started, the parish needs to consider creating published materials concerning the fund that would be available for distribution.
- † Parishioners need to be educated as to the purpose and advantages of having an Endowment Fund.

AREA # 18: PLANNED GIVING

Please describe your present Planned Giving efforts.

- Parish: none
- School: no response

- **ISPD Perspective**

- † St. Monica could offer seminars or luncheon speakers 2-3 times per year who focus on the topic of Planned Giving. This could be an excellent way to begin to introduce the subject to the community and begin the education process. It could also serve as a valuable resource to those in the parish who wish to seek assistance in making these important decisions.
- † Articles need to be written for the bulletin, proposed newsletter, and future parish mailings concerning Planning Giving.
- † The parish could host seminars for parishioners on various topics like “Saving for College”, “Medicare and Medicaid Guidelines”, Wills Seminars, etc.

- † The parish needs to identify a tax lawyer or a financial advisor who could assist the parish in this endeavor.

AREA # 19: GRANTWRITING

Please describe your grant writing program. Have you received any grants within the past five years? If so, what and how much.

- Parish: there is no formal grant-writing program. Any grant monies received have been the result of employees and/or volunteers submitting the requested paperwork on behalf of St. Monica. Grants received in the past 5 years:
 - March 2005: Indianapolis Center for Congregations - \$30,000 for Sacred Space Projects
 - August 2006: Indianapolis Center for Congregations - \$15,000 Resource Grant (Technology)
 - February 2010: Indianapolis Center for Congregations - \$14,000 Resource Grant (Strategic Plan)
 - School: The school PTO provided \$7500 to employ a part-time grant-writer. The grant-writer met with the principal then applied for multiple grants. To date none has been successful. The grant-writer took a full time position elsewhere and presently there are no funds to hire a replacement. A volunteer has begun work on several grant possibilities.
- **ISPD Perspective**
- † Perhaps a grant writing committee could be formed: 3-5 people from the school and parish who could do the research and write 3-4 grants per year.
 - † Some schools have utilized 1-2 teachers to serve on this committee and encouraged them to discuss with the faculty and staff their needs. In several cases, the schools freed the teacher up 1-2 periods during the day. Certainly something to consider.
 - † From ISPD's perspective, grant writing is over exaggerated in terms of usefulness unless the following is present:
 - On-going research
 - A skilled person in charge
 - Connections to foundation and corporate boards who make the decision

AREA # 20: BUSINESS/CORPORATE COMMUNITY

Please describe any involvement of the business and/or corporate community in your parish and/or school.

- Parish: none
- School: the PTO obtains some business and corporate support for its annual auction.

● ISPD Perspective

- † This could be a division of the school's Annual Fund.

AREA # 21: PARISH STAFFING

Please list the people (paid and volunteer) on the parish staff.

- Pastor
- Associate pastor
- Business manager who supervises:
 - Accounting assistant
 - Facilities manager
 - Parish secretaries (2)
- Music director
- School principal
- Assistant principal
- School secretaries (2)
- School faculty and classroom aides
- Cafeteria staff
- After-care director
- Receptionists—2 part-time
- Director of youth ministry who supervises 1-2 support staff
- Pastoral associate of Spanish ministry
- Pastoral associate of adult faith formation
- Director of religious education (children) who supervises:
 - Secretary—part-time
 - Computer assistant—part-time
 - OCIC coordinator (English)—part time
 - OCIC coordinator (Spanish)--volunteer

● ISPD Perspective

- † All parishioners and staff should have a clear understanding of the roles and responsibilities of each staff member.
- † ISPD commends St. Monica for publishing key positions in the Sunday Bulletin.

AREA # 22: PARISH AND SCHOOL LEADERSHIP

What are the top 5-10 issues that parish and school leaders are always discussing?

▪ **Parish:**

- Demographically, what will our parish look like in 5 years? What % of parishioners will be primarily English-speaking and what % will be primarily Spanish-speaking?
- How can we integrate our Anglo and Hispanic parishioners into one parish community?
- Do we think that most of the parishioners who were deciding to leave when Fr. Paul left are now gone, or are more planning to leave in the next year or two?
- What concerns us about not being seen as a “neighborhood parish?” How can we become more involved with our surrounding neighborhood?
- How can we develop more leadership, participation, and a greater sense of “ownership” among all parishioners?
- Budget shortfall— are active parishioners contributing as much as they can? Is there a way to encourage less active parishioners to increase their giving?
- Have our traditional major “internal evangelization” adult faith formation ministries (CRHP, RCIA, Small Church Communities) reached a plateau in the English-speaking community? Are there ways to reinvigorate them or is it time to explore additional ways of “internal evangelization” for our parishioners?
- How can we increase the number of youth, teens, young adults (especially singles) in the life and mission of the parish?
- What are the benefits of having a Spanish-speaking pastor? What are the challenges?
- Is the strategic planning process worth the cost and effort? Will it help us to grow as a unified parish?
- If we implement the archdiocesan SHINE (Spreading Hope in Neighborhoods Everywhere) program, what will it mean for our parish to increase its commitment to social justice ministries?
- How effectively are we communicating all these important issues to the entire parish? How might improved communication benefit the parish?

School:

- Enrollment
- Tuition assistance
- Continuous school improvement
- Technology advancements
- Value-added data analysis

V. Recommendations

Recommendation #1: Build up the Parishioner Base and Parishioner Involvement

- It is important to identify and discover what it would take to get inactive parishioners involved in parish activities and ministries. Steps to get them involved need to be put into place.
- A more personalized welcoming plan would be beneficial in reaching out to the new parishioners and asking them to get involved.
- The ISPD AWE! Workshop is one strategic solution.
- During the next several months, ISPD will work directly with St. Monica and the Core Team to implement key strategies that will successfully identify, invite and involve those who are currently uninvolved, and create some new “people-fuel” for the parish.

Recommendation #2: Education in the Area of Development

- Parish leaders and staff members of St. Monica Parish need to be educated on what Catholic Development is and what it is not. There are several areas of development that need to be a part of the life of the parish. Right now, as we begin the ISPD process, it is important to stress the basic definition of development: *the meaningful involvement of people in your mission and vision for the future.*
- As development initiatives begin, parishioners should be kept informed as to what the parish is undertaking. A monthly development bulletin should be created and sent to all parishioners. After ISPD has completed working with St. Monica, this communication should continue.
- It will be important that both ISPD and parish leaders reach out and educate the parish staff, parish leaders, ministry leaders and others about not only the true meaning of Catholic Development but also the ISPD process that is being undertaken.

Recommendation #3: Director of Volunteers

- As was mentioned earlier in the Report, St. Monica should consider the position of Director of Volunteers. Whether this be a volunteer role, part-time or full-time, we recommend that it be put on the table for consideration. Further discussion may evolve this position and a Director of Development and Stewardship into one.

Recommendation #4: Personal Communication

- The parish needs to continue to strengthen personal communication. St. Monica is doing a good job of getting the word out to parishioners through the bulletin and other printed media, although we cannot depend only on written communication. There should be various methods in place to let the parishioners know about parish events.
- The website provides a viable tool to inform and educate parishioners and needs to be evaluated and consistently improved to effectively meet the changing needs of the parish community.
- The LRAP process will certainly suggest many other vehicles for communication.

Recommendation #5: Organize and Conduct Input Sessions

- The Core Team needs to organize and conduct a series of Input Sessions over the next 30-60 days. Facilitated by the Core Team, these agenda-driven 55-minute roundtable discussions seek answers to specific questions. Each session should have randomly selected parishioners present. This process is designed to invite and involve parishioners and to provide input into the Long-Range Advancement Plan (LRAP) effort.
- Input Sessions are a great opportunity in which parishioners give their opinions about the parish and school. These sessions can be offered every year to ensure that the leadership stays on top of all issues.

Recommendation #6: Decide Upon the Planning Areas

- The Core Team and parish leaders need to decide on the planning areas for the planning process. Based upon this Assessment, discussions by the Core Team, and input session data, decisions need to be made within the next 60 days.

Recommendation #7: Establishment of a Parish Planning Team

- The Parish Planning Team (PPT) should be comprised of 60-80 parishioners and facilitated by the Core Team. It is established to assist in the creation of the Long-Range Advancement Plan (LRAP). Once the LRAP is completed, the PPT's primary role is to implement the development priorities and strategies of the LRAP and to help cultivate new resources in the parish that will assist with the realization of the parish vision for the future.

Recommendation #8: Focus on Parish Mission Statement

- As part of the Long-Range Planning Process, St. Monica needs to focus on the current parish mission statement. The mission statement should serve as the key

to the parish's present and future. This statement should be communicated to parishioners as the planning process moves along. What needs to be considered are three questions:

- The present mission statement should remain the same. It is relevant and states the constancy of purpose for St. Monica in 2010.
- Make minor changes
- Rewrite

This will be part of the planning process.

Recommendation #9: Consider a Formal Demographic Study

- Whether done internally or externally, a demographic study of St. Monica parish would be helpful as much of what needs to be considered in the future will be based upon present and future population projections. Quite possibly, someone on the Core Team or the Parish Council can take on this project.

Recommendation #10: Finalize the LRAP Strategic Vision and Communicate

- Once completed, the LRAP Strategic Vision for the Parish should be finalized into a working document that allows for discussion about issues that face the parish in the immediate, the intermediate, and long-term future.
- The LRAP Strategic Vision for the Parish should be communicated to all publics so that all are aware of the direction in which the parish is moving.
- A parish assembly should be organized to communicate the Plan and allow parishioners to commit to the implementation of the Plan.

Recommendation #11: AWE! Workshop

- It may be helpful for the Core Team to host the ISPD Affirming, Welcoming and Engaging Workshop for all parish leaders – staff, Parish Council, ministry leaders and others. At this workshop, a better understanding of becoming a more welcoming parish can be explained and articulated, as well as laying out the steps in the ISPD process.

Recommendation #12: Stay Focused & Positive

- As St. Monica Parish introduces the LRAP process to the parish, it will be important for the Pastor, Parish Council, Core Team, staff members, key ministry leaders and volunteers to remain positive and focused. As mentioned above, these leaders should seek to continually inform people about the process, what's involved and how they can participate in shaping the future for the parish. Any time that a parish moves into Long-Range Planning, there will be concerns and

challenges. This is usually associated with change. Communication, openness, and staying positive are always keys to a successful planning process.

- In one way or another, all parishioners will be invited to input into the process:
 - Questionnaire on the back of the Development Update
 - As a Core Team member
 - As part of an input session
 - As part of a ministry or organization that will be visited
 - As a member of the Parish Planning Team
 - As an invitee to the Parish Convocation
 - As a member of an implementation team

VI. Benchmark: Great Parishes

GOOD PARISHES vs. GREAT PARISHES

Seven basic elements, items or concepts separate the good parishes from the great parishes:

1. **Vision** -- a clear and shared mission and vision for the future, one that is on paper and lived day to day. One that has received input from all publics, improved, and analyzed every year. One that can be verbally articulated by all parish leaders
2. **Leadership** -- a leadership style that is collaborative, inclusive, responsive and always in an improvement mode. Committed to Total Quality, Energetic, Open-minded, Inclusive, Win-Win Approach, Proactive, Optimistic, Realistic, Firm, Visionary.
3. **Quality** -- an established set of indicators that are reachable and challenging goals. Quality is a continual process of improvement. This process seeks input from all. How can we systematically get better day after day, week after week, month after month, year after year? We are challenged to be the best we can be.
4. **Creativity** -- Bringing out the best in all -- the best ideas, the best processes, the best strategy. Everyone is recognized for his or her unique gifts and talents. The goal is a non-threatening environment that celebrates success and collaborative decision-making.
5. **Communication** -- Ability to have all members of the organization in tune with the shared mission and vision. Communication must be creative and consistent and one-on-one as much as possible in order for the highest level of commitment.

6. **Attitude** -- Quote by Charles Swindoll:

The longer I live, the more I realize the impact of attitude on life. Attitude, to me, is more important than facts. It is more important than the past, than education, than money, than circumstances, than failure, than successes, than what other people think or say or do. It is more important than appearance, giftedness or skill. It will make or break a company, a church, a school, a home. The remarkable thing is that we

have a choice every day regarding the attitude we will embrace for that day. We cannot change our past; we cannot change the fact that people will act in a certain way. We cannot change the inevitable. The only thing we can do is play on the one string we have, and that is our attitude. I am convinced that life is 10% what happens to me and 90% how I react to it. And so it is with you -- we are in charge of our attitudes.

ISPD finds that when the leaders of a parish understand how important attitude is, they move to consistently foster and encourage the positive side.

7. T - E - A - M -- Together, Everyone Accomplishes More.