

2011

Saint John the Evangelist Parish Five Year Plan

Draft:

*Fr. Crispin Approved
Draft Version
July 27, 2011*



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St. John the Evangelist – Five Year Plan 2011

Introduction

(Introduction to be written by Father Crispin prior to finalization)

A Note on Consultative Management:

Catholic parishes operate on a consultative and advisory model. In this model, the pastor has the ultimate authority for authorizing all decisions. Additionally, the mission of the Church calls all to share responsibility according to their appropriate role and delegation. In conducting the planning process at St. John, there was a conscious effort to maintain a posture of servant leadership on the part of the parish leadership, seeking to understand the needs of the community and building consensus around our future plans. In the plans below, concepts such as responsibility, accountability, ownership, and control will be seen. All of these descriptions are used within the context of the Catholic parish advisory and consultative model. Terms such as “ownership” or “control” are used in the context of the direction and delegation of the pastor. These words are utilized, to show our level of commitment within the prescribed Catholic parish governance system. All of the efforts of this planning process and the resulting Focus Area initiatives were performed on a consultative basis and were subject to approval and acceptance by Fr. Crispin. When completed and approved by Father Crispin this document represents his direction to our Community for our five year plan and related actions.

Background

During the months of March through June of 2011, Saint John the Evangelist Parish conducted a five year planning process. The parish leadership under the guidance of Father Crispin surveyed the current state of the parish and concluded the time had come to create a comprehensive strategic and tactical plan. A partial list of the opportunities and risks considered are listed below:

1. Church attendance is up and rising
2. Father Crispin has been assigned to a six year term as pastor
3. Parish debt is in excess of \$1.5 million
4. Several important physical plant items must be tackled including the school plumbing and the church bell tower.
5. Saint John School is robust, healthy, and at capacity enrollment
6. The school has just finished their accreditation process and 5-Year Plan
7. Agnes Jacobson, our long-term and spectacular school Principal, is retiring
8. Bernadette O’Leary, highly qualified, experienced, and energetic, has agreed to become our new Principal

The decision was made to bring together our skills and energy and, with the guidance of the Holy Spirit, take control of our future.

Process and Format

The process was designed to be inclusive of the Saint John community. Participant groups included:

- Core Team: Father Crispin, Parish Management Team, key commission and lay leaders
- Larger Core Team: Commission members and additional lay leaders
- Parish at large community

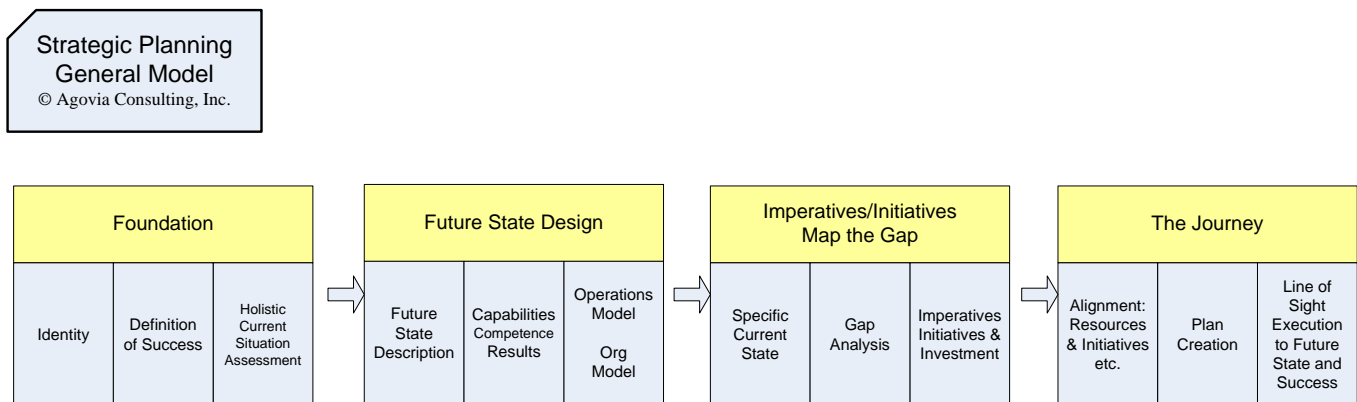
The planning process was conducted in three major phases:

1. Leadership scoping and directional planning
 - a. Core Team Kickoff: March 2, 2011
 - b. Core Team Scoping Session: March 14, 2011
 - c. Larger Core Team Scoping: March 28, 2011
 - d. Core Team Plan Process Review: April 6, 2011
2. Data Gathering
 - a. Community Kickoff: April 11, 2011
 - b. Community Data Gathering Session 1: May 2, 2011
 - c. Community Data Gathering Session 2: May 11, 2011
3. Management Staff Planning Sessions:
 - a. Session 1: May 23, 2011
 - b. Session 2: June 1, 2011
 - c. Session 3: June 13, 2011

The agendas for all meetings have been attached.

Overriding Process

The universal planning framework shown below was followed as the guiding map for the process. As is common in exercises of this nature, the sequencing of the actual work did not conform strictly to the order shown.



Planning Format

Community input for the plan was gathered from six focus groups. The focus group topics and facilitators are shown below. All community meetings were held in Egan Hall. Focus group stations were placed at intervals around the hall. Although focused on the various areas indicated by their titles, all groups addressed the same questions simultaneously.

<u>Focus Group</u>	<u>Facilitators</u>
Faith	Patrick D'Amelio
Community Ministries	Dani D'Amelio, Tony Perucca
Finance and Development	Jesse Franklin, Frank Feeman
Facilities	Gretchen Swanson
Operational Management	Michael Manley
	Dani D'Amelio, Anne Merklin

In the course of the two community data gathering sessions, the following items were addressed:

- Top of Mind: Initial exercise to gather “going-in” thoughts, concerns, and desired areas of action and change;
- Saint John Parish Identity: Beyond our identity and commitment as a Catholic Parish, what makes us a unique Community;
- Saint John Parish Definition of Success
- SWOT: An exercise to identify the Strengths, Weaknesses, Opportunities, and Threats for our Parish.
- Future State of the Parish Exercise
- Focus Area Goals and Objectives
- Focus Area Changes/Initiatives/Projects
- Timeline for Achievement

The data gathered from the community sessions was used by the Core Team to develop the following information and plan.

Process Results

Identity

The identity discussions at all levels focused on one aspect of St. John: Community. It is clear St. John is defined by the idea of “us and God” rather than “me and God.” The people of St. John view themselves and would like to assure they are a community of the faithful that love and care for one another rather than just a “place of worship” or a parochial school.

The current St. John Mission Statement is shown below:

Under the guidance of the Holy Spirit, the people of St. John the Evangelist Parish are called to embrace the Church’s mission of proclaiming the Good News of Salvation through Jesus Christ for all. Our witness to the presence of God and reaching out to others allow us to deepen our relationship with God. We accomplish this through our worship together, especially in the celebration of the Eucharist; through ongoing faith development for all people of all ages and life situations; through the performance of good works; and through responsible stewardship by which we care for the gifts given to us by our God.

In addition to the above, the St John community has a unique parish identity. As part of the planning process, the elements which define the unique identity of St. John Parish were gathered and summarized. These are shown below. It should be noted that, although the statements below are from the leadership and larger community of St John, they have not been incorporated as part of the official mission or vision of the parish:

We are a distinctive, cohesive, and unified Catholic community of faith rather than primarily a place of worship. We participate actively and fully in worship and good works to the greater glory of God. We consciously strive to make the sacraments, good works, and the parish community the center of our lives.

We welcome all, from active participants to those for whom St John is solely a place of worship, to those seeking knowledge and exploring their spirituality. We invite others to join our community and share in our faith. Each person is an integral and necessary part of our community. We work to be sure that everyone is included; no one feels they are merely tolerated or allowed, but truly welcomed.

Our focus is found in Matthew 22:37-40: Jesus said to him, “You shall love the Lord your God with all your heart, with all your soul, and with all your mind. This is the first and great commandment. And the second is like it: You shall love your neighbor as yourself. On these two commandments hang all the Law and the Prophets.”

We love and care for one another.

Definition of Success

The following bullets define the state of the parish the people of St. John will work to achieve:

- St John is a unified and strong Catholic community in which the people are fully active, and participative in faith, works, and stewardship
- St John has a distinctive and identifiable community culture of inclusion and mutual support
- St. John will strive to have a positive impact on the greater community and the world
- St. John has a strong, active, and regenerating population
- St. John has a strong underlying financial and physical infrastructure

Mission Impact Areas

The Saint John plan is crafted around Focus Areas. Each focus area represents a stream or focus of activities. Each of the focus areas supports, to a greater or lesser degree the above Mission, Identity, and Definition of Success. In order to assure we are keeping a strong connection with our desired outcomes, the initiatives under the various focus areas have indicators of how they support the elements of our Mission, Vision, and Definition of Success. The elements selected and used are:

- **Liturgy:** By fully and actively participating in our worship together, we witness the presence of God, proclaim the good news and deepen our relationship with God. We do this through worship, music, liturgical environment and prayer service
- **Faith Formation:** As a Parish community we strive to make our faith the center of our lives. We do this by providing opportunities and support for spiritual growth, life-long learning of the faith, sacramental preparation, and faith/life integration to make us true disciples of Christ.
- **Community:** We are a distinctive, cohesive, and unified Catholic community of faith rather than simply a place of worship. We welcome people of all ages and life situations. Each person is integral and necessary to our community. Social ministries to create an atmosphere of welcome, hospitality, and community spirit. Ex: Knights of Columbus, 55+ group, School Assoc. parish welcoming committee, etc.
- **Education:** Through our school and ongoing faith development for people of all ages and life situations, we grow in our relationships with each other and God. We provide a rigorous Catholic School education to children from pre-kindergarten through eighth grade.
- **Outreach:** We minister to those in spiritual, physical or emotional need in our parish, the wider-community and the world. We evangelize to those who want to know about Catholicism and those who are estranged from the Church. We grow in the love of our neighbors and in our relationship with God through the performance of good works.
- **Stewardship:** Through responsible stewardship we care for the gifts given to us by God.

Management Five-Year Plan

The Saint John Core Planning Team has selected five primary focus areas in which to concentrate achievement in the next five years. Within those focus areas, a total of twenty specific achievement areas have been defined. The primary focus areas are:

- Faith
- Ministries
- Finance
- Facilities
- Business Management

The picture below shows the interrelationships of the focus areas.

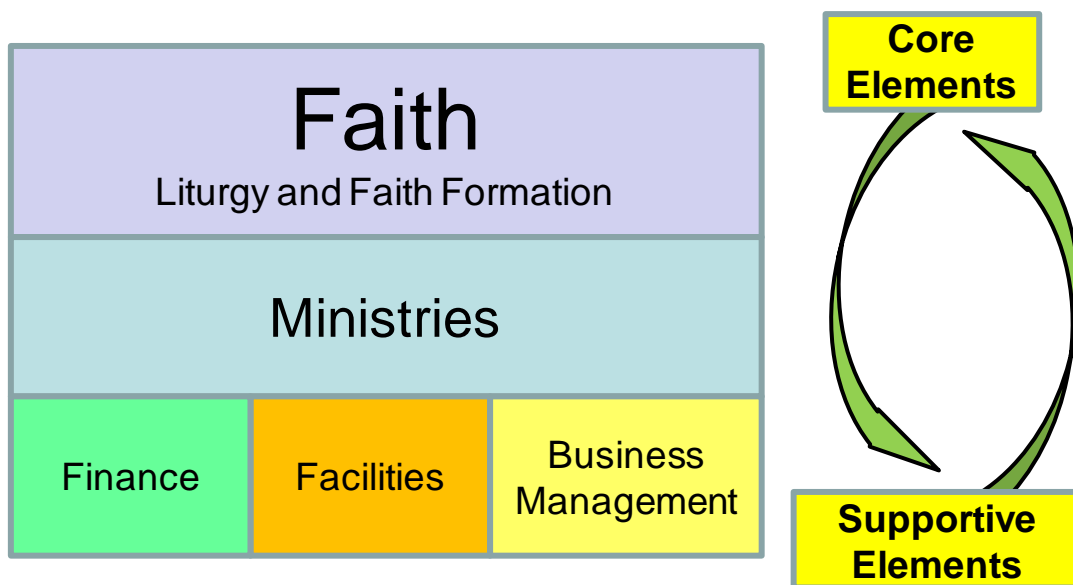


Figure 1. Focus Areas

Below are tables showing the anticipated activities and outcomes in each of the focus areas. Also shown are the areas of the St John Parish Mission which the activities impact.

Focus Groups Results

Below are Focus Areas high level outcome requirements.

Overarching Issues	
Element	Outcome
Communications	Effective communications and information availability for the parishioners of Saint John to assure the awareness and understanding of key parish circumstances and issues.
Healing	Parishioners unified in the support of the major directions, activities, and goals of St John Parish. Note: total agreement on all issues is not required or desirable but overall support is expected.

Faith	
Element	Outcome
Liturgy	Parishioners and visitors fully and actively participate in parish Liturgies, , music, and prayer services.
Faith Formation	The people of the parish actively engage in life-long learning and spiritual growth in their faith, the sacraments and prayer so that parishioners may fully integrate their faith into their daily lives so as to become true disciples of Christ.

Ministries	
Element	Outcome
Faith Ministries	Ministry structures to engage St. John's parishioners in active worship and life-long faith formation.
Supportive Ministries	Provide support and services to those parishioners in need, physically, spiritually, emotionally or facing other life challenges.
Community & Social Ministries	To create and encourage a welcoming and vibrant faith community that welcomes and is hospitable to all current, potential, and new parishioners
Education Ministries	Provide Catholic education accessible to all parish children pre-school to grade eight at the St. John School
Outreach Ministries	Provide support and connection to those in spiritual, emotional or physical need outside St John Parish

Finance	
Element	Outcome
Financial Management	Streamlined and robust financial methods and mechanisms for control, reporting, and appropriate communications
Financial Strategy & Plan	Financial Strategy to assure the dependable and predictable financial health of St John Parish
Financial Risk Management	Identify, prioritize, fund, and resolve high priority, short-term financial issues. Issues for resolution include current parish debt and anticipated short-term facilities expenses.

Facilities	
Element	Outcome
Facilities Management	Deliberate, organized, and predictable facilities planning and management methodology including adequate funding and financial management
Facilities Vision	Define and achieve a specific state of the facility in the next five years.
Risk Management	Identify, prioritize, fund, and resolve high priority, short-term facilities issues.

Business Management	
Element	Outcome
Operational Management	Optimized operational and organizational management model
Change Management	Planning, execution, and implementation capabilities and processes to assure the ongoing ability to change and grow St John Parish

Focus Area Initiatives

The below initiatives are proposed to achieve the outcomes required for the ongoing success of St John Parish. Each Focus Area and initiative will require an owner to take accountability for achieving the results desired.

Faith Focus Area

Definition: Activities directly related to the spiritual life of St John Parishioners

Over Riding Strategy: The development of the full, active, and integrated spiritual life of the people of St. John Parish.

Faith	
<i>Element:</i>	Liturgy
<i>Outcome:</i>	Parishioners and visitors fully and actively participate in liturgies, music, and prayer services.
Activity / Initiative: The Liturgy Commission will analyze ways to increase worship participation and will be accountable for the establishment of liturgy and worship experience with the outcome of active participation.	
Approach: Recommend the Liturgy Commission be directed to develop a plan to enhance and encourage full and active participation in the liturgy and create methods by which St John can optimize the worship life of its parishioners.	
Impacts: There will be a need for clarity of the parish staff, Liturgy Commission, and laity roles, responsibilities, and expectations of those involved in the liturgy at St. John. Areas for clarity include areas of responsibility and expectations of improved active participation. If the owners of various elements are expected to be accountable for improved participation, they will need the ability to have control over their areas. Sacristans, PA for Music, and Ushers, Liturgy Commission potentially will need additional clarity in their roles. We will have the ability to articulate how the various areas contribute to and result in improved participation. Additionally, methods to measure the level effectiveness of various efforts.	
Notes: Fr. Crispin and The Liturgy Commission will determine appropriate tools to evaluate success of the efforts in this area and progress in attaining full and active participation in our liturgies.	

Faith	
<i>Element:</i>	Faith Formation
<i>Outcome:</i>	The people of the parish actively engage in life-long learning and spiritual growth in their faith, the sacraments and prayer so that parishioners may fully integrate their faith into their daily lives so as to become true disciples of Christ.
Activity / Initiative:	
Creation and ongoing execution of relevant, interesting, and age appropriate Faith Formation Program (education and other other opportunities) to impart meaningful awareness and understanding of their faith, the Sacraments, and prayer so that parishioners may fully integrate their faith into their daily lives so as to become true disciples of Christ.	
Approach:	
The Faith Formation Commission in conjunction with the PA for Faith Formation and Pastor will review the current situation with faith formation programs and evaluate their ability to meet the needs of the parish for sacramental preparation and life-long learning and faith development for all ages. Catechetical teams will be built-up to meet the essential sacramental and catechetical learning of the faith community. Once essential faith formation elements have been met, additional faith formation elements will be added to provide relevant, interesting and age appropriate faith formation for all ages.	
Impacts: Possible changes to Faith Formation programs. Additions to staff and volunteers to implement program.	
Notes: Success in this area will be seen in the lifelong process of growth of spirituality and faith. Providing the tools and forms for growth will not be the aim of this initiative, rather the acceptance and use of the tools provided to achieve growth.	

Ministries Focus Area

Definition: The activities and actions of the Parish related to Liturgy, faith formation, community-building and the people of St John and the larger community

Over Riding Strategy: The creation of a ministries structure designed to support and provide for the outcomes desired by St. John Parish.

Ministries	
<i>Element:</i>	Over-riding Ministries Framework
<i>Outcome:</i>	An active and effective ministries structure designed to support and provide for the outcomes desired by St. John Parish.
Activity / Initiative:	
Building on the current St John ministries and within the Catholic parish ministries model create a St John ministries vision, framework and management method to assure both the ability to provide for outreach and support activities as well as the identification and use of the gifts of the parishioners and parish.	
Approach: Assignment of over-riding ministries responsibility to an appropriate parish body (e.g. Parish Pastoral Council, Stewardship Committee, or other group) with the direction to design and implement strong and outcome-oriented ministries framework and governance.	
Impacts: May result in reorganization of the current ministries	
Notes: Organizational decisions will be required regarding the management of volunteers and resources for various St. John activities and efforts. Central control and listing of volunteers has certain advantages but also can become unwieldy and bureaucratic. Decentralized control is more personal and effective at turning out volunteers but tends to create a narrow group of active parishioners.	

Ministries	
<i>Element:</i>	Faith Ministries
<i>Outcome:</i>	Ministry structure to support St. John Liturgy and Faith Formation
Activity / Initiative: Continuation, and enhancement of the Faith Ministries of St John. Elements will include both the support provided by St John to the Faith Ministries as well as the expectations and areas of responsibility for each.	
Approach: The PA for Music and PA for Faith Formation will provide accountability for and management of Faith Ministries as delegated by the Pastor. The Liturgy commission and Faith Formation commission will be advisory to the staff in these areas and to the Pastor. Wherever delegated by the Pastor the Commissions may provide additional management functions.	
Impacts:	
Notes: Faith ministries delegated to the PA for Music and PA for Faith Formation will report to them and wherever delegated by the Pastor will report to the Commissions. The PA for Music and PA for Faith Formation will work cooperatively with the team responsible for over-riding ministries framework in terms of volunteer coordination, communication and ministries expectations.	

Ministries	
<i>Element:</i>	Community & Social Ministries
<i>Outcome:</i>	A unified and vibrant faith community including potential and new parishioners
Activity / Initiative: Development of a Community and Social Ministries framework with the specific mandate of developing a unified and cohesive St. John community.	
Approach: Community and Social Ministries, while focused on the growth of a unified community will be driven by faith and daily life. While it is expected there will be purely social and fellowship activities (baseball games, pot-luck dinners, etc.) many of the opportunities for community and social growth will be found in other ministry areas. A fundamental philosophy of community building will be the concept of the integration of community/social activities and mission. Working together is the best way to come to know each other. Examples of this may include: Crafting activities which produce items needed by parishioners or others Increased openness and active invitations for widespread involvement in ministries, commissions, and other parish activities.	
Impacts:	
Notes:	

Ministries	
Element:	Education: St John School
Outcome:	Provide high quality Catholic and academic PK-8 education as well as supportive faith formation to faculty and parents of children at St. John School.
Activity / Initiative: See the St John School Five Year Plan	
Approach:	
Impacts:	
Notes:	

Ministries	
Element:	Outreach Ministries
Outcome:	Provide support, services, and connection to those parishioners in need as well as those in the larger community and the world.
Activity / Initiative: Development of a Outreach Ministries framework with the mandate to clarify and organize St John outreach efforts for focus and effectiveness. Development or (affirmation and clarity) of supportive ministries framework designed to assure community assistance, encouragement and support for St. John parishioners as well as the larger community.	
Approach: Assignment of outreach ministries to a team (i.e. Social Justice Committee, Outreach Committee, or other team) to create a vision and coordinated approach to St. John outreach. The framework should include areas of focus and support as well as criteria for inclusion and how resources will be allocated. The goal here will be the effective and impactful support of a clear set of worthy causes and prevent spreading our resources too thin and risking loss of impact. Supportive ministries include those activities most often needed in times of hardship or adversity. They may include: Funeral Ministry Unemployment Prison Immediate Needs - Food and Clothing and others. Additionally, this area will include ministering to the larger world with activities in such areas as: Amigos de Peru, Kenyan orphans, and others.	
Impacts: There is the potential we will reduce or eliminate support provided to some worthy causes in order to provide effective support to others	
Notes:	

Finance Focus Area

Definition: The activities and actions related to the financial management of St John Parish

Finance	
<i>Element:</i>	Financial Management
<i>Outcome:</i>	Streamlined and robust financial methods and mechanisms for control, reporting, and appropriate communications
Activity / Initiative:	
The Finance Council will continue to review, enhance, and optimize the financial methods and mechanisms for control, reporting and appropriate communications, within the guidelines of Archdiocesan policy	
<p>Approach: Creation of a temporary Financial Operations Process Team to work with the St John Management Team to create or affirm a process-driven approach to finance methods of St. John. Items for inclusion may include: Weekly/monthly/annual financial cycle activities Financial reporting and action triggers Streamlined financial allocation and approval methods Pastor/Management/Commission roles and responsibilities Clarity on large (defined threshold) financial decision methods Communication and interpretation of financial information to the parish community</p> <p>Review and continued improvement of annual financial planning and budgeting cycle to incorporate both operational requirements and funding for projects and extraordinary expenses. Budget process will provide for:</p> <ul style="list-style-type: none"> » Predictable maintenance activities » Non-operational funding requirements 	
Impacts:	
Notes:	

Finance	
Element:	Financial Strategy & Plan
Outcome:	Financial Strategy and to assure the dependable and predictable financial health of St John Parish
Activity / Initiative: Creation of detailed and specific long term financial strategy and plan including reserves, income streams, endowments, etc.	
Approach: Creation and execution on a goal-driven multi-year financial plan for St. John Parish. Financial strategy to be driven by the requirements of the St. John Parish mission. Goals will include: <ul style="list-style-type: none"> » Achievement of ability to be a self-sustaining and growth oriented parish » Reduced dependency on unpredictable fundraising » Optimal management of debt to achieve mission » Rainy Day Reserve » Clarity on school financial obligations, and expectations 	
Impacts:	
Notes: It is important to note the line: <i>Financial strategy to be driven by the requirements of the St. John Parish mission</i> . This means the mission and needs of the parish will be established and will be supported by the ability of the parish to find the funds and resources necessary. It does not mean we will spend what we do not have, rather we are confident the Spirit will lead us to ways to fulfill our mission with good stewardship and financial stability.	

Finance	
Element:	Financial Risk Management
Outcome:	Identify, prioritize, fund, and resolve high priority near-term financial obligations.
Activity / Initiative: Analysis and evaluation of Saint John financial status and forecasted financial obligations.	
Approach: Recommend a temporary Urgent Stewardship Team be created to locate, document, and create short-term solutions for urgent current and projected financial needs.	
Impacts:	
Notes: This area includes current debt as well as significant expenses forecasted in a time frame for which longer term preparation is not feasible.	

Facilities Focus Area

Definition: All activities related to the stewardship and maintenance of the physical infrastructure of the St John Campus

Over Riding Strategy: Development of repeatable and predictable management methodology with adequate staffing for

Facilities	
<i>Element:</i>	Facilities Management
<i>Outcome:</i>	Deliberate, organized, and predictable facilities planning and management methodology including adequate funding and financial management
Activity / Initiative: Develop and implement a deliberate, organized, and predictable facilities planning and management methodology including adequate funding and prudent financial management	
Approach:	
Impacts: Included should be the ongoing regular funding for maintenance and depreciation. Cyclical activities and expenditures should be planned to prevent major or catastrophic events (e.g. sectional tuck-pointing, sectional plumbing and wiring renewal, etc.)	
Notes: Likely requirement for additional facilities management resource dedicated to property management.	

Facilities	
<i>Element:</i>	Facilities Vision
<i>Outcome:</i>	Define and achieve a specific state of the facility in the next five years
<p>Activity / Initiative:</p> <p>Create parish campus future state vision and plan for achievement. Future state plan should be part of overall facilities management process and plan.</p>	
<p>Approach:</p>	
<p>Impacts: Will determine medium-to-long term funding needs.</p>	
<p>Notes:</p>	

Facilities	
<i>Element:</i>	Facilities Risk Management
<i>Outcome:</i>	Identify, prioritize, fund, and resolve high priority near-term facilities issues.
<p>Activity / Initiative:</p> <p>Develop a method to continually identify, prioritize, fund, and resolve high risk/highly urgent facility issues. Included in process will be risk mitigation methods for issues that cannot be immediately resolved.</p>	
<p>Approach: Recommend a temporary Campus Evaluation Team be created to discover and estimate urgently required facilities work. The high-level campus evaluation performed during the summer of 2010 can be utilized as a starting point. As part of the evaluation process it will be necessary to create a risk threshold for immediate action.</p>	
<p>Impacts: Potential to increase parish debt</p>	
<p>Notes: Items currently considered potential for immediate action: : Church roof repairs Rectory roof repairs Church sound system Church bell tower Church Sanctuary water leak School attic plumbing School windows hydrolic expansion.</p>	

Business Management Focus Area

Definition: All activities related to the operational and organizational management of St John Parish.

Over Riding Strategy: Optimization of operations and organizational model of St John Parish in order to best allow the achievement of our mission as a Catholic parish and realization of our parish identity.

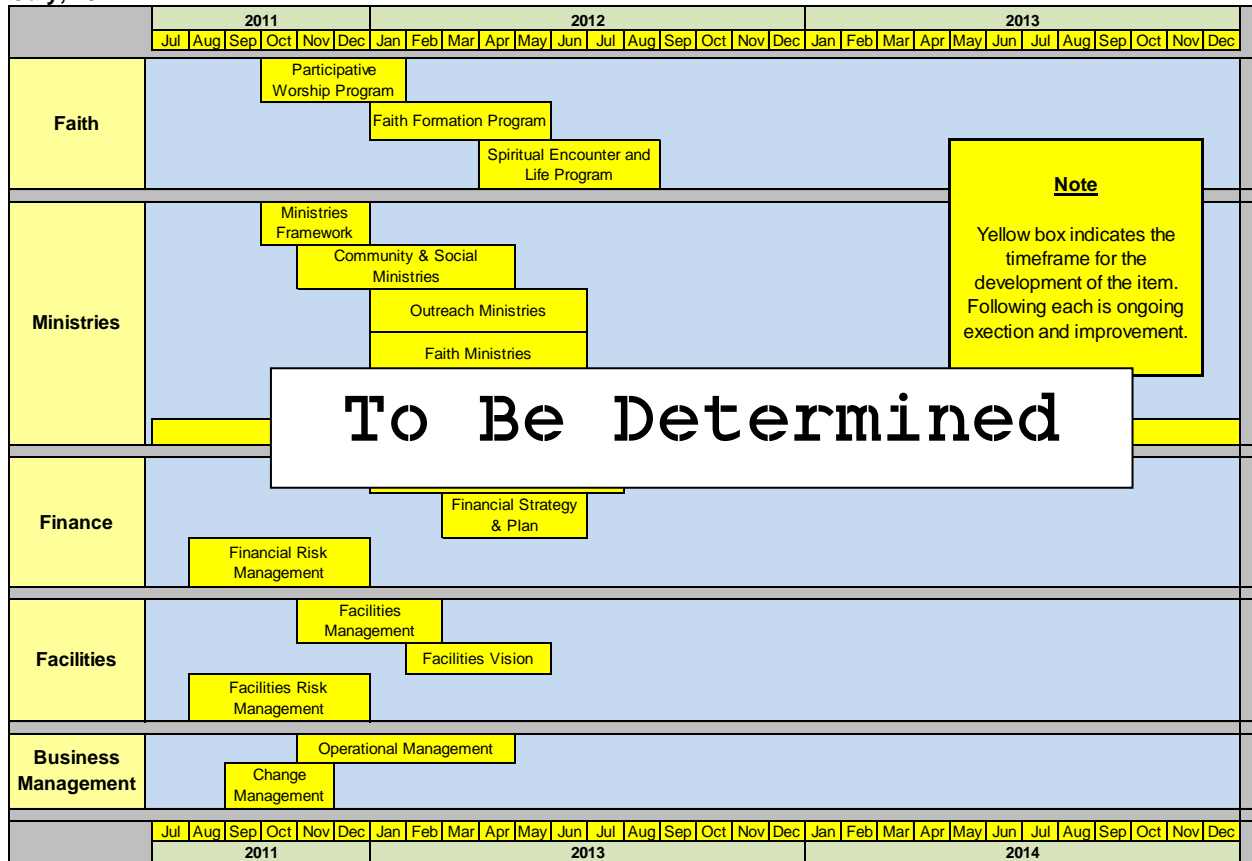
Business Management	
<i>Element:</i>	Operational Management
<i>Outcome:</i>	Optimized operational and organizational management model
Activity / Initiative: Business process management analysis and restructure project.	
Approach: Parish business mangement team and facilitators create a defined business management model for St John Parish. Will include clarity on organizational strucure as well as roles and repsonsibilities of all parish entities. Methods will be created to assure consistent communications and workflow between commissions ministries, and the management of the parish and school Outcomes will include optimization of business management processes, calendars, and reporting to assure effective and efficient administrative control and management of St. John Parish.	
Impacts: Potential need for additional staffing and volunteer resources. Potential requirement for equipment, and software upgrades.	
Notes:	

Business Management	
<i>Element:</i>	Change Management
<i>Outcome:</i>	Planning, execution, and implementation capabilities and processes to assure the ongoing ability to change and grow St John Parish
Activity / Initiative: Creation of an organization-wide project and portfolio governance process for execution with minimal resources.	
Approach: Governance mechanism will include proposal, selection, funding, monitor, and feedback elements for achievement of desired outcomes. Will include input and feedback from all parish entities as well as coordination with parish budgeting processes.	
Impacts: The establishment of the change management processes will require short term resources. Once established, the processes should be self-maintaining through reporting and minimal weekly review.	
Notes:	

Staging and Timeline

The below table shows the high-level sequence of events recommended for the twenty initiatives. This illustration is designed to show the relationship of the initiatives to one another. Additionally this is a draft timeline and is expected to change as Initiative plans become more concrete and plans are refined during the five-year timeframe.

St John Parish - Five Year Plan 2011
Focus Area Initiatives
July, 2011



Note: The above timeline shows some activities starting prior to the final review by the parish and the acceptance by Father Crispin and the Parish Council. This is due to the timing required to complete some of the higher priority plans by January, 2012. Those with early start dates are likely to be approved in the final plan.

Next Steps

(Once approved by Father Crispin and introduced to parish community)

The next steps recommended for the five year plan is the assignment of owners to each focus area and the development of initiative estimates in order to plan the effort and achievement process for the coming five years.

- Step 1.** Assignment and acceptance of Focus Areas priorities by Commissions, Staff and Pastor.
- Step 2.** Completion of Initiative Worksheet (See Appendix)
- Step 3.** Creation of Five-Year Milestone Plan
- Step 4.** Validation of feasibility and acceptance of accountability for execution by Pastor and Parish Council and Advisory Commissions.
- Step 5.** Creation and implementation of regular reporting and governance of Five Year Milestone Plan to the Pastor and Parish Council
- Step 6.** Execution with regular planned reviews of overall five-year program to the Pastor and Parish Councils.

Note: It is expected that planning for initial activities will be detailed. Later activities will be planned at a high-level with the expectation that outcomes of earlier dependencies will determine the actual project activities and steps required. Detailed planning will take place during the annual parish operational and Commission planning cycles.

Appendices

Appendix 2 – Initiative Worksheet

Agovia Consulting

Saint John the Evangelist Parish

Five Year Plan 2011 – 2016

Initiative Worksheet

Focus Area Supported:

Title of Initiative:

Responsible Staff or Commission:

General Description of actions and activities needed to implement this initiative:

Outcome Statement (*What are the measurable results of this initiative?*):

Scope (what is included and not included):

Plan/Approach/Timeline (*What are the major phases and milestones and dates by which you plan to achieve them? These will be used for follow-up and reporting*):

Dependencies (*What do you need to achieve the goals of this initiative?*):

- Items for Decision or Resolution:
 -
- Input from others:
 -
- Funding/Investment/Resources:
 -
- Other:
 -

Saint John Parish Planning Community Data Gathering Session – First Session

First Session
May 2, 2011

Agenda:

Greeting and Prayer

Agenda review and break into Focus Areas

- Faith
- Community
- Ministries
- Operational Management
- Finance and Development
- Facilities

Letter from the Archbishop

Exercise: You know more than you think you know: 10 Minutes

Top of Mind: 20 Minutes

- What do you want from this process?
- What is important to you that we make happen?
- What is concerning you about the planning process?
- What keeps you up at night?
- What is on your mind that could prevent you from focusing on this process?

Rules: Nothing is off limits – say what you like
We will be respectful
Obstructionism is not allowed
We will not solve the issues during the Top of Mind
We will address them or follow-up on all points
After the Top of Mind Exercise you may add to the list

Saint John Parish Identity and Definition of Success Exercise: 20 Minutes

SWOT Exercise: 30 Minutes

Future State Exercise: 30 Minutes

In order to succeed we:

- Be able to do this. . .
- Have these skills and capabilities
- Will look like this

SWOT

1. **Strengths:** These are the things we are good at. The things we do well and are proud of. Strengths are about us. They come from within. They may be important or not. Although strength is usually considered a good thing, this is not always true. A strength area may be good for us or it may be detrimental. If we are really good at something that does not make a contribution to our success, that strength may actually be diverting resources and energy from other, more important things.
2. **Weaknesses:** These are the things we are not good at. They are the things that challenge us. Weaknesses also are about us. Similar to strengths but in the opposite direction, weaknesses are usually considered undesirable. In most cases, if an item shows up on the weakness list, it is not a good thing. People tend to self-edit weaknesses to a greater extent than strengths. If a weakness is mentioned by the team, it is probably related to something you need to do well in order to be successful.
3. **Opportunities:** These are potential gains we see when we look around us. They tend to be external in nature although most teams automatically filter external situations for opportunities that can be exploited by an organizational strength. When looking for opportunities, remember improvement of an internal weakness can also allow you to take advantage of an external situation. Opportunities can also be found internally. The most common example of internal opportunities are seen in efficiency and expense management. Rule of thumb: if you have not looked at your operational efficiency and expense control in five years, there is probably 20% available for the taking.
4. **Threats:** These are almost always external although they tend to take advantage of your internal weaknesses. Examples of threats include:
 - Competition
 - Economic swings
 - Regulatory changes
 - Innovation
 - Music industry and MP3 compression
 - Changes in industry models
 - Newspaper classified advertising revenue vs. craigslist
 - Railroads vs. Interstate Highway System and cheap gasoline

Saint John Parish Planning Community Data Gathering Session – Second Session

Second Session

May 11, 2011

Agenda:

Greeting and Prayer

Agenda review and break into Focus Areas

Exercise: The Perfect Shirt – 10 Min

Previous Meeting Info

Focus Area Goals and Objectives – 30 Min

- What do we desire to achieve?
- What are the outcomes or results we want?
- Quantify if possible
 - Numbers
 - Measurable outcome

Focus Area Changes/Initiatives/Projects – 30 Min

- What will we need to do to reach these goals?
- Changes? Development? Projects? Work?
- What do you want done? Needs / Wants / Desires

Ten Dots – 20 Min

- **Voting**
 - Each person gets ten dots
 - Put dots on those areas you feel are most important
 - You may use up to three dots on any single item
- **Analysis**
 - What conclusions can you draw from the pattern of the dots?

Timeline for Achievement – (As time allows)

- Immediate
- One Year
- Three Year
- Five Year
- Longer