

**Prayer for Priests**

HEAVENLY FATHER, DURING THIS YEAR FOR PRIESTS, BLESS OUR DIOCESE WITH THE GRACE OF MANY VOCATIONS TO THE PRIESTHOOD FROM OUR PARISHES.

THROUGH THE INTERCESSION OF OUR BLESSED MOTHER, GRANT TO THOSE YOU HAVE CALLED, THE COURAGE TO FOLLOW YOUR WILL. GRANT ALSO TO THOSE SERVING AS PRIESTS, THE GRACE TO SERVE WITH THE FAITHFULNESS OF CHRIST.

WE ASK THIS THROUGH CHRIST, OUR LORD,  
AMEN

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**Stewardship 101**

Visioning and Strategic Planning  
(Preparing the Case)

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**The first ingredient in a successful stewardship and development process is a parish Vision. The Vision helps parishioners understand why their time, talent and treasure are needed. It also shows how these valuable resources can be used to do God's work through your parish community. This presentation helps you create (or evaluate) your parish Vision and then turn that Vision into reality with a detailed strategic plan.**

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**James 2:14**

“What good is it, my brothers, if someone says he has faith but does not have works?”

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**CHECKLIST**

- Does your parish have a Vision?
- Do you understand how a shared Vision can unite a parish in its stewardship efforts?
- Do you understand the importance of making a plan that will enable you to carry out that Vision?

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**CHECKLIST (cont.)**

- Do you know how to turn your Vision and Strategic Plan into a case statement that can be used to encourage increased giving in the parish?
- Are you prepared to put your plans into action by putting them on a calendar and regularly evaluating your progress?

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## Presentation Outline

- A: Why Every Parish Needs a Vision and A Strategic Plan
- B: The Visioning Process
- C: Moving from Visioning to Planning
- D: Moving from Planning to Action
- E: Evaluating Action and Results

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## Why Every Parish Needs A Vision and a Strategic Plan

Understanding the Terms

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## The Parish Vision

A clear statement of how the parish sees itself now and what it hopes to be in the future.

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## The Strategic Plan

It is developed after the Parish Vision has been established. It gives the detail of how the parish will accomplish the Parish Vision.

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## The Stewardship and Development Plan

It is written after the Strategic Plan is complete. It outlines what the Stewardship and Development Council will do to accomplish the Strategic Plan action steps for which the Stewardship and Development Council has been named responsible in the Strategic Plan.

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## The Case Statement

It is a document that basically summarizes the key points from the Parish Vision, Strategic Plan and Stewardship and Development Plan, while also highlighting the history and accomplishments of the parish.

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**Understanding A Parish Vision and Strategic Plan**

- The Parish Vision basically completes the statement, “*We are a parish that. . .*”
- The Parish Vision answers such questions as:
  - Who are we?
  - What do we do?
  - What makes us unique?
  - What more might God be calling us to do?

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**The Benefits of A Parish Vision and Strategic Plan**

A Parish Vision and Strategic Plan help a parish to look beyond where it is now and see where it will be in the future. They help a parish take advantage of new opportunities and respond to changes in the community. They allow a parish to assess its current situation and plan for any changes that may be necessary. In short, they help us to do the very best job possible of being God’s people.

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**How Does A Vision Help the Stewardship and Development Process?**

- You know what is important to your parishioners, who are, in fact, your major donors. You know how to appeal to them.
- You know what your parishioners value and appreciate about the parish.
- You know what the parishioners want to accomplish in the future and what they will support.
- You know what improvements will motivate the parishioners.
- You know why the parishioners are willing to support the parish and why they may not.

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## CHECKLIST

- Determine if your parish has a viable Mission Statement, Vision and Strategic Plan.
- If a Parish Vision and Strategic Plan do not exist, begin the process of creating them.
- If these documents exist, integrate them into your Stewardship and Development Plan and Case Statement.

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## B: The Visioning Process

Who Is In Charge?

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## Key Elements in the Visioning and Planning Process

- Broad-based input
- Focused input
- Writing the Vision
- Developing the Strategic Plan
- Reporting to the Parish
- Implementing, monitoring and updating

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## Broad-Based Input

- Who are the people we are serving now?
- Who will we be called upon to serve in the future?
- How well are we meeting the needs of our parishioners at this time?
- What are we best at?

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## Broad-Based Input (cont.)

- Where are our weaknesses?
- What must we do to meet the needs of our parishioners in the future?
- What are we currently doing that is unnecessary or only marginally productive?

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## Focused Input

- What are the real priorities?
- What can we change and what must we accept?
- What truly impacts our faith and discipleship and what is simply administration or logistics?
- What should be part of the Parish Vision and what should be simply handled now or ignored?
- What is feasible?

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## Writing the Vision

- The Parish Vision answers such questions as:
  - Who are we?
  - What do we do?
  - What makes us unique?
  - What more might God be calling us to do?

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## Developing the Strategic Plan

- Goals
- Objectives
- Action Steps

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## Reporting to the Parish

- A pulpit talk by the pastor
- An insert in the bulletin
- A general parish meeting
- A letter to the homes

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## Implementing



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## Monitoring



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## Updating



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## ACTION STEPS

- If the Parish does not have a viable Parish Vision and Strategic Plan, petition the pastor or Parish Council to begin the visioning process necessary to create these important tools.
- Make sure there is an opportunity for broad-based input in your visioning process.
- Have a representative group of parish leaders review the survey results to determine the real issues and priorities for the parish.

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## ACTION STEPS (continued)

- Write your Parish Vision based on the issues, needs and priorities identified by the parish.
- Develop a Strategic Plan including Goals, Objectives and Action Steps necessary to make your vision a reality.
- Report back to parishioners on the results of their input and share the Parish Vision with them.
- Make sure that all responsible parties know what they must do to carry out the Strategic Plan.

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## C: Moving from Visioning to Planning

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**Responsibilities for the Stewardship and Development Council**

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- The Stewardship and Development Plan**
- What are the needs of the parish?
  - Who will provide the resources necessary to meet these needs? (These are your donors)
  - How do we keep track of these donors?
  - How do we educate them to the needs and encourage them to give their support?
  - How do we acknowledge and thank them for their commitment?

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**The Stewardship and Development Calendar**

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## ACTION STEPS

- Review the parish Strategic Plan to determine the Action Steps for which the Stewardship and Development Council responsible.
- Take a proactive approach to the parish Strategic Plan, looking for areas where extra funding may be needed to accomplish Action Steps. Then work with the responsible parties to determine how that funding will be obtained.

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## ACTION STEPS (cont.)

- Schedule a planning retreat day, evening or afternoon to create your Stewardship and Development Plan.
- Place the activities in your Stewardship and Development Plan on a calendar grid, assigning specific times for each activity and making sure that there is not too much activity at any one time.

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## D: Moving from Planning to Action

Calling Forth the Resources

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## Writing the Case Statement

- A Case Statement should include:
  - A brief summary of the parish Mission, Vision and Strategic Plan.
  - A brief history of the parish, stressing what makes the parish unique.
  - A summary of ministries and services of the parish.
  - A description of the pastor, staff and volunteers who serve the parish.
  - A description of the people served by the parish.
  - Challenges the parish currently faces.

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## Writing the Case Statement (cont.)

- Plans for maintaining and improving the parish facilities, programs and services.
- Benefits of new parish activities, plans or improvements.
- Financial facts.
- Statement of support from parish and/or community leaders.
- A call to action or an explanation of the ways that people can help.

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## Using the Case Statement

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## ACTION STEPS

- Write a detailed, clear and optimistic case for support , or Case Statement.
- Use your Case Statement to develop all other Stewardship and Development communication pieces, to recruit and train new council members and to attract major donors.

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## E: Evaluating Action and Results

Keep it Off the Shelf

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## Getting the Job Done

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# Evaluating

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- ## ACTION STEPS
- Use your Parish Vision and Strategic Plan and Stewardship and Development Plan to keep your stewardship and development efforts focused and on track.
  - Schedule regular times to review the Stewardship and Development Plan and make sure that all activities are being accomplished or rescheduled.
  - Plan to evaluate every action that is accomplished to determine its success and possible improvements or changes.

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**Next Stewardship 101 Session:  
Communications and Marketing**

- February 3, 2010 St. Thomas Aquinas, Avondale
- February 10, 2010 Our Lady of Mount Carmel, Tempe
- February 24, 2010 St. Paul's, Phoenix

ALL SESSIONS ARE FROM

7:00 PM – 8:30 PM

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