

Saint Raphael the Archangel Catholic Church

Parish Planning Guide

Section 1.

Introduction

This planning guide has been prepared to clarify and simplify the planning process for you, and hopefully, explain the value to you, the Pastor and the parish community and serve as motivation to develop a quality plan.

In this section we will describe what a plan is, the need for a plan, its value and the need for a consistent format, across all ministries, without inhibiting, in any way, your control of the plan content and its implementation.

Section 2 will define the fundamental components of Phase 1 of the development process. These components are; the Mission Statement; Goals; and Objectives. We will attempt to provide examples of both good and poor illustrations of each component.

Section 3 will describe how to take your Goals and Objectives to the next level of detail, Phase 2, again with examples and reasons why this phase can be of value to you and the Pastor.

The Plan

The Plan is a document defining (not describing) that which you intend to achieve and the actions to be taken to succeed. In more simple terms, it is a road map that defines how you get from your present position to your final destination.

For those of you who have never been involved in a formal planning process, the first experience usually seems to be a daunting and challenging assignment. However, it need not be. We are all experienced in planning, to some degree, in our every day lives. We plan each day's activities: what time must I wake up; what will I eat for breakfast, lunch and dinner; where do I have to go today; what time must I leave; how do I get

there, etc. Have you noticed the familiar questions of “how”, “what”, “when” and “where”? You can also add “who” to that list.

Those of you who have experience in the planning process will tell you that it is much easier to do when you commit to doing it.

The Need for a Plan

The first and most direct reason for developing a plan is that the Diocese requires it. There are, however, far more compelling reasons for developing sound and detailed plans.

It may never have occurred to you that the parish, especially the large ones like St. Raphael, are complex organizations. The parish is committed to serving the spiritual and, when called upon, the corporal needs of the parishioners and by extension, those of the community in which we live. We accept these responsibilities in the spirit of Christ’s teachings, to the best of our ability. In that context the Parish Mission Statement is published weekly in our Bulletin as a constant reminder of our collective responsibility.

The Pastor is charged with the responsibility of identifying the needs of the parish community and managing all of the resources of Time, Talent and Treasure available to him, to that end. Those needs are many and varied and are changing from time to time, as the world around us changes. Organizing and managing the available resources is a challenge for anyone.

The resources to which I am referring are the parish buildings and land, purchased by the parishioners; the talents of those who choose to serve the Parish; time (which is limited); and of course, money. The organization of those resources results in the formation of the various ministries, each formed to focus on assigned needs or services.

The collective success of these ministries determines the success of the Parish in accomplishing its mission. The Parish Plan, then, is like a mosaic or large puzzle, where the plans of each ministry are pieces of the total and all must fit together to complete the mosaic or puzzle.

When viewed from that perspective, the Parish Plan becomes a useful and valuable vehicle for identifying needs and prioritizing the allocation of available resources to optimize, as near as possible, the efficient use of those resources

The Value of Planning

Personal Value

When you are faced, for the first time, with the task of developing a formal plan and documenting it, there are usually some negative reactions. You say to yourself, I know my responsibilities and I know how to get my job done and do it well. Why do I have to waste my time doing this? These are natural human reactions to change.

Those of us who have become experienced in the planning process know that once we discipline ourselves to the planning process, we gain many valuable benefits. Consider, if you will the following benefits and draw from your own every day experiences any additional benefits that you can identify.

1. By taking the time to step back from the day to day activities to focus on what you would like to accomplish during the plan period, how you will go about getting it done and what you need to do it, you will surprise yourself by realizing how much more you can accomplish than you have in the past.
2. By documenting it you are providing yourself with a road map to the successful achievement of your goals. It will minimize the number of times that important details fall through the cracks because of any number of interruptions or distractions. You will also be motivated to improve the quality of implementation because opportunities for improvement will become more obvious.
3. By monitoring your progress along the way, you will be in good position to alter your plan, if appropriate, thereby minimizing the waste of valuable resources.
4. The net result will give you an enhanced satisfaction with your accomplishment and motivate you to improve the quality of your next plan.

Value to the Pastor

The Pastor bears the responsibility for the implementation of the Parish Plan, the stewardship of the resources provided to him and is accountable to the parishioners. In addition, he has responsibilities to the

Bishop, his superiors in the Society of Jesus and for the development of his associates.

The Parish Plan is a valuable vehicle for the Pastor to evaluate the needs of the Parish, both spiritual and material; to assess appropriate priorities; and monitor activity in an organized and efficient manner.

The Planning Process

The planning process is a set of guidelines to assist the planner in focusing on the goals to be achieved and what must be done to be successful. These guidelines do not, in any way, tell the planner what their goals should be or how to accomplish them. They do define a consistent format, generic in form, that facilitates the development of the plan in a way that makes it easier for interested parties, other than the planner, to understand and use.

This consistency of format is not only useful to the Pastor in his use of the Plan, but is also valuable, for purposes of clarity, when plans overlap or interact with those of other ministries. The existence of a quality plan is evidence to the parishioners of the quality of stewardship provided in their interest.

The first phase of the planning process conforms completely to the requirements of the Diocese. As a matter of fact, it is so generic that it can be used effectively by any type or size organization. It includes the development of the Mission Statement, the definition of Goals and the identification of the Objectives which must be accomplished to achieve the Goal.

The second phase of the planning process takes the plan to the next level of detail. It identifies those tasks that need to be done; when they need to be done; what arrangements must be made; how many personnel will be needed; etc. We will discuss these issues, in more detail, in Section 3.

Once you have overcome the hurdle of conforming to this planning process, for one goal, you will discover that there is a rhythm and logic to the process. You will wonder why you have not used this approach all along.

Good Luck

Section 2: Mission Statement; Goals; and Objectives.

Introduction

In this section we will describe the three main components of Phase 1 of the planning process, their relationship to each other and, where appropriate, examples, both good and poor. These components are: 1) the Mission Statement; 2) Goals; and 3) Objectives. The understanding of the role that each component has in the planning process will assist you to focus more clearly on the process of plan development.

The Mission Statement

The mission of the Church is most simply stated by saying that the Church is responsible for spreading the teachings of Jesus to all corners of the world.

In the early days of the Church this was done by the Apostles and their disciples. As membership in the Church grew, over time, so did the need for an organization that would address the needs of the various of members, while preserving the integrity of Christ's teachings.

As a result, the current organizational structure evolved over time. In this structure the parish unit is the primary contact point for its members and therefore the most important unit. Since parish units can vary dramatically due to location, culture, environment, etc., their approach to carrying out their mission will also vary.

It is necessary, then, that each parish develop a statement of its long term strategy or direction, for accomplishing its mission-----The Mission Statement. The Mission Statement for St. Raphael parish has been developed and is published each week in the Bulletin, for all who are interested.

With the Mission Statement as a framework, the Pastor and those who assist him in the leadership of the parish, must assess the needs of the parish and organize the resources available to them to address those needs. The Mission Statement is broad enough to provide the flexibility to make changes, as circumstances dictate.

It is not necessary for each ministry to have a mission statement, but it is helpful for groups of similar ministries to have an overall mission statement.

The Mission Statement then is the first step in the development of the Parish Plan..

Goals

According to Webster's New World Dictionary (an old version) the definition of a goal, as it applies here, is "an object or end that one strives to obtain".

My working definition of a goal, in the context of planning, is "a definitive statement of that which I intend to achieve".

The main difference in these definitions is the use of the word "definitive". I deliberately use that word because I have read so many goal statements that were descriptions, instead of definitions. Descriptions almost always contain ambiguities and are prone to misinterpretation.

What then are the main characteristics of a Goal statement? They are:

1. Realistic. Set targets that are reasonable to achieve, but do not make them so easy that little or no effort is required to achieve success. Challenge yourself, but within reason. By all means do not set yourself up for failure by setting impossible goals, such as getting every parishioner to go to Mass. It will never happen. Examples of this type of mistake can be found in abundance, almost anywhere.
2. Understandable: State the Goal in simple and clear terms. Avoid ambiguous language. Test yourself after writing your goal, by reading it and counting how many different interpretations you can draw from it. If more than one---rewrite it. Ask a third party to read it and give you their interpretation. If it differs from yours----rewrite it. These little tips will help produce a goal that is clear and understandable.
3. Measurable. Every goal statement should have a quantitative element to it, in order to enable you to track progress or assess level of success. Some examples are:
 - a) increase Offertory collections by 10% over last year.
 - b) conduct 3 seminars on topic X, for 25-30 participants each.
 - c) add 5 new volunteers to ministry A.
 - d) upgrade Program Y by adding ----etc.

Avoid the use of verbs such as;

- a) encourage---your goal is not to encourage but to achieve a

specific result by a specific action.

b) improve----this is a common verb used in goal setting, but rarely is the amount of improvement defined. Therefore success can be claimed if, \$1.00 more is raised; 1 more person attends a seminar; 1 more day is added; etc. I think you get this message.

4. Accomplishment Recognizable. If a goal does not lend itself to a measurable component, the goal should be stated in a way that successful accomplishment is easily recognized. When you plan a trip, you should be able to recognize when you have reached your destination. The same is true for a goal.

Objectives

Once you are satisfied with your Goal statement, your next challenge is the identification of the major activities that must be completed to reach your goal. These activities are your objectives. I liken this part of the planning process to climbing a flight of stairs, where each step is analogous to an objective to be completed on the way to achieving your goal.

These objectives or activities can take on a variety of forms. For example:

- a) develop curriculum for seminar;
- b) recruit and train 5 new volunteers;
- c) prepare publicity release for project A;
- d) design procedures for communications to and from parish community;
- e) design procedures for secure handling of parish money.

Obviously, there are many more realistic activities. The ones you choose should be those that will lead you to your goal.

Format

For purposes of consistency, a format for structuring your Mission Statement, your Goals and Objectives, and Quarterly Progress Reports, templates have been designed for your convenience. A copy is attached as an appendix.

Copies of the appropriate templates can be received, electronically, from, the Parish Provost or the Chair of the Planning Committee.

Section 3. Phase 2. The Action Plan

Introduction

Now that you have identified your Goals and Objectives, we have to get serious about determining how to go about getting the job done. How do you get from where you are now (the starting point) to where you want to go (your destination)? What activities must be initiated and scheduled? What will I need to do to get the job done successfully?

If you have never experienced the formal process of planning, the development of your action plan may seem to be a difficult assignment. Our goal with this Planning Guide is to help you visualize what has to be done, what resources are needed and the value of doing it. We will provide you with a brief but general description of the action plan. This description will be enhanced by an examination of the various resources to be considered for use and suggestions for efficiently managing your efforts.

The Action Plan

Our recommendation is to start with one, fairly straight forward goal and select one objective for that goal. Visualize each step or task that must be completed, the sequence of the steps and the resources needed. Write them down as you think of them. Do not be surprised if, as you move toward your objective, you discover that you have omitted a step or two. This is common and natural. Simply go back and insert the steps in their appropriate place. When you are satisfied with the draft of your plan for this objective, review it one more time to confirm your result.

Next, repeat the process for each objective for that goal.

The next exercise is recommended to assist you to maximize the efficiency with which you execute your plan.

Lay out the tasks, for each objective, on a month by month schedule, for the entire year, keeping in mind the time it takes to execute and any deadlines that must be met. Repeat this process for each objective.

Completion of this exercise puts you in a position to determine when you must start each task, identify tasks that can be executed in parallel or if one activity can satisfy a requirement for more than one objective. Other opportunities for improved efficiency may well become obvious to you. You

are now in a good position to organize your time in an efficient manner.

Resources

Successful achievement of your goals will require the use of a variety of resources. Too often we give this detail too little attention, too late. We find ourselves hustling around at the last minute, trying to recover. Failure to identify the required resources during the early stages of your plan development can result in having to cancel an event or a program or to settle for less quality. In either case you have wasted the most valuable resource---time.

In addition to the personal values of quality, efficiency and satisfaction, this level of detail provides the Pastor an excellent vehicle for exercising his responsibility for good stewardship of the resources available to him. Your action plan provides the necessary input to the determination of the total and type of resources being requested. If experience runs true to form, there is a 100% probability that the total resources requested will exceed the total resources available. The Pastor has the responsibility to close that gap.

Your action plan is a valuable source of information that allows the Pastor to evaluate, prioritize and allocate the available resources. This may cause you to modify your plan, but these modifications will bring all of the plans inside a framework that can be managed.

In the following paragraphs we will identify some of the more important resources and give some ideas of why they are important.

A. Personnel

Many, if not all of your projects rely heavily on the use of volunteers. A common notion exists that the more volunteers that you have, the better. This is not always true. Give careful consideration to the number of personnel that you need to do the job. Having too many may be difficult to manage or hinder progress. Too few will not get the job done.

More important than the number of personnel are the skills that are required. A fewer number of highly skilled personnel will give you better quality results than a larger number of less skilled personnel.

Keep in mind that you may have to recruit and train your personnel. If so, time to accomplish that must be included in

your plan.

Another type of personnel consideration is the use of outside personnel on a one time basis. These would include guest speakers, service providers, contractors, etc. Be sure to include as much lead time as possible to obtain these services.

B. Administrative Support

Organizations of almost any size take advantage of the economy of scale by having a central administrative support function. This function is responsible for supporting the administrative needs of all units of the organization. Typical examples of support are provision and maintenance of work and meeting space; communication services, such as telephone, voice mail and e-mail services; clerical support; availability of office equipment; etc. If your action plan will require administration support, of any kind, identify that support early and inform your administration support group of your need. Submitting your request early improves your chances of getting the required support.

C. Facilities

Facilities such as meeting rooms and classroom space are usually limited because of the cost to build. Therefore it is in your best interest to identify the need for such space as soon as possible and make arrangements to reserve it. You will have to know how many people must be accommodated, what type of seating arrangement you desire and are tables needed. Have you checked with your speakers for a requirement for special equipment such as, video equipment, slide projectors, overhead projectors, writing material, etc. and made arrangements for that equipment to be in the room? All must be reserved for the date and time needed.

D. Supplies

Are you planning to use prepared handouts and if so, how many? Does in house capability exist for the preparation of such material or must you use outside services? What lead

times are required for preparation? How will you distribute materials to participants; by mail or other means and is that capability available in house or must you use other means?

Another consideration is the desire to provide refreshments. If you are to serve light snacks or lunch, what, when and where will it be served and who will provide it? Be sure to include ample lead times for these arrangements.

E. Finances

This is the tough one. It is a rare project that can be completed at no cost. It is very important that you provide your best estimate of your financial requirement and what percentage of that estimate can be raised by the collection of fees, tuition, special donations, etc. and that which must be funded from the general funds of the parish. Some potential costs to consider would be speaker's fees, travel expenses, rental costs of equipment, space or outside services. If your ministry is involved in the distribution of funds for the purchase of food or other essentials, the payment of bills or providing emergency funds for the needy, what is the best estimate of your needs?

F. Communications

Successful completion or achievement of a goal requires that all involved be kept informed on the continuing progress of the project. How do you plan to accomplish this? Will you do so by telephone, mail, E-mail or periodic meetings? Have you briefed your speakers on the size and type of audience, your goals and expectations from his/her presentation and the date, time and location of the meeting? How do you plan to recruit your audience and communicate pertinent information to them? All of these considerations require lead time that must be factored into your plan.

G. Transportation

Does your project require transporting a group of people

to an off site location? Are there members of your group with special needs that require special arrangements? Have you made the necessary arrangements? Schedule these arrangements in to your plan.

H. Other Resources

There are many other outside resources that should be investigated for the potential that they offer to improve the quality of your plan and the efficiency which you execute it. For example, the Diocese may have a Resource Center that contains materials, speakers or consulting services, some of which may fit your plan; is there another parish, nearby, planning to do the same as you and are they are receptive to combining and sharing resources; are there government agencies that can provide opportunities for sharing project objectives? Be creative in this area and seek all the help that you can get. Everybody benefits when resources are shared, instead of being duplicated.

It should be obvious from the above list of questions and considerations that there are many, apparently mundane, issues to be addressed. The quality of your effort in addressing them will dictate, to a large degree, your level of success.

I. Check Points

The most common negative encountered working with planners, especially those involved for the first time, is the fear of failure. Too many people believe that if they document their plans and those plans are not executed satisfactorily or fail completely, they will be labeled as failures. People who believe that have not experienced the value of planning or they work for weak managers.

Consider, if you will, the circumstances and the environment in which plans are developed and executed. Development, by definition, starts well before execution begins. It is based upon knowledge available to the planner at that time.

Estimates are also based upon current knowledge. Yet we live in an ever changing world. Is it reasonable, then, to expect that the circumstances underlying the development process will remain static? Of course not.

The challenge for the planner is to build into the plan opportunities to evaluate progress, recognize changes that may have occurred and alter their plans as appropriate. These opportunities are called Check Points and are used to assist you in managing your time and resources effectively. What then is a check point and what is its purpose?

A. The Check Point

A check point is any point in the implementation or execution cycle that provides a reasonable opportunity to evaluate progress. The location of these points in your plan will vary according to the complexity of the plan and/or the amount of resources involved, especially money. A good rule of thumb, for starters, would be at the completion of each major step in your plan, but at least on a quarterly basis.

B. Its Purpose.

Recognizing that we are operating in an ever changing world, you want to monitor your plans to make sure that the plan is on track to accomplish your goal. Therefore, the main purpose of the check point is to provide an opportunity for a quality check.

only This quality check provides an opportunity for you not to evaluate progress, but to make timely decisions on the future direction of your plan. What type of decisions do you have to make?

1. If your plan is on target and performing well, your decision is to continue as planned.

2. If progress is behind schedule then you have to identify the cause of the slippage. The cause could be a shortage of personnel or training; a delay in receiving the necessary resources; or the needs that you are addressing are much greater than you expected. Whatever the cause, you must make a decision to either modify the plan, start over by

rewriting the plan, improve the plan based upon your evaluation or cancel the plan.

3. If you are ahead of schedule, you might evaluate the possibility of completing your plan early and release the excess resources for use in other areas of need. You could also evaluate the possibility of expanding your project and accomplish more than you anticipated, with no increase in resources.

The quality and timeliness of these quality checks and good decision making will enable you to manage your project through changing circumstances, with a minimum of wasted resources. This is intelligent management and efficient use of resources. It certainly is not failure. Failure occurs when you reach the end of the implementation cycle, have not achieved your goals and you do not know why, because you did not bother to monitor your progress.

In summary, take seriously the use of check points. Build them into your action plan. Intelligent use of check points will enhance the quality of the results of your project.

J. Reporting

Now that you have completed all of the technical points in the development of your plan, it is time to think about management control and public relations issues. The following paragraphs will address these issues by recommending tried and proven practices that will minimize the time involved by all interested parties, as well as generate good will for the future.

1. Progress Reports.

The Pastor is ultimately responsible for the success of all programs and services being offered in the parish. It is your responsibility to keep him informed of your progress, or lack of progress. This can best be accomplished by the use of periodic written progress reports.

Progress reports should be written with an emphasis on brevity and clarity. A simple statement of or lack of

progress relative to your plan; an explanation of issues to be addressed; your plan to address those issues; and any requests for assistance that you deem to be appropriate. You may also want to include your expectations for the next reporting period.

The frequency of these reports will vary with the complexity and priority of the project. At minimum, quarterly reports should be submitted. Consultation with the Pastor may dictate more frequent reporting, such as monthly or every other month.

Progress reports should be directed to the Pastor, or his delegate, with copies to the Pastoral Council and leaders of any other ministries whose activities may be affected.

2. Problem Reports

It is inevitable that during the implementation of a plan a significant problem will rear its ugly head, out of the blue. When this happens, report it immediately to the Pastor. Do not wait until your next scheduled progress report. Prompt reporting of significant problems provides you with the best opportunity to evaluate the effect of the problem on your plan and to develop a strategy for dealing with it, before it is too late.

Prompt reporting of significant problems also prevents putting the Pastor in an embarrassing position. It is not a pleasant experience for anyone involved, when the Pastor is “blind sided” by a third party and looks foolish because he was unaware of the problem.

3. Informing Target Clientele.

Every activity in the parish is directed at some group of people, your target clientele. Whenever changes are made to your plan that effects them, be sure that you inform them of the change and its effect on them.

All of the above practices will keep interested parties informed of your progress with a minimum of time and effort expended. It will also minimize the number of meetings to attend and the number of unnecessary presentations. Implementation of these practices is an efficient use of everyone’s time, while maintaining good management

control.

There are two other areas of communication that require serious thought because of their potential for generating good will and future support. They are “Listening” and “Recognition”. Let’s examine both.

4. Listening

The most abused and least recognized component of effective communication is the skill of listening. Not a day goes by, probably, without someone approaching you with something to say to you. It may simply be the reporting of the completion of a task; a suggestion for improvement; the questioning of an approach; or maybe a brilliant new idea that could make you famous. Treat that person with respect by listening carefully, thoughtfully and sincerely. Avoid, at all cost insulting that person by rudely interrupting or cutting them off. Such behavior is frequently interpreted to mean a lack of interest or, even worse, arrogance. The result is often the elimination of a source of good information.

5. Recognition.

Every successful project requires contributions by many people. It is human nature to want your effort and contribution to be recognized and acknowledged. Give some consideration to addressing this need. It need not be a big deal, but then some contributions are very significant. You might consider a letter of appreciation and thanks (not a form letter); a small token gift may be appropriate; a coffee & donut event at the office is always fun; or maybe a lunch or dinner is appropriate. Whatever form of acknowledgment you believe to be appropriate is always appreciated. It will go a long way in developing good morale and loyalty.

Summary

All too often we get so involved in our day to day activities that we lose sight of why we are doing what we are doing. We get so close to the trees that we cannot see the forest. It is always helpful to step back and refresh our memory of the larger picture. It helps to recharge our battery and motivates us to not only continue, but to improve the quality of those efforts.

In that context, let us step back and review why we engage in a formal planning process.

1. A sound plan is an effective way to achieve an intended goal. It provides the road map of directions from the starting point to our destination and is an effective tool for managing and controlling the journey.
2. A sound plan is an effective management vehicle for the Pastor. It is a tool that assists him in identifying parish needs, selecting strategies for addressing those needs and the means for managing and controlling the results.
3. A sound plan provides the Pastor with a logical base for delegating responsibility and accountability, so important in his responsibility of good stewardship of parish resources.
4. A sound plan provides the means for early problem detection, providing the opportunity for early problem resolution.
5. A sound plan is an excellent transition aid when personnel changes take place. It minimizes duplication of effort and allows new personnel to fit in sooner.

You are now officially certified experts in the Planning Process. Your conscientious and diligent application of your planning skills, coupled with the expertise that you have in your area of responsibility, will contribute significantly to the continuing success of St. Raphael Parish in the service of God and community.