

Strategic Plan Progress Report 9/30/18

The Strategic Planning Committee is a joint effort between members of both sister parishes of St. Maria Goretti and Mary, Our Lady of Peace. The committee was tasked with assessing the current climate of our respective parishes. Therefore, a survey was developed in January 2015 and given to all members of both parishes in February. Based on these results, seven major goals were developed. Each goal contains corresponding objectives and suggested tasks. Each of the councils and committees in the parishes are being asked to develop one of these goals. The following document is an account of these ideas.

In June 2016, each of the following Objectives were assigned to various subcommittees of the Finance Committee. Progress made to date is shown below in red.

Goal #1: Enhance the financial well-being of the Parish.

RESPONSIBILITY: FINANCE COMMITTEE OF EACH PARISH WORKING INDEPENDENTLY

The overall goal of the parish is to grow and prosper. This can only be done through increasing current financial contributions and by growing the population of the parish to enhance the overall financial well-being of the parish.

Objective #1: Increased stewardship, particularly giving levels. Jim, Darlene & Connie

Tasks:

- Analyze peer data to establish realistic goals. **Completed Fall 2015; Requested recent data from Diocese July 2018**
- Study other denominational churches to determine how they successfully accomplish tithing. **No Progress**
- Analyze competing expense requests to determine ideal times to ask for contributions (e.g. income tax season, property taxes, SMA requests, Gala ticket sales, Vacations, Christmas, Spring Break etc.). **Analysis indicates that the fewest conflicts are the months of Jan, Feb, May and Nov.**
- Implement marketing programs to attract givers and increase stewardship. **Attended Diocesan Development Conference October 2016. Included a Stewardship Presentation**

from Our Sunday Visitor. Both provided good ideas. Attended CDOP Stewardship Conference May 2017. No Stewardship Conference was held in 2018.

- Monitor patterns of giving for parishioners and follow-up with givers as warranted. Connie has analyzed ADA giving. Darlene will prepare a report for regular Sunday giving.
- Publish quarterly financial statements compared to the budget. Completed Fall 2015 and each quarter thereafter.
- Encourage the use of automatic debits. Including a Promotion in the Bulletin Monthly.
- Pray that we can create a parish environment where all WANT to give. Some Progress and Ongoing. Will add an occasional petition for improved support.

Objective #2: To ensure the financial stability of the parish and that we are good stewards of its resources. Fr. Tony, Jim & Barb

Tasks:

- Maintain cash reserves adequate for 3 months expenses Goal \$48K; Actual \$50K.
- Maintain a balanced budget in the operating fund 2015/16 Surplus \$6K; 2016/17 Surplus \$25K; 2017/18 Surplus \$22K.
- Monitor expense levels to avoid unfavorable variances to the budget. @ Finance Committee.
- Conduct an annual wills seminar at both parishes. Completed Spring 2015. Some recent discussions. SMG working on it.
- Prepare and publish an annual budget. Completed August 2018; Surplus \$8K; Budget vs. Actual Results Published Quarterly in Bulletin.

Objective #3: Expand and activate sub-committees to improve the functionality of the parish. Fr. Tony & Jim

Tasks:

- Activate the following committees:
 - Endowment Committee, to solicit donations and monitor the existing fund. No Progress.
 - Memorial Fund Committee, to approve purchases over a given threshold, e.g. \$1000. No Progress.
 - ADA Committee, to organize and implement the giving plan. Completed and Ongoing.
 - Gala Committee, to plan and organize the Annual Gala. Completed and Ongoing.

Objective #4: Develop a long-range capital investment plan. Fr. Tony, Pat & Jim K.

Tasks:

- Activate a Building Committee to develop and implement a long-term capital plan. **Committee formed July 2016; Capital Priorities List completed in 2017; Good engagement and results to date.**
- Initiate a capital fundraising campaign. **Joined Moline and SMG in a joint campaign. Agreed to share in the feasibility study cost. Unlikely to participate in the next step.**

Goal #6: Improve effectiveness and efficiency of internal Parish operations.

RESPONSIBILITY: EXECUTIVE COMMITTEE OF EACH PARISH WORKING INDEPENDENTLY

Effectiveness and efficiency breed improved productivity with less work. This goal aims to identify areas of improvement at the level of Parish staff all the way up to the Diocese.

Objective #1: Improve the quality of the Parish bookkeeping systems. Jim, Darlene & Pauline

Tasks:

- Produce concise and accurate financial statements. **Considerable progress made.**
- Create an annual budget that aligns with the strategic goals. **Completed August 2018.**
- Consider outsourcing bookkeeping to the Diocese. **Implemented partially early 2016.**
- Increase the transparency of our financial condition to the parishioners. **Being published quarterly. Presentation at Masses. ADA Presentation. Bulletin.**
- Create 'management information systems' to monitor and control non-financial issues (Ex. Parish membership, active givers, attendance, youth). **July 2018 Mike Buckley had some suggestions to research including "Family Suite" in Parish Soft.**

Objective #2: Improve our working relationship with the Diocese. Fr. Tony, Jim & Tom

Tasks:

- Trustees and administrators establish and cultivate a relationship with a contact in the Diocesan office. **Good progress with Pauline Starling, Mike Buckley and Msg. Kruse.**
- Meet with this contact at least annually. **Completed Fall 2015, October 2016, Feb. 2017, May 2017 and July 2018.**
- Utilize development resources, such as Stewardship Conferences via webcast. **Fr. Jim & Jim D. attended Development Conference in October 2016 as well as the Stewardship Conference held May 2017. No conference was held in 2018.**

Objective #3: Improve the use of technology. Kay & Darlene

Tasks:

- Ensure office computer systems are adequate. **OK per Kay.**
- Train staff to effectively use basic computer programs. **OK per Kay.**
- Develop the skills to communicate with parishioners via email, web and social media. **Good progress with website. Minimal progress with Facebook, mass emails & mass texts. Some interest in launching an app.**

Objective #4: Participate actively in area parishes. Fr. Tony, Tom & Barb

Tasks:

- Coordinate and collaborate with other local parishes to leverage existing programs
 - Ex. RCIA. **Tom talked to CTK about a Bereavement Seminar and St. Malachy concerning a Divorce, Widowed and Separated Program.**
- Encourage MOLOP Altar and Rosary Society to consider development of a joint group with SMG. **No progress.**

Objective #5: Provide appropriate staff for the Parish. Fr. Tony, Jim & Barb

Tasks:

- Conduct a meeting with all committee chairs to determine personnel needs. **No progress.**
- Ensure that employees are well trained and appropriately compensated. **OK per Kay.**

Objective #6: Ensure the Executive Committee meets regularly. Fr. Tony, Jim & Barb

Tasks:

- Conduct quarterly meetings, as defined by the Bylaws. **Completed Fall 2015, Spring 2016, Feb 2017, Nov 2017 and June 2018.**

Objective #7: Review written policies of major committees. Fr. Tony, Jim & Barb

Tasks:

- Review and adopt a Parish Council Constitution and Bylaws. **Reviewed but not adopted.**
- Review and adopt the Diocesan guidelines for the Finance Councils. **Completed Sept 2017.**