

# **CHURCH OF THE SACRED HEART**

## **Development Assessment Executive Summary**



**Presented February 24, 2010**

# INTRODUCTION

---

## *Background*

As part of a Total Stewardship planning initiative for the parish, Sacred Heart and the Institute of School and Parish Development (ISPD) have entered into a ten-month process designed to invite and involve people from the parish and school in building a comprehensive vision and strategic plan for the future. There are several components to this process including the following:

- This Development Assessment
- Creation of a Core Team
- Education on Stewardship and Catholic Development
- Input Sessions
- Parish Survey
- Formation of a Parish Planning Team
- Creation of a Strategic Plan that will address various areas of parish life, focusing on the engagement of our parishioners

As agreed, one of the first steps of this process is to conduct a Development Assessment of the parish and school. Stephanie Greenwood, associate of ISPD, will be the lead consultant assisting Sacred Heart through this development process. Mrs. Greenwood conducted interviews on Sunday, January 17<sup>th</sup> and Monday, January 18<sup>th</sup>. The Development Assessment will be presented to Sacred Heart on Wednesday, February 24, 2010, by Stephanie Greenwood.

## *Scope of Analysis*

The Development Assessment is a look at the parish and school in general and, more specifically, in the areas of leadership and planning, development, stewardship, communication, organization, and revenue generation. Much of the emphasis is internal, seeking to understand the base of operation of development, the critical issues the parish and school face 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 Sacred Heart and assessing the strength of the development infrastructure.

Input for this analysis was received in the following manner:

- Initial meetings and discussion with Pastor, staff members and the Core Team;
- Personal interviews with various members of the parish and school community;
- Assessment questions that were answered by the parish and school 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 Stephanie Greenwood in an effort to share their concerns, opinions and hopes for Sacred Heart.

Special thanks go to Fr. Marty Schaefer, Joe Fritz, the Core Team and the parish and school office staff for their assistance and cooperation, and all who helped in preparation with this report.

### *Development as the Frame of Reference*

One of the major challenges Catholic parish and school leaders face is educating the key internal constituencies about the meaning of the word development. And, 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.

For over twenty years, ISPD has defined development as **the meaningful involvement of people in your mission and vision for the future**. By the very definition of the word, development takes time — usually two to four years from the time development efforts are begun until a parish and school begin to see substantial results. This is key. You must be willing to invest time and money in order to attract resources for the parish and school.

The model that the Institute of School and Parish Development teaches throughout the country is called “The Seven I’s of Catholic Development.”

## The Seven I's of Development

- Identify:** Specifically the people, processes, values and goals that will be key to the development process.
- Inform:** Reach out to the key publics, informing them of the development process and the essential elements of your parish and school.
- Invite:** Ask 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 school 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 Sacred Heart 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 parish and school administrator, development director and teacher for more than 20 years. There are seven associates — full and part-time — working with ISPD, along with a staff of three 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
- † Total Quality for Catholic Parishes and Schools

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 communities throughout the country, and understanding what is working well and what is not, ISPD is pleased to present this Development Assessment to Sacred Heart.

# HIGHLIGHTS

---

## Area #1: Strong Leadership

- In speaking with parishioners during the interview process, it is clear that the people of Sacred Heart value and admire their leaders. Strong leadership was consistently cited as one of the parish's greatest strengths. The community sees their pastor, Father Marty, as energetic and committed to excellence. He is not afraid to try new things and always seeks to find ways to improve the Sacred Heart experience. ISPD is impressed with his collaborative leadership style and is excited to be working with a pastor who has such vision and enthusiasm for his community. Sr. Lois Erpelding was also mentioned as a tremendous asset to Sacred Heart. Parishioners recognize her dedication and commitment to the community and value her as part of the leadership team.
- Additionally, LeAnn Dahle was cited as an excellent leader for Sacred Heart School. Her commitment to Catholic education and to serving the students is to be commended. She is an integral part of the parish leadership team and is clearly beloved by many in the community.
- ISPD would also like to commend Sacred Heart for its leadership councils and boards. The Pastoral Council, Finance Council, Board of Education and the recent Core Team all demonstrate a firm commitment to serving the parish family and furthering the parish's mission: *Living Christ so that all may fully live.*

## Area #2: Desire to Pursue Excellence

- As ISPD has had the opportunity to get to know Sacred Heart, we are pleased to note that the parish as a whole is committed to pursuing excellence in all things. From music to education to its level of engagement, both staff members and volunteers are interested in moving Sacred Heart forward.
- Often in our work, we see resistance to new ideas and come across many "guarded kingdoms". Refreshingly this has not been the case at Sacred Heart. The parish and school should be proud of its leaders who are open to all perspectives, and have a firm commitment to growth and development for the parish family.

### **Area #3: Need for Greater Participation and Engagement**

- While Sacred Heart does boast a loyal and long-standing core group of volunteers who support the ministries of the parish and school, one of the key areas that surfaced during the interviews is the need to generate a broader sense of involvement and engagement throughout the community. It is a constant challenge to invite and encourage active participation among all members of the parish.
- During the next several months, ISPD will work directly with Sacred Heart and the Core Team to implement key strategies that will successfully identify, invite and involve those who are currently uninvolved, and raise the level of engagement in the parish. We will also focus on creating an organized and systematic structure to ensure this continued growth in the future.

### **Area #4: Infrastructure**

- Though Sacred Heart has strong leadership, diverse and vibrant ministries and programs, committed core volunteers and a clear desire to grow and improve, ISPD does see opportunity for the parish to improve its development infrastructure.
- The parish currently uses the Parish Data System (PDS) software to track parishioner and contribution information and is regularly updated. ISPD feels this is a great foundation that offers potential. Expanding the types of information that are recorded and tracked in the PDS system can help Sacred Heart better connect with its parishioner base.
- One key area that was mentioned in the interview process was the current welcoming effort. While parishioners recognize that there are committed volunteers in place to work with this ministry, they feel that the past activities have been operating without a clear plan. Assimilating newcomers into the life of the parish can be a daunting task, but it is vitally important. ISPD will work with the Core Team and parishioners to organize a planned and systematic approach to welcoming that will be an asset to the parish.
- Another key area of opportunity for Sacred Heart is in parish communication. ISPD recognizes Sacred Heart for its strong web presence and financial reporting. However, there are always ways to improve any communication effort. ISPD would like to see Sacred Heart evaluate its current methods of communication for clarity, diversity and consistency through this planning process.

### **Area #5: Commitment to Catholic Education**

- Sacred Heart's commitment to Catholic education should be celebrated. Offering a tuition-free school, along with a cross-generational religious education program for parishioners demonstrates a deep commitment and desire to educate all parish members – young and old, about our rich Catholic tradition and faith.
- Along with its outstanding Principal, many people who were interviewed cited the committed faculty and staff as the school's greatest strength. School personnel as a whole demonstrate a deep commitment to the students and truly care about each individual. Offering small class sizes and fostering close personal relationships were also mentioned as key strong points.
- During the past several years, Sacred Heart has gone through a transition with its religious education program. The most recent shift has been to adopt the *Generations of Faith* series. The parish has chosen to schedule classes such that adults as well as children are able to receive instruction at the same time. Those that we interviewed who are participating in the program are supportive of this change. However, several others who are not participating expressed some confusion about what is offered and the changes that have taken place with religious education overall at Sacred Heart.
- From what we learned through the assessment process, it seems that the parish is undergoing some "growing pains" in the area of faith formation. We applaud Sacred Heart for its diligence in researching and trying to find the right curriculum and fit for the parish. However, with the recent transition to a new program, schedule and loss of a paid staff position to oversee this area, there are still some parishioners who aren't sure what's going on with religious education.

### **Area #6: Fall Festival**

- Sacred Heart's annual Fall Festival is something to brag about! This community building event is a true asset to the parish and is a wonderful way to reach out to the wider Waseca community and invite others in to see what Sacred Heart has to offer. Not only does it attract over 1,000 guests each year, it raises over \$50,000 to contribute to parish needs, and is a beloved event for all. ISPD commends Sacred Heart for this effort.

### **Area #7: Financial Communication**

- The level of financial communication within the parish is very impressive. In ISPD's experience, many communities do not regularly share this type of information with parishioners. Sacred Heart is a positive exception with regular financial updates in the weekly bulletin, quarterly financial reports and an annual financial report and presentation to the parish.

- Taking an open and transparent approach with parish finances has instilled a sense of pride and trust among parishioners at Sacred Heart. Parishioners can be confident that the parish is leading by example as a good steward of its resources.

### **Area #8: Total Stewardship Education**

- With Father Marty's arrival at Sacred Heart nearly two years ago, the parish is in the process of shifting its views on stewardship. By focusing on its broader message, Father Marty is beginning to make some inroads with parishioners recognizing that stewardship goes beyond the pocketbook. The consensus, however, is that the average parishioner at Sacred Heart views stewardship as being primarily about money.
- The Sacred Heart community is fortunate to have a visionary pastor in place that is willing to teach and communicate the message of Total Stewardship. Father Marty is committed to working with the Core Team to continue this education process and "redefine" the stewardship approach at Sacred Heart. ISPD commends Father, the Core Team and other parish leaders for recognizing this need and their dedication to making it happen.

### **Area #9: Planning for the Future**

- Sacred Heart is a dynamic parish that has so many positive qualities and programs. ISPD is truly impressed with the commitment of Father Marty and with other parish leaders to accept nothing less than the best for their community.
- One key area that ISPD sees as a need for Sacred Heart is long-range planning. The parish is facing some tough challenges:
  - Long-term use of the parish center (2<sup>nd</sup> floor)
  - Gathering Space needs
  - Potential school growth
  - Alumni outreach
  - Parish staff needs
  - Youth needs
  - Long-term financial stability
  - Parishioner engagement
- Inviting parishioner opinions and feedback about parish and school needs, articulating challenges and organizing a forum for providing strategic solutions is a fundamental need for the parish. The long-range plan for Sacred Heart will provide the road map it needs for the future and the specific strategies that will

help to make its vision a reality. ISPD will continue to work with the Core Team to guide this effort for Sacred Heart.

## **RECOMMENDATIONS**

---

### **Recommendation # 1: Continue to work with the Core Team.**

- The Core Team will guide the Total Stewardship effort for Sacred Heart during the next eight months. ISPD recommends that Sacred Heart support the work of the Core Team in their mission to advance the strategic planning efforts, educate on Total Stewardship and raise the level of parishioner engagement within the parish.
- ISPD would also like to see the Core Team added as a permanent leadership group within Sacred Heart's organizational structure. Their role in parish life would be to guide the creation and implementation of the parish's long-range plans, continue development and stewardship education initiatives and support the overall development processes for the parish.

### **Recommendation # 2: Create a plan to provide development and Total Stewardship education.**

- In-service and education in the areas of Catholic development and Total Stewardship will be an on-going process that needs to continue at Sacred Heart. Even though Father Marty, the Core Team and other parish leadership groups are on board with these ideas, it is a constant challenge to bring this message to the average parishioner.
- Development and Total Stewardship education is woven into the process that ISPD will follow with the Core Team; however, further education should take place after completion of the plan in order to introduce the information to newcomers, build on the momentum of the plan and its strategies and reinforce the true meaning of stewardship. This education will only build on Father Marty's theme and focus of engagement for all members of the Sacred Heart family.

### **Recommendation # 3: Evaluate and improve the process for inviting and involving people.**

- As in many parishes, one major area of concern for Sacred Heart is the issue of the same people being involved year after year. A core group of volunteers exists and these are the individuals who organize, support and spearhead parish

and school ministries, groups, activities and events. Growing the level of parishioner involvement and engagement at Sacred Heart is a key need that has been expressed by the pastor, Core Team, other leadership groups and even parishioners in general.

- ISPD recommends that Sacred Heart evaluate its current methods for inviting people to participate in parish and school life. When informing people about groups and activities and inviting their participation, ISPD finds that the more personal the invitation, the more success you will have.
- Some suggestions to improve this invite process might include introducing a phone-a-thon to reach out to parishioners and invite them to an annual parish event. Another idea would be to set a goal of having each person currently involved in ministry to invite a “new” parishioner to participate during the next year. “New” would be new to involvement – not necessarily new to the parish.
- The message of involvement and engagement can come from Father Marty, but in order to see it realized, the leaders at Sacred Heart must take ownership and work with Father to extend broad, consistent and personal invitations to participate.
- The Core Team will explore other opportunities to improve this area throughout the strategic planning process.

#### **Recommendation # 4: Seek Input.**

- It will be important for Sacred Heart to continue evaluating what parishioners want to see for their parish’s future. Seeking input and opinions about current parish life and asking them to think about what they would like to see in the future will often invite fresh and creative ideas about moving the parish forward in its mission and vision. This type of dialog sends a message to parishioners that parish leaders value and care about their ideas, hopes and dreams for their community. It also helps to uncover potential new leaders for the future.
- ISPD will work with the Core Team to conduct a series of Input Sessions in March and a Parish-Wide Survey in April to invite parishioner participation in this process. In ISPD’s experience, seeking input from constituents is often an excellent way to invite people to belong to the community, and to begin more personal relationships with them. *Belonging* leads to *believing*.

#### **Recommendation # 5: Conduct a comprehensive Parish Census.**

- ISPD recommends that Sacred Heart make plans to conduct a comprehensive parish census. The last formal census effort was conducted in 2002. The parish office makes regular updates to parishioner records and contact information, however, ISPD sees potential to broaden the type of information that is collected

and utilized for parishioners. In addition, the parish is making plans to put together a new pictorial directory in the fall of 2010. Moving forward with a census would be beneficial for that effort as well.

- ISPD would like to see the Core Team make this a key priority in the Total Stewardship planning process.
- Organizing a personally conducted census could be a great way to actively reach out to all members of the parish family - getting to know them and ensuring that they all feel a part of the community.
- ISPD recommends implementing a three-phase approach to conducting the census: paper/e-mail – phone outreach – person-to-person. We would suggest beginning with printed records that parishioners can update during, before or after Masses over a few weekends. Next, the remaining parishioners could be contacted via a phone-a-thon effort. Finally, those parishioners that are not reached could be incorporated into the home-visit process.
- Additionally, ISPD recommends that Sacred Heart ask for information about special gifts, interests, hobbies and professional expertise. Collecting, inputting and utilizing this type of information will assist the parish in its goal of better matching ministries with interests and will help to realize a greater level of engagement.

### **Recommendation # 6: Continue to focus on collecting e-mail addresses.**

- In order to improve the existing parish database and communication effort, ISPD feels it is vital for Sacred Heart to actively collect parishioner e-mail addresses. Technology provides an inexpensive and immediate method for effective communication in today's world, and more and more people are turning to e-mail and websites for their primary method of receiving and disseminating information.
- Obviously, this will be one of the pieces of information that is collected in moving forward with a comprehensive census effort. Another strategy that ISPD would like to see Sacred Heart consider is making sign-in sheets available at all parish and school meetings or functions asking for names and e-mail addresses.

### **Recommendation # 7: Communicate! Communicate! Communicate!**

- As part of the planning process, Sacred Heart has begun sending a monthly *Stewardship Update* to all parishioners. The focus of this publication will be to keep parishioners informed about the Total Stewardship process that Sacred Heart is undertaking. Members of Sacred Heart's Core Team are also taking part

in the communication effort by personally visiting key leadership groups in the parish and school, keeping them up-to-date on what's happening with the planning process and inviting their participation.

- ISPD would also like to see Sacred Heart evaluate all of its current communication tools. The parish and school already boast a strong web presence, and various publications and brochures exist to inform people about Sacred Heart activities and offerings. ISPD recommends that the parish audit all current publications and evaluate the following:

- † Visual unity
- † Consistency of mission and vision
- † Audience
- † Purpose
- † Clarity
- † Professional appearance
- † Frequency

### **Recommendation # 8: Establish a Development Director position.**

- ISPD realizes that it is a difficult time of transition for Sacred Heart and its parish staff. Having recently eliminated two paid ministry positions has caused the current staff to be stretched very thin.

- ISPD makes this recommendation as a long-term goal for Sacred Heart. The Core Team will provide an excellent support system for the Total Stewardship effort; however, ISPD feels that a dedicated staff position in this area would greatly benefit Sacred Heart. In our experience, we have seen this type of position begin successfully as a volunteer role, then grow into a part-time paid position and ultimately, over time, evolve into a full-time paid position. This position would provide continuity, consistency and accountability after the planning process is complete, and ensure successful implementation and long-term stewardship and development initiatives. This position will be an important part of the parish's organizational infrastructure and should include the following key components:

- † A Director with a detailed job description focused on stewardship and development
- † Day-to-day development operations
- † Parishioner/Parent invitation and involvement
- † Total Stewardship
- † Parish/School communications and publications
- † Long-Range planning
- † Coordinating any parish/school fundraisers

- † Planned giving
- † New parishioner welcome
- † Annual Fund
- † Planned Giving
- † Major Gifts
- † Grantwriting

**Recommendation # 9: Review and communicate this Development Assessment.**

- ISPD feels that it is important to conduct a thorough review of this Development Assessment with the parish and school staff and all leadership groups. It needs to be read, presented and discussed by the key stakeholders of the community. There is a significant amount of useful and practical information contained in this assessment, and we would like to see Sacred Heart utilize it to its fullest potential.
- This assessment represents an excellent tool for the development and stewardship foundation for the parish. It outlines the strengths that are in place, and offers practical suggestions from proven experience to address challenges at Sacred Heart. We recommend that the staff, committees, ministries and councils review the findings, discern ISPD's perspective and suggestions, and discuss ways to implement the suggested changes. It would be ideal to develop both short-term and long-term goals for addressing the key areas outlined in this report.
- ISPD would also like to see Sacred Heart communicate the findings of the report to the parish at large.