

CHURCH OF THE SACRED HEART
ISPD Development Assessment
February 2010

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I. 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 17th and Monday, January 18th. 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.

II. Key Input

Materials Gathered

1. Quarterly Financial Report that is mailed to parishioners
2. Financial and Statistical Report that is submitted to the Financial Council for review
3. Diocese of Winona Foundation Planned Giving Presentation (May 3, 2009)
4. Sacred Heart School Kindergarten Registration Packet
5. Stewardship of Treasure Commitment Card
6. Parish Organizational Chart
7. Parish Registration Packet
 - Census form
 - Stewardship of ministry form
 - Ministry pamphlet
 - General Information pamphlet
 - Generations of Faith newsletter
 - Prayer pamphlet
 - Eucharistic Adoration pamphlet
 - Welcome letter
 - Sacred Heart School & Children's House Montessori pamphlet
 - Music Ministry flyer

Key Persons/Groups Providing Input

- ❖ *Patty Altman*
- ❖ *Frank Byron*
- ❖ *Marion Byron*
- ❖ *LeAnn Dahle*
- ❖ *John Diedrich*
- ❖ *Martha Diedrich*
- ❖ *Sr. Lois Erpelding*
- ❖ *Peggy Frederick*
- ❖ *Bill Fitzsimmons*
- ❖ *Dan Haley*
- ❖ *Jerry Haley*
- ❖ *Marcia Haley*
- ❖ *Jack Johnson*
- ❖ *Dan Johnson*

- ❖ *Kelly Johnson*
- ❖ *Helen Kingsley*
- ❖ *Matt Metzdorff*
- ❖ *Andy Miller*
- ❖ *John Priebe*
- ❖ *Ron Rollenhagen*
- ❖ *Mike Rolling*
- ❖ *Shelia Rolling*
- ❖ *Kim Rux*
- ❖ *Tom Sankovitz*
- ❖ *Gretchen Sankovitz*
- ❖ *Father Marty Schaefer*
- ❖ *Val Spies*
- ❖ *Jacob Staloch*
- ❖ *Katie Staloch*
- ❖ *Larry Thompson*
- ❖ *Linda Thorton*
- ❖ *Kevin Walter*

Interview Question Compilation

Note: A number denotes the number of times a response was given.

1. What most impresses you about the Sacred Heart?

- The school – 7
 - How we run it on a shoestring
 - Make it work so well
- Good group of people – 6
- Fr. Marty – 5
- Family environment – 2
- Collaborative leadership – 2
- Parish is open and welcoming. – 2
- Our ability to offer a tuition-free school – 2
- Pride in our parish
- Leadership of the parish
- Ability to gain support form important initiatives
- Committed church leaders
- It's size and gravity on the community
- The heritage of our church and its members
- Great community

- Our physical campus/church improvements
- Our commitment to Catholic education and religious education
- Faithfulness of our parishioners
- Our concern for others
- Team players
- Our Principal
- Sr. Lois Erpelding

2. *What do you see as the strengths of the parish?*

- The school is an asset to the parish. – 7
- Energetic pastor – 6
- Fr. Marty is a strong leader. – 6
- We have had strong pastors. – 3
- We come together to meet the needs in the parish when they arise. – 3
- Parent involvement with religious education – 3
- Strong leadership – 3
- Music is excellent. – 3
- Men's group – 3
- Fall Festival pulls the whole parish together. – 2
- Dedication of our core group of volunteers – 2
- The involved are involved 100%. – 2
- Always a lot going on
- Dedication of staff
- Facilities
- Strong sense of liturgy
- Home visits
- Our vision statement
- New focus of our Pastoral Council
- History
- Adoration and our prayer activities
- Worship space
- Generosity of parishioners
- Religious education
- We have a lot of potential.
- Community building activities
- Financial reports are a plus.
- Our parish and school's support staff
- Constant effort of improvement
- Father does a good job of communicating from the pulpit.
- Peaceful atmosphere

- Prominence in the wider community
- Pastor is inclusive
- Open to newcomers
- Diverse talents to draw from
- Family friendly schedule for religious education
- Our faith
- Fall Festival

2b. What do you see as the strengths of the school?

- Great faculty/teachers – 12
- Small classrooms – 5
- LeAnn is outstanding and a strong leader. – 4
- Turn out great students – 3
- We care about our students. – 3
- Good school – 3
- Montessori preschool – 2
- Religious education in the school – 2
- Close relationships – 2
- Wonderful parent volunteers – 2
- Well rounded students – 2
- Strong communication effort – 2
- Parents are truly invested and willing to participate. – 2
- Advance degreed teachers
- Genuine people
- Strong tradition
- Tuition free
- Stability
- We go beyond academics to teach our faith.
- Faith Foundation
- Facility
- Parish's strong support of the school
- Forged strong relationships
- Strong leadership
- Strong foundation
- They try hard.
- Good job communicating via email.
- Moral values
- High expectations
- Well prepared
- Strong discipline

- The ability to have Catholic education in our community

3. *What areas do you think need improvement?*

- Expanding grades (5-8th and upward) – 6
- Teenager (youth) involvement – i.e. attending Mass – 5
- Higher percentage of involvement – 5
- Parish staff growth/needs/vacancies – 5
- Struggles with new religious education program – 5
- Greater financial stability and resources – 4
- Engaging our non-participants – 2
- Involve young families in parish. – 2
- Parish communication – 2
- Faith Formation leadership – 2
- Follow-up for bereavement – 2
- School communication
- Gathering space
- Ability to follow-up when we invite participation
- Continued academic growth in our school
- Ability to meet the needs of all of our students
- Add email
- Teaching our faith
- Addition of small prayer communities
- Bigger recess area
- As a church we need to be strong and disciplined in our faith – not afraid to teach our faith for fear of offending people.
- Concern about follow through
- Better communication between parish groups/ministries
- We have too much music – lengthens the Mass too much.
- Too hard of a sell for our adult education program
- We need to maintain a stronger connection to our kids when they leave our school.
- Transition for RCIA to get into religious education
- School tries to force people into volunteering.
- School technology
- We need to promote a greater, broader approach to stewardship.
- We need to help our parishioners shift their priorities.
- Our school parents (grandparents) are very involved – then we lose them when their kids are gone.
- There are no consequences for those school parents who do not volunteer or tithe.

- LeAnn is stretched too thin with her duties.
- Keep better track of parishioner interests, gifts, and talents to call on when needed.
- Salary schedule for all employees
- Clarifying staff and volunteer training and expectations
- How can we tap into our fun potential?
- Consistency
- Infrastructure
- Evangelization
- Creating a welcoming environment
- Liturgical etiquette
- Reaching all ages
- Making the school available to all families
- Young adult ministries
- Marriage enrichment
- Parish nursing
- Training for altar servers
- Cut down on noise/talking before Mass.
- Additional planning for the future

4. *What is your impression of the parish's welcoming efforts?*

- People are warm and welcoming. – 6
- Unsure – 4
- How do we clearly identify newcomers? – 4
- Fine – 2
- Newcomers can get lost sometimes. – 2
- It is up to the newcomers to reach out and become involved. – 2
- We have great ideas and people willing to participate, but we have been inconsistent and are still growing this ministry. – 2
- Somewhat lacking, but not because of a lack of effort. – 2
- Fr. Marty is welcoming.
- I received an open invitation to the school.
- Positive experience
- My envelopes took a while to come in.
- We go out of our way to include the Hispanic community.
- New parishioner dinners are nice.
- It can be intimidating when you are not originally from here.
- It is an open parish - easy to get involved.
- Our greeters do a good job.
- School is often people's first contact.

- Gathering space is a plus.
- Suggestion – have name tags for ushers.
- We have good efforts but Catholics in general are not great in this area.
- We need to formalize/systematize the effort.

5. *What is your impression of the involvement level at Sacred Heart?*

- High level of involvement but from a core group of volunteers. – 16
- We need to bring new people to the table to use their gifts and talents. – 3
- Need some fresh faces – especially the younger parishioners. – 2
- We need to be clear and specific when we invite people to participate. (job descriptions) – 2
- We have a desire to grow in this area.
- People have different priorities.
- Disappointed with the lack of discipline in our faith.
- How do we get people back in church?
- There could be more involvement.
- We want to continue to help and give gifts to the school.
- The school is the primary vehicle for drawing people into the parish.
- Getting worse
- Too much going on
- Too many committees to get involved with
- The school pulls people in for involvement.
- We need to give everyone in our parish a “job” to get them involved.
- We need to continue to reach out to the uninvolved.
- Older population is more involved in volunteering.
- We can improve how we match needs with peoples’ gifts and talents.
- We can do a better job of utilizing resources and communication between existing volunteers and ministries.

6. *What does the word “stewardship” mean at Sacred Heart?*

- Wide perception is money – 13
- Fr. Marty is making a good effort to educate on stewardship and its broader meaning. – 7
- Time, talent, treasure – 6
- Giving what you can – 3
- Being a good steward of the environment
- It has to come from the heart.
- Mostly financial – but also how you participate in the parish
- We need to take care of our church.
- The parish idea of stewardship is evolving.

- Everything I hear Father say is money.
- Giving your time, effort, involvement
- We've never felt pressured to give money.
- A constant hurdle for us to overcome
- Taking care of what you've been given
- Some understand that it is more.
- Our parish is a strong steward in the wider community.
- Financial resources

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 (2nd 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.

IV. Areas of Assessment

Area #1: Present Governance Structure

Programs/Activities

- Sacred Heart Parish adheres to Canon Law and has established a Pastoral Council and Finance Council. These two groups are consultative to the Pastor.
- Ideally, the Pastoral Council in cooperation with the Pastor sets goals for the parish, and the Finance Council then uses these goals as benchmarks to set the parish budget. With recent tight economic times, the financial resources of the parish have dictated these goals.
- Sacred Heart School is governed by the Parish Council. Two advisory groups, the Board of Education and the Finance Committee help guide the Pastoral Council, Principal and Pastor in their leadership of the school.
- An administrative flow chart and job descriptions are in place.

ISPD Perspective

- Having a diverse group of advisory boards and councils in place is an excellent way for the Pastor to keep his finger on the pulse of the community, and seek advice on important parish issues. These groups can also serve as excellent communication tools for the parish and school community.
- ISPD applauds Fr. Marty's collaborative leadership style. In our experience, this collaborative style of leadership leads to positive energy in the parish where parishioners feel they play a vital role in the parish's direction and future. When people feel valued and integral to the parish, we see them open to taking on leadership roles and responsibilities.
- The organizational chart that is in place can be an excellent tool for communication. Consider including it as part of the welcome materials and annual financial report that are distributed to parishioners. It will be helpful for all members of the Sacred Heart community to become familiar with the parish and school organizational structure and the responsibilities of each individual person or leadership group.

Area #2: Planning and Internal Communication

Programs and Activities

- Both the parish and school have mission statements in place.
- The last formal parish census was conducted in 2002. Sacred Heart currently serves approximately 1,000 households.

- The parish does not currently have any long-range plans in place. In working with Sacred Heart, ISPD will help the parish to put a long-range plan in place that addresses its top Challenges.
- Sacred Heart School does have a long-range plan in place as required by the Minnesota Non-Public School Accrediting Association (MNSAA). A school plan is required every seven years, with an annual report submitted to show yearly progress.

ISPD Perspective

- Managing day-to-day functions is important for the success of the parish; however, long-range strategic planning is a must for any institution that seeks to “raise the bar” and achieve long-term stability and viability in the community. ISPD applauds Sacred Heart for taking on the process of strategically planning for the parish’s future – specifically in the areas parishioner engagement, development and Total Stewardship.
- ISPD is pleased that Sacred Heart School does regularly plan for its future. We suggest that the school share its long-range plans with the parish community as a whole – letting them know in what areas the school most needs help with volunteers, professional knowledge or expertise and financial resources. The parish takes such pride in its school and by openly sharing this plan it may uncover some new resources and ways to engage people in the school community.
- Maintaining an accurate an up-to-date parish database is a key element for a successful development effort. The parish database at Sacred Heart is updated regularly. Recent volunteer phone calling efforts and home visits have also helped to contribute current information for the database.
- ISPD applauds Sacred Heart for offering the parish registration form on its website. This is a very user-friendly feature.
- ISPD would encourage the parish to continue collecting e-mail addresses, and add some additional elements to the current registration form:
 - † Professional expertise
 - † Gifts, talents, hobbies, interests

Area #3 Marketing Research

Programs/Activities

- No formal marketing research is currently conducted for the parish. Through the Total Stewardship process, ISPD will lead Sacred Heart through several initiatives to collect current attitudinal, qualitative and quantitative data. This information will be utilized to identify the top challenges for the parish, and translated into a formal long-range plan for Sacred Heart.

- The school conducted a survey in the spring of 2007 as part of its accreditation process. The results are available in the principal's office.

ISPD Perspective

- ISPD feels that it is extremely important for parishes and schools to keep their finger on the pulse of their communities.
- In the future, it will be important for Sacred Heart to become involved with this trend by seeking input on key parish and school issues. Some methods would include:

- † Input Sessions
- † One-on-one interviews
- † Focus Groups
- † Town Hall meetings
- † Surveys

- It is important to note that ISPD will work with the Core Team to conduct a series of Input Sessions and to develop and administer a parish-wide survey during this process in order to give parishioner direction to the long-range planning effort.

Area #4: Past Building Efforts

Programs/Activities

- Sacred Heart has five buildings on campus and has done extensive planning, remodeling and repair work during the past ten years.
- The most significant building effort began in 1999 when \$1.2 million was raised to renovate the church. Seven primary areas were addressed: worship space, sanctuary, music space, gathering space, baptismal font, small chapel and the balcony. Repairs to the stained glass windows and church steeple were also addressed.
- The parish center has a second floor that is in need of finishing and updating. It is not currently used for any parish activities. Parish leaders consider this space to be the next capital need for the parish to address in the future.

ISPD Perspective

- During the interview process, ISPD learned that the parishioners at Sacred Heart are ready to respond when the parish expresses specific needs. We suggest that Sacred Heart continue to regularly communicate physical plant needs to the parish and invite their professional and financial participation to address these needs.
- ISPD is pleased to note that parish leaders have already consulted professionals with regard to finishing the second floor of the parish center. Having a needs and cost assessment will help leaders in future physical plant planning.

Area # 5: Internal Development

Programs/Activities

- Sacred Heart communicates with its key audiences through the following vehicles:
 - † Parishioners: newsletter mailings, weekly bulletin
 - † Parish Staff: weekly staff meetings
 - † Faculty: bi-weekly faculty meetings
 - † Administrative Team: weekly meetings
 - † Parents and Students: monthly newsletters, weekly e-mails and letters as needed for events
 - † Governing/Advisory Boards: monthly administrative reports and meetings
 - † Alumni: annual newsletter from Endowment Committee

ISPD Perspective

- One of the steps in achieving a successful Catholic parish and school development effort is continual development education. The Core Team is currently visiting all leadership groups in the parish and school community to invite their participation in this planning effort. ISPD recommends that the Core Team continue to conduct these visits on a semi-annual basis (2-3 times per year) to share parish and school progress, successes, needs and concerns, and to invite wisdom and opinions from these leaders. Consistency in internal communication is the key to keeping information correct and positive.
- A monthly one-page development *Stewardship Update* is an excellent tool that Sacred Heart is using to keep all internal and external publics up-to-date on what is going on with the process. ISPD will continue to work with Sacred Heart to publish the *Stewardship Update*.

Area #6: Public Relations

Programs/Activities

- Sacred Heart has many activities in place to reach out to its own parishioners as well as members of the wider Waseca community:
 - † RCIA leaflets, personal invitations
 - † Food vouchers for needy
 - † Monthly meal for those in need (collaborative effort with the Social Concerns Committee, Waseca Area Neighborhood Center and Waseca Ministerial Bread of Life)
 - † Christmas gift fruit bags for elderly
 - † Bereavement outreach through personal contact and cards

- † Baptismal preparation that is geared to meet the needs of the unchurched and non-Catholic spouses
- † Personal parish visits
- † Monthly gathering of support for the unemployed
- † Homebound Communion Ministers
- † Ministers of Word and Communion at the Federal Prison
- † Welcoming Committee

ISPD Perspective

- ISPD congratulates Sacred Heart on its strong web presence. The parish website offers detailed information about parish and school and is updated regularly. This presence gives Sacred Heart a strong edge in the area of public relations.
- ISPD would like to see Sacred Heart designate a publicity contact for each ministry, activity, class, athletic event and club at Sacred Heart. These contacts would forward “good news” to the parish office for press releases and use on the website and in parish and school publications.
- Sacred Heart offers a wealth of in-parish and community-wide ministries and resources. Publicizing these opportunities will allow for the parish to raise its profile in the community as well as inform more people about everything that Sacred Heart has to offer. ISPD would like the parish to consider developing a “community packet” that could be distributed to several area venues: Chamber of Commerce, local physician and dentist offices, realtors and community bulletin boards.
- ISPD would also like to see Sacred Heart capitalize on its annual Fall Festival. With an event that draws such a large attendance from the parish and wider community, it’s a great chance to show off the parish and school! Offering a booth with information packets, pencils, magnets or other giveaways would be a way to draw attention to the many things that the parish and school have to offer.

Area #7: Publications

Programs/ Activities

- Sacred Heart is currently releasing the following publications:
 - † Weekly Parish Bulletin
 - † Websites
 - † School Annual Report
 - † Waseca Daily News, Waseca Enews and the Local Buzz are utilized to publish events and news
 - † Quarterly financial statements to parishioners
 - † Annual Financial Report
 - † New Parishioner Packet

ISPD Perspective

- It will be important to continue to unify the verbal and visual messages that are sent out from Sacred Heart. All publications must have common themes and messages and should contain the parish/school logo and mission.
- ISPD commends Sacred Heart for its regular communication of financial information. Keeping parishioners abreast of the parish's and school's financial status is an important element in maintaining trust and accountability.

Area #8: New Parishioners

Programs/Activities

- The parish recently introduced a dinner to welcome new parishioners and more are planned for the future.
- Newcomers also receive a personal phone invitation to attend the Fall Festival.
- When newcomers register with the parish, they receive a welcome packet containing literature and meet with Fr. Marty or Sr. Lois when available.

ISPD Perspective

- ISPD commends Sacred Heart for adding personal touches to its welcoming effort for new parishioners. Some additional suggestions that Sacred Heart may want to consider would be to have parish volunteers personally visit each new parishioner in their home within one month of registration. The purpose of this visit would be to answer any questions the new member may have, explore their interests/needs and personally invite them to become involved in a parish ministry that is of interest to them.
- We also see an opportunity for the parish to unify the New Parishioner Packet. The packet contains practical and useful information, but in the form of several different brochures, pamphlets and flyers. Having so many pieces (fourteen) to look through might be intimidating and/or confusing for someone who is new to the community. ISPD encourages Sacred Heart to review this packet with a critical eye – possibly inviting a recent newcomer's perspective, to streamline the information and make it as "user-friendly" and simple as possible.

Area #9: School Recruitment and Retention

Programs/Activities

- Sacred Heart offers a tuition-free school for Kindergarten through fourth grade. Letters are sent to all students who are eligible for Kindergarten in January. They are also invited to attend the Open House in March. Follow-up letters and phone calls complete the recruitment cycle in May, June and July.

- Retention of students has never been a problem since the school is tuition free for parishioners.

ISPD Perspective

- Sacred Heart School is very unique in that it does not charge tuition. ISPD commends the parish and school for developing such a positive and collaborative relationship. It shows tremendous commitment to Catholic education on behalf of parish members.
- Though Sacred Heart School does not have a need to recruit students, nor does it struggle with student retention, ISPD feels that it is still important for SHS to maintain some of the “customer service” principles that exist in these key areas of development.
- Parents at SHS do not pay formal tuition; however, from ISPD’s perspective, they are still the customer. It will be important for Sacred Heart School to maintain its commitment to customer service. Continuing to provide clear communication to parents, offering a well-rounded program and demonstrating a daily commitment to educating students in the Catholic faith will help Sacred Heart School to remain a shining beacon in the parish and wider Waseca community.

Area #10: Special Events / Fundraisers

Programs/Activities

- The parish and school have several fundraising events and activities in place:

† Annual Fall Festival	\$51,292	(2009)
† Marathon	\$22,797	(2009)
† Men’s Club Auction	\$1,000	(2009)
† Palm Sunday Dinner	\$3,663	(2009)
† Golf Outing	\$8,152	(2009)
† SCRIP	\$20,000	annually

ISPD Perspective

- ISPD recommends that fundraisers accomplish three major objectives:
 - † Bring in good net dollars;
 - † Build a strong sense of community;
 - † Be a training ground for good volunteers.
- ISPD feels that the current fundraisers seem to meet the above criteria.
- ISPD would suggest that the school consider implementing a formal Annual Fund effort with a focus on grandparent, business community and school alumni participation. By following ISPD’s proven Annual Fund structure and process, the school could form relationships with these constituencies and invite their support. From ISPD’s perspective, the potential for long-term development relationships

and support of the school could increase dramatically through a formalized Annual Fund effort.

Area #11: Involvement of People / Volunteers

Programs/Activities

- The parish uses volunteers for all ministries. They are recruited by expression of personal interest and suggestions from parish/school staff.
- The school invites parents to volunteer in a ministry that is of interest.
- The parish hosts a Volunteer Appreciation function annually to recognize and thank the people who serve the parish and school.
- Volunteers are also thanked personally, via letters and the weekly bulletin.

ISPD Perspective

- We commend Sacred Heart for recognizing its volunteers.
- ISPD would like to see Sacred Heart consider setting a goal for “new” involvement. Seeking to invite and involve twenty-five or even fifty “new” people in the parish each year would go a long way toward raising the level of engagement at Sacred Heart. “New” in ISPD’s definition does not refer to newcomers to the parish, it refers to people who would be new to involvement. A great way to accomplish this task would be to invite the parish’s current ministry leaders and member each to be responsible for personally inviting one new person into their group. When leaders share that responsibility and commitment to personal invitations, it can have a tremendous impact on engagement.
- ISPD would encourage Sacred Heart to consider implementing some type of tracking method for volunteer hours. Many people don’t realize how much time they devote to volunteer activities – you can begin to recognize your volunteers when they reach certain hour levels with certificates, plaques, verbal recognition, etc.

Area #12: School Alumni

Programs/Activities

- Sacred Heart School alumni are invited to participate in the following activities:
 - † Golf Outing
 - † Fall Festival
 - † Catholic Schools Week Breakfast
 - † Endowment Fund

ISPD Perspective

- Sacred Heart School should consider establishing an organized Alumni Association or Club. Volunteers could be recruited for each class or group of

classes and assist in the formation of the group as well as communication of important information. This network of individuals could be an amazing support system and voice for SHS in the wider community.

- ISPD thinks it would be a great idea for Sacred Heart School to sponsor a “young-alum” event annually for its recent graduates. A pizza and movie night would be fun for junior high and even high school students, and would be a great way to keep these former SHS students connected to each other and to the school and parish community.
- Another initiative for the school to consider would be to implement a semi-annual alumni newsletter. Sending out a newsletter two-three times per year would be a great way to update alumni about life at Sacred Heart and invite them to current events at the school and parish.

Area #13: Total Stewardship

Programs/Activities

- Three Sundays in October are dedicated to Stewardship of Ministry and Offering. Weekend one involves parishioners who give witness of their work in ministry. During weekend two, the Finance Council and Pastor present the annual financial report and needs for the future. The third weekend is an invitation for parishioners to complete pledge cards for ministry and offering for the coming year.

- Average weekly offertory:

† November 2009	\$11,502
† October 2009	\$11,792
† September 2009	\$12,826
† August 2009	\$9,967
† July 2009	\$11,961
† 2009	\$11,550
† 2008	\$11,907
† 2007	\$11,329

ISPD Perspective

- The development and implementation of a Total Stewardship process will be important to the future of Sacred Heart. This effort will be a year-round process that concentrates on:

- † Stewardship of Prayer
- † Stewardship of Ministry/Involvement
- † Stewardship of Offering

- ISPD endorses the three-phase model because it will allow Sacred Heart to put the message of stewardship in front of parishioners twelve months out of the year

as opposed to the once-a-year appeal. With the three-phase model, brochures explaining each component along with response/commitment cards and envelopes are developed and distributed during each of the phases. We find that the prayer phase works well during the Lent or Advent season. Offering is most successful in the December – January – February time frame and Ministry can be done in the Fall or Spring.

- ISPD teaches that there are six keys to success in Total Stewardship are:
 - 1) Commitment from the leadership
 - 2) Education
 - 3) Organization -- annual process, three phases, timeline, leadership, publications, budget, goals, etc.
 - 4) Communication
 - 5) Stewardship Committee/Commission
 - 6) Follow-Up (Commitment Cards)
- ISPD commends Sacred Heart for its formation of a Core Team who is ready and willing to put this Total Stewardship process in place. Their commitment, in collaboration with the pastor, will ensure the parish's success.

Area #14: Database Management

Programs/Activities

- The parish utilizes Parish Data System (PDS) to maintain parishioner records.
- Sacred Heart School utilizes Works to maintain their database.
- Both parish and school offices are networked.
- Information is updated regularly.
- Financial contributions are tracked through PDS. Parishioners receive quarterly giving statements and an annual substantiation letter.

ISPD Perspective

• Developing a strong, accurate and well-planned database is of utmost importance in any successful Catholic parish and school development effort. It provides the essential foundation upon which Sacred Heart's future development efforts will be built. ISPD recommends putting a database program in place that is designed specifically for development. It should have the capability to:

- † Track and code all constituencies of Sacred Heart;
- † Track all financial pledges and gifts to the parish and school;
- † Generate pledge reminders and donor statements;
- † Generate financial and analytical reports for various funds;
- † Track multiple solicitations;
- † Track basic contact information for constituents including e-mail addresses;

- † Query the database for specific records or sets of information.
- The parish's current PDS program should be sufficient to handle these suggested requirements.
- This development database should include the following constituencies:
 - † Current parishioners
 - † Current parents
 - † Alumni
 - † Parish staff
 - † Faculty and Staff
 - † Former faculty
 - † Grandparents
 - † Former parishioner and parents
 - † Business community contacts
 - † Friends
 - † Prospective parents and students
 - † Media contacts
 - † Ministry and Leadership groups
- ISPD recognizes that growing and maintaining a database can be a daunting task. We encourage the parish to utilize the time and commitment of its ministry leaders and the Core Team to assist with this ongoing effort.

Area # 15: Annual Fund Drive

Programs/Activities

- Sacred Heart does not currently have an Annual Fund effort in place for the parish or school.

ISPD Perspective

- ISPD encourages Sacred Heart to consider implementing an Annual Fund Drive for the school. We have seen this type of development strategy work well across the country. An Annual Fund Drive would seek to invite and involve people to further the mission of the school. This would be a great way to involve grandparents and even reach out to some alumni. Key steps would involve:
 - † Establishing a strategic, formal, written plan
 - † Earmarking funds for a specific need or project
 - † Formation of an Annual Fund Cabinet to oversee and implement the drive
 - † Developing written strategies for each division

Area #16: Major Gifts

Programs/Activities

- The parish occasionally receives bequests.
- A \$25,000 gift was given to the school this past year and was designated to technology. The donors were personally thanked.
- There is no formal program in place to identify, invite, solicit or recognize those individuals who have the potential to consider a major gift to the parish or school.

ISPD Perspective

- For the long-term development effort or future capital campaign, it would be beneficial for Sacred Heart to consider creating a Major Gift process. The first step would be for parish leaders to receive education and training on the Major Gift process. This training would involve information on how to create the “Blue Ribbon Committee” and what their role should be. The main components of a Major Gift process include:

- † How to set up a people-based effort
- † How to identify prospects
- † How to research
- † How to cultivate prospects
- † How to visit prospects
- † How to invite major gifts
- † How to keep involved

Area #17: Endowment/Foundation

Programs/Activities

- Sacred Heart has an Education Endowment Fund in place. It was chartered in 1987 and is a separate entity from the church.
- The current balance is approximately \$1.6 million. A portion of the interest is allocated each year for general church support.
- Parishioners are invited to make gifts to the Endowment through the envelope system and school alumni receive an annual mailed solicitation.

ISPD Perspective

- ISPD commends Sacred Heart for having the foresight to plan for its future through an established Endowment fund. Developing an updates brochure that educates people about the fund and provides information about how people can contribute would be an excellent step for Sacred Heart to grow its development efforts.

Area #18: Planned Giving

Programs/Activities

- Sacred Heart does not have a formal Planned Giving program in place.
- A seminar on Planned Giving was presented to the parish in the spring of 2009.
- Sacred Heart has several parishioner volunteers who assist with the handling of planned gifts when needed.

ISPD Perspective

- Articulating planned giving opportunities will be an important addition to Sacred Heart's overall development efforts. This is an area that Sacred Heart should consider addressing for its long-term development effort.
- Many parishes and schools find that they are able to identify new donors and form new relationships by offering deferred giving opportunities. ISPD encourages Sacred Heart to utilize the Archdiocesan resources and others in the parish or school community who may have expertise in the areas of financial and estate planning to help organize an effective and well-rounded planned giving program for the parish and school.

Area #19: Grant Writing

Programs/Activities

- Sacred Heart submits annual grants for the Bluejay Debit program, State Farm Insurance and Diocese Seeds of Faith. Generally the parish receives \$4,000 annually from these requests.
- Many local grants are not available to Sacred Heart because of its religious affiliation.

ISPD Perspective

- ISPD would encourage Sacred Heart to continue applying for grants from the funding sources with which it has had success in the past. As the parish and school continue to build their development effort, a more extensive Grant Writing program should be considered for the future.

Area #20: Business / Corporate Community

Programs/Activities

- Sacred Heart does not have a formal program in place to involve the business or corporate community in the life of the parish or school.

ISPD Perspective

- The parish and school should consider hosting an annual Business Breakfast on campus to cultivate relationships. Use this event to thank and recognize the

contributions that these people and businesses make to Sacred Heart. The parish/school could present a Business Partner of the Year Award at this event.

- A Business Community Division could also be incorporated into a future Annual Fund structure.

Area #21: Parish Staffing

Programs/Activities

- Pastoral Staff

- † Reverend Martin Schaefer, Pastor
- † Sister Lois Erpelding, Pastoral Minister
- † Helen Kingsley, Parish Administrator
- † Valerie Spies, Parish Secretary
- † Edna Burns, Faith Formation Support Staff
- † Brad Bartz, Custodian
- † Jan Larson, Assistant Custodian
- † Tara Parpart, Assistant Custodian

- Job descriptions are in place for these positions.

- Volunteer Staff

- † Bill Fitzsimmons, Buildings and Grounds
- † Bea O'Brien, Office
- † Sr. Paulanne Gruber, Office
- † Mildred Hanson, Envelopes
- † Barb Hoehn, RCIA
- † Sara DeLong, Data entry
- † Deb & Rich Perreault
- † Arlys Fell, Adoration, Right to Life
- † Sandra Fitzsimmons, Office
- † Marlys Froehle, Liturgies, Music
- † Jane Fyre, Funerals
- † Elizabeth Henderson, Weddings
- † Mark Denn, Liturgies, Music
- † Marya Eustice, Vacation Bible School

ISPD Perspective

- ISPD commends Sacred Heart for putting job descriptions in place for staff positions.

Area #22: Parish and School Leadership

- Top Challenges identified by parish and school leaders:
 - † Initiating and enabling a renewed and ongoing faith formation program
 - † Update on parish home visits
 - † Needs for impoverished
 - † Response to the unemployed
 - † Sister parish in Kyle, South Dakota
 - † Calendaring events
 - † Parish ill and homebound
 - † Ways to enhance Liturgy

V. 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.

VI. BENCHMARK: *Great Parishes*

Seven basic elements, items or concepts separate the good parishes from the great parishes:

1. **Vision** — a clear and shared mission and vision for the future, one that is on paper and lived day to day. One that has received input from all publics and is improved and analyzed every year. One that can be verbally articulated by all parish leaders.
2. **Leadership** — a leadership style that is collaborative, inclusive, responsive and always in an improvement mode. Committed to Total Quality, Energetic, Open-minded, Inclusive, Win-Win Approach, Proactive, Optimistic, Realistic, Firm, and Visionary.
3. **Quality** — an established set of indicators that are reachable and challenging goals. Quality as a continual process of improvement. This process seeks input from all. How can we systematically get better day after day, week after week, month after month, and year after year? We are challenged to be the best we can be.
4. **Creativity** — Bringing out the best in all — the best ideas, the best processes, the best strategy. Everyone is recognized for their unique gifts and talents. A non-threatening environment that celebrates success and collaborative decision-making.
5. **Communication** — Ability to have all members of the organization in tune with the shared mission and vision. Communication must be creative and consistent and one-on-one as much as possible in order for the highest level of commitment.
6. **Attitude** — Quote by Charles Swindoll:
“The longer I live, the more I realize the impact of attitude on life. Attitude, to me, is more important than facts. It is more important than the past, than education, than money, than circumstances, than failure, than successes, than what other people think or say or do. It is more important than appearance, giftedness or skill. It will make or break a company, a church, a school, a home. The remarkable thing is that we have a choice every day regarding the attitude we will embrace for that day. We cannot change our past; we cannot change the

fact that people will act in a certain way. We cannot change the inevitable. The only thing we can do is play on the one string we have, and that is our attitude. I am convinced that life is 10% what happens to me and 90% how I react to it. And so it is with you — we are in charge of our attitudes.”

ISPD finds that when the leaders of a parish understand how important attitude is, they move to consistently foster and encourage the positive, inclusive approach.

7. T - E - A - M — Together, Everyone Accomplishes More.