

St. Joseph Parish Long Term Strategic Plan

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Introduction

The 2010 – 2011 Parish Council for St Joseph Congregation developed this strategic plan. It provides the parish with a long range vision for strengthening supports, expanding services and optimizing organizational development. It also provides a roadmap for the next three years to help achieve the visions set forth. There are provisions provided for the Council and staff to review progress at every Council meeting as well as update the plan accordingly. In this way the plan is intended to be a living document, used as a management tool by the Council and Staff to help achieve our strategic vision.

This plan was developed with broad involvement and guidance from Council representatives, various committee members, and parish staff. It also took into great consideration feedback that it received from the parish members at large. The Council reviewed past planning efforts, examined methods employed by similar organizations, and referenced many external documents to help formulate this plan.

During this process the Council reviewed our Vision and Mission statements, as well as our core operating values and assumptions underlying the organization's approach to its mission. From these efforts comes the Strategic Direction outlined in this document.

Background and History

St. Joseph Parish Council looked at the last formal Long Term Strategic Plan which was created in 1999. It also reviewed the "Parish Stewardship Assessment" completed in April of 2009. After careful consideration the Council concluded that it was necessary to begin formalizing a new long term strategic plan.

Much of the feedback used to develop this plan was accumulated from 2009 to 2011. This feedback accurately represents many of the great challenges facing both the Parish and the Archdiocese at the time that this plan was developed. Among those challenges was the significant economic downturn of the previous three years, the uncertainty surrounding the legal battles facing the Archdiocese, and the dwindling number of key volunteers in the congregation.

The Council met for many long hours to review this feedback and to determine which areas should be focused on initially. The Council realized that not everything it wanted could be included within the initial framework of this plan. The Council felt it was most important for this plan to provide a guideline for future usage.

Strategic Direction

Based on the Parish Council's understanding of the current environment in and around St Joseph Congregation, the opportunities that exist, and the threats that are present, the next three to five years will be a time of strengthening the parish's existing base and looking to expand the services offered, all in an effort to maintain a strong and vibrant parish.

The strategic direction that will be taken by the parish focuses on these areas:

1. Expanding the number of parishioners in St Joseph Congregation. More families in the parish, as well as the day school, leads to more volunteers which provides the ability to expand our services, as well as generate more revenue.
2. Strengthen our Faith Formation team and provide more opportunities for our parishioners to enrich their faith. Focus those efforts on expanding our Child, Youth, and Adult Ministries.
3. Maximize our revenue opportunities. While there must be an effort to increase the contributions that the parish receives from its parishioners, there are also additional opportunities that need to be explored to ease the financial burden of St Joseph's parishioners. Additional revenue also affords the opportunity to expand outreach and formation programs.
4. Provide more services to our parishioners. The more services the parish provides the stronger the parish will become. Opportunities here include our young adult and adult formation programs as well as hosting more "community building" events in and around our parish.

During the next three to five years it will be crucial for our parish to focus on these objectives in order to be strong and vibrant within the community.

There was much discussion about past planning efforts and what was necessary to move forward. The Council felt it was very important to include a mechanism for feedback and follow up within the long term strategic plan.

Ultimately, it is the wish of this Council that the review and continued updating of the Long Term Strategic Plan become an established part of every Parish Council meeting.

Organization of the Strategic Plan

This plan is intended to be a management tool for the Parish Administrators and the Council to use. This plan has two purposes. First, it presents a comprehensive compilation of Objectives and Action Plans that the Council felt were important at the time of the plan's creation. It is a record of the strategic planning process and the decisions reached by the Parish Council and staff. Second, it is a reference guide for future strategic planning efforts. It is intended to be a living document that is reviewed regularly and updated accordingly.

The background and history of the planning process provide a glimpse of the efforts and thought process involved. From here our Vision and Mission statements are presented, as well as the underlying assumptions that were taken into account at the time the plan was created. There is an environmental scan, including the SWOT analysis that was performed.

The resultant Goals and Objectives that were defined are broken into six categories: Community, Financial, Stewardship, Faith Formation, Facilities, and School. Each of these areas has Long Range Objectives listed at the top followed by Action Plans designed to help achieve those objectives.

At the end of the plan is a year by year summary of events from the action plans, as well as a guide and timeline for helping implement these plans. Finally, there are future considerations which did not currently fit into our long range strategic plan but are things the Council considered and may be beneficial as this strategic plan continues to evolve.

Vision

St. Joseph Parish is a community where faith is enriched and nurtured. The Eucharist and Liturgy are both celebrations and sources of life. Active participation is not only meaningful but also energizing. We welcome all people and encourage them to share time, talent and treasure through stewardship.

Mission

We the people of St Joseph are a Catholic Faith Community formed by the Gospel of Jesus Christ. Modeling the example of Jesus in the spirit of St Joseph, we serve God, our community, and each other by sharing our time, talent, and treasure. We will strive to grow closer to God and the spirit of God in each other, in the community, and the world.

Summary of Our Current Environment

The following is a brief summary of opportunities, threats, strengths and weaknesses highlighted by the Council during their 2010 SWOT analysis.

Strengths

Areas that were identified to leverage off of include:

- Friendly welcoming parish
- Core group of enthusiastic and involved parishioners
- Very generous parishioners
- Excellent pastor
- Day school offers a high quality education
- Many second generation families involved here
- Strong Catholic Formation team

Weaknesses

Areas of concern that that offer room for improvement include:

- Declining number of parishioners
- Communication both internally and externally
- More open minded and welcoming of volunteers
- Aging parish base
- A lack of new, younger volunteers
- Long term planning

Opportunities

Areas that offer potential to take advantage of include:

- Growth of our School
- Coordinate more activities in and around the parish
- Evangelization within the neighborhood
- Greater focus on developing our young adults
- Benchmark the activities of other parishes
- Use of technology to connect with younger members of the parish, as well as alumni
- More personal contact with each member of the parish
- More marketing of parish and school
- Use our facilities for more events, including fund raising efforts

Threats

Areas where we may be vulnerable include:

- Priest shortage in coming years
- Declining number of parishioners, as well as contributions
- Lack of long term future planning
- Society's relativism and secularism
- Few fund raising efforts within the parish
- Reliance of volunteers for fund raising and the subsequent burn out of volunteers
- Parish office and school administration working together
- Loss of interest among young people
- Unknown impact of Archdiocese current issues
- Lack of supports for new ideas
- Other local parishes attracting our members
- Prolonged economic downturn
- Maintaining a strong Catholic Formation team
- Loss of key people within the parish

Underlying Assumptions

This is a compilation of assumptions that the Parish Council was operating under at the time that they developed this plan. Any changes to these assumptions may necessitate a review and redirection of current Objectives and Action Plans.

- St. Joseph Parish will continue to have it's own Pastor
- St. Joseph Parish will employ it's own Catholic Formation Team
- There will be no excessive financial burdens placed on the Parish by the current legal troubles facing the Archdiocese.
- There can be no significant expansion of the current facilities
- St. Joseph's Parish will continue to support an elementary school consisting of grades 3K through 8.
- Stewardship awareness and participation is a critical determinant in the spiritual growth and financial stability of the Parish.

Objectives and Action Plans

Objective: Increase the community's awareness of St Joseph Parish and events within the parish. Foster a sense of belonging, and encourage greater participation by coordinating, promoting, and hosting more fun, social, informative, and teaching events. These events should target our youth, teens, families, and those outside our Parish.

A. Strengthen and develop the focus and role of the 'Parish Life' Committee

1. Develop a charter and find a core group (minimum of 8) of people to serve on the committee.
Assign to: Parish Council
Due Date: 1/15/12
2. Develop a plan to place at least four events on the 2012 calendar.
Assign to: Parish Life Committee
Due Date: 2/15/12
3. Develop a plan for the Parish Life Committee to assume responsibility for overseeing Oktoberfest.
Assign to: Parish Life Committee
Due Date: 3/15/12
4. Explore the idea of creating a service plan to provide day care services for certain events at St Joseph's. Determine how and when services may be provided.
Assign to: Parish Life Committee / School Committee
Due Date: 1/15/12

B. Further the use of technology in Marketing and Promotion of our Parish and School

1. Explore the possibility of merging the Parish and School websites to provide more uniformity and cohesion. In addition, develop a prioritized list of improvements that would improve scalability and usability of the websites.
Assign to: Parish Council / School Committee / Business Admin
Due Date: 1/15/12
2. Explore the possibility of expanding the use of Social networking and email distribution for communication purposes.
Assign to: Parish Council / Stewardship / School Committee
Due Date: 2/15/12
3. Explore opportunities to increase efforts on marketing parish and parish events in and around the community.
Assign to: Parish Life Committee / Stewardship Committee / Business Admin
Due Date: 2/15/12

Objective: Develop and promote solid financial resources necessary to sustain the Vision and Mission of Saint Joseph's Parish. Create a strong and stable economic foundation to support the current and future financial needs of the Parish and its outreach initiatives.

A. Focus on maximizing the Contribution Levels of our Parishioners

1. Develop a comprehensive and detailed analysis with a financial breakdown of the contribution patterns for Parish Council review and analysis. Include demographic and comparison of other local Parish's statistics.

Assign to: Finance Committee / Business Administration
Due Date: 1/15/12

2. Develop and present to Parish Council a detailed two part plan using the data collected in action item 1 to increase by 5% the contribution level of existing contributors, and receive some contribution level from current non-contributors

Assign to: Stewardship Committee
Due Date: 3/15/12

3. Create a comprehensive communication plan to inform and educate all Parish members on the financial needs and overall status of the Parish finances – consider ALL media sources (mail, publications, e-formats, audio, voice, etc).

Assign to: Finance Committee / Business Administration
Due Date: 1/15/12

4. Explore and implement alternative contribution payment channels such as e-payments, person-to-person or person-to-business or other web-based options.

Assign to: Finance Committee / Business Administration
Due Date: 1/15/12

5. Develop a five (5) year Financial Plan detailing projected revenues and expenditures and present to Parish Council:

Assign to: Finance Committee
Due Date: 1/30/12

6. Create and implement a strategy to provide a minimum Parish contribution of 5% for Outreach activities.

Assign to: Parish Council / Finance Committee
Due Date: 1/30/12

7. Create a strategy to expand endowment awareness and promote participation.

Assign to: Parish Council / Finance Committee
Due Date: 1/30/12

B. Expand Current Fund Raising Programs and Explore Alternative Revenue Sources

1. Provide Parish Council with an assessment of the current fundraising activities and returns for the last five years.

Assign to: Current Program Coordinators
Due Date: 11/30/11

2. Develop and implement a plan to increase participation in the *Script*, *Market America* and *Market Day* program. Consider expansion outside of direct Parish membership.

Assign to: Current Program Coordinators / Business Administration
Due Date: 11/30/11

3. Develop a plan to increase Parish participation in all fundraising activities.

Assigned to: Parish Council / Fundraising Committee
Due Date 10/30/11

C. Re-examine the way the Parish handles tuition at the Day School in terms of affordability and alternative funding.

1. Explore the benefits and limitations of considering the cost of tuition as a Parish donation for tax considerations. Consider all tuition payment options and alternatives.

Assign to: Parish Council
Due Date: 10/30/11

2. Develop a plan for providing a Catholic education to more Parish families. The plan should leverage the use of tuition assistance, tuition abatement and other funding sources.

Assign to: Finance Committee / School Committee/ Business Administration
Due Date: 1/30/12

3. Develop a plan to ensure that St Joseph's teacher salaries are competitive with surrounding elementary schools. This plan should include current benchmarking.

Assign to: School Committee / Finance Committee
Due Date 1/30/12

Objective: Continue to promote and expand the various ministries here at St Joseph Parish. Provide more opportunities to share our God-given gifts and talents in service to others.

A. Strengthen and develop the focus and role of the 'Stewardship' Committee

1. Review the current Stewardship Committee charter and find a core group of at least 8 people to serve on the committee

Assign to: Parish Council
Due Date 9/2/11

2. Develop and present a plan to conduct a ministry fair twice per year (once in fall coinciding with back to school, and once in spring coinciding with commitment week)

Assign to: Stewardship Committee
Due Date 10/15/11

3. Develop a plan to further expand the time and talent database. Plan to provide regular update reports to parish council as well.

Assign to: Stewardship Committee
Due Date 12/15/11

B. Continue to promote the concept of Volunteerism across all areas of the parish while looking for ways to maximize the efficiency of various volunteer groups

1. Develop a plan for a volunteer coordinator to help facilitate the managing of needed volunteers.

Assign to: Stewardship Committee / Parish Council
Due Date 12/15/11

2. Gather leaders of the most successful committees and have them present to parish council a summary of their activities, income, expenses, key volunteers, processes and timelines for the parish council and others to learn from and expand upon their successes. Plan for 3 presentations in 2011-12.

Assign to: Parish Council
Due Date 06/15/12

3. Develop a plan to help facilitate getting various groups and organizations to work together toward achieving common goals rather than having them focus solely on their own agendas. This begins by choosing an objective and then developing a plan centered around cross functional support of the objective.

Assign to: Parish Council
Due Date 03/15/12

4. Develop and document a succession plan for key committees and volunteer positions within the parish. In addition, look to various organizations for designated committee participants on certain committees.

Assign to: Parish Council
Due Date 03/15/12

Objective : To further develop faith-filled parishioners whose lives are centered on the Eucharist leading to individual holiness, spiritual growth, and an authentic community of believers. These efforts should be centered around Child Formation, Youth Formation, and Adult Formation activities.

A. Expand the Child and Youth Formation Activities offered at St Joseph Parish

1. Recruit and train 3 new volunteers to assist in Child Formation programs.

Assign to: Director of Child Ministry
Due Date 1/30/12

2. Extend the small group model currently used in adult formation to the youth formation program. Begin by creating 3 small groups during the upcoming year.

Assign to: Director of Youth Ministry
Due Date 3/30/12

3. Train 3 Youth Catechists referred to as “small group leaders” in all adult formation leadership training, and youth-specific training; to take on administrative responsibility for small groups.

Assign to: Director of Adult Ministry
Due Date 3/30/12

4. Put together a preliminary exploration of what it would take to create a youth mass on Sunday evenings at our parish. Present the findings to Parish Council.

Assign to: Director of Youth Ministry
Due Date 4/30/12

B. Expand the Adult Formation Activities currently offered at St Joseph Parish

1. Increase the participation in small groups by 5% in 2011-12.

Assign to: Director of Adult Ministry
Due Date 3/30/12

2. Increase devotion to/participation in the Eucharist by way of Sunday Mass, daily Mass and adoration evidenced via surveys of parishioners and observation (usher counts)

Assign to: Director of Adult Ministry
Due Date 3/30/12

3. Establish an expanded men's ministry.

Assign to: Director of Adult Ministry
Due Date 1/30/12

4. Increase the prayer life of parishioners signifying a vibrancy of Christian life thru an increase in participation of the Thursday night prayer group, and the Family Holy Hour

Assign to: Director of Adult Ministry
Due Date 4/30/12

C. Provide continued support of all Faith Formation activities

1. Implement an annual update / Presentation of Faith Formation activities to Parish Council

Assign to: Directors of Youth / Child / Adult Ministries
Due Date 2/15/12

2. Oversee the implementation of new missal verbiage.

Assign to: Prayer & Worship Committee / Business Administration
Due Date 11/30/11

3. Explore the idea of implementing and maintaining a Marquee for music and readings

Assign to: Prayer & Worship Committee
Due Date 1/30/12

4. Initiate a Pastor's Column in the bulletin.

Assign to: Pastor / Parish Council
Due Date 12/1/11

Objective: Provide the timely support necessary to continue to maintain our facilities at a high level. In addition, explore opportunities and develop plans for those improvement projects deemed worthwhile.

A. Explore Opportunities to improve existing facilities

1. Gather costs for prioritized maintenance projects in order to help develop a plan for expanding the 'Capitol Building Fund'
Assign to: Buildings and Grounds Committee
Due Date: 1/30/12

2. Explore the addition of a lighted marquee on Center St highlighting events and activities at St Joes. Develop a plan and a timeline for evaluation that includes these steps:
 1. Investigate the City of Wauwatosa requirements for signage.
 2. Outline multiple options for new marquee taking into account city restrictions.
 3. Collect project cost estimates noting recommendations for sign vendors/installers.Assign to: Buildings and Grounds Committee
Due Date: 1/30/12

3. Gather costs for facility enhancement projects. These are mid-sized projects that would enhance or improve the overall experience for parishioners. Provide summary report of collective scope and costs of the following items.
 1. Church Organ
 2. Church Speaker System
 3. Glass Doors inside ChurchAssign to: Buildings and Grounds Committee
Due Date: 12/30/11

4. Explore opportunities to create updated meeting / gathering places for those involved in active ministries and service to St Joes, as well as places to promote new activities. Put together a summary of the areas that may fit these criteria, along with potential costs and benefits to present to Parish Council
Assign to: Buildings and Grounds Committee
Due Date: 4/30/12

5. Investigate different funding avenues based on immediate need and long term goals.
Single purpose fundraising (Specific to one need, e.g. Marquee)
Broad scope funding (e.g. Multi-year Capitol Fund Appeal)
Assign to: Buildings and Grounds Committee
Due Date: 1/30/12

Objective: Focus on maintaining strong enrollment in our school while continuing to develop our students into future leaders with a well-developed Catholic identity, strong academic foundation, and commitment to community.

A. Continue to promote our Strong Catholic Identity and Academic Foundation

1. Create a long term strategy to establish and sustain a vibrant Home and School Committee. Key considerations should include the creation of a formal charter with a defined membership policy to leverage active involvement on behalf of the school families.

Assigned to: School Committee

Due Date: 1/30/12

2. Define a fundraising policy to complement the general fundraising objectives and requirements of the Parish.

Assigned to: School Committee / Fundraising Committee

Due Date: 10/30/11

3. Establish enrollment growth (recruitment and retention) objectives and opportunities. Consider full enrollment projections, capabilities and limitations.

Assign to: School Committee

Due Date: 1/30/12

4. Develop a plan to continue the annual financial analysis activities to support the budgeting process.

Assign to: School Committee

Due Date: 10/30/11

5. Update the current St. Joseph School Plan. Include the following considerations:

- Accreditation certification objective
- Ongoing curriculum evaluation and review including textbook upgrades
- Expanding the use of technology to enhance the existing curriculum
- Evaluate school promotion opportunities

Assign to: School Committee

Due Date: 03/31/12

6. Conduct an annual school survey to document some key metrics such as:

- percent of families participating in school activities
- level of school family awareness of involvement activities
- percentage of students completing service projects
- improvements in academic performance
- general perceptions of the school community
- include other considerations

Assign to: School Committee

Due Date: 12/31/11

7. Update Crisis Management Plan

Assign to: School Committee

Due Date: 5/30/12

Implementation of Strategic Plan

This document is a synopsis of the actionable items and deliverables defined in the previous Objectives. This document is meant to provide an overall high level view for the council and administration to look at and review at regular intervals. The document is organized by delivery dates and is meant to be used as a living document for management of the strategic plan. For management purposes it was decided that the “living document” portion of the plan was best to be kept in a spreadsheet format. That way the Council can sort on deliverables, dates, and responsibilities as well as have a place to document updates, comments, and changes to the plan as it sees fit.

Fields that should be populated in the document are as follows:

Date Added: This is the date that the Council decided the corresponding action is worth being added to their objectives

Objective (Category): This pertains to which of the Larger Objectives (at the time this plan was created there were six primary objectives) the action is tied to. It provides a way for the Council to sort on the particular work being done on a specific objective.

Action #: This refers to the specific step within the plan. Initial entries are assigned and future entries will be incremented.

Action: This is a specific detailed description of the necessary action.

Responsibility: The committee, group, or person responsible for completing the specific action item.

Due Date: This is when the council would like the required action completed by. The Council can also sort on this field to focus on upcoming due dates.

Comments: Used to document any discussions, updates, or modifications to the particular steps in the plan. Comments should contain a date as to when they were entered and can continue to be appended as necessary.

Status: Shows the state of the action item – Complete, In Progress, Behind Schedule, or Obsolete

A Review of the Strategic Plan should become a regular part of every Council meeting, and these fields should be filled in accordingly.

See Attached File:

Future Considerations

This area of the plan is a parking lot for ideas that the Parish Council feels may have merit but are not currently viable at the present time. This list should be reviewed once a quarter and if the Council feels an idea is worth pursuing they should develop an action plan for it and move the item to the 'Objections and Action Plans' area of the document.

- Review the idea of offering daycare services
- Examine the possibility of offering some summer school options for families that may be interested
- Develop a plan to continue to grow the school enrollment, including determining what we could do to move beyond our current max capacity.
- Examine the possibility of creating a nursery in the church
- Offer Bingo at some regular interval
- Develop a plan to expand the capitol building fund.
- Pancake breakfasts
- Have regular / quarterly gatherings focused on a specific teaching
- Establish child-care to support Adult formation offerings
- More parish-wide formation programming on evangelization.
- Look at more offerings for High School students
- Develop a plan for maintaining a strong formation team at St Joe's
- Focus on New age teachings
- Review the current mass schedule and whether or not it is in the best interests of the parish and its members
- Create a place for some sort of acknowledgement of our members or relatives in service
- Increase the percentage of 3K and 4K families that stay with St Joe's
- Work toward strengthening ties to school alumni
- Create plans for maintaining and expanding extra-curricular activities
- Engage school alumni in parish fund raising activities.
- Benchmark the activities and operations of other parishes.
- Promote plan to take advantage of third party "sweat equity" fund raising opportunities
- Focus on getting and keeping the youth involved here at St Joes with various events
- Expand on "Welcoming New Parishioners" ideas
- Volunteer recognition at mass
- Auto dialing program for birthdays, anniversaries, etc
- Implement a volunteer campaign/blitz. Goal = Spring 2012
- Implement an incentive campaign such as "give back X-hours" type campaign, replacing paid services possibly. Goal = Spring 2012
- Investigate expansion of youth choir and liturgical music