



Dear Friends,

I am writing to introduce the St. Peter Strategic Planning document. This document is the result of a long process of pastoral discernment conducted through gatherings large and small of parish groups that included priests, parish staff, lay leaders and ministries. This is a living document which will guide our parish's ongoing pastoral planning.

The Diocese of Charlotte and the Society of Jesus of the United States and Canada asked St. Peter to undertake this focused pastoral planning to ensure that we minister most effectively to our growing parish family and fulfill our mission as the Jesuit church in Charlotte's Center City. For the past two years, we have been reflecting specifically on what it means to be a Jesuit parish in Charlotte Center City and how we can go forth in our Jesuit service to be men and women for others.

St. Peter is Charlotte's oldest Catholic Church (1851). In 1986 Jesuit priests were invited by the Bishop to serve the parish. We are a vibrant, growing community known for heartfelt worship and active lay involvement with many opportunities for spiritual growth and service. Our parishioners, who live throughout the greater Charlotte area, are energetic and engaged as evidenced by continued strong participation in stewardship of time, talent and treasure. They are drawn to our worship experience, preaching, Ignatian spirituality and commitment to social justice and service to those on the margins.

As one of only 66 Jesuit parishes in the U.S., we are called to nurture spiritual growth through Ignatian spirituality, to help our members find God in all things and live a faith that does justice. We find inspiration in Pope Francis' vision of a parish from *The Joy of the Gospel*:

"The parish is the presence of the Church in a given territory, an environment for hearing God's word, for growth in the Christian life, for dialogue, proclamation, charitable outreach, worship and celebration. In all its activities the parish encourages and trains its members to be evangelizers. It is a community of communities, a sanctuary where the thirsty come to drink in the midst of their journey, and a centre of constant missionary outreach."

Parish Growth

St. Peter is currently staffed by three Jesuit priests. I came to St. Peter as pastor in June 2015. I was joined by Fr. John Michalowski in early 2016 and by Fr. Jim Bowler in early 2017. In the past two years, we have also added parish lay staff to support our growing parish. We anticipate adding additional lay staff as the parish continues to grow. In 2009, we had 888 registered households. In 2017, we have 1,400. In 2017, weekend Mass attendance averaged 1,270, up from 759 in 2009. Younger people are coming to St. Peter.

Ten years ago the largest group of parishioners were between 41-50 years-old, followed by those 51- to 60-year-old group. In 2017, our largest populations are 30- to 39-year-olds and 40- to 49-year-olds. Young children and teenagers are the next largest groups. Because of the large numbers attending Sunday Masses, we now provide additional assembly space at the 9:00 a.m. and 11:30 a.m. Sunday Masses in Biss Hall, our basement assembly space where we installed a media system in 2013. While not

an ideal Mass experience, parishioners who attend in Biss are prayerfully and actively engaged, and Ministers of communion bring the Eucharist.

In 2016, we added a 9:00 a.m. Family Mass on the second floor of Benedict Hall, a multi-use building leased from the diocese. Approximately 200 parishioners, mostly families with school age children, attend this Mass. This service has given our children the opportunity to participate more fully in the Mass by serving as ushers, lectors, Eucharistic Ministers and players in the interactive sermons that are sometimes delivered by the Presider.

We are also committed to ministering to those who work in the Uptown area. Attendance at our 12:10 p.m. daily Mass has doubled in the past two years. Two years ago we began celebrating the Sacrament of Reconciliation every weekday before the 12:10 Mass. Large numbers take advantage of this opportunity for the Sacrament. Ash Wednesday, due to our uptown location, is one of the highest attendance days for Mass. In 2017, to serve not only our parishioners, but also the Center City business community, we added a lunchtime service at the Knight Theater and had more than 700 in attendance.

Faith Formation

Similar growth and space constraints can be seen in Faith Formation programming. In 2009, we had 136 elementary through high school students for our Catechesis of the Good Shepherd, Pre-confirmation and Confirmation classes. That number swelled to 313 in 2016. During the summer, we conduct a Teen Service week where our teenagers spend the week volunteering at non-profits varying from working in the field at a micro urban farm, waiting tables at a soup kitchen in Dilworth, helping counselors at the Boys Club / Girls Club, cleaning out creeks and various other service projects. 50 Teens participate each year and the slots are filled within 24 hours.

Adult Education

Our Adult Education programming has also experienced a significant growth surge as we increase opportunities to help parishioners go deeper in their prayer life and relationship with God. Reimagining the Examen, Meeting Christ in Prayer, seasonal guided retreats in Advent and Lent and the Spiritual Exercises (19th Annotation) introduce and reinforce the richness of Ignatian spirituality in group settings. We also provide Spiritual Direction and the Spiritual Exercises on an individual basis. Through Gift and Talent workshops, we help parishioners understand how they are called as men and women for others to go forth and serve.

Our parish invites expert speakers in theology, spirituality and social justice throughout the year for our parishioners and the community at large. In October 2017, Fr. John Baldovin S.J. held a session for our Liturgy Commission and spoke after Mass to parishioners. Our Kennedy Lecture series in 2017 hosted Fr. Greg Boyle, S.J., whose ministry works with the gangs in the Los Angeles area. In January 2018, Bishop George Murry, S.J. addressed the community on racism.

Justice and Outreach Commission

St. Peter focuses on four key social justice areas: Immigration and Refugees, Education and opportunities for youth in at risk neighborhoods, food, housing and shelter for the needy, and race relations. We have three Migration and Refugees programs, seven programs to service the poor in Charlotte, a tutoring and mentoring program in a Title 1 school, and a partnership with Our Lady of Consolation Church to collaborate on race relations.

Parish Life

To foster fellowship, build connections and provide support networks among our members, we offer a number of Parish Life programs. Caring Cooks, Fellowship Committee, Garden of Eat'n, Garden Ministry and the Welcome Committee focus on service to one another. Parishioners can deepen their parish connections through our Dinner Groups, Diocesan LGBTQ group, Girl Scouts Troop, Hiking Group, Men's Group, Respect Life Rosary Group, Taize Prayer and Young Adult Ministry (YAMs).

Ministering to the growing numbers of young adults in Charlotte, our Young Adult Ministry has renewed energy. YAM programs each month focus on enhancing spirituality, serving others and building community with one another.

Lay Leadership

Our Pastoral Council was reorganized in 2015 and is a robust team of leaders representing a cross-section of parishioners. The **Pastoral Council** meets monthly, and its members are fully committed to the life at St. Peter. The Pastoral Council has fully embraced this new organization structure, which has and resulted in greater collaboration and more effective communal discernment around parish needs.

Commission and At-Large members typically serve three-year terms, with one-third rolling off each year. The Chair serves a term of one year, supported by a Vice Chair and Immediate Past Chair. All members are committed to deepening our Ignatian core as a parish and work together for the greater good in our communities of engagement.

The **Finance Council** meets at least 10 times a year. Monthly results are reviewed and compared to budget. Any capital improvements that are done on an ongoing basis are reviewed by the Council and recommended to the Pastor. In addition, the Council continually looks at best practices. Recently, the Council set guidelines for Operational Reserves balances and determined a methodology for setting aside excess funds to a Campus Restoration and Maintenance Fund. That fund has had almost \$250,000 designated to it since its inception in early 2017. Also, designated and restricted funds are evaluated each year as to their use and the investment vehicles which are used for each one

The Finance Council started up a formal development committee, which resulted in the launch of our Stewardship of Treasure campaign in 2016. Each Fall, we ask that parishioners, through prayer and discernment, make a thoughtful financial commitment towards the life at St. Peter and beyond. Our first year, we had a 32% pledge participation rate, which grew to 33% the second year. The dollars pledged, grew by more than 10% in the second year.

In 2017, the Development Committee and Stewardship of Time and Talent were merged in order to deliver a more unified message of our gifts and how parishioners can give back to the church through these gifts. In 2017 we held a Time and Talent Stewardship Fair over Pentecost weekend. This is intended to be an annual event or as needed to ensure the parish is aware of all programming and volunteer opportunities.

Pastoral Planning

In 2016, following previous planning sessions that laid the groundwork, a subset of the Pastoral Council met to work on a Strategic Plan. To help articulate our purpose and our desired state, we created a new mission and a vision for our future. The mission and vision statement has been presented to the whole parish. The statement follows below.

OUR MISSION

As a Catholic Jesuit parish in Charlotte's Center City, we are animated by the spirit of St. Ignatius and welcome all to share in the joy of the Gospel and to come to know, love and serve God and one another.

OUR VISION

Stronger Together — We are a joyful, supportive, engaged and connected parish community.

Go Deeper — Parishioners have the tools to go deeper spiritually and are grounded in an Ignatian foundation and aware of a God who is trying to be known to them.

Go Forth — United through our Ignatian spirituality, we lead and serve others in all our communities of engagement.

Thriving Foundation — Our parish structure is well-organized and resourced to be responsive and support our mission.

The Strategic Planning Team established three main strategies to help us navigate barriers to achieving our vision.

- **Create a culture of discernment.**
Through prayerful and deliberate reflection and examination of all issues, we can make the best choices as a parish to move us toward our vision.
- **Intentionally build a collaborative parish.**
By increasing interaction and connectedness among groups, ministries and staff, we create a supportive, joyful community, engaged in a holistic experience as the body of Christ.
- **Become a more effective organization to support our mission.**
Clearly define our structure and processes with well-developed and documented roles, responsibilities and processes, in order to become more focused and to maximize our efforts in support of a large parish.

The group presented their work to both the Pastoral and Finance Councils. We then communicated to ministry leaders and staff in February 2018. As our plan evolved, we developed tactics to address the specific needs of each Commission and Committee. We also identified larger, parish-wide needs.

Space Constraints

Our four buildings, three of which are quite old, do not meet current needs and will not support sustained growth. In 2018, a discernment team will continue to explore how to go forward. The discernment team will work with our Facilities Commission to look at how we use campus space, determine how we can maximize it for the near-term and recommend needed capital improvements. As pastor, I am leading discussions with talks with community leaders, architects and centers of influence in the community to continue to gather information.

Our parish plan envisions establishing an Ignatian Center for Spirituality and Justice. Our existing programming provides a strong foundation for a center. This Center would provide our parishioners, the

greater Charlotte community and beyond with a means to go deeper into the Ignatian charism of contemplation and action, living a faith that does justice. A discernment team study of other Ignatian Spirituality centers throughout the country will determine how future programming should evolve and what physical space and staffing will be needed to support it.

To build a more collaborative parish, we will look at enhancing our website and initiating a communications study that examines all of our platforms. Parish communications are of the utmost importance for keeping our parishioners informed and engaged.

The parish planning process has accomplished a great deal. Much remains to be done in our discernment as we respond to the needs of our parishioners and the wider community. As we continue develop our plans, I will keep you informed through our communication channels.

Please pray for our parish and for our ongoing discernment of the Lord's call, that we might live for the Great Glory of God.

Sincerely in Christ,

A handwritten signature in black ink, appearing to read "Fr. Jim Shea". The signature is fluid and cursive, with a large initial "F" and "J".

Fr. Jim Shea, SJ
Pastor

**St. Peter Catholic Church
Charlotte, N.C.
FY18-FY20 Strategic Plan
As of 01/30/2018
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PARISH OVERVIEW

St. Peter Church, Charlotte's oldest Catholic Church (1851), was entrusted to the Society of Jesus in 1986. The church has grown with the city's influx of Catholics. The parish exhibited considerable growth in households from 2011 through 2015, growing from 1,067 to 1,390. The growth in worshippers continues, but at a slower pace. Parishioners come from throughout greater Charlotte. They are drawn to the worship experience, preaching, Ignatian spirituality and commitment to social justice and service to those on the margins. We currently have 1,390 registered households. We have also built up a dedicated lay staff and now have three priests. Over the past three years, attendance at Mass has increased over 30%.

Charlotte's Center City is growing rapidly and St. Peter is reaching out to serve those working, or increasingly, living, in our immediate area. Attendance at weekday Mass has grown greatly. The Sacrament of Reconciliation, now offered each weekday, is frequented by those working nearby. Conscious of these new demands for sacramental ministry and pastoral care, we now often refer to ourselves as "the Jesuit Church in Charlotte's Center City."

As our flock has grown, so has the number of programs and activities to meet the spiritual needs of our diverse parish and to go beyond our walls to reach the Charlotte community and beyond. Our parishioners are strongly committed to providing support in the Charlotte community and beyond, through social justice and outreach.

With this growth, however, comes the need to carefully discern, evaluate and choose how we continue. Resources are not limitless, and we run the risk of putting our efforts behind "more" rather than choosing wisely and ensuring our parish remains on the Ignatian path. Growth dictates a need for us to change how we operate. Limited personnel, inconsistent training of lay volunteers, space constraints and new ideas proposed on an almost weekly basis support the need for more strategic planning.

We must look at where we want to go and make deliberate choices in a proactive manner rather than being merely reactive. We must also ensure that as we grow, we do not lose the unique closeness cited by many parishioners in our previous planning sessions. And we need to have a greater understanding of Ignatian spirituality to ensure our vibrant community is singing from the same hymnal.

"A Church which 'goes forth' is a church whose doors are open. Going out to others in order to reach the fringes of humanity does not mean rushing out aimlessly into the world. Often it is better simply to slow down, to put aside our eagerness in order to see and listen to others, to stop rushing from one thing to another and to remain with someone who has faltered along the way."

#46 Evangelii Gaudium of the Holy Father, Pope Francis

Highlights of key events and previous planning events are found in the [Appendix](#).

OVERVIEW OF THE STRATEGIC PLANNING PROCESS

The development of this plan reflects the involvement of many parishioners over the past year and a half. The following is a summary of the planning process and participants.

Following several broad discussions on parish planning, from 2014 to 2016, the Pastoral Council formed a Strategic Planning Committee (SPC), which was a subset of its members. The SPC had its initial planning session on Sept. 7, 2016, establishing a common understanding of the challenge St. Peter Parish leadership would address. Together, we defined our challenge:

***How can we deepen our Ignatian core as a parish and work together
for the greater good in our communities of engagement?***

Setting the Stage in our Hearts

To bring the SPC into the right frame of mind, Fr. James Shea introduced numerous excerpts from apostolic letters and apostolic exhortations, including the *Joy of the Gospel* and the *Novo Millennio Ineunte*. The SPC discussed these at length and felt the presence of the Holy Spirit with them throughout the process. Additional quotes can be found in the Appendix.

“With its universal and indispensable provisions, the program of the Gospel must continue to take root, as it has always done, in the life of the Church everywhere. It is in the local churches that the specific features of a detailed pastoral plan can be identified — goals and methods, formation and enrichment of the people involved, the search for the necessary resources — which will enable the proclamation of Christ to reach people, mold communities, and have a deep and incisive influence in bringing Gospel values to bear in society and culture.”

Source: Novo Millennio Ineunte of His Holiness John Paul II, No. 29 Jan. 6, 2001

Framework for Planning

All members of the SPC had been through some form of strategic planning in their professional experiences. To ensure we had a common mental model throughout the strategic planning process, we first had to determine what methodology to use.

The SPC first reviewed and discussed materials provided by both the Diocese of Charlotte and the Jesuit Conference of Canada and the United States. We then adopted a step-by-step, prescriptive planning approach used by one of the SPC members, who would act as the facilitator.

We began with an understanding of what is meant by strategic and what steps we would take to create a meaningful plan. These guiding principles and key terms are included below.

Being strategic: Consistently making those core directional choices that will best move us toward our hoped-for future.

Mission: Why we exist, our unique purpose as an organization

Vision:	What we would look like if we were more fully achieving our purpose: our hoped-for future as a parish
Obstacles:	What might make it difficult for us to be the parish we envision
Strategies:	Core directional choices toward becoming the parish we envision
Tactics:	Specific actions that will best implement those strategies

Order for the Process

- Clarify What Is **(SWOT)** – Pulling back the camera to get clear on what is, including how we got here.
- Envision What's the Hope **(Vision)** – Clarifying the future we intend to build before moving toward it.
- Face What's in the Way **(Obstacles)** – Getting clear about the obstacles we have to overcome
- Determine What's the Path **(Strategies and Tactics)** – Make foundational decisions about how we'll approach the work toward our Vision. Tactics for each key area of the parish are intended to support our strategies and be FIT: feasible, impactful and timely.

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS

The SPC spent two working sessions providing candid feedback on our current state and documenting a thorough analysis of the parish's strengths, weaknesses, opportunities and threats (SWOT). Additional detail in Appendix. The top SWOT outputs from the SPC sessions are below, with a detailed SWOT included in the [Appendix](#).

KEY STRENGTHS (Internal)	KEY WEAKNESSES (Internal)
<ul style="list-style-type: none"> • Pride in being a Jesuit parish • Pastoral leadership: 3 engaging priests • Staff devoted and Jesuit-based; open to evolving roles/responsibilities • The dynamic at St. Peter is a spirituality of service – value outreach • Thriving, still growing 	<ul style="list-style-type: none"> • Lack of understanding on being a Jesuit parish, Jesuit spirituality • Spirituality hasn't permeated in a way that makes us a shared community • Lack of defined processes/roles • Growth has created greater disconnect • Space constraints
KEY OPPORTUNITIES (External)	KEY THREATS (External)
<ul style="list-style-type: none"> • Additional staff • Greater collaboration w/Diocese, Jesuit Province, City, Jesuit Refugee Service, Ignatian Solidarity Network • Pope Francis is a beacon of our faith, drawing many into our parish 	<ul style="list-style-type: none"> • Supply/demand for Jesuit priests • Declining vocations • Status as Jesuit parish • Protestant/non-denominational churches create full-life experience

MISSION AND VISION

Our plan's foundation is our Mission and Vision, which was developed initially by the SPC and then reviewed and approved by the Pastoral Council.

OUR MISSION

As a Catholic Jesuit parish in Charlotte's Center City, we are animated by the spirit of St. Ignatius and welcome all to share in the joy of the Gospel and to come to know, love and serve God and one another.

OUR VISION

Stronger Together	We are a joyful, supportive, engaged and connected parish community.
Go Deeper	Parishioners have the tools to go deeper spiritually and are grounded in an Ignatian foundation and aware of a God who is trying to be known to them.
Go Forth	United through our Ignatian spirituality, we lead and serve others in all our communities of engagement.
Thriving Foundation	Our parish structure is well-organized and resourced to be responsive and support our mission.

As our parishioners gather together, we build relationships through social interaction, get intentionally invited to well-planned events and programs, and then go deeper in our faith and go forth to serve through programs and community. This mirrors the structure of the Mass: gathering hymn and collect prayer, scripture wisely interpreted for reflection, communion shared to help us enter more deeply in Christ and community, then the dismissal and sending forth with purpose.

To see the individual SPC member outputs that formed this Vision please refer to the Appendix. They reveal the common thinking among the team.

Obstacles to Our Vision

Once we defined our Vision, the SPC looked again at our current state (SWOT) and contemplated what is holding us back from our hoped-for future. Relative to our Vision, we found these dominant obstacles.

- Silos — Groups seem to be all about their own work.
- Our growth has created more disconnect because we don't know as many of our fellow parishioners.

- Many parishioners don't understand what it means to be a Jesuit parish and don't know much about Jesuit spirituality and how to develop it.
- Spirituality hasn't permeated in a way that makes us a shared community.
- There are few documented processes and boundaries around what gets started, how it should be run and what the roles and responsibilities are.
- New programs and opportunities to engage seem to crop up without being connected to one another.
- Physical resources aren't always thought about as we take on new ministries, programs, etc. We're tight on space and this impacts the quality of the Mass experience. Because of increasing numbers, we use Biss Hall for overflow, which has as many as 150 parishioners on peak Sundays. The church capacity is 300 and Benedict Hall is 200.
- No succession planning – need to involve others and be ready to pass on.

STRATEGIES TO OVERCOME OBSTACLES AND ACHIEVE OUR VISION

From this, the SPC developed three overarching strategies that would help ensure we make the core directional choices to overcome obstacles and achieve our vision. These were vetted through the Pastoral Council and refined to be:

- **Create a culture of discernment.**
Through prayerful and deliberate reflection and examination of all issues, we can make the best choices as a parish to move us toward our vision.
- **Intentionally build a collaborative parish.**
By increasing interaction and connectedness among groups, ministries and staff, we create a supportive, joyful community, engaged in a holistic experience as the body of Christ.
- **Become a more effective organization to support our mission.**
Clearly define our structure and processes with well-developed and documented roles, responsibilities and processes, in order to become more focused and to maximize our efforts in support of a large parish.

TIMEFRAME

Work on some of the tactics in this plan has already begun, and other tactics may be added along the way. Accomplishing other goals and objectives may require additional time beyond that projected in this document. This plan will be reviewed and updated quarterly by the Strategic Planning Committee, Commission Leads and Parish Staff as appropriate..

We invite our parishioners to read and prayerfully reflect on the contents of this plan. We encourage you to provide feedback to the [Pastoral Council](#) or directly to the Pastor.

SPECIFIC TACTICS BY COUNCIL, COMMISSION AND COMMITTEE

PASTORAL COUNCIL

The Pastoral Council collaborates with the pastor to develop priorities and directions for the parish. The Council is to become the means of achieving full participation by the whole parish community in its mission by giving all a voice in discerning the direction of our parish life, in accordance with our Jesuit identity and mission. The Pastoral Council will collectively be responsible for implementing and updating the Pastoral Strategic Plan. Meetings are held monthly.

Strategy 1: Create a culture of discernment.

- **Establish twice annual Pastoral Council and Finance Council Ignatian retreats to enhance our understanding of Ignatian spirituality and its practical application for group discernment.**

Owner: Anne-Marie McLeod and Fr. Bowler

Timeframe: Ongoing beginning Q4 2017

Status: October retreat led by Fr. Bowler; Early 2018 retreat in planning

- **Refocus our monthly Pastoral Council meetings to greater prayerful discernment and sharing of consolations and desolations to guide our strategic planning. Commission monthly updates are handled as preliminary reading and only significant issues are discussed.**

Owner: Pastoral Council

Timeframe: Ongoing

Status: Launched Q4 2017

Strategy 2: Intentionally build a collaborative parish.

- **Pastoral Council Chair, Vice Chair and Past Chair establish cadence to attend other parish meetings.**

- Chair attends meetings when possible for Finance Council, Stewardship Committee and Strategic Planning Committee. Vice Chair attends as needed.

- Past Chair attends Staff meetings quarterly.

Owner: Anne-Marie McLeod, Mike Holland, Pat Mumford

Timeframe: Ongoing

Status: Launched Fall 2017

- **Share Pastoral Council meeting minutes with parishioners via website.**

Owner: Scott Stengel (Secretary) with Joan Guthrie

Timeframe: Q4 2017

Status:

Strategy 3: Become a more effective organization to support our mission.

- **Evaluate Policies and Procedures of each Commission in conjunction with bylaws to ensure the policies are appropriate and relevant.**

Owner: Commission Leads

Timeframe: Q1 2018

Status:

- **Establish and document annual succession planning process for Council leadership and all Commissions.**

Owner: Anne-Marie McLeod, Mike Holland and Scott Stengel

Timeframe: Q4 2017

Status: In progress; based on FY18 effort, which provided effective

LITURGY COMMISSION

The Liturgy Committee is concerned with discerning, training, developing, scheduling and the renewal of Laity in their participation in liturgical celebrations. Commission members must form themselves into a praying, learning, community of faith, educating and renewing themselves through prayer, study and attendance at appropriate workshops. The Commission meets monthly except for July and August.

- Altar Servers: assist the priest celebrant at the altar and throughout the Liturgy
- Eucharistic Ministers: is a lay parishioner who assists the priest in administering the Body and Blood of Jesus Christ during Holy Communion at Mass.
- Eucharistic Ministers for the Sick and Homebound: strives to maintain that special connection of church-life with those who are either temporarily or permanently unable to attend Mass.
- Sacristans and Crossbearers leads the presider and the other ministers to the sanctuary at the celebration of Mass. His or her chief function is to ensure the smooth unfolding of the Eucharistic celebration
- Lectors: includes proclaiming the Scripture and Prayers of the Faithful at the Church's worship
- Ushers: greet parishioners and visitors as they enter the church, look after those with special needs and collect the offertory collection.
- Music Director
- Family Mass musicians
- Adult Choir
- Cantor
- Children's choir
- Linens: this group is to pick up the soiled altar linens each week, launder, iron and then return them to the church.
- Liturgical Environment: responsible for flower arrangements for the sanctuary as well as seasonal decorations in the church.

Current Status

As a Jesuit Parish, energized by Ignatian spirituality, we are committed to helping one another grow in the knowledge and love of Christ. Liturgy at St. Peter is the center of parish life. We now offer five Masses, including a Family Mass in Benedict Hall, which provides a greater opportunity for children to participate in all aspects of the liturgy.

There is a high level of participation by lay people in liturgical ministries. Currently there are more than 230 active liturgical ministers. A key area of opportunity is to encourage and facilitate ways for our youth to take active roles in the liturgical ministries available to them. Our Family Mass is one area in which we see a growing number of our youth participating as ushers.

Strategy 1: Create a culture of discernment.

- **Examine all elements of the liturgy for potential to incorporate Jesuit-centered messages and practices.**
 - **Invite Jesuit liturgists to visit more often (similar to Kennedy lecture) and have reflections afterwards.**

Owner: Fr. Shea
Timeframe: 2017-2018 Liturgical Year
Status: Fr. John Baldovin, S.J. Professor of Historical and Liturgical Theology, Boston College School of Theology and Ministry, will spend the weekend of October 27-29, 2017 at St. Peter. He met with liturgical ministers, preside at Sunday Mass and made an adult education presentation after the 9:00 a.m. Mass.
- **Have Jesuit Liturgy Education for Commission and Congregation**

Owner: Commission Lead, Rick Hudson and Pastor, Fr. Shea
Timeframe: 2017-2018 Liturgical Calendar Year
Status: Liturgists took part in education opportunity and recommitment to liturgical ministry on Oct. 28.
- **Develop an educational plan to foster an understanding of why we do what we do during Mass for the various seasons.**

Owner: Pam Allen and priests
Timeframe: February 2018
Status: In development
- **Evaluate need for additional Masses based on year-over-year attendance increase on peak holy days. Potentially hold two Ash Wednesday Masses at an alternative venue to allow us to worship together.**

Owner: Rick Hudson and Fr. Shea
Timeframe: November 2017
Status: In progress

Strategy 2: Intentionally build a collaborative parish.

- **Collaborate with Education and Faith Formation Commission to develop and connect with specific groups, both inside and outside our parish.**

Owner: LM Heads in collaboration with Faith Formation Parish Staff.
Timeframe: Q1 2018
Status:
- **Establish path for post-sacrament connection points for our youth, e.g. after First Communion, train as Altar Servers; Confirmation, work with Confirmation Candidates to fulfill their service hours by working in a Liturgical Ministry and keep them engaged after they are confirmed.**

Owner: LM Heads (not Sacristans/Cross bearers) in collaboration with Faith Formation Parish Staff.

Timeframe: Q1 2018

Status:

Strategy 3: Become a more effective organization to support our mission.

- **Evaluate and document descriptions and time commitment for all liturgical ministry roles to be included in updated ministry booklet and have them posted on St. Peter website.**

Owner: Each Liturgy Ministry Head

Status: November/December 2017

- **Create onboarding document for new liturgical ministers to ensure they can use sign-up tool, etc.**

Owner: Chris Churchill and Office Staff Member

Timeframe: November/December 2017

Status:

- **Develop and document Liturgy Commission Chair and Liturgical Ministry Head Succession Plans**

Owners: Rick Hudson and all Liturgy Ministry Heads

Timeframe: December 2017

Status: Draft complete

EDUCATION AND FAITH FORMATION COMMISSION

This Commission develops programming, uses existing programming and creates process and procedures for religious education. The Commission Lead led two meetings with staff and volunteer leaders in 2016-2017 to discuss areas of focus. We're examining where we're struggling and how we're meeting our vision through it. This will help us to think through what we've been doing more deeply.. The Commission meets quarterly.

Current Number of Parishioners Served Annually through our programs: 1,487

Children:

Sacramental

- Baptisms 2016 - 77
- First Reconciliation and Communion - 43
- Pre-Confirmation - 28
- Confirmation – 49

Education

- Catechesis of the Good Shepherd: curriculum is rooted in the Bible, the liturgy of the Church and the educational principles of Maria Montessori. In CGS, we follow the child into the depths of his or her existing relationship with God. 70 children (at our current capacity)

- Whole Family: is offered as an option alongside the Catechesis of the Good Shepherd and homeschool programs. It involves every member of the family in the learning experience, helping parents and children grow in faith together. 14 families (36 children)
- Homeschool Textbook Program: is a unique option for a parent who want to be more directly involved in the formal religious education of their child(ren). 49 children (no capacity issues)
- Teen Summer Service Week: Youth and adult volunteers to put faith in action and give back to the community. Each day our teens focused on the Daily Examen and asked God to show them specific ways He is present to them. 52 youths participated (above capacity)

Adults:

Sacramental

- Rite of Christian Initiation of Adults (RCIA): is to prepare the catechumens and candidates for full initiation into the Catholic Church and a lifelong commitment of sharing in the Paschal mystery. 11 for 2017
- Fall Adult Confirmation - 7 fall 2016, 6 spring 2017, 3 fall 2017

Education and Spirituality

- Bible Study (Sunday mornings) Approx. 20
- Gifts and Talents Workshop (four weeks)
- Ignatian Spirituality
 - Eight-week Directed Individual Retreat (4)
 - Spiritual Exercises (19th Annotation) Approx. 10: The Spiritual Exercises are a compilation of meditations, prayers and contemplative practices developed by St. Ignatius Loyola to help people deepen their relationship with God. Fr. Bowler 7; Fr. John 12 (includes 7 in the group that finished in May 2016 + group that began September 2017)
 - Spiritual Companionship: offered to those already on a spiritual path who desire a deeper relationship with God.
 - Spiritual Direction (15 with Ignatian team: Joe Breen, Julie Glasser, Peg Ruble, Bryna Bozart, Christine Pearson, Bea Staub and Jim Reichard; and 12 with Fr. Bowler and Fr. John)
 - Reimagining the Examen: A four-week small group retreat that explores the Examen prayer which is a prayer of reflection on the events of the day in order to detect God's presence and discern His direction for us.
 - Young Adults: Ignatian-focused, panel discussion, The Examen and ongoing spiritual programming
 - Meeting Christ in Prayer: An eight-week small group program of spiritual renewal fostered by daily guided prayer modeled on the Spiritual Exercises of St. Ignatius of Loyola. (Approx. 69)

Current Status

In support of our Vision, the Catechesis of the Good Shepherd is meeting our “Going Deeper” element of our Vision through education with the children, but it does not go to the next level of Go Forth — connecting participants to service outside our walls — or Stronger Together by supporting community among families. We need to develop tactics around discernment of the future of the program. The structures and processes are roughly defined in the parish office. While collaboration exists for adult education, it is not yet strategic.

- Fr. Bowler, Mark Bartholet, Kevin Crimmins offering Adult/Family Education programming monthly 2017-2018
- Adult bible study occurs at the same time.

- Lenten small group held in the nursery
- Family Mass is offered at the same time, which is a support.
- Parent education in conjunction with CGS is planned monthly for the 2017-2018 school year.
 - One Sunday meeting per month
 - Children and parents attending class together
 - Interactive and intergenerational sessions
 - Concrete ways to bring faith into daily life
 - A direct connection to a child's faith formation

Challenges specific to Catechesis of the Good Shepherd:

- Training for catechists long and sequential, making staffing Level II (1st-3rd grade) and Level III (4th-6th grade) challenging.
- Recruiting families for times other than Sunday mornings has been challenging, limiting the amount of families served.

Challenges specific to the Whole Family experience:

- Insufficient space to meet needs
- Families finding time for faith formation for busy schedules
- Finding or creating programs to meet families where they are

Improving communication to families

- Communication requires connections between people
- Communication of overall programming needs to be intentional
- Improving ways to connect current programs to people and leveraging people already here with new offerings

Strategy 1: Create a culture of discernment.

- **Create programming and family fellowship opportunities for parishioners**

Owner: Kevin Crimmins, Mark Bartholet, Fr. Bowler

Timeframe: October 15, November 5, December 3, January 7, February 4, March 4

Status: Planning several coffee and conversations in Faith Formation for families to promote faith formation programming while children are in class.

- **Evaluate use of Benedict Hall for programming after Family Mass.**

Owner: Fr. Shea and Staff

Timeframe: 2017 - 2018

Status: Ongoing

- **Evaluate which faith formation programs to use going forward.**

Owner: Cathy Chiappetta, Fr. Shea, Lori Fenzl and Mark Bartholet

Timeframe: 2017 - 2018

Status: Focusing on future of Catechesis of the Good Shepherd in terms of catechist training, offerings and sustainability.

- **Benchmark with other churches, including non-Catholic, on ways to engage adults in ministry.**
Owner: Fr. Shea
Timeframe: 2018 - 2019
Status: Plan to focus efforts in 2018 – 2019
- **Determine unmet needs in Faith Formation for Children, i.e. how many are turned away.**
Owner: Cathy Chiappetta
Timeframe: 2017
Status: Evaluating class sizes and scheduling to begin preparing for 2018-2019 faith formation year.

Strategy 2: Intentionally build a collaborative parish.

- **Collaborating with Parish Life, build connections between faith formation groups and others through small community events.**
Owner: Cathy Chiappetta, Lori Fenzl and Sarah Kernodle
Timeframe: 2017 - 2018
Status: Try small community events after the Family Mass to build community. Evaluate how we can offer programming for couples on Sunday mornings. Family Mass kickoff with ice pops was big success. Fellowships and adult parent education offerings planned monthly after Family Mass during CGS in Benedict Hall.
- **Using RCIA sponsors, determine and establish ways to connect RCIA participants to Parish Life after RCIA.**
Owner: Doneata Grisdale
Timeframe: Ongoing
Status: Doneata and Cathy are continuing this effort.

Strategy 3: Become a more effective organization to support our mission

- **Evaluate the possibility and need of an Adult Education Coordinator or ways to designate this to a staff member.**
Owner: Fr. Shea and Fr. Bowler
Timeframe: 2018 - 2019
Status:
- **Create a communication plan to help the parish know what is available for adult faith formation.**
Owner: Joan Guthrie, Suzie Shermer and Barbara Gaddy
Timeframe: 2017 – 2018
Status: Have created printed promotional material and calendar for adult offerings through December 2017. Currently planning January – June 2018 Adult Education programming.

CENTER FOR IGNATIAN SPIRITUALITY

Owners: Fr. Shea and Fr. Bowler with Ignatian Team

The most influential spiritual movement of the modern age is Ignatian spirituality, an approach to the spiritual life based on the insights of St. Ignatius of Loyola. Ignatian spirituality teaches an active attentiveness to God joined with a prompt responsiveness to God, who is ever active in people's lives.

Ignatian spirituality is a spirituality for everyday life. It insists that God is present in our world and active in our lives. It is a pathway to deeper prayer, good decisions guided by keen discernment and an active life of service to others.

Current Status

While we have many programs related to Ignatian Spirituality, under the umbrella of Adult Education, branding these programs under Ignatian Spirituality would give it more substance as a program and lay the foundation for a Center of Spirituality in the Center City of Charlotte.

Strategy 1: Create a culture of discernment.

- **Pastor leads a discernment team to assess the development and administration of a center for Ignatian spirituality at St. Peter for the region, nurturing a faith that does justice.**

Owner: Fr. Shea

Timeframe: Q1 2018

Status:

- **Conduct retreats for Pastoral Council and Finance Council members to deepen their understanding and appreciation of Ignatian spirituality to enhance their leadership.**

Owner: Anne-Marie McLeod and Fr. Bowler

Timeframe: Twice annually to ensure majority can attend.

Status: Oct. 7, 2017 Complete; Next session in planning.

- **Identify and recruit external and internal individuals to train as Spiritual Directors.**

Owner: Fr. Shea, Fr. Bowler

Timeframe: Q2 2018

Status:

Strategy 2: Intentionally build a collaborative parish.

- **Broaden leadership retreat to leaders of ministries and outreach in order to broaden the Ignatian charism.**

Owner: Fr. Bowler

Timeframe: 2018

Status:

Strategy 3: Become a more effective organization to support our mission.

- **Create an annual plan of opportunities for the parish to deepen their relationship with God.**
Owner: Fr. Shea with Ignatian Spirituality Team
Timeframe: Q3 2018
Status:
- **Create and implement a communications plan to market the Center for Spirituality beyond our parish Charlotte.**
Owner: Pastoral Council with Fr. Shea
Timeframe: Q2 - Q3 2018
Status:

PARISH LIFE COMMISSION

Parish Life Commission: This commission identifies and coordinates the social and recreational needs of the parish, maintains an annual calendar of scheduled events and suggests and institutes programs of welcome for new parishioners, as well as programs of concern and support for parishioners. This ministry is concerned with those matters that help to build the parish community into a parish family spirit and improve Christian life in the community of faith. Procedures to increase involvement of parishioners in planned parish activities are instituted by its members.

Current Programs:

Service

- Caring Cooks: Prepare (or purchase) a meal and deliver it to a parish family who has a new baby or is experiencing illness.
- Fellowship: Organize events to foster fellowship for the members of the parish throughout the year during special events.
- Garden of Eat'n: Provide hot dog meal to Charlotte Panthers fans prior before all home games for a donation. Proceeds support various non-profit ministries in Charlotte community. This also increases awareness of St. Peter to the community and visitors.
- Garden Ministry: Nurture the gardens around St. Peter as a place to rest, prayerfully ponder and engage in fellowship while enjoying its splendor.
- Welcome Committee: Provide a warm welcome to new members of St. Peter Church to ensure that all new parishioners are contacted by a fellow parishioner and know how much we appreciate them.

Groups

- Dinner Groups: Parishioners meet for fellowship over a meal organized in six-month cycles.
- Diocesan LGBTQ: Promotes and fosters holistic spirituality grounded in the Catholic and social justice tradition.
- Girl Scouts, Troop 10: Open to all girls from kindergarten through high school
- Hiking Group: Monthly hikes in state and national forests and parks
- Men's Group: Share thoughts on religion, work, home life and everything in between, consider joining us

- Respect Life Rosary Group: Meets the first Sunday of the month in Ignatius Center
- Taize Prayer: Group music and contemplative prayer
- Young Adult Ministry: Young adults in their 20s and 30s who meet for social, spiritual and service activities

Strategy 1: Create a culture of discernment..

- **Develop a timeline of all programs and opportunities available to a parishioner from birth/baptism to death/funeral to determine where there are opportunities to stay more engaged..**

Owner: Sarah Kernodle

Timeframe: January 2018

Status:

- **Evaluate opportunity with young adults (20s and 30s).** We think we have them, but when, where and how often are they coming here? What are their needs? How can we develop them as leaders?

Owner: Sarah Kernodle, Lindsey Westphal, John Walawender, Fr. Bowler

Timeframe: Kick-off meeting held Aug 27, 2017.

Status: Fr. Bowler has established a team of seven young adults who are planning three events for each month — one spiritual, one social and one service. Event planning is now ongoing and owned by the Young Adult Ministry group.

- **Determine appropriate, feasible service focus for the Men's Group to build upon. Look at opportunities to benchmark with similar parish.**

Owner: Sarah Kernodle, Jody Dawson, Robert Price

Timeframe: Q1 2018

Status:

- **Develop overall plan for the post-confirmation (14-15 year olds), gaps for teens and potentially college students.**

- Planning for a fall brainstorming meeting with parents who have expressed interest in helping.

- St. Peter teens and adults participated at ISN Family Teach-In November 2017

Owner: Sarah Kernodle

Timeframe: Q1 2018

Status:

Strategy 2: Intentionally build a collaborative parish.

- **Create communications plan around the mission and spiritual benefits of fellowship through Parish Life — rather than event-specific messaging — to regularly promote participation in Parish Life opportunities.**

Owner: Sarah Kernodle

Timeframe: Q3 2018

Status:

- **Transition Sunday coffee and conversation events to special event support role, assisting with receptions, etc.** (ex: Meet Fr. Bowler, Kennedy Lectures, Recommitment receptions). The need for this stems from space constraints as well as from growing number of competing events almost every Sunday.
Owners: Ted Peters
Timeframe: Fall 2016
Status: COMPLETE
- **Collaborate with Education, Faith Formation Confirmation Team and Parish Staff to brainstorm on social, educational, service events, etc. that could be tied to a Parish Life group.**
Owner: Cathy Chiappetta
Timeframe: ongoing
Status: Most Faith Formation programming, i.e., Confirmation, Pre-Confirmation, 2nd Grade and Whole Family do service / social justice events at St. Peter or off campus. We have calendars for these events, i.e., Room in the Inn, Trees Charlotte, Sandwich Making, White Bread project, Social Justice Day, Souper Bowl, etc.)

Strategy 3: Become a more effective organization to support our mission

- **Develop succession plans for leaders in Parish Life groups.**
Owner: Sarah Kernodle with Pastoral Council
Timeframe: Q1 2018
Status:
- **Create a calendar of annual events to begin longer-term planning that will drive volunteer development.**
Owners: Ted Peters
Timeframe: Fall 2017
Status:

JUSTICE AND OUTREACH COMMISSION

Grounded in the justice of the Gospel, our Justice and Outreach actions advocate for and accompany the marginalized. We have five areas of focus that include the following opportunities to serve:

Current Programs:

Migration & Refugee Committee (MRC) Initiatives

- Refugee Resettlement Mentoring: Accompanies newly settled refugees through the Diocese of Charlotte Catholic Charities Refugee Resettlement Program
- A Tu Lado: Accompanies Central American immigrants to Charlotte who are seeking asylum through the legal process
- Kino Border Initiative: Visits and supports this Jesuit program that provides meals and assistance to migrants at the U.S.-Mexico border

Housing, Shelter, & Food for the Poor

- Room in the Inn: Provides overnight shelter in our church hall for men in partnership with Urban Ministry Center from December through March
- Habitat for Humanity: Accompanies Habitat families and Charlotte Church Partners in building new homes
- Dove's Nest: Serve the needs of women's recovery program and residence
- Homeless Relief Ministry: Assists in setting up apartments for those previously homeless; done in collaboration with St. Vincent and St. Matthew ministries,
- Men's Shelter of Charlotte, Tryon Street: Serves meals to those without a home.
- Loaves and Fishes: Helps unload the Loaves and Fishes delivery truck, stock the shelves and distribute food to the needy at the Pantry at First Presbyterian Church.
- Urban Ministry Soup Kitchen: Serves meals to those without a home.

Educational Ministry

- Druid Hills Title 1 School: Tutors and mentors students and supports Druid Hill staff and parents to create a strong learning community.

Social Justice Ministry – Education/Advocacy/Action

- Justice and Peace Education and Advocacy: Educates the community, discusses social justice issues and then advocates action.
- Race Relations: Partners with Our Lady of Consolation Catholic Church to work on building a trusting and caring relationship with people of all races.

Church at Large

- Jesuit Social Justice Education and Advocacy Initiatives: Through our Jesuit network, addresses social issues by way of education and advocacy initiatives.
- Day of Service: Parish-wide service opportunity provides service to various community agencies on a designated day annually.
- Angel Tree: Engages parishioners during advent to provide Christmas gifts to refugee families and the poor.

Current Status: The current offerings are robust and have been assessed as to the appropriateness to the parish strategic plan.

Strategy 1: Create a culture of discernment.

- **Evaluate all current and proposed ministries to ensure they align to our parish mission and are sustainable.**

Owner: Linda Grippando and Fr. Shea

Timeframe: Ongoing

Status: Ministries are aligned to our parish mission and are sustainable.

Strategy 2: Intentionally build a collaborative parish.

- **Develop opportunities for Ministry leads to present to the parish at large to share details the direct impact we're having.**

Owner: Linda Grippando and Fr. Shea

Timeframe: Q1 2018

Status: Schedule at least one ministry presentation per quarter

Strategy 3: Become a more effective organization to support our mission.

- **Publish new ministry process on parish website to ensure understanding.**

Owner:

Timeframe:

Status:

- **Update all contact info among the ministry leads and also include cell numbers.**

Owner: Joan Guthrie

Timeframe: Ongoing

Status: Located on office drive, sent to Anne-Marie McLeod 7/31/17 **Should be published on website.**

- **Align with Staff to better understand how new members are made aware of what we do to serve outside the parish and what opportunities there are for them.**

Owner: Joan Guthrie and Fr. Jim Shea review Parish Stewardship Handbook

Timeframe: Q1 FY 2017

Status: In progress

- **Create increased awareness of all efforts — what ministries do — and need for leadership and volunteers.**

Owner: Stewardship Committee; See Stewardship Section for Updates

BUILDINGS AND FACILITIES COMMISSION

Those involved in this commission, inspects and inventories all parish properties, including grounds, security, equipment, furnishings and facilities. This commission also reviews and recommends needed additions, repairs, replacements and servicing, to be done, if needed, under a schedule to be submitted with the recommendation for the work. The Commission meets monthly.

Strategy 1: Create a culture of discernment.

- **Use 10-year budgeting tool to forecast capital projects of existing facilities.**

Owner: Maintenance Manager and Business Office Manager with Commission support

Timeframe: In process/on-going

Status: Format and procedure completed

- **Research and hire the appropriate firm(s) to develop a Preventative Maintenance Plan for the campus and rectory, complete a thorough assessment of each building** (building code, building code compliance/structural assessment//HVAC/energy/security/IT/ADA accessibility, etc.) and survey site to locate utility service lines (Ignatius Center, church and administration building); this mapping should include all public easements.
Owner: Maintenance Manager and Commission Supporting
Timeframe: Q1 2018
Status:
- **Maximize our facilities Preventative Maintenance Plan to minimize significant, unplanned budgetary impacts.**
Owner: Maintenance Manager and Commission Supporting
Timeframe: Q1 2018
Status:
- **Track capital and operating costs on a building-by-building basis.**
Owner: Buildings & Facilities Commission with support from Terrie Moran and Fr. Shea
Timeframe: Ongoing
Status: Template completed; process beginning.
- **Conduct annual survey of facility needs of other Commissions.**
Owner: Buildings & Facilities Commission Chair
Timeframe: Spring 2018
Status:

Strategy 2: Intentionally build a collaborative parish..

- **Recruit Buildings & Facilities members who expand the capacity of parish staff.**
Owner: Cooperative effort: Staff, Pastor, FC members
Timeframe: FY 2019
Status: Ahead of schedule -- additional members added through recruitment campaign.
- **Communicate facility constraints to Commission chairs.**
Owner: Buildings & Facilities Commission Chair
Timeframe: Provide quarterly at Pastoral Council meetings.
Status: Complete for October 2017; Next update Q3
- **Develop a roster of professional and trade resources within parish for subject matter experts.**
Owner: Staff with Buildings & Facilities Commission support
Timeframe: Spring 2018
Status:

Strategy 3: Become a more effective organization to support our mission.

- **Outline Buildings & Facilities Commission purpose, scope and organizational structure.**

Owner: Buildings & Facilities Commission Chair with Pastor

Timeframe: Q1 2018

Status:

- **Provide visibility to Buildings & Facilities Commission activities to the parish quarterly.**

Owner: Buildings & Facilities Commission

Timeframe: Launch Spring 2018

Status:

FINANCE COUNCIL

The Finance Council assists the pastor in the administration of parish temporal matters. These guidelines are designed to aid pastors and Finance Council members in the effective functioning of a Finance Council, which is to support the pastor in his stewardship of parish resources while being accountable to the parish and the diocesan bishop. The Finance Council meets at least 10 times a year

An active, well-formed Parish Finance Council is a key element in promoting the financial health of a parish, assuring accountability and assisting the pastor with his temporal responsibilities and to support the Strategic Plan and Mission of St Peter.

Current Status

As stated in the introduction, the parish exhibited considerable growth in households during the years 2011 through 2015, growing from 1,067 to 1,390. That growth tapered off in 2015. Commensurate with that growth, operating expenses grew from approximately \$974,000 in the year-ending June 30, 2012 to \$1,291,000 at fiscal year-end 2017. It is expected that the current year will have expenses slightly higher than that. Revenue growth during the comparable time period 2012 through 2017 was \$546,000, resulting in revenues of \$1,554,000 last fiscal year. The first two months of fiscal year 2018, revenue was \$251,000 which is slightly ahead of Budget.

As of September 2017, our operating reserve is 3.7 months up from 3.4 months at the beginning of the fiscal year. In addition we have almost \$993,000 of designated and restricted accounts.

The parish develops a yearly budget which is monitored on a monthly basis by the Finance Council. Online giving has been encouraged in the parish to smooth out the monthly donations and provide consistency in giving. Currently, online giving accounts for 45% of our Sunday Offertory.

A Development Committee was created in 2014 to focus on changing the culture of giving within the parish. As a result, in addition to promoting online giving, a Stewardship of Treasure program was started at the end of 2016. That program asks parishioners to commit in writing to their gifts in the coming year. There was a favorable response from our parishioners with 32% participating.

Strategy 1: Create a culture of discernment.

- **Continue to plan and monitor the financial needs of the parish including developing an annual operating budget and reviewing a multi-year capital expense projection**, which is developed by the Buildings & Facilities Commission and staff. In addition, the other Commissions and ministries

develop budgets, which are reviewed by Finance Council and upon approval are integrated into the annual budget.

Owner: Buildings & Facilities Commission and Staff

Timeframe: Ongoing

Status: Current

- **Continue to review staff salary levels through compensation studies, to ensure that all employees are paid on a fair and consistent basis.**

Owner: Finance Council Member

Timeframe: Every 2 to 3 years

Status: Complete for June 2017

Strategy 2: Intentionally build a collaborative parish.

- **Continue informing the parishioners with the “State of the Parish,” which is an annual report that covers an overall picture of the parish.** In addition to year-end results, it also lays out the current budget to apprise parishioners of the needs of the parish and where funds are allocated. The bulletin, distributed at church, via email and online, is used to update parishioners on the offertory as well as special assessments throughout the year.

Owner: Stewardship Committee in collaboration with Finance Council Chair and Staff

Timeframe: Annually in August

Status: See [Stewardship Section](#) for updates.

- **Increase offertory reporting on an individual basis from annual to quarterly so parishioners stay aware of their giving year-to-date.** This is sent to all parishioners to remind all parishioners of their level of year-to-date giving .

Owner: Terrie Morin

Timeframe: Q4, 2017

Status: Complete

- **Continue to thank parishioners for their offertory as well as other collections through letters and personal notes from the pastor to express the gratitude of the parish.**

Owner: Fr. Shea

Timeframe: Ongoing

Status: Current

Strategy 3: Become a more effective organization to support our mission

- **Develop a methodology as to what portion of excess operating results should be designated towards future needs of the parish in conjunction with the Strategic Plan and facility needs.**

Targeted operating reserves are currently 3 to 6 months.

Owner: Finance Council, Chris Brown, Terrie Morin

Timeframe: July 2017

Status: On a Quarterly basis, operating funds in excess of 3.5 months operating reserve will be allocated to the Campus Restoration Account.

- **Update our online giving platform to include not only collections, but also registration for Faith Formation and Special Events to simplify the process for both parishioners and office staff.**

Owner: Terrie Morin
Timeframe: Spring 2018
Status: Vendor evaluation on schedule

STEWARDSHIP COMMITTEE

The Stewardship Committee exists to promote stewardship as a way of life at St. Peter. Recognizing that stewardship is our response to Jesus' call to discipleship, the committee is responsible for all aspects of the annual stewardship efforts of time, talent and treasure and the ongoing awareness of stewardship as a way of life. We do this by helping parishioners discern, understand and respond to their individual call to stewardship. The Committee is scheduled to meet monthly.

Current Status

The Stewardship Committee was re-established in 2017 combining time and talent with the development program that focused on treasure. Marketing materials and annual plans and formats were developed in the first year as each aspect of time, talent and treasure was addressed with the parish. They are reassessed and adjusted after each event.

Strategy 1: Create a culture of discernment.

- **Develop updated messaging plan to educate parishioners about Stewardship — why each component is important and ties to a more enriched relationship with God.**

Owner: Stewardship Committee and staff

Timeframe: April through June

Status: Ongoing in parish bulletin

Strategy 2: Intentionally build a collaborative parish.

- **Create procedure for annual Time and Talent Stewardship Fair.**

Owner: Stewardship Committee

Timeframe: Hold annually in spring in conjunction with Pentecost if possible.

Status: Completed

- **Continue informing the parishioners with the “State of the Parish,” which is an annual report that covers an overall picture of the parish.** In addition to year-end results, it also lays out the current budget to apprise parishioners of the needs of the parish and where funds are allocated. The bulletin, distributed at church, via email and online, is used to update parishioners on the offertory as well as special assessments throughout the year.

Owner: Stewardship Committee

Timeframe: Annually in August

Status: Completed for 2017

- **Support the parish ministries by helping them promote their activities and encourage new members through Stewardship Guide**

Owner: Stewardship Committee and staff (Joan Guthrie)

Timeframe: See Communication for updates

Status: Ongoing

Strategy 3: Become a more effective organization to support our mission

- **Create a communication plan to explain the Stewardship Committee role to foster stewardship activities and opportunities to serve.**
Owner: Stewardship Committee and staff
Timeframe: Ongoing
Status:
- **Create a structure for the Stewardship Annual plan for time, talent and treasure so that communications and events take other parish activities and seasons into account.**
Owner: Stewardship Committee in collaboration with Staff and Finance Council (for treasure)
Timeframe: Annually
Status: Completed
- **In cooperation with the Finance Council and the parish Finance Office the stewardship committee will develop policies for promoting stewardship of treasure during the annual renewal time and a debriefing after the process.**
Owner: Barbara Gaddy and Terrie Morin
Timeframe: Annually in October through December
Status: Completed
- **In cooperation with the coordinator of data and compliance the stewardship committee will develop policies for gathering data and how it is shared with ministries.**
Owner: Barbara Gaddy and Staff
Timeframe: Spring 2017
Status: Completed
- **Institute best practices for Stewardship Committee in order to keep the Councils apprised of Stewardship plans.**
Owner: Barbara Gaddy
Timeframe: Ongoing
Status: Completed

COMMUNICATIONS

Communications is responsible for internal and external communications to support ministries and parishioners in planning and implementing programs and events and for establishing and protecting the parish brand within the parish and in the community.

Strategy 1: Create a culture of discernment.

- **Staff develops an annual parish census and/or survey, with input from Pastoral Council, Finance Council and Stewardship Committee, to gather concrete data and assess needs.**
 - Review past surveys for development and present draft to councils and committee for feedback.

Owner: Joan Guthrie, Pastoral Council, Strategic Planning
Timeframe: Launch survey FY18 Q2
Status:

Strategy 2: Intentionally build a collaborative parish.

- **Review social media platforms, including new template for website, identify audience, purpose, length of content, frequency and analytics for each platform.**

Owner: Joan Guthrie
Timeframe: FY 18 Q2 & Q3
Status:

Strategy 3: Become a more effective organization to support our mission

- **Review Communications policies and procedures on providing written and electronic documents to parishioners.**

Owner: Joan Guthrie
Timeframe: FY 18 Q1
Status: In progress

- **Communications aligns with Commissions to inform parishioners of service opportunities**

Owner: Joan Guthrie and Fr. Jim Shea review Parish Stewardship Guide
Timeframe: Q1 FY 2017
Status: In progress

OVERALL PARISH TACTICS

Strategy 1: Create a culture of discernment.

- **Increase awareness of Ignatian Spirituality and become a resource to the Center City of Charlotte.**

Owner: See [Center for Ignatian Spirituality](#)

- **Engage an architect for** a programming/design charrette to engage parish leadership and Charlotte Diocese Director of Properties and Risk Management Anthony Morlando in a collaborative idea forum to identify needs and constraints, and uncover potential solutions

Owner: Patrick Mumford
Timeframe: November-December 2017
Status:

- **Develop campus master plan to support parish program needs.**

Owner: Fr. Shea, Pastoral Council
Timeframe: Launch Spring 2018
Status:

- **Collaborate with staff to develop an annual parish census and/or survey, with input from Pastoral Council, Finance Council and Stewardship Committee, to gather concrete data and assess needs and develop plans to address concerns**

Owner: Joan Guthrie, Pastoral Council, Strategic Planning Committee

Timeframe: See [Communications](#)

Strategy 2: Intentionally build a collaborative parish.

- **Monitor, assess and act upon the tactics developed by the Commissions to ensure the Strategic Plan is effective in building collaboration.**

Owner: Fr. Shea, Pastoral Council

Timeframe: Ongoing

Status:

Strategy 3: Become a more effective organization to support our mission

- **Evaluate and as necessary create Office Policy and Procedure manual to ensure that it is relevant and up to date.**

Owner: Staff

Timeframe: Mid-year 2018

Status:

STRATEGIC PLAN NEXT STEPS

The Pastoral Council will collectively be responsible for implementing and updating the Pastoral Strategic Plan. As part of an annual planning process, parish staff and commission members will develop annual implementation plans based on the tactics. The implementation plans will identify:

- a detailed description of the work needed to be accomplished;
- the time frame within the year for accomplishing the goal (or a portion of the goal);
- resources needed for accomplishment, including time, staff, volunteers and operating and/or capital funds; and
- source of operating and/or capital funds.

These plans will be shared at the annual Parish Pastoral Council retreat. Based on discussions at the retreat, an Annual Parish Plan for the year will be established and then published and shared with the parish. The resources needed to implement the goals will be incorporated into the parish's annual budgets, and contingency plans will be developed to deal with lack of sufficient funds or other needed resources.

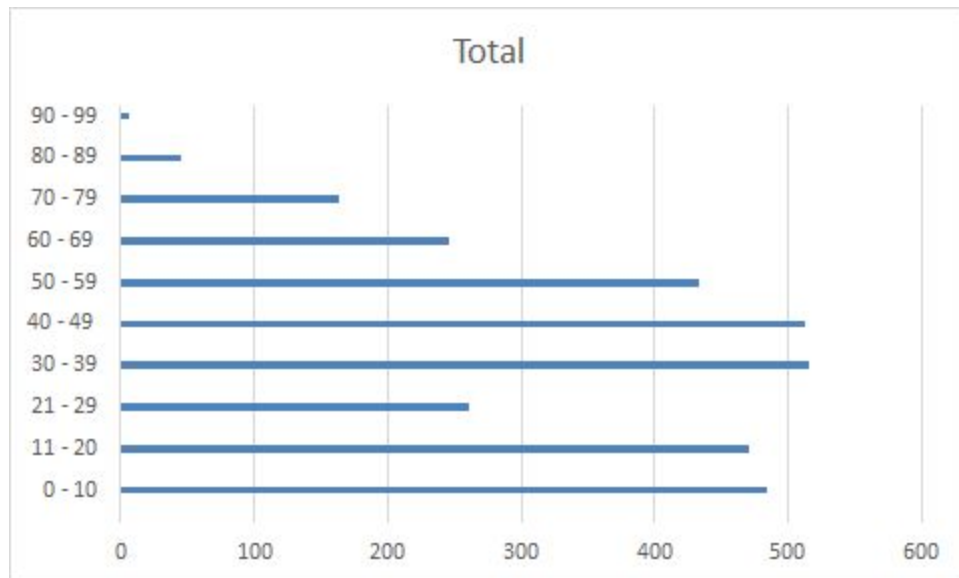
Through the year, the Parish Pastoral Council will use the Annual Parish Plan as a guide for its activities. Once the plan, including target deadlines, is approved, each commission (including the Parish Pastoral Council, the Finance Council and Parish Staff?) will prepare a quarterly update on its activities including work done to implement the goals and objectives from the Pastoral Strategic Plan. This report will be provided to the Pastor at the Pastoral Council meetings. The annual report will include:

- progress against the tactics
- analysis of success and failures to identify ways for better planning the following year
- expectations for the coming fiscal year

APPENDIX

PARISH DEMOGRAPHICS

FROM ST. PETER DATABASE



Total parishioners 3,138

COMMITTEES, COUNCILS & COMMISSIONS

These are the members of parish groups who are working to carry out the **Pastoral Strategic Plan**.

Staff Members

Rev. James Shea, SJ, Pastor
John Michalowski, SJ, Parochial Vicar
Jim Bowler, SJ, Pastoral Minister
Jim Bozik, Deacon
Rebekah Thompson, Executive Assistant
Ted Hughes, Facilities Manager
Cathy Chiappetta, Faith Formation Director
Lori Fenzl, Faith Formation Admin. Assistant
Terrie Morin, Finance Office
Bill Rainey, Music Director
Joan Guthrie, Communications & Events
Celia Denlea, Communications/Events Admin. Assistant
Mark Bartholet, Catechesis of the Good Shepherd Coordinator

Pastoral Council

Fr. James Shea, SJ, Pastor
Fr. John Michalowski, SJ, Parochial Vicar
Jim Bozik, Deacon
Anne-Marie McLeod, Chair
Patrick Mumford, Immediate Past Chair
Mike Holland, Vice Chair
Scott Stengel, Secretary
Chris Brown, Finance Council Chair
Rick Hudson, Liturgy & Worship Commission
David Schilli, Education & Formation Commission
Sarah Kernodle, Parish Life Commission
Linda Grippando, Social Justice & Community Outreach Commission
Paul Fenzl, Buildings & Facilities Commission
Kathy Leggio, At-large Member
Joe Breen, At-large Member
John Walawender, Young Adult Ministry Liaison

Strategic Planning Committee

Fr. James Shea, SJ, Pastor
Anne-Marie McLeod, Advisor
Michelle Maidt, Lead
Joe Breen
Betsy Gatewood
Bill Murphy
Suzie Shermer

Finance Council

Chris Brown, Chair
Matt Springman, Vice Chair
Conor Byrne
Ellyn Korzun
Chris Loeb
Layne McGuire
Geoff Owen
Carlin Taylor

Commissions

Liturgy and Worship Commission

Commission Lead: Rick Hudson

Leads

Altar Servers: Jeremy Needham
Children's Choir: Alicia Long
Eucharistic Ministers: Chris Churchill
Eucharistic Ministers for the Sick and Homebound: Joe Breen
Lectors: Pam Allen
Linens: Beth Cieri
Liturgical Environment: Daphne Dwyer
Liturgical Servers scheduling: Chris Churchill
Sacristans and Cross bearers: Kathy Karmondy
Ushers: Layne McGuire

Weekday Sacristans: John Gallagher
Music Director: Bill Rainey
At Large: Lori Fenzl

Parish Life Commission

Sarah Kernodle, Lead

Education and Formation Commission

David Schilli, Lead

Social Justice and Community Outreach Commission

Linda Jean Maka Grippando, Lead

Buildings and Facilities Commission

Brenda Eckmair, Chair

Stewardship Committee

Barbara Gaddy, Chair

Glen McLaughlin

Michelle Maitt

James Reichard

Iggy Del Valle

Austin Haba

HISTORY OF ST PETER

Rev. Jeremiah J. O'Connell, a circuit riding priest from Columbia, S.C. and the Diocese of Charleston, spent two days on a stagecoach traveling to Charlotte to lay the cornerstone for the first Saint Peter's church on March 25, 1851. He was responsible for the nurturing of Catholics in the area. Fr. Jeremiah served the areas in North and South Carolina for over 25 years. He helped secure the land for Mary Help, now Belmont Abbey, and lived out his final years there.

The cost for two acres of land and St. Peter's Church was \$1,000.00. Much of the money given was by non-Catholics who liked Fr. Jeremiah when he preached at the Episcopal Church. In the area of North Carolina and South Carolina from Columbia to "Warm Springs," there were approximately 100 Catholics -- "Poor, virtuous, zealous." They were served by various priests beginning in 1824, including two brothers of Fr. O'Connell. At the dedication of St. Peter in 1852, Bishop Reynolds of the Diocese of Charleston spoke of the "zeal and piety of the few Catholics" in building the church.

Charlotte had a population of 1,000 and was said to be "falling into decay and miserable existence and the only signs of life were during Court week, circus time and on the 4th of July." The people were looking forward to the railroad to Columbia being finished in early 1852 and as a result the city was "putting on its best" to welcome the Iron Horse. An explosion at a munitions factory during the Civil War caused a crack in one of the walls of the church, and in 1869 the people began to raise money for a new church.

In 1878, one of the benefactors whose presence is still felt at St. Peter's came to town. His name was Dennis O'Donoghue and he was in charge of the new Weather Bureau. He was also a physician and was well known in the Charlotte area.

In 1888, St. Mary's Seminary, a day and boarding school began on the St. Peter's property. Mother Catherine Price, sister of the one of the founders of the Maryknoll Fathers, Rev. Frederick Price, was the Superior. The boarding school was discontinued in 1892 when Sacred Heart Academy in Belmont was established.

In 1892 the Benedictine Order from Belmont Abbey began their service to St. Peter's. Fr. Francis Meyer came to be pastor and the present church was built a short time later. It measures 100 x 40 feet. In 1893 the cornerstone was laid by Bishop Leo Haid of Belmont Abbey who also donated a window for the church. The structure is of Victorian gothic style and was said to have a "steel" ceiling and American stained glass windows.

Besides Dr. O'Donoghue there were other benefactors including Sr. Catherine Drexel from Philadelphia. She had founded Sisters of the Blessed Sacrament for Black and Native American peoples. Her gift to the parish was contingent on a promise of pews reserved for the "colored" people, in fulfillment of her order's mission.

The old "parish house" behind the church became the first Mercy Hospital, founded by the Sisters of Mercy. This hospital had 25 beds. It remained at this location until 1915 when the hospital relocated to Vail Avenue. The present building was completed in 1922 as a convent (pictured left). Renovations improved the structure and functionality in order for it to serve today as the church office. The Benedictine priests remained with St. Peter's until 1960. At that time Diocesan priests began serving St. Peter. In 1970 the parish became a "church of convenience" since the population of the area had diminished and other Catholic Churches were in place. St. Patrick's was begun as a mission of St. Peter's in 1939.

The parish was again established in 1986 when the Maryland Province Jesuits led by Rev. John C. Haughey, S.J., came to serve the Diocese of Charlotte. Since its rebirth in 1986, the parish has grown to over 1,300 registered families. The people of St. Peter are strongly committed to the poor in this area, especially in the shelter of homeless men. There is also a commitment to the business community through the celebration of weekday Mass at 12:10 p.m. Parish outreach programs are many, including Urban Ministry, Room in the Inn, Druid Hills Academy Partnership, McCreesh Place, and various ministries that serve our community.

In 1986, artist Ben Long was commissioned to paint a Fresco. The fresco spanned the entire back wall of the church, and the triptych design portrayed the Agony in the Garden, the resurrected Christ, and Pentecost. After the renovation and restoration of the Church and completion of the Fresco, St. Peter's was rededicated in 1989.

On the 20th of February, 2002, shortly after 11:00 am, one third of the central part of the fresco fell to the floor in a million pieces, and the left and right segments of the fresco remained partly attached to the wall and partly hanging free. After months of searching, St. Peter found a craftsman willing to save the parts of the fresco that remained by removing them from the wall. Through this tedious process we were able to save eighteen pieces of the original fresco which now hang in various areas of our campus.

In the spring of 2004, two years after the fall of Ben Long's fresco, we began the search for an artist to provide our sanctuary with a new work to inspire and focus the prayer of our community. We chose John Collier of Plano, Texas, the artist responsible for the Catholic Memorial at Ground Zero in Manhattan, as the one to create our art work. It was not, however, until 2007 that the work as conceived by John Collier began to become a reality in our sanctuary.

John Collier not only painted the central painting and sculpted the bas-reliefs; he also designed the frame in which the painting is set, and the background of oak panels behind the painting, as well as the knee wall which supports the painting and tabernacle. The tabernacle and the woodwork framing the bas-reliefs are also the work of this artist.

Mr. Collier is one of America's most honored Artists. Each year the magazine Faith & Form, in conjunction with IFRAA, the Interfaith Forum on Religion, Art and Architecture, present awards for outstanding contributions in faith-based art. In four of seven recent years, John Collier won awards from this prestigious group, namely for his sculptures of the "Annunciation," "St. Mary Magdalene," his "Crucifix" and for his "Mary at the Wedding of Cana." John has also won numerous awards from Ministry & Liturgy magazine including three in 2008.

HIGHLIGHTS OF KEY EVENTS AND PREVIOUS PLANNING EVENTS

1986 Maryland Province Jesuits led by Rev. John C. Haughey, S.J., came to serve the Diocese of Charlotte.

2009 Fr. Patrick Earl, SJ, installed as pastor. The parish grew to more than 1,700 households, with the addition of many young adults now in the Charlotte Uptown area. Families engaged in several innovative faith formation programs including Whole Family and Home School catechesis.

Under Fr. Pat's guidance, the following mission and vision statements were created:

Praise. Reverence. Serve.

We welcome everyone desiring to be a disciple of Jesus. As disciples, we praise God in the liturgy and the Word, we reverence God by celebrating the sacraments, and we serve God by reaching out to and advocating for all, especially the neediest.

2014 Announcement that Fr. Pat would leave St. Peter

2015 January 31: Fr. Ed Quinnan S.J. from the Maryland Province sent to St. Peter to lead a discussion among staff and volunteer leadership, including most ministry leads. We gathered for

a half-day session in an atmosphere of prayer and reflection to share consolations and desolations related to the current state of the parish.

March 21: External facilitator holds leadership discussion with tactical outputs.

June 15: Fr. James Shea, SJ, installed as pastor. Prior to coming to St. Peter, Fr. Shea served as the Provincial for the Maryland Province of the Society of Jesus for six years, as pastor of Holy Trinity Church in Washington, D.C., and at St. Rita Church in Dallas. He provided pastoral care and directed programs of clinical pastoral education at St. Louis University Medical Center and Georgetown University Medical Center.

October 17: Fr. Jim Conroy facilitates Leadership Retreat, producing several top focus areas (below). These have continued to be dominant themes throughout subsequent leadership meetings and in our strategic planning.

Ministry of the Word — Faith formation for children/youth/adults

Greater coordination, clearer focus among staff, Ignatian group, .e.g. small groups, GIFT, Ignatian Programming.

Enhance Sacramental life of Parish — Greater opportunities for Sacrament of the Sick, Sacrament of Reconciliation and Eucharistic ministry to sick and homebound.

Enhance the Ignatian Charism of St. Peter — Development of Ignatian Group, creating culture of discernment, Prayer/Discernment/Examen, opportunities for making Spiritual Exercises, Ignatian formation for parish leaders, connection with Jesuit apostolates: St. Therese, Jesuit Vocation Promotion, [Jesuit Volunteer Corps](#) (JVC), [Ignatian Volunteer Corps](#) (IVC), [Jesuit Refugee Service](#) (JRS), Ignatian Solidarity Network (ISN).

Engaging the wider community — Collaboration with Diocesan programs and ecumenical efforts, other Catholic parishes, national and international Jesuit initiatives and the Charlotte business community.

Lay Ministries — Prioritization through a discernment model. Develop a reflective component. Incorporate theological reflection and faith sharing on ministry

Financial Stewardship — Change the culture of giving. Make it more robust. Achieve greater success with diocesan assessments. Launch pledge program.

Structures of Parish Leadership — Development of a discernment model for our way of proceeding, clarity of roles and responsibilities, coordination among clergy, staff, councils and committees.

2016 Pastoral Council instated. This more comprehensive body replaced separate Parish and Stewardship Councils and is more closely aligned with diocese guidelines for parishes. It includes Commission Leads for Liturgy and Worship, Parish Life, Education and Faith Formation, Social Justice and Community Outreach, and Buildings and Facilities.

August 18: First meeting of the Pastoral Council

August 20: Pastoral Council led a half-day Ministry Leadership session to discuss top focus areas previously identified and to open the floor to additional concerns. Ministries had the opportunity to participate in breakout sessions led by their new Commission Leads.

September 7: First meeting of the Strategic Planning Committee

Fr. Shea, Pat Mumford (Chair, Pastoral Council), Anne-Marie McLeod (Vice Chair), Michelle Maidt (Finance Council Chair), Bob Macpherson (Commission Chair, Social Justice and Community Outreach) and Dan Roth (At-large Member, Pastoral Council)

Subsequent meetings held: Sept. 26, Oct. 14, Dec. 3 (half-day session)

OVERVIEW OF THE STRATEGIC PLANNING PROCESS

Setting the Stage in our Hearts

Throughout the strategic planning process, Fr. Shea shared readings and insights to guide our efforts.

“I hope that all communities will devote the necessary effort to advancing along the path of pastoral and missionary conversion which cannot leave things as they presently are.” Joy of the Gospel #25

“The parish is the presence of the Church in a given territory, an environment for hearing God’s word, for growth in the Christian life, for dialogue, proclamation, charitable outreach, worship and celebration. In all its activities the parish encourages and trains its members to be evangelizers. It is a community of communities, a sanctuary where the thirsty come to drink in the midst of their journey, and a center of constant missionary outreach.” #28

“With its universal and indispensable provisions, the program of the Gospel must continue to take root, as it has always done, in the life of the Church everywhere. It is in the local churches that the specific features of a detailed pastoral plan can be identified — goals and methods, formation and enrichment of the people involved, the search for the necessary resources — which will enable the proclamation of Christ to reach people, mold communities, and have a deep and incisive influence in bringing Gospel values to bear in society and culture.”

Source: Novo Millennio Ineunte of His Holiness John Paul II, No. 29 Jan. 6, 2001

SUMMARY OF STRENGTHS, WEAKNESSES, OPPORTUNITIES AND CHALLENGES

This summary is from work begun the Strategic Planning Committee in September 2016 and continued through discussions in Pastoral Council meetings and at the Feb. 18, 2017 Strategic Planning Leadership Team meeting.

SWOT

To ensure an accurate SWOT analysis, the SPC facilitator provided these guiding principles:

- Become a “Fair Witness.” Be accurate and impartial in assessment.
- Pull back the camera. Look at the larger picture to gain perspective.
- Sort for impact to ensure we’re looking at the big picture and not getting distracted by less relevant details.

The SPC spent two working sessions providing candid feedback on our current state and documenting a thorough analysis of the parish's strengths, weaknesses, opportunities and threats (SWOT). The SPC included inputs from previous, more ad-hoc strategic planning discussions in 2015 and 2016.

The SPC shared the SWOT with the Pastoral Council and the Finance Council for additional input. The SWOT findings were confirmed first by the Parish Council in subsequent monthly meetings and then at the Feb. 18, 2017 Strategic Planning session with 45 parish leaders.

STRENGTHS

- We have great pride in being a Jesuit parish.
- Pastoral leadership — a year ago one priest saying Mass, now three engaging priests
- Current staff — devoted and Jesuit-based in thinking/actions — they are receptive to their evolving roles/responsibilities.
- The dynamic at St. Peter is a spirituality of service.
- Pretty good at the core mission.
- There is already a feeling of inclusiveness and joyfulness in general at St. Peter.
- Thriving as a parish in numbers and growing in diversity.
- We're still growing.

WEAKNESSES

- Many parishioners don't understand what it means to be a Jesuit parish and don't know much about Jesuit spirituality and how to develop it
- Spirituality hasn't permeated in a way that makes us a shared community.
- We're tight on space and this impacts the quality of the Mass experience and parish activities.
- Silos — Groups seem to be all about their own work.
- No succession planning — need to involve others and be ready to pass on.
- The numbers are being fed, but don't really know why. They don't relate that to a Jesuit experience.
- Many Catholics are inwardly focused. They have a private nature to their faith and are not comfortable with evangelization.
- Pedestal effect — getting comfortable and complacent in our reputation and what we do today so that we do strive for more.

OPPORTUNITIES

- Foster a larger lay formation that is less dependent on clergy.
- Additional lay could transition to be on staff. (We have done this in the past with good success.)
- Possibility of greater collaboration with entities outside our parish. e.g., The Charlotte Diocese, The Jesuit Province, The Charlotte Center City, Jesuit Refugee Service and the Ignatian Solidarity Network
- A devout Catholic will still come to Mass for the Eucharist.
- Pope Francis is a beacon of our faith and great PR officer that draws many into our parish.

THREATS

- Supply/demand for Jesuit priests
- Declining vocations — statistics and trending says we may have only one priest again.
- Status as Jesuit parish can be taken away.
- Protestant and non-denominational Christian churches create full-life orientation experience, drawing Catholics away from the Church.

Following a prayerful and reflective SWOT analysis of our current state, the SPC drafted a vision for the future of St. Peter — what we would like to look and feel like in 2020 and beyond. Each SPC member crafted statements around all aspects of the vision they saw for St. Peter. The output was shared with the larger group, and themes emerged. These also reflected what we've been hearing in previous leadership sessions. Our hearts and minds are moving in similar directions as we seek the answers.

Our vision was created not only with well-articulated statements about the future, but also with monikers that act as memory devices. As the work begins among all groups at St. Peter, these will all become part of the parish lexicon, just as one already has: Go Deeper is a frequent message from the pulpit.

OUR VISION

We are a joyful, supportive and engaged parish community.

Stronger Together

- The entire parish community feels connected — Inclusive parish
 - Community of people who support each other in life's journey to realize each person's potential (true self)
 - Community of people filled with joy
 - Community of people who live freely and without fear, knowing the Joy of the Gospel.
-

All are grounded in an Ignatian Foundation.

Go Deeper

- Deeply grounded in Ignatian spirituality
 - All of St. Peter's outreach (leadership) has a core understanding of Ignatian spirituality
 - Leadership is grounded in Ignatian teachings
 - Participation in Jesuit opportunities
 - More robust Ignatian spirituality experiences/sessions
 - Connection of Ignatian spirituality to thought process of leadership
 - Ignatian-based leadership functions through discernment
 - Social justice is a key component of youth education throughout the parish
 - Liturgy is nourishing, participative and leads to service
 - Parishioners "walk the walk" of Ignatian spirituality rather than "talking the talk"
 - Strong lay leadership, with deep appreciation for Ignatian spirituality and broadening our ability to reach people
-

Through our Ignatian spirituality, we lead and serve others.

Go Forth

- Pride in being associated with St. Peter
 - Parish of choice
 - Well-respected community partner
 - St. Peter is a recognized center for all Christian engagements in Ignatian spirituality
 - St. Peter is a principle focus in Charlotte for the resolution of justice issues
-

Our parish structure is well-organized and resourced to be responsive and support our mission.

Thriving

Foundation

- Clarity of lay roles and responsibilities
- Ministries are focused and successful
- Broader participation in ministry by parishioners
- Physical plant facilities are put to best use
- Resources, financial and personnel are allocated according to shared priorities

Sharing the Mission, Vision and Strategies

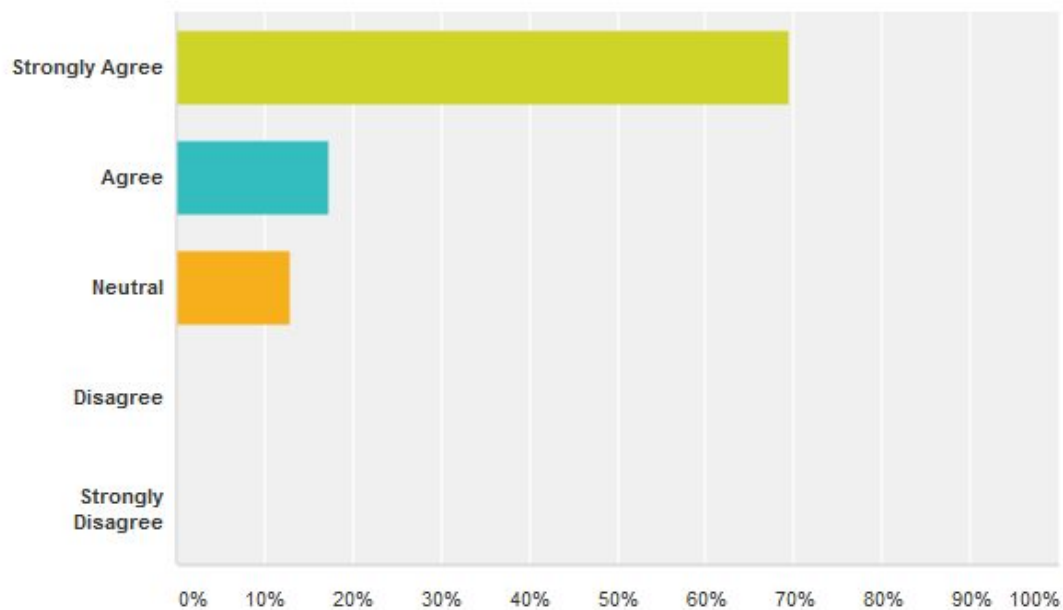
In a half-day session on Feb. 18, 2017, the SPC shared its work with the larger parish leadership team, which represented all Commissions. There were 45 members in attendance, including staff and clergy. All were invited to give feedback and then worked in breakout sessions by commissions to craft tactics to support the strategies. Following the session, participants received a survey to gauge the event's effectiveness and the overall understanding and buy in of the mission, vision and strategies.

After reviewing and incorporating the inputs from the Commissions, as well as that of the Pastoral Council, the SPC drafted this Pastoral Strategic Plan. We gratefully acknowledge the participation of everyone involved in this important work of the parish.

Feb. 18, 2017 Strategic Planning Leadership Meeting Post-event Survey Results

The Feb. 18 St. Peter Leadership Meeting was a valuable use of my time.

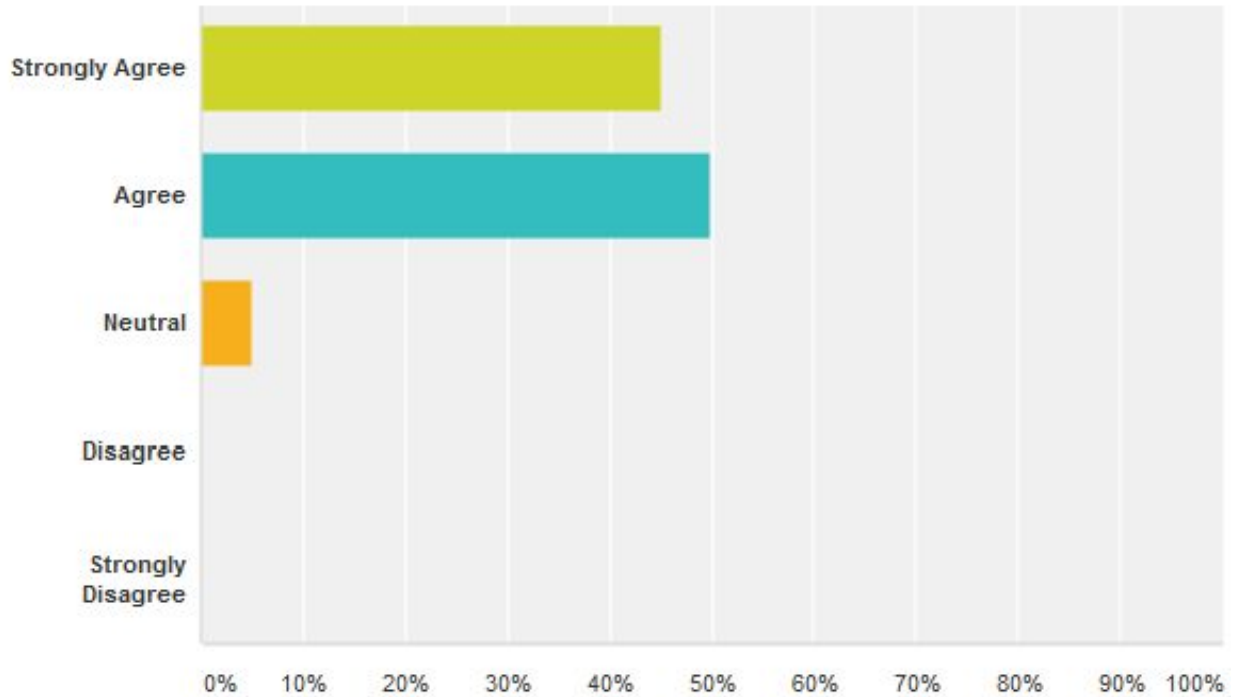
Answered: 23 Skipped: 1



Answer Choices	Responses	
Strongly Agree	69.57%	16
Agree	17.39%	4
Neutral	13.04%	3
Disagree	0.00%	0
Strongly Disagree	0.00%	0
Total	23	

I have a better understanding of the strategic planning process being led by the Strategic Planning Committee and the wider Pastoral Council.

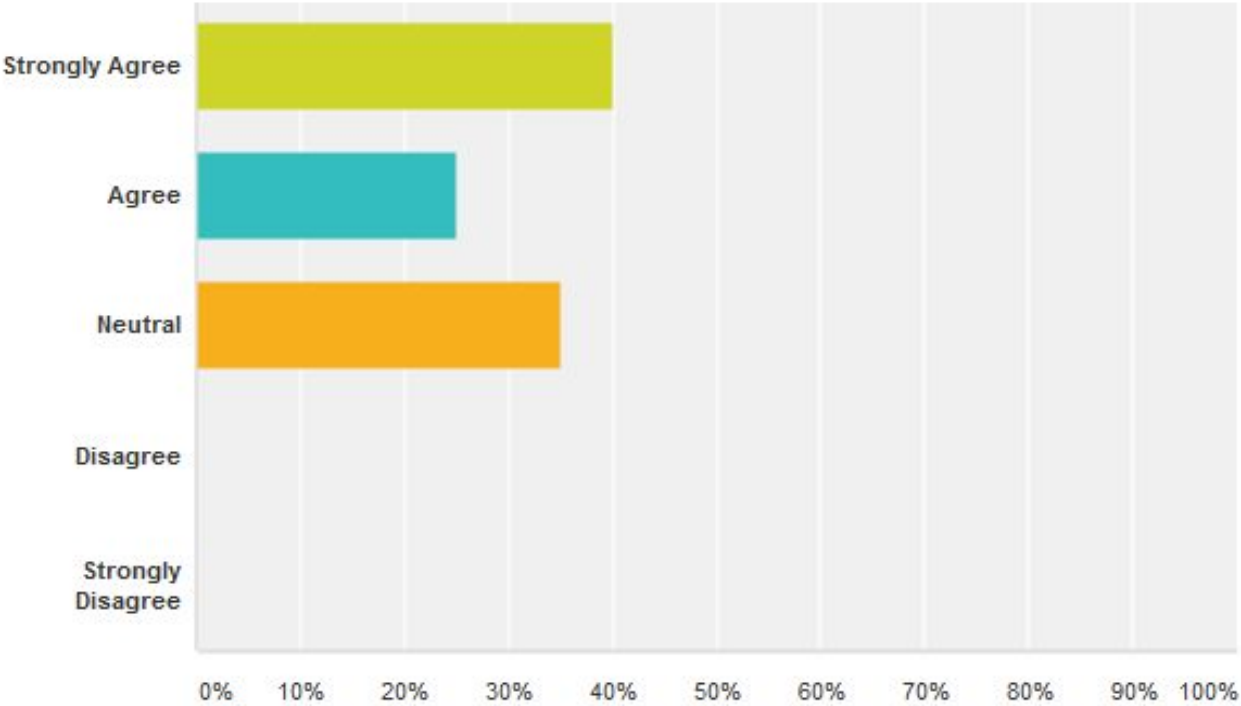
Answered: 20 Skipped: 4



Answer Choices	Responses	
Strongly Agree	45.00%	9
Agree	50.00%	10
Neutral	5.00%	1
Disagree	0.00%	0
Strongly Disagree	0.00%	0
Total		20

I understand how the tactics will support our strategies and the basic criteria to ensure they are good tactics - feasible, impactful and timely (FIT)

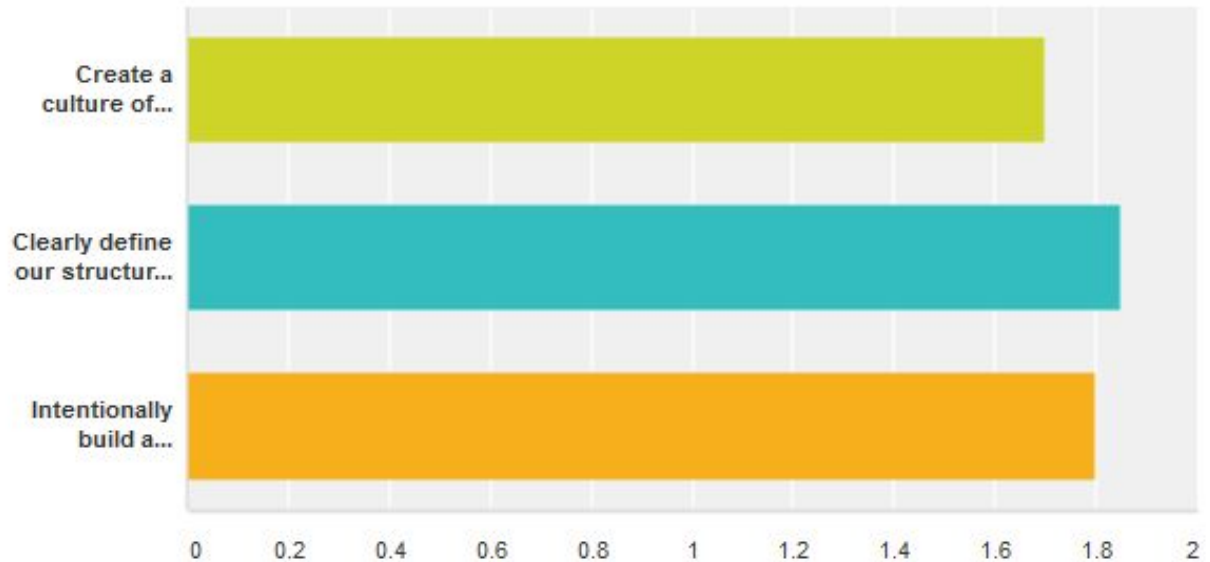
Answered: 20 Skipped: 4



Answer Choices	Responses	
Strongly Agree	40.00%	8
Agree	25.00%	5
Neutral	35.00%	7
Disagree	0.00%	0
Strongly Disagree	0.00%	0
Total		20

I understand how each of the three strategies will help get us to our hoped-for future — our vision.

Answered: 20 Skipped: 4



	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Total	Weighted Average
▼ Create a culture of discernment	40.00% 8	50.00% 10	10.00% 2	0.00% 0	0.00% 0	20	1.70
▼ Clearly define our structure and processes.	35.00% 7	45.00% 9	20.00% 4	0.00% 0	0.00% 0	20	1.85
▼ Intentionally build a collaborative parish.	40.00% 8	40.00% 8	20.00% 4	0.00% 0	0.00% 0	20	1.80

Verbatim Comments:

- I loved it. I love the understanding that before we have tactics we need a clear understanding, foundational grasp of all the other questions.
- Our group was focused on the future planning of the parish and how do we prepare for it. With the city growing, do we want to control the parish's growth, or do we have any control over it?
- Provide a more complete understanding of what Ignatian Spirituality means for lay persons.
- More clarity on specific goals and better understanding of how existing efforts fit into the vision.
- Great session. More details relating to tactics to various, very diverse commissions.
- I thought the session was extremely effective.

What feedback do you have to enhance the process or content of the session? Please provide any other comments to help with future meetings:

- Utilize templates, boilerplate materials, etc. to move efforts along, so we're not all recreating the wheel, but leveraging what little time we have in work sessions. Retain outside help to do organizational "drafting" of "structure & process" components.
- The sharing and interaction with others builds community & understanding.
- Have meetings to focus on each area. One meeting to specifically discuss all the ways we are supporting Going Deeper, etc. we should also discuss what metrics we are going to use to define success.
- Hope for more break-out time in the future.
- I really appreciate the obvious time, effort and energy that went into this. It was an extremely valuable use of time. St. Peter is an amazing parish that keeps getting stronger and working through the strategy is crucial to continued strength, so thank you to everyone who helped pull it together.

