



Catholic Leadership  
INSTITUTE

Welcome Parish Leaders!

# Called for More

## DMI *Webinar #3*

– DISCERNING ACTIONS –



**IGNITING**  
OUR PARISHES



**EMBOLDENING**  
OUR CLERGY



**FORGING**  
OUR FUTURE

# Objectives for this Session

---

1. Consider a parish planning process for moving from prioritized strengths and opportunities to action.
2. Learn how to express desired outcomes into SMART goals and increase your odds of achieving those outcomes.



## Prayer for Leaders

We pray that you will create among us Catholic leaders, individuals made in your image who will apply your teachings in their lives and positively impact our families, our workplaces, our communities, and our Church.

Help us to inspire those with whom we come in contact to share their God-given talents, to do your will, and to find a place in your kingdom where their deepest joys and the world's deepest hungers meet and cry for their special qualities and abilities.

Make us leaders, Lord, leaders with strength and courage to follow you. Leaders who make your love visible to the world in all of our words and actions. Amen.

# This DMI Webinar Series

---



#1  
Access  
Results

#2  
Understand  
Results

#3  
Discern  
Actions

# Wisdom from St. Augustine

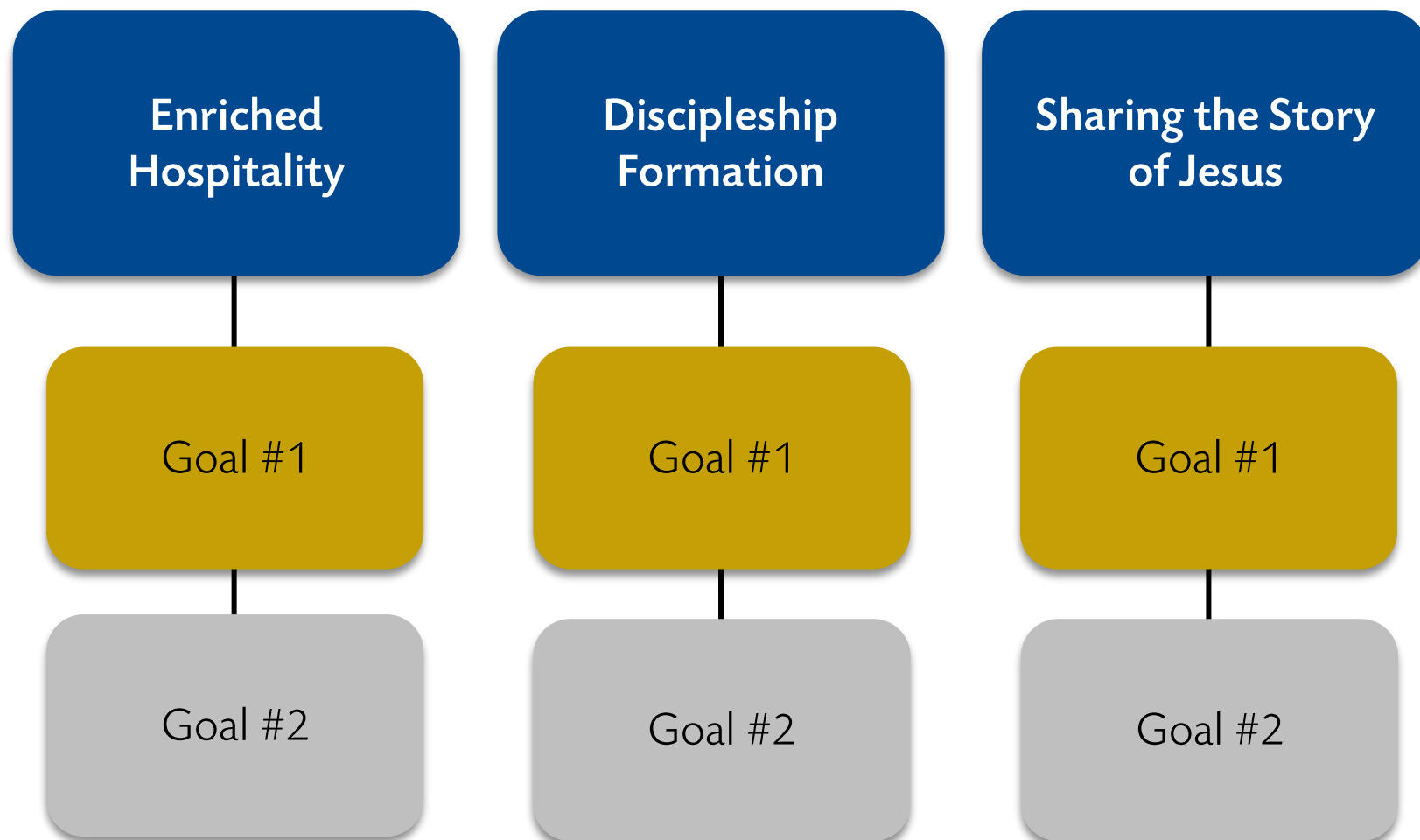
---



“Safeguard order  
and order will  
safeguard you.”

# Priorities with Aligned Goals

---



# What is a Priority?

---

## Priorities

answers WHAT we will accomplish in the next 24-36 months.

### Examples

Greater Hospitality

Increased Spiritual Practices

Strengthened Missionary Impulse

# Is it a Priority?

---

**Each priority must meet three criteria:**

1. It requires cross-functional support.
2. It is complex enough that it can't be delegated to one direct report.
3. It is important enough to be on the pastor's list.

# What is a Goal?

---

**Priorities**

answer **WHAT** we will accomplish in the next 24-36 months.

**Goals**

focus energy and activity to achieve this accomplishment.

Priority: Strengthened Missionary Impulse

Goal: Increase results of “Invited someone to Mass quarterly” from 25 to 40-50 by April 1, 20XX.

# Goals and Action Steps

---

## Goals and Action Steps

**Goals focus energy and activity to achieve this accomplishment.**

**Action Steps assure that goals are met.**

# Turning Data into Fruitful Results

---



## Accessible Framework:

- 3 priorities with 1-2 SMART Goals each and related strategies/action steps per goal.
- Implement over the next 24 - 36 months.

## Benefits to You and Your Community:

- Focus to use limited time and resources.
- Engage new/dormant parishioners.

# Holy Family Cathedral

---

– EXAMPLE –



## Context:

- Tulsa, Oklahoma
- Also participating in *Called For More*

# Beginning with the DMI

---



## Key Growth Opportunities:

- Hospitality (**28%**)
- Forms as Disciples (**17%**)
- Service/Support (**22%/16%**)

# Holy Family Cathedral

---

– EXAMPLE –

## Priority and Aligned Goals:

### **Hospitality**

Increase registered households from 600 to 700-750 by May 31, 2023.

### **Forms as Disciple**

100-120 adults engaged in 2-5 prayer and faith formation activities annually by May 31, 2023.

### **Service/Support**

Annually accompany 50-60 parishioners who are sick, dying, or vulnerable by May 31, 2023.

# Other Priority And Goal Examples

---

## **Parish in the Archdiocese of Galveston-Houston**

**Priority: Engaging Families**

**Goal:** Engage an additional 100 families into new/different ministries or activities by 1/1/2023.

## **Parish in Diocese of Richmond, VA**

**Priority: Enriched Hospitality**

**Goal:** Increase the number of those who “strongly agree” that the parish is welcoming from 49% - 60% by June 1, 2025.

# Other Priority And Goal Examples

---

## **Parish in the Diocese of Burlington, VT**

**Priority:** Everyday Life Fortified by Sunday Mass

**Goal:** 125-175 parishioners strongly agree that Mass has a positive impact on their week by May 1, 2025.

## **Parish in Diocese of Rockville Centre, NY**

**Priority:** Welcoming School Families

**Goal:** 50-75 school families will attend 3-5 parish events per year by May 1, 2020.

# SMART Goals

---



- From your DMI-informed strengths and opportunities, identify priorities (the most urgent needs and opportunities of the parish).
- Address those priorities with SMART Goals and detailed action steps.

# SMART Goals

---

## – SIMPLE STATEMENTS –

- Where are you going and how will you know when we get there? **A SMART goal leaves no room for misunderstanding.**
- SMART Goals are models of clarity: one sentence, easy to read and understand.
- Action steps are not included, and qualifiers are limited.
- SMART Goals are stated in behavioral (doing) terms rather than as statements of attitude, thought, or belief.

# SMART Goals

---



- SIMPLE STATEMENTS –
- Specific & Measurable
  - Motivating
  - Attainable
  - Relevant
  - Timebound/Trackable

# SMART Goals

---

## – SIMPLE STATEMENTS –

### **Specific and Measurable**

- *Specific* leaves no doubt about the intended outcome/achievement
- *Measurable* provides an objective target.

**Motivating** - *The Motivation is implied* by setting a tangible achievement that connects to a larger, meaningful vision.

**Attainable** - The outcome will stretch the parish. It is possible through creativity, planning, shared action, assessment along the way, and accountability.

**Relevant** - The outcome makes sense in terms of the larger parish goal. It cannot be left out.

**Timebound / Trackable** - There is a date set to reach the outcome. Mark it on the parish calendar.

# Focus on Outcome vs. Output!

## OUTCOME

An end result



The hungry are served

## OUTPUT

Production or product used to create end result



Training program for  
soup kitchen volunteers

# Focus on Outcome vs. Output!

## OUTCOME

Increase results of *"I have personally encountered Jesus Christ and am growing as a disciple"* from 60 to 80-100 by May 5, 20XX.

Increase strongly agrees for *"the parish helps me connect with a Catholic community by making me feel welcome and accepted"* from 120 to 200-220 November 30, 20XX.

Increase results of *"Invited someone to Mass quarterly"* from 25 to 40-50 by April 1, 20XX.

## OUTPUT

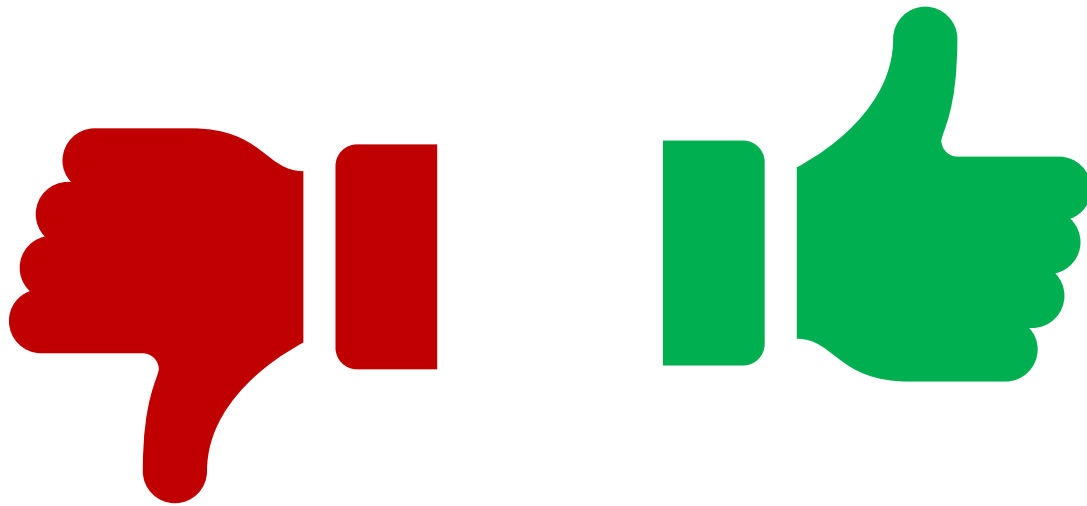
Create a new series to foster a personal relationship with Jesus by May 5, 20XX.

Offer 3-4 new social activities by November 30, 20XX.

Offer 2-3 new series on deepening understanding of the Mass by April 1, 20XX.

# Let's Take a Poll!

---



**Is it SMART?**

# Is it SMART?

---



Help people grow in knowing  
Jesus by March X, XXXX.

- Specific & Measurable 
- Motivating 
- Attainable 
- Relevant 
- Timebound  Trackable 

# Is it SMART?

---


Increase the number of parishioners who strongly agree that “I have personally encountered Jesus Christ and am growing as a disciple” from 75 to 125-175 by March X, XXXX.

- Specific & Measurable 
- Motivating 
- Attainable 
- Relevant 
- Timebound  Trackable 

# Is it SMART?

---






Help parishioners benefit from attending Mass by March X, XXXX.

- Specific & Measurable 
- Motivating 
- Attainable 
- Relevant 
- Timebound  Trackable 

# Is it SMART?

---

Increase the number of parishioners who strongly agree that Mass helps them grow spiritually from 35 to 75-100 by March X, XXXX.

- Specific & Measurable 
- Motivating 
- Attainable 
- Relevant 
- Timebound  Trackable 

# Don't let it sit on the shelf!

---



# Implementation Planning

---

## 1. What?

- What are some of the major tasks that will be required to achieve the goal?
- What milestones must be reached in order to fulfill the ultimate goal, as stated?

## 2. When?

- In what sequence do the major tasks need to be completed?
- What dependencies or other calendar/scheduling items need to be considered?

## 3. Who?

- Who will be the point person for the goal?
- Who else should be invited to help advance the goal from a leadership standpoint?

## 4. How much?

- What investments of money or other resources will be required to meet this goal?

# Action Plan Worksheet

---

## Goal Action Plan Work Sheet

*"Make sure that everything is done properly and in good order...since God is a God not of confusion, but of peace." —1 Corinthians 14:40,33*

PRIORITY \_\_\_\_\_

SMART GOAL \_\_\_\_\_

POINT PERSON RESPONSIBLE \_\_\_\_\_

Tasks	Person Responsible	Due Date	Necessary Resources	Potential Challenges <i>How will they be addressed?</i>
-------	--------------------	----------	---------------------	--

# Example Entries

---

**PRIORITY:** Strengthen Missionary Impulse

**SMART GOAL:** Increase results on “share my personal witness story” from 15 parishioners who share quarterly to 30-40 by June 1, 2025.

**POINT PERSON:** Kenn Cramer

Tasks	Person Responsible	Due Date	Necessary Resources
Assess how we currently support and form parishioners to share their witness	DRE and Faith Formation Ministry Team	March 6, 2023	<ul style="list-style-type: none"><li>• 20 hrs</li><li>• Access to all programming current and past 10yrs</li></ul>
Identify who currently shares their witness stories	DRE and Faith Formation Ministry	March 6, 2023	<ul style="list-style-type: none"><li>• 25hr</li><li>• 5 additional volunteers</li><li>• Parish Directory</li><li>• Communication dept</li></ul>

# Example Entries

PRIORITY: Sunday Experience

SMART GOAL: 125-175 parishioners strongly agree that Mass has a positive impact on their week by May 1, 2025.

POINT PERSON: Clair Francis

Tasks	Person Responsible	Due Date	Necessary Resources
Obtain a baseline of strongly agrees through a 1-2 questions survey card in the pews	John D. Baptist	July 1, 2022	<ul style="list-style-type: none"> <li>Printed cards with questions and pens for pews</li> <li>Bulletin and social media to promote</li> <li>Other promotional strategies, e.g., invitations from the pulpit</li> <li>5 volunteers to tally results</li> <li>Excel spread to track initial baseline and follow-up pulse checks.</li> </ul>
Host 12, monthly post-Mass socializing with 10 min Sharing from predetermined parishioners on how Mass impacts their week	Albert D. Great	Start Sept 1, 2022	<ul style="list-style-type: none"> <li>3 Volunteers to organize and oversee</li> <li>Budget for refreshments or find an underwriter</li> <li>24 volunteers (2 volunteers per session) who are willing to share their story</li> </ul>

# Next Steps

---

1. Recruit a pastoral planning & implementation team (see resources on the platform).
2. Prayerfully discern and prioritize your parish's data-informed growth opportunities.
3. Clarify these opportunities in SMART Goals statements.
4. Establish detailed action steps to accomplish each goal.
5. Implement the plan!

# Questions or Other Ideas???

---



Use the **Q/A function** to send questions



# Thank you!

*You were made by God for this moment –  
thank you for your leadership  
and for being pioneers!*



**IGNITING**  
OUR PARISHES



**EMBOLDENING**  
OUR CLERGY



**FORGING**  
OUR FUTURE