



Catholic Leadership
INSTITUTE

Welcome Parish Leaders!

Called for More

DMI *Webinar #3* – DISCERNING ACTIONS –

| Please put your questions in the chat



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.



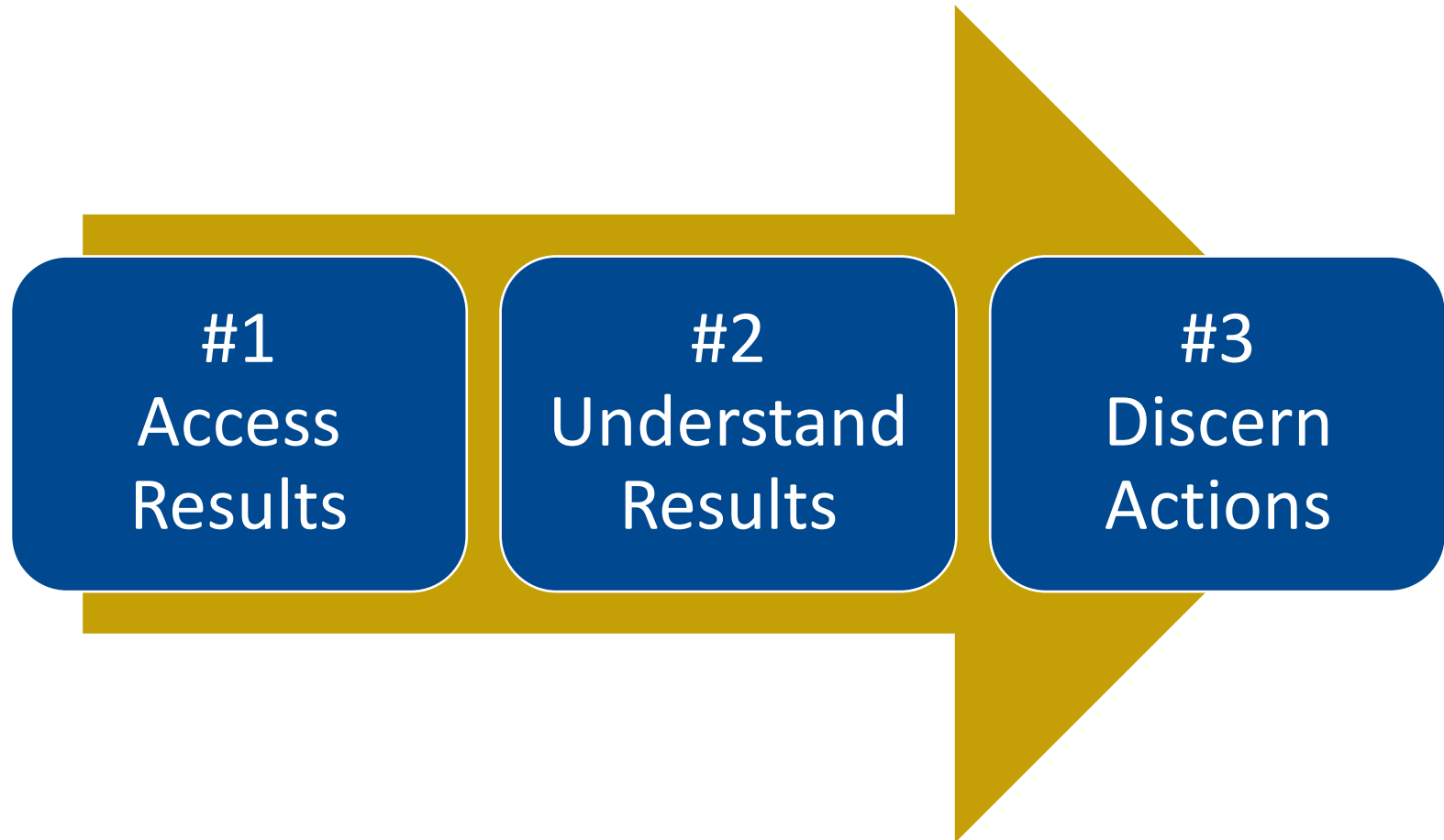
Prayer for Leaders

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

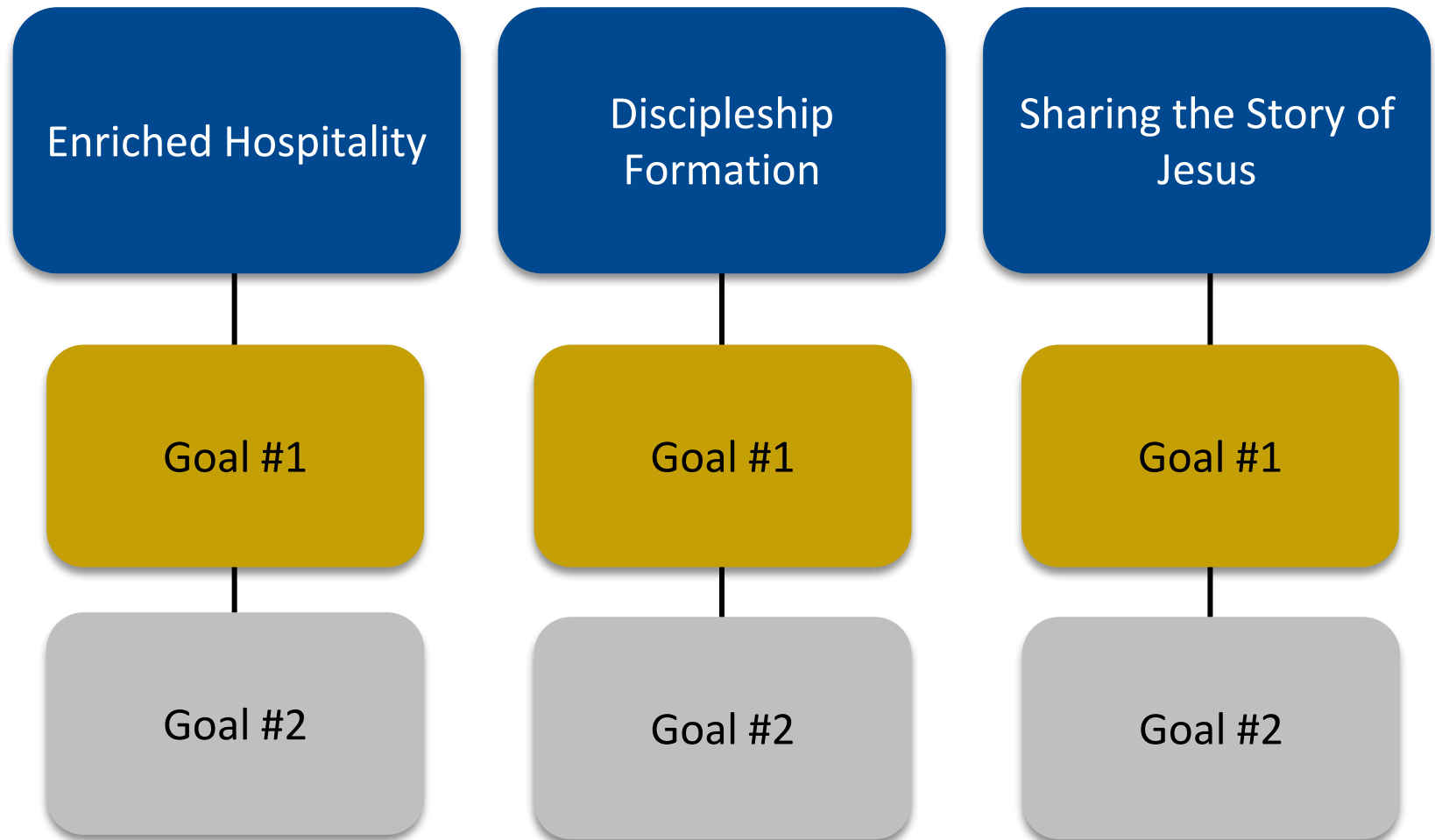


Wisdom from St. Augustine



“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

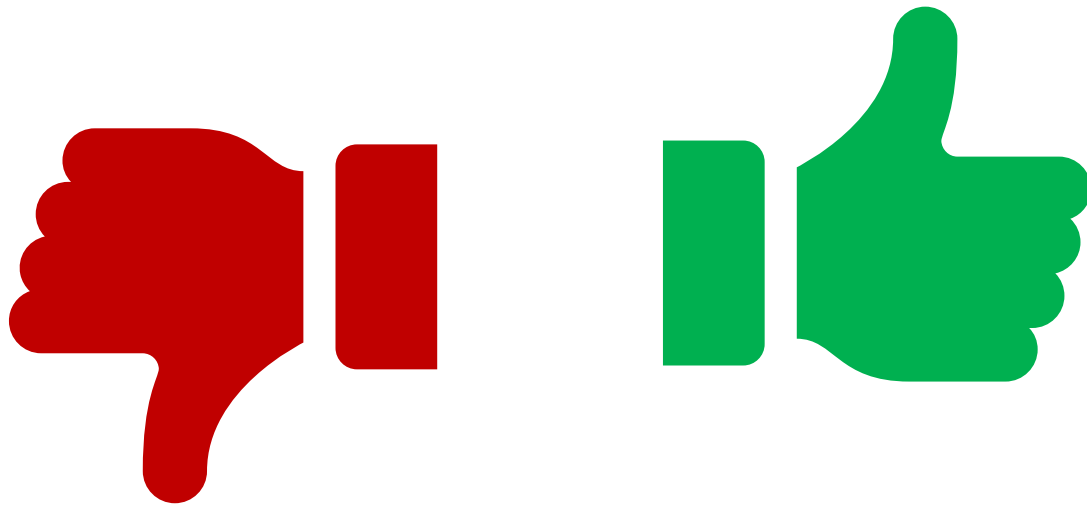


Training program for
soup kitchen volunteers

Focus on Outcome vs. Output!

OUTCOME	OUTPUT
Increase results of <i>“I have personally encountered Jesus Christ and am growing as a disciple”</i> from 60 to 80-100 by May 5, 20XX.	Create a new series to foster a personal relationship with Jesus by May 5, 20XX.
Increase strongly agrees for <i>“the parish helps me connect with a Catholic community by making me feel welcome and accepted”</i> from 120 to 200-220 November 30, 20XX.	Offer 3-4 new social activities by November 30, 20XX.
Increase results of <i>“Invited someone to Mass quarterly”</i> from 25 to 40-50 by April 1, 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>
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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	• 20 hrs • Access to all programing current and past 10yrs
Identify who currently shares their witness stories	DRE and Faith Formation Ministry	March 6, 2023	• 25hr • 5 additional volunteers • Parish Directory • Communication dept

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	• Printed cards with questions and pens for pews • Bulletin and social media to promote • Other promotional strategies, e.g., invitations from the pulpit • 5 volunteers to tally results • Excel spread to track initial baseline and follow-up pulse checks.
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	• 3 Volunteers to organize and oversee • Budget for refreshments or find an underwriter • 24 volunteers (2 volunteers per session) who are willing to share their story

One Road Map

Lent2026	• Disciple Maker Index Administered
Jun-Sept2026	• Begin review DMI Feedback and identify top strengths and opportunities.
October2026	• Form Planning Team (use existing Leadership Team?) and continue to review feedback. • Identify priorities and 3-6 SMART goals, establishing a detailed action plans for each.
January2027	• Assign Implementation Teams • Communicate to the parish • Begin implementation

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

contact



Catholic Leadership
INSTITUTE

Thank you!

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



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