

Quintessentials

Top 5 insights for ministry from our team in the field



Catholic Leadership
INSTITUTE

5 Steps to Bring the Right Metrics to Parish Ministry

While ministry is a life-long effort with no earthly destination, how do we know if we are on the right track? How can we help engage others toward a shared vision? How do we best steward our limited resources of time and money?

For the last decade, Catholic Leadership Institute has been intensely studying parish life. With one of the largest datasets in the world on this subject, the apostolate itself continues to discern what are the most relevant metrics to track vitality in parish life. It is important to identify how the Church can best support local leaders by using those metrics in the mission field to make sure everyone is moving toward a future full of hope (Jeremiah).

While we can never predict how the Holy Spirit will work, parish leadership can use measurement to help understand the mission landscape, to stay disciplined in the virtues that will define the Christian quality of parish communities, and to identify new opportunities for service to the People of God.

To help your parish on this path towards discipleship, below are five steps your community can take to begin engaging in relevant metrics for parish vitality.

For I know well the plans I have in mind for you—oracle of the LORD—plans for your welfare and not for woe, so as to give you a future of hope.

– Jeremiah 29:11

1. Gather hypotheses, narratives, and resources

God gifted humanity with the ability to make meaning from what we experience. Any worthwhile effort in trying to use relevant metrics in ministry should be rooted to help parish leaders individually and collectively better align our efforts in service to the Kingdom of God. Before introducing a framework of relevant metrics, gather feedback from members of your community, including parish leadership, about what is important to them about the parish. Most parishioners have not given it too much thought. By asking them, you not only gather their input, but you also help them get their wheels turning about what really matters to them.

- ❑ **Host focus groups at-large or within the context of different existing groups (e.g. the Knights of Columbus or women’s bible study) and listen to answers to prompts such as the following:**
 - What makes this parish special?
 - What role does this parish play in the larger community that other parishes or churches do not?
 - How would you describe this parish to the bishop if he asked?
 - If we were going to share a one-page “state of the parish” and could only share 10 things, what would be on that list for you?
- ❑ **Engage formal leadership structures such as the parish or finance councils or the staff, generate some specific hypotheses and narratives. Consider asking someone outside the parish to facilitate this meeting and try to generate some of the connections that leaders may be making consciously or unconsciously.**
 - People register at this parish because...
 - People leave this parish because...
 - This parish has gotten bigger/smaller in the last three years because...

It is important that whoever is leading these sessions or receiving this feedback is professional, can maintain objectivity and proactive listening despite hearing things that may be hard to hear or inaccurate. The point of this exercise is to identify what is important to key stakeholders and what assumptions (founded or unfounded) they may be operating under without even knowing it.

- ❑ **Consult thought leaders in parish vitality. Organizations such as Catholic Leadership Institute have done extensive research on topics across every aspect of parish life. After you identify the most helpful sources, think about how those might get shared with others in parish leadership.**
 - Gather people to watch a video and discuss reactions to it – what resonated, what was confusing, what struck them as most relevant for their parish?
 - Invite a local or national speaker in to share about the topic and use it as the keynote presentation for an annual retreat or planning day for ministry leaders. (Tip: collaborating with other parishes and/or the diocese, can help pool resources and create a shared language outside of your own community.)
 - Circulate links to articles, videos, or podcasts to a small group of parish leaders who have the most enthusiasm about the topic.

2. Create a shared framework of relevant metrics amongst parish leadership

No single metric will help guide parish leadership to make better decisions, nor will a never-ending list of anything that could ever be tracked help. Whether your framework has three metrics or 30, what is most important is that the framework is understood and shared by as many people as possible, especially those in leadership.



VIDEO

Looking for a video to watch with your group? Scan the QR code below to watch “What if They Don’t Come Back?” by Dan Cellucci, CEO.



Form an ad-hoc team to develop the framework.

- Identify 4-6 people who can help dive into resources, review feedback, and work collaboratively on several drafts of a framework.
- It is important to ensure that all the people have the right mindset and that they offer a variety of perspectives.



Ensure it is an iterative process.

- Set expectations with the pastor, the ad-hoc team, the councils, that you will be bringing drafts over time and looking to strengthen each draft with their thoughtful feedback (see sample meeting schedule for ad-hoc team).

Set a due date for it to be finalized.

- Consider setting a milestone event in the future to help keep the process moving and work backwards from that. For example, a parish-wide session where you share the framework or a retreat for all ministry leaders where you share the framework with them.
- Give yourself at least 3 months but no more than 6 months to develop this collaboratively.

3. Commit to the best tools, not the perfect tools

One of the biggest challenges for the average parish is not necessarily identifying what they would like to measure, but building, securing, and gathering the different metrics they prioritize. While large organizations can invest in sophisticated business intelligence tools, departments, and consultants, the average Catholic community cannot. It is important to create tools that offer useful solutions and that can be administered as effectively and efficiently as possible over time. Try not to let the perfect be the enemy of the good or you might never get off the ground.

VIDEO

Scan the QR code to learn more about the Disciple Maker Index survey.



Look at existing tools first: Your diocese or a Catholic apostolate may have an existing tool that could provide the foundation for your effort.

- The Status Animarum census report, “State of the Souls,” submitted by parishes can provide a strong start to a benchmark you may develop, and the information will be submitted to help you stay accountable.
- Parishioner surveys such as Catholic Leadership Institute’s Disciple Maker Index or models such as the Ring of Relevancy may prove helpful starts.

If building your own tool, know the what, why, and how: It is important that as you build a framework everyone is clear on the metrics used and how they will be secured.

- What: what specific data will be captured?
- Why: what is the rationale behind collecting this data?
- How: how will this information be submitted, by whom, to whom, when, with what frequency, and in what format?

- ❑ **Solicit feedback as you go:** As you collect data according to the framework and share it with the appropriate leaders, keep track of the responses. The pastor, your councils, and key ministry leaders can be a valuable sounding board as the framework is rolled out.
 - What questions are they asking?
 - What emotions is it eliciting?
 - What is confusing?
 - What additional information are they looking for?
- ❑ **Commit to some cadence of using the tool(s) over at least a 2–3-year time before refinement. It will take time to build confidence and competence in using the framework. If you change it or discard it too quickly, it will be hard to assess its effectiveness.**

4. Focus on what is actionable, not just interesting

As your framework is rolled out and you begin to use your tools to gather data, it is important to review the incoming data on the frequency that makes sense. Depending on the metric, this could be quarterly, twice a year, or minimally annually. Larger efforts like surveying parishioners might be better every other year or every 3 years to allow time for the parish to respond to the data and see change. For some leaders reviewing data can be exciting and lead toward a temptation to over analyze it and go down several paths that are not helpful. For others, reviewing data is overwhelming and confusing and there can be a temptation to simply “want the answer.” It is important to balance this tension with your leaders using the following steps throughout the process.

- ❑ **Review what the data says:**
 - Is there clarity about what information is being shown, where it came from, how it was obtained, etc?
 - What trends or themes are in the data? What sticks out?
- ❑ **Consider why the data says what it says:**
 - What questions does the data prompt?
 - What hypotheses come to mind about a theme or trend?
 - What else would you like to know about that data?
- ❑ **Prioritize what is important and actionable:**
 - What is most relevant to the parish's overall mission?
 - Even if we understand it better, which trends can we influence most readily that would align to the greatest good?
- ❑ **Dig a little deeper into what the data says:**
 - Which questions can we answer, and which hypotheses can we test?
 - What other means could we use to understand a topic more deeply (e.g. a focus group)
- ❑ **Capture action steps about where you want to go next with the data:**
 - What teams or leaders do you need to gather to strategize around next steps?
 - What is the new opportunity to explore, the problem to resolve or improve, or the area to expand?



5. Share the fruits of your labor often and creatively


It is important to help the People of God understand what is going on in their community so they can embrace their baptismal call to evangelize and to strengthen their local church. Often times, parishioners are only made aware of data when the community is in trouble. By proactively adopting a shared framework of relevant metrics for parish vitality, and communicating the framework and the data within it consistently and creatively, leaders can equip their fellow parishioners to understand where the parish is, where it is trying to go, and how they can help contribute to that movement. Here are some creative and common ways to imbue your framework within your community:


- Issue an annual “state of the parish” report: A one-to-two-page summary distributed through print and digital channels, reminding parishioners of the key metrics, and reporting on how the parish is doing is a wonderful way to keep these important aspects of parish life in front of people. Keep extra copies in the rectory and the back of the church for visitors and to remind people.
- Review a scorecard at every pastoral and finance council meeting: For metrics that change quarterly, highlight those briefly at the beginning of every meeting.
- Record a brief video on each metric and send it out to the community via email to explain the rationale behind why the parish tracks it and how the parish is doing.
- Have members of your ad-hoc team or parish leadership attend different ministries’ meetings and deliver an annual update on how the parish is doing against the framework. When new families register, share the framework with them to help get them informed and involved.

FOUR KEY DRIVERS

- 1** Foster spiritual maturity with a plan for discipleship for its members.
- 2** Share leadership by commitment to a healthy organization.
- 3** Offer a vibrant Sunday experience with excellent hymns, homilies & hospitality.
- 4** Embrace a missionary impulse to go out and lead others to Jesus Christ.

The Four Key Driver marks are measured through the Disciple Maker Index (DMI) survey tool and specific parish data to identify strengths and areas for growth. Survey statements such as, “My parish helps me grow spiritually” and “My parish makes me feel welcomed and accepted” are collected along with parish data, such as baptism/funeral ratio, parish net income/loss, and sacramental trends. National Benchmarks show participants’ responses to these questions:

 **43%** Strongly agree that “My parish makes me feel welcomed and accepted.”

 **39%** Strongly Agree that “My parish helps me grow spiritually.”

What story does your parish data tell?

These metrics help provide insight to the pulse of the parish and aid in developing a plan of action to increase vibrancy.

Next Steps

To become more proactive with your efforts in tracking the most relevant metrics for your parish's vitality, consider incorporating these steps to build a shared framework:

- 1 Schedule a meeting between the pastor and pastoral team to discuss the topic of relevant metrics and seek interest and concerns about taking next steps.
- 2 Identify key leaders in the community who have a passion for the community, might be skilled in data, planning, technology, and/or ministry and invite them to form an ad-hoc team to develop this focus more.
- 3 Canvas the resources and thought leadership available from your diocese, Catholic colleges and universities, apostolates on the topic of relevant metrics.
- 4 Set a date when you would like to issue your first "state of the parish" report using your framework and back-up at least 6-9 months to ensure you can do your homework, develop a framework, and start gathering and reporting data.
- 5 Invite some outside perspective (local business/non-profit leader, a diocesan leader, Catholic apostolate or thought leader) to check out your framework and data and offer feedback.

Whitepaper: Relevant Metrics for Measuring Parish Vitality

This whitepaper is a summary from Catholic Leadership Institute's Virtual Symposium on the Relevant Metrics for Measuring Parish Vitality. The symposium, hosted May 10-11, 2021, included 55 leaders from the United States and Western Europe. Their perspectives and experiences included that of clergy and laity. They brought experience and wisdom from the parish, diocesan, academic, philanthropic, apostolates and movement context, as well as the perspectives of various ethnic communities.



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