

To: Fr. Kornath and Parish Leadership

From: Barbara Vite, Archdiocesan Director of Parish Stewardship

Preliminary Recommendations Holy Trinity & St. Michael Parishes January 2018

Note*: *The parish has been implementing many stewardship best practices for some years now. A dedicated volunteer, along with the help of other individuals and staff members, has made great strides in communicating the “big picture” of stewardship over the past several years.*

The time is now right to strengthen the Stewardship Commission and work toward developing short and long-term goals as part of an orchestrated plan designed to ignite the budding culture of stewardship that exists within the Holy Trinity parish community. The time is also right to engage St. Michael parishioners, recognizing the personality of each community, as well as the collaborative nature of ministry in the months and years to come.

Some of the recommendations below are in process / practice; however they are listed here to be documented as action steps within the comprehensive Commission plan.

The Parish Stewardship Assessment completed by leaders at Holy Trinity and St. Michael Parishes illustrated that parish leaders rated the assessment categories as follows: “Spiritual & Physical Environment” received the highest score (rated at 70% positive), followed by “Financial Stewardship” (rated at 61% positive), “Gratitude” (59% positive), “Parish Worship” (rated at 54% positive), “Communications” (rated 53% positive) and “Time and Talent” (35% positive). “Stewardship Formation and Education” (33% positive) received the lowest ranking.

It is important to note that individual line scores in many cases ranged from a maximum point value of 15 to the lowest possible score (0). The individual line scores when tabulated by participating groups are consistent overall.

There were relatively few verbatim responses or added comments. Verbatim responses centered around two general themes; the perceived need for more communication at all levels and the desire to understand stewardship in all its fullness.

Individual line scores identified several threads that are consistent throughout the assessment:

1. The need to strengthen and form the Stewardship Commission to shepherd stewardship planning and activities.
2. The need for increased communication; between committees, with volunteers, and most critically to parishioners at large and to audiences not reached “in the pew”.
3. The need for stewardship education and formation at all levels (parish leaders, parishioners “in the pew” and beyond).
4. A lack of understanding about the holistic nature of stewardship and the need for one clear definition of stewardship that resonates throughout the parishes.

5. A need to review and revise traditional stewardship activities; reviewing and enhancing the Talent recruitment and follow-up processes as well as enhancing the annual increased offertory process.

Based on the results of the parish assessment, following for consideration by parish leaders are my “first steps” recommendations listed in order of priority. **Each recommendation is discussed in detail under the appropriate assessment category.**

Additional recommendations in each assessment category directed to the specific area (s) where respondents indicated the most room for improvement, follow on subsequent pages.

Top Five recommendations in order of priority:

- i. **Increase lay (non-staff) membership of the Stewardship Commission** to lead the effort to establish and shepherd a stewardship initiative. The commission should use assessment data and their knowledge of the parishes to develop a 3-year plan. On paper, detailing action steps, timelines and responsibilities.
- ii. **Develop a communications plan.** Begin by publishing a summary of the assessment results. Compile a pastoral report as a tool for broad-based communication with the parish at large. Design a process for communication between committees that may include common meetings, cross-distribution of meeting notes and/or other techniques.
- iii. **Review current process of inviting ministry/volunteer participation.** Revise this process as resources allow; develop a comprehensive ministry guide and support processes. ***Developing a comprehensive ministry guide has been the focus of Commission efforts for some months now. A collaborative ministry guide is in final review. The process for distribution and engaging parishioners needs to be addressed.***
- iv. **Continue the increased offertory program** with enhancements in fall of 2018.
- v. Develop a plan for **stewardship formation with the Pastoral and Finance Councils.**

Recommendations by assessment category are detailed below. **Successful long-term implementation of these recommendations will depend on an effective stewardship commission which can work collaboratively within the structure of available parish resources.**

A. Spiritual & Physical Environment; Develop a plan for reinvigorating parish spiritual life.

Responses indicate that parishioners do not recognize a **systematic** plan to encourage spiritual growth. Developing, publishing and implementing a plan which includes measurable action steps will establish and maintain positive momentum.

Action: Develop a systematic plan for on-going spiritual growth/formation Including short term and long term goals. This may be one of the goals designated by the stewardship commission during the planning process. Action steps could include:

- **Establishing a stewardship theme** that can cross over into all ministry communications.

- Examining possibilities for [collaborative stewardship messaging across all ministries](#). This will require collaboration across ministry/constituent groups, particularly the School and Christian Formation programs. *Considering the personalities of the two parish communities, a “covenant” approach may be particularly effective.*
- [Compiling a “stewardship calendar”](#); identifying stewardship messaging/components within established parish activities and outreach, adding any new stewardship focused activities. This can cross-over as a communications piece but primarily serves to help parishioners recognize stewardship as it already exists in the parish (outside the traditional time/talent/treasure).
- [Beginning a prayer initiative](#). including stewardship-focused Mass intentions, asking for prayers for the parish and its ministries and adding stewardship/discipleship themed prayers to meetings and other parish gatherings.

B. Parish Worship; Collaborate closely with liturgy staff and committee members

[Plan multiple, creative ways to include stewardship messages in liturgies;](#)

- [Work with Liturgist and liturgy committee](#) on creative ways to highlight offertory; special emphasis for specific activities or tied to seasonal celebration.
- [Consider training/mentoring non-traditional lay witnesses](#) at specified times throughout the year. Done well, this component can be a very powerful way to invite parishioners to prayerfully consider their responses to their individual giftedness. The inclusion of lay witnesses into a communications plan is a highly effective stewardship, evangelization and communication tool.
- [Consider seasonal focus on stewardship of time](#); focused on strengthening each individual’s relationship with God. Initiate for Lent 2018, or as a planned component of the annual renewal of financial support in fall of 2018.
- Consider [highlighting parish human concerns/outreach and other parish ministries within the context of liturgy](#) and as a component within the communications plan. *Statistics show that in the average parish 90%+ of parishioners have no awareness of the depth of parish outreach – yet sharing this good news (time and time again) is among the most inspiring and compelling ways to engage parishioners.*

C. Stewardship Formation & Education; Reinvigorate stewardship formation parish-wide

Stewardship Formation/Education was identified as the area with the most potential for growth. Along with prayer, formation and education form the pillars of a strong, sustained and successful stewardship renewal effort.

[Develop a strong Stewardship Commission:](#)

- [Recruit 3-4 additional commission members through personal invitation](#) of the Pastor and Pastoral Council. *The current commission is “staff-heavy” and would benefit from more parishioner participation.*
- [Conduct orientation/information session for new members.](#)

- Develop/Refine a mission statement/job description for the Stewardship Commission to insure that it reflects the full scope of focus;

Example –

The Stewardship Commission of the Holy Trinity/St. Michael Catholic community is charged with shepherding the renewal of all aspects of parish stewardship. The committee focuses on stewardship education for the Catholic community at large, offers input regarding stewardship formation and education for parish leadership, conducts annual stewardship renewals of time/talent/treasure, initiates community building events and helps to develop the parish-wide stewardship action plan.

- Flowing from the mission statement, stewardship committee members should **develop a vision statement** as an overview of the commission's immediate and long term goals. Share these with parishioners often and consistently.
- **Plan formation time for the stewardship committee as a group.** This can be done in conjunction with establishing mission and/or vision statements. It is important for this group to establish a common understanding of stewardship and agree on the strategy and methods for moving forward.
- **Develop a three-year plan, on paper,** that outlines priorities, action steps, timelines and other components of the stewardship initiative.
- **Communicate the process and progress to the parish communities.**

Commission members should, if personal schedules allow, take advantage of outside formation and training opportunities for stewardship commissions and councils such as the Archdiocesan regional stewardship seminars.

In addition education and formation activities should be planned for additional "audiences";

Design and Implement a plan for stewardship education at the Leadership Level;

The commitment of parish leadership to stewardship education is critical to the success of any stewardship effort. The Pastoral Council, as the visioning body of the parish, has a leading role along with the Pastor in helping the parish community embrace stewardship as a way of life.

Options for Pastoral Council (and Standing Commission members) to begin the process of leadership formation:

- Add a **short** formation element to all committee meetings (Many resources are available for this function that are effective, **but do not add a significant amount of time to meetings that already have full agendas**).
- **Commit to personal and group dedicated time reading about and studying stewardship** in order to fully understand its meaning and focus. This time **should be formalized**; 5 minutes at the beginning of each Council meeting for example. I recommend "Stewardship: A Disciples Response", the U.S. Catholic Bishops' Pastoral Letter as a beginning resource. Other possible resources include; *Excellent Catholic Parishes* by Paul Wilkes and *Stewardship: A Parish Handbook* by C. Justin Clements.

Council members should, when possible, take advantage of outside formation and training opportunities for stewardship committees and councils such as the Archdiocesan regional stewardship seminars.

D. Communication Tools; Increase parish communication effort

Communication is critical to any successful stewardship plan. Increased communication about the parish and its ministries, as well as educational and inspirational pieces highlighting the stewardship message and reinforcing the covenant nature of living stewardship, underscore that stewardship is not a one-time activity, but continues as an on-going theme running through parish life.

It is critical to remember the statistics on how many times people must see/hear/read a message before it “sinks in”.

Begin by publishing the assessment results as a first step in a communications plan that may include:

- Continuing to publish a [Pastoral Report](#); this communication can form the foundation for an on-going stewardship communications plan. This report should make the connecting between parish resources and ministry, drawing parishioners’ attention to the good works accomplished through their support (prayer, talent and financial). It will also help to reinforce the ministry activity within the parish.
- A formalized, regularly scheduled [communication to parishioners from the stewardship commission](#), which would be included in already scheduled parish mailings, inserted in the bulletin and distributed through any/all available outlets. This communication would not address finances, but rather begin to acquaint parishioners with the language of stewardship, highlight parish ministries, invite parishioners to consider different aspects of faith and parish life and serve to underscore a renewed stewardship vision for the parish. *The Vineyard* newsletter is one source of content.
- Adding [communications that highlight a parishioner or group](#) living the stewardship way of life; could also contain inspirational thoughts, quotes from the Bishops’ Pastoral Letter on stewardship. [Example; a weekly “stewardship corner” in the bulletin that addresses more than financial support.](#)
- [Reviewing materials in New Parishioner Packets](#). Information in the packet should include the parish philosophy of stewardship, ministry opportunities, schedules of spiritual formation activities, education programming overviews, etc. *The Commission should consider if welcome “packets” should remain parish-specific, or contain collaborative messaging (i.e. Ministry Guide, etc.)*
- [Developing a formal welcoming process](#). Verbatim responses indicated that most participants were unaware of any structured process to personally engage new parishioners/families..
- [Developing on-going communication among standing committees](#); consider a committee evening of reflection around a stewardship theme, reexamine committee liaison structure, publication of meeting minutes, etc.
- [Building a corps of lay witnesses](#) who are willing to share their stories of blessings received and gifts given, are effective in addressing all aspects of gratitude. Integrate lay witness messages as key components in the overall communications plan.

E. Gratitude; Continue messaging – but with a “twist”

- a. The line scores in this category as well as the “Time & Talent” area, reflect the need to refine the “corporate” aspect of gratitude. Recommendations include:
 - Reviewing volunteer appreciation processes; an appreciation event can be done in conjunction with outreach for a local cause demonstrating gratitude flowing multiple ways.
 - Considering establishing a parish book of thanksgiving; modeled after a parish book of offerings inviting parishioners to enter blessings they are grateful for, rather than things they are asking for.
 - Based on the overall communication plan, incorporating a blessing for ministry members, new ministers, etc. at Mass. This will require cooperation from the liturgy committee and should be done in close collaboration with pastoral leadership.

F. Time & Talent; Focus on Invitation and Follow-up

Action steps currently underway:

- a. Developing a collaborative ministry guide/talent commitment tool. ***The commission has been engaged in this activity for some months now in an effort to produce a Ministry Guide that is comprehensive and inviting.***
- b. Reviewing current process of inviting ministry/volunteer participation.
 - Develop a timeline for Talent commitment. March 2018 was discussed as the timeframe for launching the new Ministry Guide. A formal timeline should be developed.
 - Consider a formal gifts discernment process in advance of an annual renewal of Talent. This can be done simply, with a self-assessment tool that incorporates stewardship messaging with prayer and reflection, helping parishioners consider their talents in a new light.
 - Based on resources available, develop a ministry database for managing ministry/volunteer opportunities and participants. ***While this step poses some challenges, establishing a volunteer database in some form should become a goal within the stewardship plan.***
- c. In collaboration with the school and CF program, develop a simple ministry guide with service opportunities for children, youth and young families.
- d. Consider a ministry celebration event as an alternative to a traditional ministry fair.

G. Financial Stewardship; Review Communications and Annual Process

The rating and verbatim comments in this area indicate that assessment participants agreed that the parish follows sound financial practices, however, responses indicated the need for increased communications about parish finances **as they relate to a vision for ministry**. Offertory at Holy Trinity has shown steady increases through several successful enhanced offertory programs and a successful capital campaign, however connecting parishioner giving with a vision for the future of ministry is critical to sustain or accelerate growth.

- a. **Calendar a *comprehensive* enhanced offertory program** for fall of 2018 Include St. Michael parishioners in this process.
- b. Begin to educate parishioners about **proportionate/sacrificial giving**. This is an unfamiliar concept to many Catholics. Tying financial giving to personal gratitude through communication, discussion and education about proportionate giving will result in increased offertory over time.
- c. **Review periodic and annual financial reporting process** and communications to parishioners. All correspondence regarding finances should be revised to reflect the “tone” of a ministry driven budget.
- d. **Add a “lead donor” strategy to the process at Holy Trinity**. (St. Michael, being new to the process, should defer this advanced step).
- e. **Develop a planned giving process/strategy for both parishes**. The Stewardship office has materials and information on this process.

The most critical element for a successful stewardship plan is leadership willingness to support a detailed action plan, and their commitment to staying the course. Next steps should include:

- Identifying 3-4 additional individuals to serve on the Stewardship Commission.
- Commission development of a 1-3 year plan, on paper, with timelines/stated goals/work assignments, etc. The Parish Stewardship Director is available to consult on this part of the process.
- Developing a timeline for the renewal of “talent”.
- Communicating assessment results and progress to parishioners through any/all means available. This announcement should be designed as the springboard for on-going communication.

These recommendations are presented as a framework to be “customized” by parish / Catholic community leadership based on their knowledge of this parish community, designed to work within the parameters of available resources. The archdiocesan Parish Stewardship Director is available to help with planning, training and implementation as requested.

“Parishioners must accept responsibility for their parishes and contribute generously - both money and service - to their programs and projects. The success or failure of parish programs, the vitality of parish life or its absence, the ability or inability of a parish to render needed services to its members and the community depend upon all.”

*Stewardship A Disciples Response
U.S. Catholic Bishops’ Pastoral Letter*