



## ***Vision 2020: A Strategic Plan for St. Giles Parish, 2015-2020***

### ***Executive Summary***

St. Giles Parish is a vibrant, engaged community by many measures.

Each week the pastor and parish staff work with dozens of regular volunteers who together create numerous opportunities to live our 3 W's: Worship, Welcoming and Walking the Way. Many families in the parish have roots going back several generations and new residents of the area continue to join the parish, seeking sacraments, fellowship, service opportunities, and religious formation for their children. Parish finances are sound and the parish recent capital campaign raised nearly \$4 million.

However, the parish leadership is also conscious that many parishioners do not feel connected to the faith community and, therefore, are not engaged in the life of the parish. Additionally, financial stability can quickly be compromised if the parish does not continue to maintain strict financial oversight and seek new revenue sources. Dedicated volunteers can burn out or not be open to new ideas because "we have always done it this way." Those parishioners, and would-be parishioners, who are at turning points in their lives, particularly teenagers, young adults, and families that do not fall into traditional categories, are not engaged at a level that allows the faith community to truly thrive.

In fall 2014, in the wake of the successful capital campaign and soon after completing his first five years at the helm of St. Giles, Pastor Carl Morello established a Parish Strategic Planning Committee (SPC) to work with the Parish Pastoral Council (PPC) to look ahead to the next five years of parish operations. Tasked with an examination of strengths, weaknesses, opportunities, and threats, as well as St. Giles faces inside its campus and in the broader community, this overarching group was asked to use its collective experience of St. Giles parish life and its varied professional and personal skills to set a course for the next five years.

### **The Next Chapter**

This strategic planning process culminated in the development of a number of focused goals for St. Giles Parish reflected in the Strategic Plan 2015-2020 or *Vision 2020*. The full plan, and executive summary as presented here, is intended as an organic, living document to be used as a planning tool by the pastor, parish staff, key parish leaders, and active ministries. That will only be the case if the Strategic Plan is used as a road

map, reviewed on an ongoing basis by the PPC, SPC, Finance Committee, School Board and Religious Education leadership, and the leaders of various ministries.

The group's consensus was that the Strategic Plan needed to address three goals:

1. We need to bring more people into and bridge gaps in the life of the Parish.
2. It is important to safeguard and grow the financial and operational foundation of the Parish.
3. Education and formation are a priority for our Parish families.

The *Vision 2020* Plan was developed with the intention of determining those primary initiative areas that are pivotal to the success of the St. Giles Mission and to recommend goals for implementation that should ensure the long term success of our Parish in achieving that Mission. The plan will be presented to the parish in fall 2015 and will be reviewed again in various forums quarterly through 2020.

To that end, three Initiative Areas were identified:

1. Protect and Enhance the Gifts and Resources with which we've been Blessed.
2. Be Relevant to all Parishioners and the Community.
3. Grow the Active Participation of Parishioners.

Subcommittees were then established for each Initiative Area to identify goals for each area, as well as measures or implementation benchmarks by which we could periodically assess whether our goals had been achieved or were achievable.

## **Foundational Goals for 2015-2020**

### **A. Initiative Area 1: To Protect and Enhance the Gifts and Resources with which we've been Blessed.**

This subcommittee discussed the Archdiocese's ever-more vigilant review of Parish budget/finances and the need for us to better track our financial stability and adherence to financial budgeting. The subcommittee also focused on the importance of covering costs and generating new revenue ideas to ensure we are meeting percentage increases in forecasted operational expenses, and established the following goals:

- Goal 1: To Focus On Revenue Generation and Management
- Goal 2: To Improve Budgeting and Forecasting

The specific implementation benchmarks can be found in the attached Appendix A: Implementation Matrix.

## **B. Initiative Area 2: Be Relevant to all Parishioners and the Community.**

This subcommittee engaged in extensive discussion to identify the current groups of parishioners who are significantly underrepresented or lacking in participation in the Parish community. For purposes of this Plan and consistent with the SPC's direction, the subcommittee focused on St. Giles School, Religious Education, teens (post-8th grade through college graduation), and young adults (college graduates through age 30).

### **1. Religious Education**

While there is clear room for development and growth of the RE program, it is important to support the many varied and strong parish programs that provide important religious education to our community, including the liturgy of the word, PREP, traditional RE, the children and teen choirs, and the CGS program.

Goal 1: Make the Sacraments A “Deeper, Richer Experience” Connected To RE Instruction In and Out of School

Goal 2: Help Post-Confirmation Teens Feel Connected To Each Other and To the Broader Faith Community

Goal 3: Ensure the RE Programs Are Well Supported By Integrating More Adult Parishioners

Goal 4: Provide Formal and Informal Opportunities To Communicate With RE Leaders

### **2. St. Giles School**

Contemporaneously with and as part of the St. Giles Parish SPC, the Board of Specified Jurisdiction at St. Giles School undertook a two-year, in-depth strategic planning analysis of the school. This analysis included the annual parent satisfaction surveys, several open forums to gather input, a strategic planning survey of the teachers, SWOT analyses of the early childhood and junior high programs, and work of the BSJ's committees, including Athletics, Development, Finance, Marketing, and Technology. The following goals are based on upon the St. Giles School Reasons to Believe, which are the school's established benchmarks to ensure that we deliver promised benefits and that the benefits are true and credible.

Goal 1: Academics – Achieve and Build Upon Academic Excellence

Goal 2: Values – Ensure That Our Students Understand and Own Our Catholic Identity

Goal 3: Nurturing Community – Develop Long-Term School Commitment

Goal 4: Leadership – Develop Successful Graduates, Lifelong Learners and Citizens of A Global World

### **3. Teens and Young Adults**

The subcommittee discussed that adult Catholics often bemoan the lack of teens or young adults in the pews as evidence of a rather grim forecast for the American church's future. However, as evidenced by the enormous participation in the ASP program within St. Giles, and recognizing that young adults typically return to the Church with the birth of their first child, we may just not be approaching these groups from their perspective or with activities like retreats, service opportunities, and group outings.

Goal 1: To Engage Teens and Help Them Form an Identity That Includes St. Giles Parish

The specific implementation benchmarks can be found in the attached Appendix A: Implementation Matrix.

#### **C. Initiative Area 3: Grow the Active Participation of Parishioners.**

The objective of this initiative area is to create and establish opportunities for meaningful activities and interpersonal relationships within the Parish. However the subcommittee assigned this objective determined that SMART goals that speak directly to growing participation and involvement would be difficult to address without the appropriate data about parish demographics and the broader market in which the Parish operates.

Goal 1: Identify Our Parishioners and Their Needs

Goal 2: Identify Key Groups That Need Programming to Help Grow Active Participation

Goal 3: To Communicate With Young Adults So That They Look First To St. Giles Parish As Their Spiritual Home and Faith-Based Community.

The specific implementation benchmarks can be found in the attached Appendix A: Implementation Matrix.

**I. APPENDIX A: STRATEGIC PLAN IMPLEMENTATION MATRIX**

**Initiative Area 1: To Protect and Enhance the Gifts and Resources with which we've been Blessed**

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
1.To Focus on Revenue Generation and Management	Establish an annual offertory renewal and increase appeal to match the % increase in forecasted operational expenses for the fiscal year	Parish Finance Committee	Trial: October 2015	Full Roll-Out: October 2016
	Establish a Parish fundraising team, including but not limited to development staff and major Parish groups, to evaluate the idea of one larger parish-wide fundraising event. The primary objective is to fund capital projects and supplement operating revenue, for the entire Parish.	Parish Finance Committee and Development Director	Install steering committee by May 2016	Submit implementation plan by October 2016.
	Establish a flexible and user-friendly platform that all parishioners and benefactors can use to either automatically or manually transmit funds as offertory or donations, as well as other types of donations (e.g. ASP Poinsettias, Block Party tickets, etc.), to the Parish bank accounts established for those purposes.	Parish Finance Committee together with Parish operational staffs	Establish platform by January 2016	Roll out to establish Parish-wide use by June 2016
2. To Improve Budgeting and	Establish a joint subcommittee of the Parish Pastoral Council and Parish Finance Council (including the Chair	PPC, PFC, School Finance Committee Chair	Begin by January 1, 2016	January 1, 2017

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
Forecasting	<p>of the School Finance Committee) and/or process for the Parish Finance Committee to regularly engage in substantive reporting and discussions with the Parish Pastoral Council in order to monitor a parish operational budget based on forecasts derived from current accounting and financial reporting. The focus of this effort will be on smoothing and increasing revenue streams and proper expense control;</p> <p>Establish a three-year schedule of expected maintenance and capital replacements to include a 3% increase year-over-year of unforeseen capital expenditures based on FYE 2015-16, which will be used by the Parish Finance Committee in budgeting;</p> <p>Establish a Human Resources Committee, following applicable guidelines from the Archdiocese and to include staff and parishioners, to evaluate the need for additional or replacement staff on an ongoing basis and to advise the Pastor based on this evaluation on a case-by-case basis.</p>	<p>Facilities Committee</p> <p>PPC, Parish Staff, Resources Committee</p>	<p>January 1, 2016</p> <p>PPC and staff to est. HRC by January 1, 2016</p>	<p>Annually by January 1</p> <p>HRC to be operational by June 1, 2016</p>

**Initiative Area 2: Be Relevant to all Parishioners and the Community – Religious Education**

<i>Goals</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
1. Make the sacraments a “deeper, richer experience,” connecting them more explicitly to religious education offered in and out of school	Establish a working team or meaningful dialogue between the RE Director, Principal, teachers and parents to develop a plan to learn, teach and celebrate the sacraments together through each touchpoint from the faith community in a child’s life, i.e. home, church, school and RE	Religious Education Director, Principal	Establish communication by January 1, 2016	Implement plan by August 2016
2. Provide a mechanism for Confirmandi to feel connected to each other and to the broader faith community.	Establish a working team with the RE Director, Youth Ministry, School representative, and Confirmandi to brainstorm and initially develop two events or ways to connect (or maintain a connection) with post-confirmation teens to our faith community.	RE Director, Youth Ministry	Establish team by January 1, 2016	Implement initial two events or methods by December 31, 2016
3. Integrate more adult parishioners in the RE program	Develop a team of volunteer catechists such that all RE classes are fully staffed by catechists	RE Director	July 1, 2016 (implement plan to develop team of volunteers)	August 2016
4. Ensure formal and informal pathways for communication with RE leaders	Create annual surveys for RE families	RE Director	March 2016	Spring 2016
	Survey or request feedback at conclusion of sacramental programs	RE Director	December 2015	January 2016

**Initiative Area 2: Be Relevant to all Parishioners and the Community – St. Giles School**

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
1.Achieve and Build Upon Academic Excellence	Develop and implement a teacher training and professional development plan	Principal	January 1, 2016	August, 2016
	Establish subcommittee for the assessment and implementation of appropriate curriculum standards and best practices for the Early Childhood Development Program	Principal, Early Childhood Committee	Establish subcommittee to conduct the assessment – by January 1, 2016;	Recommendations to be made by July 1, 2016
	Conduct annual surveys of high school families regarding their students' preparedness from SGS	Marketing Committee	Begin by January 1, 2016	Annual
	Implementation of a formal hiring protocol for teachers and staff based on industry best practices	Principal	January 1, 2016	January 2016

2. Ensure that our students understand and own our Catholic identity	<i>Establish a positive culture and climate that promotes formation of the whole child</i>	<i>Principal</i>	<i>January 1, 2016</i>	<i>Ongoing</i>
3. Nurturing Community - Develop Long-term School Commitment	Ensuring opportunities for communication and collaboration between the Principal and RE Director	Principal, RE Director, Pastor	January 1, 2016	August 2016
	Integrating sacramental education into the School religious program and with the School teachers	Principal, Religious Education Director	Establish team by January 1, 2016	Implement plan by August 2016
	Internal enrollment retention initiatives, including conducting exit interviews for departing families, setting internal retention goals for preschool to kindergarten students, and improving communication avenues (including the website)	Marketing Committee	Establish goals or plans for each area by January 1, 2016	June 2016
4. Leadership – Develop Successful Graduates, Lifelong Learners and Citizens of a Global World	External enrollment management initiatives, including focusing on ensuring enrollment goals are reached for kindergarten classes and setting more formal policies on acceptance of transfer students post-kindergarten	Marketing Committee, Principal	Principal to set transfer student policies by June 1, 2016 for implementation for 2016-17 school year	Marketing initiatives schedule set annually by January 1
	Conduct annual surveys of high school parents to assess their students' readiness from their SGS education, and use those results to analyze SGS curriculum and other components	Marketing (surveys), Principal (assessment)	March 2016	Annually

**Initiative Area 2: Be Relevant to all Parishioners and the Community – Teens**

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
1. To engage teens and help them form an identity that includes St. Giles Parish	Establishment of St. Giles Youth Group to engage teens outside of Church in a program that calls to their spirits	Youth Ministry Team	January 1, 2016	Ongoing
	Implementation of quarterly teen meetings or events to engage teens within the St. Giles community and to begin the conversation of the role of faith within their lives	Youth Ministry Team	December 15, 2015	Ongoing

**Initiative Area 3: Grow the active participation of parishioners**

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
1. Identify our parishioners and their needs	Development and implementation of an electronic and pew-administered survey to assess social and service needs and desires of the Parish	PPC, Initiative Area 3 Working Group	February 2016	June 2016
	Creation and/or update of a comprehensive, fully-populated parishioner database, which can be used to understand the Parish demographics and constituents to be served	Parish staff, Parish ministries	Ministry updates by September 2016	Database by November 2016
2. Identify key groups of parishioners seeking to increase participation; identify programming areas which are missed opportunities for increased engagement in the life of the parish.	<p>Work with the survey responses to identify:</p> <ul style="list-style-type: none"> <li>• Formal/informal groups with interest in increasing participation in parish life</li> <li>• Mismatch between people’s needs and current programming/ministry opportunities</li> <li>• Barriers to active participation</li> </ul> <p>Sponsorship of two events with two different groups with the long term goal of increasing engagement in active</p>	Parish staff, PPC, and TBD	June 2016	January 1, 2017

<i>Goal</i>	<i>Action Steps</i>	<i>Person/Group Responsible</i>	<i>Interim Target Date</i>	<i>Completion or Full Implementation Date</i>
3. To stay in communication with young adults (post-college) so that, when they are ready to reconnect with their faith or are in need of support, they look first to St. Giles Parish as their spiritual home and faith-based community.	Parish life.  Identify missed opportunities for helping parishioners engage with existing ministries – e.g., adult faith formation, social justice, et al.  Develop strategies to address 2 top barriers to participation			
	Establish a tracking mechanism to track our student parishioners during their teen and college years and communicate with them to celebrate their accomplishments and provide quarterly communications from their home parish.	Parish staff, RE Director, Development Director	Tracking mechanism by June 2017	Communications to begin Fall 2017
	Continue relevant communication through to young adults to provide support	TBD	Fall 2018	Ongoing
	Identify new young adult Catholics in Oak Park to introduce St. Giles Parish as a relevant faith-based community.	TBD	Fall 2018	Ongoing