



Catholic Leadership
INSTITUTE

DIOCESE OF BURLINGTON

Action Planning Days



Catholic Leadership Institute



Catholic Leadership Institute provides bishops, priests, religious, deacons, and lay persons in the Roman Catholic Church with world-class, pastoral leadership formation and consulting services that strengthen their confidence and competence in ministry, enabling them to articulate a vision for their local church, to call forth the gifts of those they lead, and to create more vibrant faith communities rooted in Jesus Christ.

Vision

We see a world where each individual understands their God-given mission in life and is doing their best to fulfill it; a world where Catholic leaders are influential voices in society; a world where Jesus' example of loving, servant leadership is modeled in every family, workplace, parish, and community.

Values

The following enduring beliefs guide the behaviors, decisions, and actions of Catholic Leadership Institute:

1. Love of Christ and the Church
2. Highest standards of Excellence
3. Care for the Individual



2018 Synod Priorities

Evangelization - call people to faith

“Do not be afraid to welcome Christ and accept His power. ... Open wide the doors for Christ.” —St. Pope John Paul II

“The task of evangelizing all people constitutes the essential mission of the Church. It is a task and mission that the vast and profound changes of society make all the more urgent. Evangelizing is the grace and vocation proper to the Church, her deepest identity. She exists in order to evangelize.” —St. Paul VI

Building Vibrant Parishes - give people a place where faith lives

“A parish is a certain community of the Christian faithful stably constituted in a particular church, whose pastoral care is entrusted to a pastor ... under the authority of the diocesan bishop.” — Code of Canon Law, canon 515, §1

“A parish is a community united in the universal call to holiness that is given through baptism. While traditionally established and organized territorially, the synod delegates recognized the current reality that people choose their parishes for reasons other than geography. The community that is entrusted to a pastor’s care is less clearly defined and identified than in the past. This reality must be acknowledged if vibrant parishes are to be built up.” — Diocese of Burlington 2018 Synod

Communications - proclaim a message that can be heard, received, understood and accepted

“Communication is part of God’s plan for us and an essential way to experience fellowship.” — Pope Francis

“The work of building vibrant parishes and evangelization relies on effective communication within parish communities, the Diocese and the broader Church. The goal of effective communication is the triumph of truth over falsehood. To this end, synod delegates stated that Catholics must be intentional in their communication efforts both within the Diocese and outside it.” — Diocese of Burlington 2018 Synod



Synod Recommendations

Evangelization

The Diocese of Burlington will...

1. Establish a Diocesan Evangelization Committee under the direction of the executive director for evangelization and catechesis.
2. Develop a pastoral approach that helps every parish become an intentionally evangelizing community.
3. Establish an evangelization committee in every deanery, revising the deanery structure if necessary to make this effective.
4. Develop a diocesan-wide curriculum for religious education in grades K-6.
5. Develop a post-confirmation program for middle and high school students.
6. Develop and implement a program of adult catechetical and faith formation for the Diocese.
7. In evangelization efforts, stress intentional outreach to young people in the Church, those ambivalent about the faith and those fallen away from the practice of their faith.



Synod Recommendations

Building Vibrant Parishes

The Diocese of Burlington will...

8. Engage in a survey of all parishes based on common criteria that recognize the differences between urban/suburban and rural parish communities. This survey can then be expanded to include the wider Vermont community, including non-Catholics.
9. Following the survey, implement a process to build vibrant parish communities centered around the liturgical, sacramental and devotional life of the Church as well as on social justice as evidenced by the corporal and spiritual works of mercy. This process should take into account the limited availability of priests and recognize that the presence of priests for more than just the celebration of weekend Mass is essential.
10. Foster vocations to the diocesan priesthood, emphasize the importance of all vocations and support the work of parish vocations committees.
11. Investigate new forms of lay and diaconal parish leadership, helping to free priests to focus more on pastoral ministry and less on administration and facilitating greater lay participation in the spiritual and pastoral works of the parish.

Communications

The Diocese of Burlington will...

12. Enter into a planning process to strengthen the Office of Communications for the Diocese.
13. Establish a communications plan to further the work of evangelization and good communications with those both inside and outside the Church, identifying and addressing existing challenges and obstacles that might impair communications.
14. Create a means by which communication can flow back and forth between the bishop, administrative offices, deaneries, parishes and people.
15. Create communications uniformity within the Diocese, for example by common email (@vermontcatholic.org), website and bulletin formats.
16. Continue to maintain traditional forms of communication while exploring new ways of communicating.



Opening Prayer

The Synod Prayer

Almighty and ever-living God, You continually guide and sustain your pilgrim Church, which you established as “the universal sacrament of salvation.” Direct the Church in Vermont during this time of preparation for the Diocesan Synod.

Help us to discern the signs of the time wisely, that we may joyfully proclaim the Good News of salvation through Jesus Christ.

May we never fail to trust that “with God, all things are possible.” We ask this, with the help of the Holy Spirit, through Christ our Lord. Amen. Mary, Mother of the Church,

Pray for Us.



Questions for Reflection

1. In what way(s) does the Synod Prayer give you hope?

2. What will you find challenging about Action Planning?

“The work that lies ahead for all members of the Catholic Church in Vermont is to share joyfully by word and deed our love of God and the Church with all those we encounter. This must be done on a personal level as well as on parish and diocesan levels with a special focus on evangelization, vibrant parishes and communication.”

— Diocese of Burlington 2018 Synod



2 Day Session Outcomes

During these sessions, you will...

- **Reconnect with** *Synod priorities and goals*
- **Receive** the results of the Disciple Maker Index survey to understand and learn from the responses of your parishioners
- **Appreciate** how your Disciple Maker Index results support the need to pursue the diocesan Synod priorities and goals
- **Learn** how to investigate and use the data as a relevant tool for planning
- **Align** your parish with the diocesan priorities and goals by **creating parish based strategies** that will directly affect the faith life of parishioners.

“Stand firm in the faith, be courageous and strong.”
— **1 Corinthians 16:13**

“I dream of a “missionary option”, that is, a missionary impulse capable of transforming everything, so that the Church’s customs, ways of doing things, times and schedules, language and structures can be suitably channeled for the evangelization of today’s world rather than for her self-preservation. The renewal of structures demanded by pastoral conversion can only be understood in this light: as part of an effort to make them more mission-oriented, to make ordinary pastoral activity on every level more inclusive and open, to inspire in pastoral workers a constant desire to go forth and in this way to elicit a positive response from all those whom Jesus summons to friendship with himself.”

— Pope Francis, *The Joy of the Gospel* (27)



Disciple Maker Index Results

In order for the Disciple Maker Index to bear the most fruit in your parish community, please remember and reflect on the following:

<p>A Significant Input but not the only input</p>	<ul style="list-style-type: none"> • Consider the results as a way to narrow down the additional discernment you want to do. • The Disciple Maker Index is not meant to be an absolute determination of what your priorities should be, it is meant to focus your discernment on where there are the biggest opportunities. • Ultimately the Disciple Maker Index results will prompt more questions than provide answers – that is the point.
<p>Context not Competition</p>	<ul style="list-style-type: none"> • The Disciple Maker Index has been conducted in over 450 parishes in more than 25 dioceses throughout the US and Canada. • The results will show how your community scored on certain questions in the context of the database of all participating parishes, and also in the context of your diocese (should there be other parishes from your diocese) as well as the context of communities of like size and setting. • This is intended to help communities understand what the range looked like on each question as well as to highlight best practice and models to be shared among communities.
<p>Share the Information the Right Way</p>	<ul style="list-style-type: none"> • The report and results are robust. To simply forward the report to parishioners without the benefit of any framing would be irresponsible. It's too much information to process and the wrong conclusions could be drawn. • What should absolutely be shared is gratitude for those who took the time to complete the survey and the top 2-3 strengths to celebrate and the 2-3 top areas of opportunity for growth that emerged. • Catholic Leadership Institute has templates for leaders to use that appropriately share the results with the whole parish community.



<p>The “Net Promoter Score” – A Prioritization Tool</p>	<ul style="list-style-type: none"> • Some of the results will be shown simply by the number of respondents who “strongly agree” with a question (e.g. Likelihood to Recommend My Parish). • This is to more clearly to identify those areas of strength and those areas of potential growth • Cutting edge survey design has shown that those who indicate “strongly agree” (promoters) are most likely to influence another behavior’s positively. While those who indicate “neither agree/nor disagree, disagree, or strongly disagree” (detractors) are most likely to influence another behavior’s negatively. Therefore, questions with a very high “strongly agree” are strengths. Areas with a very low “strongly agree” would tend to be areas for potential growth. • There is more information about the “Net Promoter Score” and why it is used in the report on the next page.
<p>Understanding the National Narrative</p>	<ul style="list-style-type: none"> • Based on its more than 125,000 individual responses, Catholic Leadership Institute has pulled out the trends we think are most important for any faith community to know. • Some trends may not be as relevant to your situation. We attempted to pull out the ones most relevant to the largest number. • You have access to all of your data and you are encouraged as a team and individually to dig into other areas. We are here to help.



Understanding the Net Promoter Score

The purpose of the Disciple Maker Index is to provide a tool that will help us equip and call forth disciple-makers – **people who bring others to know Jesus**. We want to build promoters of the faith and promoters of our parishes as places to encounter Jesus and communities of faith.

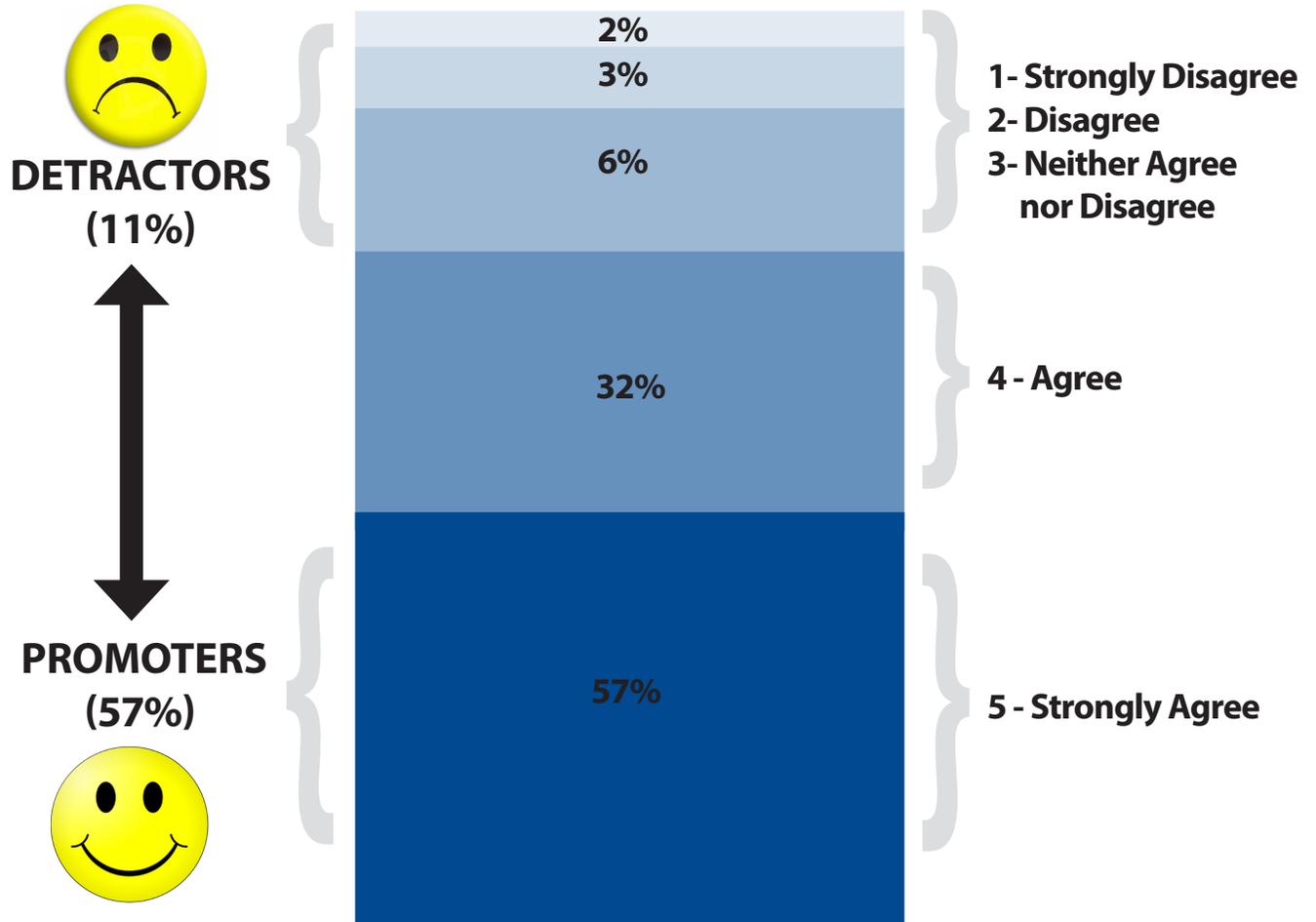
Given this purpose and the fact that the survey will most likely be responded to by people who are already coming to the parish, the “Net Promoter Score” is a helpful and cutting edge way to analyze survey responses on a 5-point scale of agreement for any given question.

Net Promoter, developed by Satmetrix, Bain & Company and Fred Reichheld, is now the worldwide standard for organizations to measure, understand, and improve their “customer” experience. While parishes don’t exist simply to provide customer satisfaction, if people feel their needs are being met or are not being met, **it will influence how willing they are to engage and to invite other people to engage in the life of the community**.

When we take the percentage of those who “strongly agree” (5’s) and subtract from it those who “neither agree nor disagree”, those who “disagree” and those who “strongly disagree” (3’s, 2’s and 1’s) we have the “net” percentage of promoters for that question.

If that net percentage is positive, that is most likely an area of strength. If the net percentage is negative, it may be something you want to reflect upon more as a potential area of growth.

Research shows that the positive behavior and emphatic endorsement of those who “strongly agree” will positively influence another person’s behavior. As part of the Disciple Maker Index, you will receive some of the survey results through this lens. You will also have access to all of the data and straight distribution of responses for each question.



57% Promoters
-11% Detractors
= Positive Net Promoter Score



Disciple Maker Index: Digging into Data

1. Take a survey item (question) and see the breadth of responses.
2. Share observations about the results.
3. Generate several hypotheses to help you dig deeper. Use other survey inputs (from the questions list) to help you test your hypotheses.
4. Identify current strengths and opportunities for growth or change.

Survey Item (Question)	Make Observations and Generate a Hypothesis	TEST Hypothesis by Cross-referencing Other Survey Items	Determine Strength or Opportunity
Church critical to relationship with God	This is generally strong. Hypothesis: This is stronger in some age ranges.	1 comparison: 35 and older 2: ages under 18-35	STR with older OPP with younger
Prayed with another person	This is not a habit among those who responded. Hypothesis: Individuals with greater spiritual awareness are more likely to pray with others. Also those who are part of certain groups.	1. pace of spiritual growth 2. God is working in my life 3. participate in Bible study 4. children in parish school 5. etc	OPP: Teach how to pray with another person more intentionally and raise comfort level. Begin with certain groups: seek out those who strongly agree God is at work in their life. STR: A high number are praying on own as individuals. The desire to pray is strong. OPP: in parish school and religious ed.
Would recommend parish to a friend	Our Net Promoter Score is below average for the diocese. Hypothesis 1: We could be more welcoming. Other Hypotheses: (Take the time to consider other drivers and discover areas of opportunity.)	1. Church makes me feel welcomed and accepted.	STR: We are slightly higher in this area and could build on this.



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Report Overview

TABS	FOCUS	STYLE OF RESULTS
Workbook Pages / Tableau Tabs: CLI provides you with results in significant areas.		
2	High Level Dashboard: <ul style="list-style-type: none"> Number of survey-takers Catholic Journey Question Outcome Question 1 and 2 	Snapshot of 3 of key questions.
3	Top Drivers for Outcome Questions 1 and 2	Shows the strongest impacts (drivers) with those who "strongly agree" with the 2 questions.
4	Top Drivers for Outcome Question 3	Shows the strongest impacts (drivers) with those who "strongly agree" with the 2 questions.
5	The 6 Belief Questions	Shows the strength of each core Catholic belief in one view.
6	8 Frequency Questions: Personal Prayer & Spiritual Life	Shows the strength of participation in areas with a personal focus.
7	11 Frequency Questions: Missionary Discipleship	Shows the strength of participation in areas with a 1:1 focus, plus small group and social.
8	Catholic Journey Question	<i>Benchmarking</i> your results with others' results.
9	3 Outcome Questions and some of their Top Drivers	<i>Statistical Significance:</i> comparing your parish to the average in the diocese.
EXPLORE and DISCOVER: You choose the questions to investigate.		
10	Any 1 Question	Results across the 5 possible answers: Strongly Agree to Strongly Disagree
11	Any 1 Question	<i>Benchmarking</i> your results with others' results.
12	Comparing any 2 Questions	Cross-Tabulating
13	Zip Code comparison	Cross-Tabulating: You choose a question with which to cross-tabulate with zip codes.
14	Demographic comparison	Cross-Tabulating: You choose any question AND any demographic question to cross-tabulate.
15	Net Promoter Score for any question	You choose any question to find the Net Promoter Score. (Best used with "I would recommend" questions.)
16	Settings for tableau	You can change presets.



My Top 3 Priorities

Individually write down, in rank order, what you believe to be the top 3 **Priorities** for your parish community

Our Top 3 Priorities

After discussing as a team, write down what **your team** has identified to be the top 3 **Priorities** for your parish community

Priorities

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

Goals

- Goals focus energy and activity to achieve this accomplishment

Each priority must meet the 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.



Opening Prayer and Reflection: Fearless

“Peter got out of the boat and began to walk on the water toward Jesus. But when he saw how strong the wind was he became frightened; and beginning to sink, he cried out, ‘Lord, save me!’ Immediately Jesus stretched out His hand and caught him, and said to him, ‘O you of little faith, why did you doubt?’”

—Matthew 14: 29-31

“Peter shifted his attention away from Jesus and toward the squall, and when he did he sank like a brick in a pond. Give the storm waters more attention than the Storm Walker, and get ready to do the same.”

—Max Lucado, *Fearless*

Questions for Reflection

1. As you consider “getting out of the boat” to follow Jesus, what is He calling you to do in response to the Disciple Maker Index Survey results?

2. As you respond to His call to help the people of your community grow in their spiritual journey, what challenges or “storms” are causing you to take your eyes off Jesus?

3. How will you respond to these challenges? In other words, how can you stay focused on the “Storm Walker”?



Disciple Maker Index Discussions

In groups of three, discuss the following questions. Feel free to jot down your thoughts.

- What was surprising? What was validating?

- What do we need to know more about?



Each goal will be achieved through a set of strategies, for example:

Priority: Youth Ministry

GOAL 1:

Pilot 5-7 new youth ministry opportunities with 25-35 youth in attendance for each, by December 1, 2020.

1. Create a youth leadership team by _____ in the parish to investigate and recommend practices to retain more youth in parish and Church life and mission.
2. Install 20 - 25 youth volunteers by _____.
3. Complete a youth-focused technology plan by _____.

Priority: Evangelization

GOAL 2:

Equip parishioners as Missionary Disciples who are inspired to invite and accompany others by May 31, 2020.

1. Select Bible study program.
2. Promote program and faith-sharing.
3. Launch the first 5-7 small Bible study/faith-sharing groups by _____.
4. Offer 10-15 monthly opportunities to experience a *Witness Talk* by _____.

Remember, a goal is...

A thoughtful and discriminating initiative that rises to the top of one's leadership agenda.

It becomes the driving initiative for action and leadership in service to a new or desired outcome of possibility;

all other decisions are made in deference to named goals.



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.

A SMART Goal takes into account these 5 characteristics:

Specific - Leaves no doubt about the intended outcome/achievement

Measurable and Motivating

- Measurable provides an objective target.
- The Motivation is implied by setting a tangible achievement that connects to a larger, meaningful Vision.

Attainable - The outcome will stretch the parish but 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



SMART Goal Worksheet

Priority: _____

Goal:

Achieve <i>Vibrant Verb</i>	
Outcome <i>Measurable Middle</i>	
When? <i>Definitive Date</i>	

Goal (Achieve • Outcome • When?)

Evaluate: Use the SMART Goal pages in your binder to determine if the goal statement can be made SMARTer.

- Is the Goal Statement:
- Specific and Measurable?
 - Motivating?
 - Attainable?
 - Relevant?
 - Trackable?

Answer: _____

If not, write a revised SMART Goal Statement:



SMART Goal Worksheet

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Answer: _____

If not, write a revised SMART Goal Statement:



Over-Communicate Clarity

In organizations that effectively over-communicate, the People of God understand what the community is about and how they contribute to its mission. Because of this, there is a strong sense of common purpose and direction.

Ways to Over-Communicate Clarity

The first step to effectively over-communicate is to embrace the three most critical practices of effective organizational communication: repetition, simple messages, and multiple mediums. When you get tired of hearing yourself speak of the parish priorities, know that this is when your people are just starting to get it... and be prepared to say it at least 20 more times!

- 1. Repetition:** According to experts, people must hear a message seven times before they begin to believe and internalize it.
- 2. Simple Messages:** The People of God need clear, uncomplicated messages about where the parish is going and how they can contribute.
- 3. Multiple Mediums:** Experiencing a message through multiple mediums increases a person’s ability to internalize it.

Below, list at least 8 media, vehicles, or ways you can communicate with your people.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____



Disciple Maker Index: Communication Plan

Reflecting upon the data that you received from the Disciple Maker Index for your community, what messages do you want to share? What audiences do you want to specifically target?

Key Audiences <i>What communities within the parish?</i>	Desired Outcome <i>What action I want them to take</i>



Key Messages <i>What are the main points I need to get across?</i>	Person Responsible	By When



Our Tasks

In the next 7 days:

I am responsible for:
