

**Saint Joseph the Worker Parish  
Strategic Plan Progress Report  
May 29, 2018**

Dear Council and Commission Members:

All of you may recall in February 2015 (has it been that long?), the Pastoral and Finance Councils, Stewardship Commission, School and Parish Strategic Planning Committees came together to begin assembling a strategic plan for the Parish's future. In *Planning Tomorrow's Parishes*, Bishop Joseph Cistone has asked all parishes in the diocese to develop such plans.

During this planning process, I often asked the question: *Why Plan?* Perhaps the most possible outcome of planning is that it helps me and the parish to distinguish between the urgent and the important. What planning does is to establish for us what is actually necessary, so we can prioritize for the best use of our time and resources of the parish.

In experiencing this bold vision coming together over the past two years, for the betterment of our community, it is clear that our work is really cut out for us. We have a wonderful vibrant community; however, at this juncture in the life of our parish and school, there is no time for us to be complacent. Jesus Christ and His Gospel proclaimed in the church are needed now more than ever!

And so, the parish and school plans have been developed; now we must act!

Therefore, as parish leadership, I submit the following *Progress Report template* to all Councils and Commissions, so we can begin to track the progress of the parish and school strategic plans. I am asking Finance Council and all Commissions to submit a monthly report (using the attached template) to the Pastoral Council for review; so the Pastoral Council can review/evaluate and offer assistance in furthering your respective goals/initiatives. Also, each month starting in February, the Pastoral Council will invite each council/commission to present their updates.

Again, many thanks to you and the Pastoral Council for your hard work and sincere dedication as we continue to foster/breathe the new life into our parish community. God bless.

Father Ricky Varner, Parochial Administrator  
Members of the Pastoral Council

**PARISH MISSION STATEMENT**

**Saint Joseph the Worker Roman Catholic parish and school encourages its members to live fully the message of Jesus Christ. Inspired by the Holy Spirit through faith, love, sacraments, and service, our parish family will be a community of lifelong achievers and a center for academic excellence.**

# STRATEGIC PLAN PROGRESS WORKSHEET

<b>Name of Council/Commission:</b> Finance Council, Stewardship Commission		<b>Date:</b> 2/1/2017	
<b>Initiative 1:</b> Increase the amount of the Sunday collection by \$5 per average envelope used.		<b>Measures of Success:</b> Between online giving and envelopes, about 280 are used weekly. At \$5 per envelope/online giving that would be \$1,400 per week, resulting in \$72,800 per year increase  COMPLETED	
<b>1. Strategy</b>	<b>Target Date</b>	<b>Responsible</b>	<b>Collaboration Needed</b>
<b>a. Action Steps</b>			
Announce at Mass	2015-2016 2016-2017	-Finance Council	-Parishioners
Hold town hall meeting after Mass to discuss in detail	1 <sup>st</sup> quarter 2016	-Finance Council	-Parishioners
Promote online giving, will and estate planning	2016-2017	-Finance Council -Stewardship Committee	-Parishioners
			<b>Status</b>
			See Status box below
			See Status box below

**Status (chart progress of specific initiative):**

2015-2016: Announced at Mass during yearly Financial talk.

2016-2017: Sunday collection through April of this fiscal year up \$43,922. This works average increase of \$3.62 per envelope. Some of the Sunday collection increase can be contributed to the extra envelopes that used to all be capital improvement/building fund are now ear marked cemetery or school.

2016-2017: Sunday collection through year-end of June 2017 was up \$30,115. Average increase of \$2.07 per envelope based on 280 per week. This does not include the capital improvement dollars of \$43,386. **If capital improvement dollars are included the Parish is over the \$5/week goal.**

**Status (chart progress of specific initiative):**

1<sup>st</sup> quarter 2016 – One of the topics talked about during the Financial town halls (2 times).  
 November 2016 - Part of the yearly Financial talk.  
 November 2017 - Part of the yearly Financial talk.  
 November 2016 - Announced at Mass during yearly Financial talk.  
 November 2017 – Announced at Mass during yearly Financial talk.

<b>Initiative 2:</b> Increase usage of the capital improvements (green) envelopes equal to the number of weekly contributors.		<b>Measures of Success:</b> Weekly contributors = 280. Capital improvements (green) projects. ONGOING – USE OF CAPITAL IMPROVEMENT CONTINUES	
<b>1. Strategy</b> <b>a. Action Steps</b>	<b>Target Date</b>	<b>Responsible</b>	<b>Collaboration Needed</b>
Announce at Mass	2015-2016 2016-2017	Finance Council	-Parishioners
Hold town hall meeting after Mass to discuss in detail	1 <sup>st</sup> quarter 2016	Finance Council	-Parishioners
Promote online giving, will and estate planning	11/2016 New date 11/2017	Finance Council	-Parishioners
			See Status box below

**Status (chart progress of specific initiative):**

Status (chart progress of specific initiative):

2015 – 2016 – Loan paid off October of 2015.

April 2017 - The capital improvements envelopes continue to come in. Through April of this fiscal year total \$43,779. This is an average of \$3.61. We cannot consider the capital improvements as increases in Sunday collection, but it should be noted that this account will be used for projects and not normal expenses. It also means the Sunday collection will not have to be used for these projects.

Do not have counts differences in green envelopes.

As of year-end June 2017 capital improvement, envelopes brought in \$43,386, which is \$2.98 per envelope based on 280 per week. Plus the capital improvement fund brought in interest of \$7,677 with a total balance of \$124,383.77

**As of end of April 2018 the Parish has a Capital improvement fund of \$167,562.**

1<sup>st</sup> quarter 2016 – One of the topics talked about during the Financial town halls (2 times).

November 2016 - Part of the yearly Financial talk.

November 2017 - Part of the yearly Financial talk.

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November 2016 - Part of the yearly Financial talk.

November 2017 - Part of the yearly Financial talk.

Initiative 3:	Measures of Success:
Establish a fund balance.	Develop annual budget goals to meet fund balance

1. Strategy a. Action Steps	Target Date	Responsible	Collaboration Needed	Status
10 percent of total revenues by 2018 COMPLETED	2016-2017	Finance Council	-Parishioners	See Status box below
15 percent of total revenues by 2020 COMPLETED	2019-2020	Finance Council	-Parishioners	See Status box below

**Status (chart progress of specific initiative):**

2016 – 2017: In December of 2016, we have exceeded the 10% goal.

2016 – 2017: End of year June Fund balances combined for church and school \$237,418.88. Parish expenses for last year were about \$875,000.

2016 – 2017: We are close to our 15% goal.

2016 – 2017: Goal has been reached and exceeded. End of year June Fund balances combined for church and school \$237,418.88. Parish expenses for last year were about \$875,000. Parish expenses budgeted for this year are \$838,457.91 not counting any capital improvements.

As of end of October 2017: Expense is \$285,160.41 or 34.01% of total for year. That is within 1% of projected. Income is \$334,086.90 or 35.83% of total for year. That is a little more than 2% of projected. Current year is on track.

April 2018 – \$231,463 in saving, not counting what was brought in from auction.

<b>Initiative 4:</b> Develop a deferred maintenance plan.	<b>Measures of Success:</b> Maintenance plan is itemized with cost and prioritized. Then completed in year approved.			
<b>1. Strategy</b> <b>a. Action Steps</b>	<b>Target Date</b>	<b>Responsible</b>	<b>Collaboration Needed</b>	<b>Status</b>
Perform inventory of maintenance projects	2015-2016 2016-2017	-Buildings & Grounds Committee	-Finance Council -Father Ricky	See Status box below
Establish costs	2015-2016 2016-2017	Buildings & Grounds Committee	-Finance Council -Father Ricky	See Status box below
Prioritize projects annually	Spring 2016 Spring 2017	Finance Council, Buildings & Grounds Committee	-Finance Council -Father Ricky/Father Tom	See Status box below
Coordinate with Finance Council to establish completion year	Spring 2016 Spring 2017	Finance Council, Buildings & Grounds Committee	-Finance Council -Father Tom	

<b>Status (chart progress of specific initiative):</b>	
2015 - 2016: List completed	
2016 - 2017: List updated	
2017 - 2018: No changes	
2015 - 2016: Costs have been established.	
2016 - 2017: Costs updated as needed.	
2017 - 2018: No changes	
2015 - 2016: Prioritized.	
2016 - 2017: Each year review and reprioritize.	
October 2017: Start process of replacing school boiler system. Move capital improvement projects to separate initiative.	

**Status (chart progress of specific initiative):**

2015 – 2016: List was completed with dates.  
 2016 – 2017: Review list and re-date any items not completed. Through April of 2017 over \$40,000 has been on items on the list.  
**2017-2018 - Trees removed from cemetery. Classrooms lights all updated. Final 4 classrooms to have new carpet and paint. Convent exterior trim to be painted. Rectory soffit and fascia to be repaired/replaced.**

<b>New Initiative 5:                      Complete one sizeable capital improvement project per year.</b>	<b>Measures of Success:</b> Capital Improvement projects itemized and appx. cost. Capital improvement projects completed within project timeframe once approved.			
<b>1. Strategy                      a. Action Steps</b>	<b>Target Date</b>	<b>Responsible</b>	<b>Collaboration Needed</b>	<b>Status</b>
Perform inventory of capital improvement projects	2017 - 2018	-Buildings & Grounds Committee	- Finance Council - Father Tom	See Status box below
Establish costs	2017 - 2018	Buildings & Grounds Committee	- Finance Council - Father Tom	See Status box below
Prioritize projects annually	Winter of 2017	Finance Council, Buildings & Grounds Committee	- Finance Council - Father Tom	See Status box below
Coordinate with Finance Council and Pastoral Council to establish completion year	Spring 2018	Finance Council, Pastoral Council, Buildings & Grounds Committee	-Finance Council -Pastoral Council -Father Tom	See Status box below

**Status (chart progress of specific initiative):**

**Status (chart progress of specific initiative):**

2017 – 2018: Use deferred maintenance plan as a starting point as it had maintenance and capital improvement projects on the same list.  
**2017-2018 – School furnace to be replaced during Summer of 2018.**

<p><b>New Initiative 6:          Establish committee to oversee Parish staff wages and benefits.</b></p>	<p><b>Measures of Success:</b>          Parish staff wages and benefits are fair, consistent and follow Diocese guidelines. All of this is based on the Parish financial situation.</p>			
<p><b>1. Strategy</b>  <b>a. Action Steps</b></p>	<p><b>Target Date</b></p>	<p><b>Responsible</b></p>	<p><b>Collaboration Needed</b></p>	<p><b>Status</b></p>
<p>Create committee to review current teacher salaries</p>	<p>2017 - 2018</p>	<p>Finance Council          Pastoral Council          School Principal</p>	<p>- Father Tom</p>	<p>See Status box below</p>
<p>Put in place a salary step policy for teachers</p>	<p>2017 - 2018</p>	<p>Parish staff compensation committee</p>	<p>- Finance Council          - Pastoral Council          - School Principal          - Father Tom</p>	<p>See Status box below</p>
<p>Met yearly to review current staff wages and benefits.</p>	<p>2018 - 2019</p>	<p>Parish staff compensation committee</p>	<p>- Finance Council          - Father Tom</p>	<p>See Status box below</p>
<p>Make recommendations to adjustments in wages and benefits.</p>	<p>2018 - 2019</p>	<p>Parish staff compensation committee</p>	<p>- Finance Council          - Father Tom</p>	<p>See Status box below</p>

**Status (chart progress of specific initiative):**

**Status (chart progress of specific initiative):**

September 2017 – Committee formed  
2017 -2018 - Need a replacement for Julie Ward. Leslie Thielen is Finance Council rep.

February 2018 – Salary step policy is shared with Finance Council.  
March 2018 – Finance Council recommends putting step policy in to place over a couple of year period depending on Parish finances with first half step to start in April 2018. Pastoral Council agrees.

2018 - 2019 – future update

2018 – 2019 – future update