

*Visitation Church*  
**STRATEGIC PLANNING REPORT**  
September 2004

**To** The Parish Council of Visitation Church, Kansas City, MO  
**From**

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## INTRODUCTION

A strategic plan for any organization is a sacred task because it aims to embody the vision, the aspirations, and the commitments of a group of human beings. When a church body takes on this task, it goes even deeper into the spiritual realm because it touches the congregation's most cherished hopes and beliefs about the ultimate meaning of life.

“God so loved the world ...” That's where it all begins for us. Our faith and trust in God, our commitment to Jesus Christ, our belonging to the community of faith, the people of God, the church—all rest on the firm foundation of God's love for the world. And in response to God's love for us, we are called to love (I John 4:9-21; John 13:34) and serve (Gal. 6:10; I Peter 4:9-10) one another and the world through our individual and collective spiritual gifts and graces.

This is the task that is set before all of us. But where do we begin this process and how can we faithfully accomplish it? The strategic planning effort is indeed a way to capture the message of Christ as a blueprint for action. Roman Catholic theologian Hans Kung points us in the right direction when he states that in order to reflect, communicate, and act upon this challenge, the church must always understand the questions people are asking. In other words, we must always listen carefully to what the world, the people around us, the particular men, women, and children who walk “inside” and “past” the church every day, are asking, saying, thinking, and feeling.<sup>1</sup>

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<sup>1</sup> Hans Kung, *Credo: The Apostles Creed Explained for Today*. Trans. John Bowden (New York: Doubleday, 1993), xii.

With the strong support of the Parish Council, the Steering Committee members have listened, and listened long, carefully, and profoundly to the church members. This is a time of great change and anticipation at Visitation, a time of great *excitement* and *anxiety*. These two feelings are interrelated. Some psychologists view anxiety as a form of veiled excitement. Our hope is that this report will provide a blueprint for unveiling and for transforming the anxiety into the kind of enthusiasm that manifests as the love of Christ in the community.

Theologically, while the church is not called to be “of” the world, it is certainly called to be “in” it without reservation or apology. It is an *incarnational* expression for us. Just as Jesus Christ is God’s commitment to the world, God’s life lived out in the world, so the church, the Body of Christ, lives thoroughly and without reservation in the world, not abstractly, but in the city, the community, and the particular neighborhood. Therefore, listening to what is going on inside the church and outside in the world is of paramount importance for the mission of the church.

As facilitators of the strategic planning process, we are pleased to report to the leadership of Visitation that the steering committee has been actively responsive to the concerns within the church and to the realities and opportunities existing in the neighborhood. As you examine the goals and objectives identified by the committee members, you will no doubt feel their sensitivity to these concerns.

The church today is facing a multitude of challenges that must be addressed and overcome in order to maintain its vitality and relevance in the face of an increasingly complex world. And while the solution to these problems will require great leadership skill and wisdom, the process will begin with a simple act of listening. The risk of not listening is marginalization, and marginalization occurs when churches do not hear the questions people are asking both inside the church and in the world at large.

With this understanding, the strategic planning committee, in an act of faith to the scriptural command to love and serve, held in tension both the task of listening as well as the scriptural wisdom found in Proverbs 29:18: “Where there is no vision, the people perish.” Both the methodology utilized and the final product are reflective of a faithful attempt to live out the dictates of Jesus Christ internally to the church and externally to the world.

## **OVERVIEW OF THE STRATEGIC PLANNING STEPS**

### **Selection of Consultants**

The decision and the mandate to undertake a strategic planning process came from the leadership of Visitation Church. The Parish Council assembled a Steering Committee in the fall of 2003 and appointed a search committee to select consultants to facilitate the strategic planning process. In December 2003, the search committee recommended the team from Corporate Mastery USA: Ramon Corrales, Ph.D. and Chuck Rhodes, Psy.D.

### **Strategic Planning Survey**

Prior to the selection of consultants, members of the Steering Committee (SC) had asked Dr. Dave Ekerdt, a sociologist and a member of the church, to prepare a Parish Survey to be mailed to the entire congregation. The survey was adapted by Dr. Ekerdt from the one used by the Baltimore Diocese. This was reviewed by Ramon, Chuck, Dave, and select members of the SC. This survey was sent to church members in mid January 2004. 2100 surveys were distributed and by February 25, 2004, 582 responses were received. This represented 28% of the surveys sent. Of all the returns, 50% were received within 13 days, 75% in 19 days, 80% within 21 days. (See appendix for a copy of this survey and the survey findings.)

There are important pieces of information contained in the survey findings. First, the characteristics of the respondents by several categories will merit ongoing study by the leadership of Visitation: age, gender, marital status, time in the parish, attendance patterns, children under 18 at home, and children attending Visitation school. These demographics could guide the church leadership as they develop strategies for realizing some of the goals and objectives identified in this report.

Second, there is a section with quantitative data based on scales from *strongly agree* to *strongly disagree* and from *very important* to *not important at all*. The general trend of these responses shows a strongly positive view of people's experience in this church. It is important to keep this positive view in mind even as we seek to continually improve our ability to become effective vessels of Christ in action. However, the SC did not fail to notice the percentage of those who still feel a weak sense of belonging or who do not yet experience the spiritual nourishment they seek as members of this community.

The third set of findings contains the comments people wrote at the end of the survey. These comments are included verbatim so the church leadership can examine them in their raw form and get a sense of what the SC members read and reflected upon as they fashioned the goals and objectives they are recommending for the next five years. These comments became a rich source of themes and questions that we used at the Town Hall meetings as takeoff points for participant feedback.

### **SWOT Information**

SWOT stands for Strengths, Weaknesses, Opportunities, and Threats. In the course of assessing the environmental conditions in which the Church finds itself today, the Corporate Mastery consultants and select members of the SC met at various times with Tom McGee, Glenn LeRoy, and Steve O'Neil as key resources. (See appendix for the SWOT information summary.)

Even a broad review of the SWOT information presented in the appendix will give the reader a sense of optimism with respect to the general environment in which the church finds itself today. The opportunities outweigh the threats. However, there are clear challenges ahead. The church debt, the recent U.S. Catholic Bishops' Audit, and the upcoming pastor transition give us pause for careful thought. They provide us with an antidote to overconfidence.

In order to assess the internal, organizational dynamics of the Church staff, the consultants designed a Questionnaire to which the staff members responded. Ramon and Chuck then met with the staff to discuss and reflect upon the patterns and the implications of their responses. (See appendix for a copy of the staff questionnaire.)

This is a dedicated staff with members who have worked together with honest openness and with a leader who is both respectful of staff ideas and talents yet is unafraid to take stands. The culture and the patterns that Father Rotert has coevolved with the staff will serve the church well this year, through the transition period, and in the years ahead.

### **Town Hall Meetings**

Four Town Hall meetings were organized to solicit ideas, identify concerns, and receive suggestions from the congregation. Participants were put in groups of 8 to 12 members. A list of themes and questions was given to each participant as a point of departure for the feedback process. This list was generated from the pattern of responses found in the comments section of the Parish Survey. (See appendix for this list.) Participants were told that the list was simply a takeoff point, not a limit to the range of their remarks.

Each group had a facilitator (a volunteer from the Steering Committee) and a recorder. All comments were recorded and collected, then sent to Ms. Teresa Petrovic who transcribed them in the form now seen in the appendix. Once again, the SC members read and reflected upon these remarks as a way of listening to the Body of Christ.

### **Focus Groups**

Ramon Corrales and Chuck Rhodes led 6 focus groups in an in-depth discussion using the following questions as a guide:

#### **FOCUS GROUP QUESTIONS**

- **What is your vision for this Church? Give us your 5-year and long-term vision.**
  - **Give us your indicators of progress toward this vision. In other words, how would you know if this church is making progress toward your vision?**
- **What are the primary values you would want to this congregation to uphold in word and in deed?**
- **What suggestions would you make to the Leadership of this church with regard to:**
  - **promoting the spiritual development of the members?**
  - **the social/community development of the members?**

- **Please share any concerns you want the Leadership to be aware of. Be prepared to offer suggestions that could address these concerns.**

There was a recorder assigned to each of these focus groups. All major points made by participants were recorded and transcribed in the form now found in the appendix. One of the focus groups was the Parish Council. The other five were composed of randomly assigned members or were organized to include members from the different ministries of the church.

These focus group comments were another important way the SC members listened to the congregation. They not only listened but also prayed and reflected upon the meaning of these messages in terms of church direction.

### **Strategic Planning Retreat**

Corporate Mastery consultants conducted numerous meetings with the Steering Committee from January through May 2004. These planning and discussion meetings culminated in a strategic planning retreat (11 hours over three nights). SC members studied and reflected upon all sources of information gathered in preparation for this retreat.

It was during this retreat that the goals and objectives were brainstormed, discussed, written, and refined. All the data from the parish survey, the town hall meetings, the focus groups, and the SWOT analysis became important grist for the mill. SC members labored earnestly to represent this body of thought that came from the congregation. They discussed these insights with passion and great dedication in order to ensure that the GOALS and the OBJECTIVES articulated below are indeed representative of the Body of Christ at Visitation Church.

## **GOALS & OBJECTIVES**

### **Preamble**

The Steering Committee, with the encouragement and advice of the Corporate Mastery team, decided to focus their main recommendations on the identification of the:

- GOALS the church leadership needs to focus on in the next five years
- OBJECTIVES that need to be achieved in order for those goals to be realized.

This decision included a resolution to refrain from generating specific strategies for achieving the objectives that would realize the goals. In so doing, the committee members to a role much like that of a Board of Directors: to articulate a vision and the terms of success and leave the strategic management to the church leadership.

And so with great trust and much supportive prayer, the members of the Steering Committee offer the following goals and objectives for serious consideration by the

leadership of Visitation Church. The sequence in which the goals and the objectives are presented do NOT indicate any kind of priority.

**Promote the common good by committing our time and talent for the welfare of all, with a special emphasis on those in need.**

1. Develop programs, which provide to all age groups opportunities to participate in outreach ministry.
2. Explore opportunities to create partnerships with local parishes and congregations.
3. Enhance the welcoming and nurturing spirit of the parish.
4. Continue to develop and broaden partnerships with social service organizations.
5. Communicate the needs of our various outreach ministries to those parishioners serving on community and civic boards, with the goal of connecting these possible outside resources to the outreach ministries we serve.
6. Develop programs for matching talents with needs of individuals – both inside and outside the parish.

**Carry out the mission of Visitation by developing and promoting strategies for organizational excellence.**

1. Communicate the organizational structure of the parish to enhance understanding and encourage participation of all parishioners in the work of the parish.
2. Assess existing communication tools and develop additional resources to promote awareness of all facets of parish life and provide opportunities for community input.
3. Develop ways to utilize the energy of a new church facility to welcome new members, invigorate our community, and make it our home of faith.
4. Communicate the role of lay ministry as a vocation of service in the church.
5. Lead the parish through the transition process of welcoming a new pastor and saying goodbye to Father Rotert.
6. Support and maintain good personnel policies to retain, train, and recruit quality staff.

**The Visitation community is actively involved with the school as it forms the next generation in the Catholic faith and strives for academic excellence.**

1. Emphasize the school as integral to the Church's mission.
2. Support school financially and spiritually as it implements its action plan.
3. Promote clear communication between church and school.
4. Provide opportunities for parishioners to be informed about and involved in the school.
5. Promote opportunities for the students to be informed about and involved in the parish and the community at large.
6. Provide opportunities for the school and parish to celebrate sacraments together.

**Carry out the mission of Christ by sharing the gospel with our neighbors.**

1. Welcome all people by opening the church to the city and offering community events, programming and services.
2. Recognize the sacraments and other special occasions as opportunities to share the faith.

3. Use the church building as a vehicle to educate and promote understanding of Catholicism.
4. Provide congregation with tools to actively embrace visitors and new parishioners.
5. Reach out to the unchurched, the inactive, and the disenfranchised in the community.
6. Promote Catholicism through RCIA program.
7. The leadership needs to clarify the parish core identity.

**Deepen and enrich our faith lives as individuals and as community.**

1. Create a community where everyone is welcome and respected and is given an opportunity to contribute their gifts.
2. Offer liturgies that joyfully express our worship of God as sacramental people who are united with the Catholic Church.
3. Continue small group study and faith-sharing opportunities.
4. Provide opportunities for young adults (ages 14 – 30) to socialize, to reflect on their faith, and to discover their vocation in life.
5. Provide superior religious education for our children in our school and the school of religion.
6. Expand faith formation and sacramental preparation programs that offer a broad range of learning opportunities.

**The Visitation community will take an active role in promoting the financial health of the parish.**

1. Balance budget.
2. Retire debt in a financially prudent timeframe set by AMT.
3. Increase revenue.
4. Keep parish informed of financial status by providing clear and concise information on a regular basis.
5. Manage program costs by allocating resources without adversely affecting the quality of ministries of the parish especially in the school.
6. The concept of tithing needs to be emphasized and thoroughly explained in a consistent manner.

**Final Comments**

Many members of the Steering Committee have indicated willingness and a desire to share their ideas about specific strategies that the church leadership may wish to consider as it begins the process of strategic direction of the church.

As facilitators of the strategic planning process, we join the members of the SC in presenting these goals and objectives for your thoughtful consideration. The committee members do not assume that you will adopt these goals and objectives as the guiding blueprint for your strategic management in the next five. But they are confident you will give these ideas serious thought.