

CHRIST OUR

Hope

BUILDING A VIBRANT CHURCH



Parish Campaign Manual



Strengthening the unity among parishes in Vermont.
Deepening our practice of stewardship.

Renewing our parishes.

Engaging our youth. Forming lay leaders.
Serving the most vulnerable among us.
Building a vibrant Church in this time and place

And for generations to come.

A CAMPAIGN FOR THE CATHOLIC CHURCH IN VERMONT

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Campaign Prayer

Almighty and eternal God,
we place our hope in You
to guide the Catholic Church in Vermont
to renew our parishes,
and engage our youth;
to form lay leaders,
and serve the most vulnerable among us.

In the power of the Holy Spirit,
help us build a vibrant church
in this time and place
and for generations to come.

Seeking the intercession of our
first bishop, Louis deGoesbriand,
We pray this through Christ Our Lord, Amen.

Mary, Mother of the Church, Pray for us.

Welcome

Christ Our Hope: Building a Vibrant Church Capital Campaign

Together we are working to renew, strengthen and secure the future of the Catholic Church in Vermont. This manual has been developed to give a general overview of the upcoming campaign and the role of your parish in making the effort a success.

We will do our best to communicate with you throughout this campaign journey, in the planning and the execution of this vital effort. Approximately four to six weeks before this campaign begins at your parish, we will hold an orientation meeting that shares even greater detail.

We know you will be supportive, and we want you to know that we will support you and your parishioners throughout your entire campaign. We are your partners in this mission.

What we say and how we say it speaks volumes. Please continue to have a positive approach to the campaign. This campaign is for the greater good of the Church in Vermont.

Campaign Elements

To be successful, we will execute a campaign with the following key elements:

- Visible leadership of the entire Catholic Church in Vermont, from clergy and laity
- Personal communication with donors (virtual or in-person)
- Specific gift consideration amounts or ranges for every household
- Specific, attainable parish project goals
- Major gifts phase for larger gifts and early campaign momentum
- Comprehensive communications and marketing materials
- A three-year campaign, addressing the highest priority needs, with a proposed fundraising target of \$10 million
 - 60% of funds will be for your parish initiatives to realize its vision
 - 20% of funds will be for the emergency assistance endowment to benefit Catholic Charities clients in need
 - 20% of funds will be for faith formation endowments to aid initiatives throughout the state
- All gifts received for the campaign will be held in the Vermont Catholic Community Foundation. The foundation will collect funds as they are received from donors and distribute the funds for the purposes that are outlined in the campaign case statement.

Campaign Introduction

CHRIST OUR HOPE: BUILDING A VIBRANT CHURCH

Mission

The situation and circumstances we face today, in the culture and the Church, call for us to move *from maintenance to mission*. At every Catholic parish in Vermont, we are called to respond in faith – in new ways, with a new vigor.



“Perhaps you were born for such a time as this.”

Esther 4:14

Synod

In 2017, Bishop Coyne announced plans to convene the first Diocesan Synod in Vermont since 1962. Its purpose was to establish a pastoral plan for the immediate future of the Catholic Church in Vermont. Parishes across the state held moderated listening sessions. Through the work of listening, discernment and prayer, three key pastoral priorities emerged:

Vibrant Parishes

Evangelization

Communications

Unity

Implementation of the pastoral priorities and plan identified in the Synod requires the unity and resources of the entire Vermont Catholic community. The Catholic Church in Vermont is now a missionary church. A missionary call demands a plan of action. Together we can do better. We can do more.

*“And he went about all Galilee, **teaching** in their synagogues and **preaching** the gospel of the kingdom and **healing** every disease and every infirmity among the people.”*

Matthew 4:23

The following initiatives flow from the work of the Synod and reflection on the earthly ministries of Christ: preaching, healing and teaching.

Vibrant Parishes
PREACHING

Evangelization
TEACHING

Communications
HEALING

Campaign Overview

I. Personal Solicitation and Specific Gift Requests

- Personal solicitations, through follow-up phone calls, virtual meetings or face-to-face visits, are the endorsed method for inviting parishioners to support this initiative. National statistics indicate a much higher percentage of households participate and contribute a larger gift when asked in some personal manner.
- Visiting with a potential donor allows for an explanation of the goals, time to answer questions and assist donors with submitting their pledge form.
- People give to people, and people give if they are invited to participate.
- The Foundation will gratefully accept all gifts, but specific gift requests are made to assist the donor in the decision-making process. Asking households to consider a specific gift amount provides them with context for the scope of the projects and how much needs to be raised. This information is helpful as they prayerfully discern the amount they may consider giving.
 - (Note: Requests are made in appeal letters from the pastor and Bishop Coyne, so team members will not know gift request amounts, but will simply follow up with parishioners and assist them with sharing their gifts.)

II. Reporting

- Regular reports give volunteers an update on the campaign and also inspire volunteers to complete their follow up visits.
- If donors return completed commitment forms to the parish office, the church is asked to mail them to the Vermont Catholic Community Foundation.

III. Campaign Commitments

- The campaign will seek contributions above and beyond regular offertory giving.
- The ***Christ Our Hope*** commitment card will include an opportunity for donors to make a Bishop's Annual Appeal gift if they have not done so already.
- To emphasize a commitment to these priority initiatives and allow for generous support, 3-year commitments are suggested. Donors may be asked to consider giving a cash down payment, but one-time gifts are not the objective as they do not represent the extraordinary nature and principles of this campaign.
- There are many ways to give and the campaign will gratefully accept gifts of cash/debit/credit, and other methods including, but not limited to: real estate; gifts of security – stocks, bonds and mutual funds; life insurance; and deferred or planned gifts

Campaign Overview (continued)

IV. Parishioner Data

- The Foundation will provide the Steier Group with the following contact information for your registered parishioners in an Excel spreadsheet:
 - Last name of each parishioner
 - First name of each parishioner (include spouse name if available)
 - Current address
 - Proper title (Mr., Mrs., Ms., Dr., etc.)
 - Email address
 - Phone number
- The Steier Group will assign initial ask amounts based on previous giving, which will then be forwarded to the parish for review, corrections to contact information and suggested changes to ask amounts.

With this information, we will send a personalized mailing to each parishioner. This is the best practice when sending a gift request letter. Here is an example of how we would like to address each mailing and an example of the salutation.

Mr. and Mrs. Smith
1234 Main St.
Burlington, VT 05408

Dear Mr. and Mrs. Smith,

V. Gift Processing

- All processing of gifts and commitments will be handled by the Vermont Catholic Community Foundation.
- Parishes should receive and send commitment forms or cards to the **Christ Our Hope** campaign office – similar to the procedure for the Bishop’s Annual Appeal in previous years.

Vermont Catholic Community Foundation
55 Joy Drive
South Burlington, VT 05403

- The Foundation, Steier Group and parish administration will share weekly updates, following the practice of the Bishop’s Annual Appeal.

Campaign Overview (continued)

VI. Disbursement Policy

- Approximately 60 days after the completion of the parish’s campaign and after gifts have been processed, the parish will receive its first disbursement. Disbursements will continue bi-annually through the remainder of the pledge period.
 - Please note, this schedule is subject to change if unforeseen circumstances require changes to the campaign timeline.
- Disbursements are based on cash received from pledge payments, NOT from pledges received.
- Parish expenses, as detailed under “Campaign Policies #16”, will be deducted from the first disbursement or disbursements, until the full amount is received.
- Parish expenses, as detailed under “Campaign Policies #16”, will be deducted from the first disbursement or disbursements, until the full amount is received.

VII. Donor Evaluation

- During the campaign, each household will be asked to consider a specific gift request. A parishioner’s yearly offertory giving will provide a starting point for the evaluation. The table below will assist in this process. The Steier Group will also look at the household’s feedback received during the planning study and provide that information to the parish. The Steier Group will set the initial “ask” amounts, followed by a parish-level review to include local knowledge about the donors’ ability to give.

Offertory Range	Three-Year Appeal Request	Request by Frequency/Letter
\$10,000 or more	\$30,000	\$10,000 annually
\$7,500 - \$9,999	\$24,000	\$8,000 annually
\$5,000 - \$7,499	\$21,000	\$7,000 annually
\$4,500 - \$4,999	\$15,000	\$5,000 annually
\$4,000 - \$4,499	\$12,000	\$4,000 annually
\$3,500 - \$3,999	\$9,000	\$3,000 annually
\$3,000 - \$3,499	\$7,500	\$2,500 annually
\$2,500 - \$2,999	\$6,000	\$2,000 annually
\$2,000 - \$2,499	\$4,500	\$125 monthly
\$1,500 - \$1,999	\$3,600	\$100 monthly
\$1,000 - \$1,499	\$2,700	\$75 monthly
\$500 - \$999	\$1,800	\$50 monthly
\$100 - \$499	\$1,260	\$35 monthly
\$1 - \$99	\$1,095	\$1 per day
\$0		1 hr. pay per month

Campaign Overview (continued)

VIII. Pastor

- The pastor will lead the campaign in his parish.
- The Steier Group will actively and openly communicate with pastors throughout the capital campaign, including progress reports.
- All pastors should understand the campaign's basic timeline, the goals and have a general understanding of the methods utilized to generate gifts and commitments.

IX. Leadership

- In order to help lead the campaign, Bishop Coyne convened a Campaign Clergy Advisory Committee comprised of pastors from across the state.
- The Clergy Advisory Committee reviewed a set of campaign policies and made recommendations to Bishop Coyne and he accepted their recommended policies.
- The purpose of the Clergy Advisory Committee is to assist Bishop Coyne in overseeing the effort. The leadership structure also includes an Executive Committee who assist with statewide major gift solicitations, and leaders and volunteers at individual parishes.
- Parish leaders need to be personally committed to reaching or exceeding their parish campaign target.
- A successful parish effort requires the recruitment and training of volunteers who are willing to work for the success of the Christ Our Hope campaign.
- All leadership for the campaign is proactive and agrees to follow the campaign plan and adheres to the timetable. Specific job descriptions and schedules will be provided for each volunteer position.
- Leaders should aim to enlist parishioners who are willing and able to complete their tasks in a timely fashion and motivate other volunteers.
- The campaign leaders must be committed to helping create a sense of unity and urgency to complete the statewide campaign, in the allotted timeframe.

Campaign Policies

- 1 All parishes are required to participate in the ***Christ Our Hope: Building a Vibrant Church*** capital campaign. It is important that all parishioners are educated on the needs and vision for the Catholic Church in Vermont. All the faithful should have an opportunity to support the initiatives and their local parish needs. Parishes will not be allowed to “buy out” of the campaign unless they demonstrate an extreme reason for doing so. Exceptions must be approved by the Clergy Committee and Bishop Coyne.

- 2 Parishes and schools will delay any individual capital campaigns until after the diocesan campaign commitment period has ended (three years). The parish share component of the campaign will be set at 60% of funds raised, which will come back to the parish for its identified needs. Parishes and schools in a planning study or campaign may continue with their projects and incorporate the campaign accordingly.

- 3 The parishes may run “combined campaigns” for identified needs that are above and beyond what is expected in their parish share targets, provided they meet the following criteria:
 - Include communication of joint participation in the ***Christ Our Hope*** campaign, including the initiatives and total financial goal.
 - Contact the Office of Development and Stewardship for approval and counsel. Larger campaign efforts may require professional counsel.
 - Meet the diocesan goal set for the parish.

- 4 Parishes will work with the Office of Development and Stewardship to ensure an updated parish roster, including complete contact information, with the three-year annual offertory giving for every registered household.

- 5 The campaign’s goal will be set at \$10 million. The generic breakdown for allocation of the \$10 million in funds received follows:
 - 60% parish-share for identified individual parish needs (up to 115% of individual parish goal)
 - 100/0 split for funds more than 115% of parish goal.
 - 20% for Catholic Charities emergency services endowment.
 - 20% for faith formation (endowment funding for Catholic schools, youth ministry, evangelization).

- 6 Parish goals will be set at 1.2 times the average of each parishes’ previous three years’ ordinary income (Average offertory FY17, FY18, FY19).

- 7 It will be the role of the Bishop and Clergy Committee to consider and resolve parish appeals from pastors regarding their campaign goal.

Campaign Policies (continued)

- 8 Donors will have a three-year commitment term, although flexibility will be given for major gift donors who would like to stretch their gift intention for up to five years to maximize their giving. While gift commitments given over a three-year period are preferred for maximized giving based on the profound needs of the campaign, one-time gifts will also be welcomed.
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- 9 The Foundation will honor donors' intentions and will provide donors with the option to designate their gifts. However, the campaign will not proactively communicate this option. Gifts of \$25,000 or more specifically designated for a particular purpose and held in a fund with the Vermont Catholic Community Foundation will be provided naming opportunities.
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- 10 All parishes will use a commitment form that includes sections for gifts to the Bishop's Annual Appeal 2020, the ***Christ Our Hope*** campaign and planned gifts to the parish or Diocese. Separate communications for the Bishop's Annual Appeal and ***Christ Our Hope*** campaign will be provided to avoid confusion.
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- 11 Major gifts will be identified as gifts greater than \$10,000. Major gifts which come directly from the efforts of diocesan campaign leadership will be allocated at the discretion of the donor with preference to the following designations at each parish:
- Major gifts will count toward the parish's goal but will not be counted publicly until the end of the parish campaign.
 - The amount of the donor's gift that will count towards the parish share will be capped at the total parish goal.
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- 12 All gifts of stock, property, life insurance and other planned gifts must be coordinated through the Vermont Catholic Community Foundation. While legacy and estate gifts may not be realized in the campaign's standard commitment redemption period, the parish will receive credit towards its goal for assessable estate gifts intended for the campaign. However, the parish will not receive its share of any planned gift until the gift is realized. Planned gifts that are not designated for the campaign will also be accepted and promoted to build parish funds held with the Vermont Catholic Community Foundation. These legacy gifts will be independent of campaign splits and policies. Any new planned gift opened during the campaign will be directed to the Vermont Catholic Community Foundation for the benefit of the parish's fund or fund the donor designates.
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- 13 Campaign funds will be distributed to parishes based on cash received, not commitments. The foundation will first account for campaign costs and parish share. The remaining goals will be funded proportionately thereafter. The Vermont Catholic Community Foundation will distribute funds to parishes on, at least, a semi-annual basis.
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Campaign Policies (continued)

- 14** A campaign manager will work with each parish to establish clear and compelling initiatives for the parish's case statement insert. Parish's should consider incorporating tiered goals which will allow the communities to share an overall vision and celebrate success as each goal is reached. Individual parish-share initiatives may be developed based on needs identified through the CLI process. Because of COVID-19, parishes may use the campaign to offset offertory shortfalls and replenish or start a reserve fund. Where possible, these initiatives should align with the preaching, teaching and healing initiatives of the campaign. Building projects must be approved in accordance with diocesan policies.
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- 15** Campaign funds are restricted to the initiatives set forth in the campaign case statement. All funds will be received, processed and distributed through the Vermont Catholic Community Foundation. All campaign solicitation communications should include messaging to the effect of – "Your gifts will only be used for the stated goals of the campaign."
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- 16** Standard campaign expenses, including expenses unique to each parish, such as, printing, postage, mailing and design costs will run through the Vermont Catholic Community Foundation. If the campaign goal is reached, at least 90% of every dollar raised will go directly to program delivery. Campaign costs are fixed at \$1,000,000 and will be shared by the parish and VCCF from campaign income. Each parish will be responsible for expenses of 4.8% of its average ordinary income. The VCCF will be responsible for 3.2% of expenses for each parish's average ordinary income. Specific figures for campaign costs will be disclosed to each parish before their wave commences. Parish expenses will be deducted from the parish's first disbursement. (See Campaign Overview VI. Disbursements) Parishes will receive their first disbursement 45-60 days after the campaign ends. If a parish hosts an event to promote the campaign to its parishioners, the parish will bear those costs. With regional campaign meetings, parishes may be asked to assist in providing light refreshments.
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Campaign Structure & Timeline

Executive Timeline

OBJECTIVES	MAY	JUNE	JULY	AUG	SEP	OCT	NOV
PREP/SILENT PHASE							
Annual appeal							
Pastor engagement							
Campaign resources							
Recruit chairs/volunteers							
Evaluate households							
Finalize goals							
Initial communication							
Major gift cultivation							
Major gift appeals							
Leader/clergy appeals							
Parish orientation							
Parish training							
APPEAL PHASE							
Appeal mailings							
Campaign kickoff events							
Parish appeals							
Ongoing communication							
FOLLOW-UP APPEALS¹							
Commitment weekend							
Mail-electronic appeals							

Key Benchmarks

- Early June – Send annual appeal email.
- Mid-June – Host orientation meeting with pastor, parish administrator & lay leaders.
- June 30 – Recruit volunteers, complete donor evaluation and establish goals.
- Weeks of July 13 and 20 – Host 4 - 5 orientation meetings with pastors and volunteers.
- July 29 – Conduct Founder’s Day annual appeal.
- Weeks of August 10, 17 and 24 – Host training sessions and mail appeal letter with case booklet to all registered parishioners.
- Weekends of August 15-16 and 22-23 – Host campaign kickoff event. The weekend of August 29-30 will serve as a contingency date.
- Mid-August – end of October – Conduct appeals and promote campaign progress.

Notes¹: The goal is to complete all Commitment Weekend/Day of Giving appeals by the end of October. In select circumstances, these appeals may extend into November. The final direct mail/electronic appeal will likely be sent in November.

Communications

Tasks to Complete in June:

- Review the manual to gain an understanding of the campaign process.
- Create a “Campaign Update” section in your bulletin.
 - Every week you should include the campaign bulletin announcement which will be provided for you. Campaign bulletins begin on July 19, please work with your campaign manager to establish the timing and method for receiving bulletin inserts to ensure their inclusion in the weekly bulletin.
 - On 2 - 3 occasions, the parish may be asked to include an insert in its bulletin.
- Campaign stewardship messages will be provided for inclusion in the bulletin.
- Campaign pulpit announcements will be provided for inclusion during your normal Mass announcements.
- Finalize parish goals by June 30, using the worksheet at the end of this manual. For those parishes formerly in Wave 1, work with your campaign manager to discuss any changes you may need to make to your existing parish goals. Engage parish and lay leadership where appropriate.
 - Each parish will have its own insert in the case booklet that describes the parish’s goals. After receiving the parish goals, the Steier Group will create the insert which the parish will review and finalize before it is sent to the printer and inserted into the Christ Our Hope campaign case statement.

Communications (continued)

Sample Bulletin Announcement:

I'm excited to announce that starting next month our parish will be taking part in the ***Christ Our Hope: Building a Vibrant Church*** campaign. The campaign will build up the Catholic Church in Vermont through vibrant parishes, strengthening faith formation efforts and serving the poor.

This is an important campaign to not only implement the pastoral priorities identified in the recent Synod but help rebuild our parishes and communities that were affected by the COVID-19 pandemic.

We will kick off the campaign in a few weeks and we'll share more information with you as we get closer to the kickoff date. Also, be sure to read the Vermont Catholic and Inland See for more information about the campaign.

Sample Stewardship Message: (Sunday, July 26)

“One does not live on bread alone, but on every word that comes forth from the mouth of God.” Natural desires of food, power and worldly recognition will never satisfy our true longing. Our call is to be united to the Bread of Life, the Word of the Lord, the Kingdom of God.

Pulpit Announcement: (Sunday, July 26)

- We are about to kick off the ***Christ Our Hope*** campaign that will benefit both our parish and the entire Catholic Church in Vermont. The campaign will build up our diocese through vibrant parishes, strengthening our faith formation efforts and serving the poor.
- This will be an important campaign to not only implement the pastoral priorities identified in the recent Diocesan Synod but help rebuild our parishes and communities that were affected by the COVID-19 pandemic.

Campaign Job Descriptions

PASTOR

- Demonstrate interest, concern and support for the capital campaign and the needs it will address.
- Recruit campaign leadership and campaign team members.
- Attend regularly scheduled meetings during the campaign.
- Evaluate your registered parish families regarding their ability and willingness to financially support the effort.
- Work with the parish's lay leadership to finalize your parish's goals.
- Ensure that your parish follows the recommended campaign procedures.
- Assist with select gift solicitations.
- Speak positively about the campaign, dedicating at least one homily to the effort.
- Make a personal commitment in support of the effort.

Campaign Job Descriptions

PARISH CAMPAIGN TEAM

- Openly support the goals of the campaign.
- Make a three-year gift to the campaign.
- Accept responsibility for following the campaign plan and timetable.
- Attend scheduled virtual meetings during the campaign effort, including an orientation meeting in mid-July and a training session in mid-August.
 - If you have reservations or uncertainty about joining a video conference, we will be offering a test meeting solely to assist you with getting connected and feeling comfortable with the technology
- Make 20-30 follow up calls to fellow parishioners who are historically strong supporters of the parish and/or diocese. Please note:
 - Training will be provided
 - Households will receive campaign information prior to beginning calls
 - Volunteers will have the option of using video conferences or one-on-one visits
 - The active volunteer commitment runs from mid-August to mid-October

Note – A parish can designate a lay leader as its parish campaign chairperson. That person would assist with supervising volunteer assignments.

Campaign Job Descriptions

CAMPAIGN ADMINISTRATOR AND/OR PARISH ASSISTANT

- Attend scheduled virtual meetings during the campaign, including training sessions.
- Act as an advocate for the Christ Our Hope campaign by openly supporting the goals of the campaign.
- Assist with database management which consists of updating contact information and with donor prospect evaluation.
- Update bulletin and pulpit announcements with materials provided by the Steier Group.
- Forward all commitment forms and payments received at the parish to the Vermont Catholic Community Foundation office on a weekly basis. Follow Bishop's Annual Appeal process.
- Consider a gift to the campaign.

Contact Information

Vermont Catholic Community Foundation

Ellen Kane

(802) 846-5837

ekane@vermontcatholic.org

Dawn Kellogg

802-658-6110 x 1452

dkellogg@vermontcatholic.org

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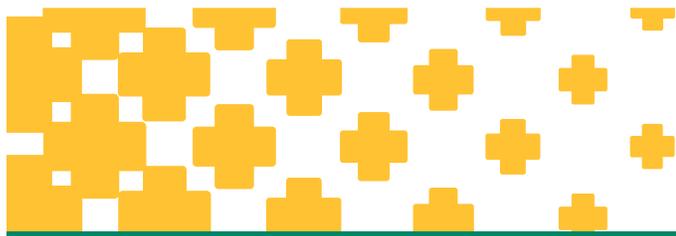
rkaipust@steiergroup.com

Rich Roberts – Campaign Manager

(402) 829 – 8652 (office)

(402) 210 – 6230 (cell phone)

rroberts@steiergroup.com



PARISH INITIATIVE PLANNING

VISION

In addition to the parish's participation in the CLI, the following questions are intended to help you identify the parish's goals in this campaign.

1. **What are your core values?** What are the parish's guiding principles?
2. **What is your parish's core purpose?** How does the parish fulfill its mission?
3. **What are parish's immediate and long-term needs/goals?** What requires action?
4. **How would you describe your parish after you've accomplished your plan?** How will the parish become more vibrant?

ASSESSMENT

What improvements would you like to see in the following core areas?

a) Programs

- i) Sunday experience _____
- ii) Liturgy and sacraments _____
- iii) Fellowship _____
- iv) Prayer _____
- v) Faith Formation _____
- vi) Social Outreach _____

b) Resources

- i) Stewardship program _____
- ii) Debt obligations _____
- iii) Enhanced offertory _____
- iv) Reserve fund _____
- v) Marketing and communications _____

c) Facilities/Systems

- i) Deferred maintenance _____
- ii) Renovations _____
- iii) New construction _____
- iv) Technology upgrades _____

d) Staffing

- i) Church _____
- ii) School _____

Note: Focus on identifying priorities that are significant and will help produce a more vibrant parish.

INITIATIVE FUNDING

Each parish will have a financial target for the campaign calculated as follows:

$$\frac{\text{Parish Ordinary Income FY2017} + \text{FY2018} + \text{FY2019}}{3} = \text{Average Ordinary Income}$$

$$\text{Average Ordinary Income} \times 1.2 = \text{Parish Target}$$

$$\text{Parish Target} \times .6 = \text{Estimated Parish Share}$$

Of the determined parish target, 60% will be returned to your parish for parish-share initiatives. Your Estimated Parish Share are funds that you will be able to use toward your priority parish initiatives. Funds in excess of 115% of your parish target are not subject to the 60/40 split and will be returned at 100% to the parish. Specific parish initiatives that are far beyond the scope of the *Estimated Parish Share* should be coordinated with the diocese. A separate combined-campaign approach may be preferable. NOTE – building projects must be approved in accordance with diocesan policies.

GOALS

What are the parish priorities over the next three to five years that will help realize your vision?

- a) These initiatives could be developed based on the needs identified through this planning process, the CLI assessment or other pastoral planning work.
- b) Where possible, these initiatives should align with the preaching, teaching and healing initiatives of the diocese.
- c) It is recommended that parishes establish tiered goals which will allow parishes to share an overall vision and celebrate success as goal milestones are reached. It is recommended that the first tiered goal (celebration goal) is 50 percent of the parish's financial target and the second tiered goal (transformation goal) is the overall financial target.

First tiered goal

INITIATIVE/PROJECT	ESTIMATED COST

Second tiered goal

INITIATIVE/PROJECT	ESTIMATED COST
	\$
	\$