

THE REID GROUP'S
SUSTAINABLE FUTURE ORGANIZATIONAL AUDIT
FOR DIOCESES AND ARCHDIOCESES



STRATEGIC PASTORAL PLANNING	
Indicators:	
a. Current Diocesan Pastoral Plan	<input type="checkbox"/> We have a current Diocesan Pastoral Plan. <input type="checkbox"/> We do not have a current Diocesan Pastoral Plan. <input type="checkbox"/> We'd like to begin a Diocesan Pastoral Plan
b. To what extent is your Mission and Vision widely known and embraced by diocesan and parish leaders?	Diocesan leaders: <input type="checkbox"/> Strongly Embraced <input type="checkbox"/> Accepted <input type="checkbox"/> Minimally known Parish leaders: <input type="checkbox"/> Strongly Embraced <input type="checkbox"/> Accepted <input type="checkbox"/> Minimally known <input type="checkbox"/> We need to put work into this area Comment

c. What are the core values that inspire and influence diocesan decision making and programming?	
d. What are the top three priorities that your diocese is working on to further the mission of Jesus Christ?	
e. To what extent are these priorities supported by action plans?	Our action plan is: <input type="checkbox"/> Comprehensive <input type="checkbox"/> Acceptable <input type="checkbox"/> Needs attention <input type="checkbox"/> We don't have an action plan for our priorities.
f. To what extent has planning with parishes been done that takes into account the diminishing number of priests and or changing demographics?	<input type="checkbox"/> we have talked about it, and made a few changes when we absolutely had to <input type="checkbox"/> we did a plan more than 5 years ago and began linking parishes <input type="checkbox"/> we need to do a plan as soon as possible <input type="checkbox"/> we just finished a plan that should help us in the next few years. <input type="checkbox"/> we have a plan and now need to implement it
FINANCIAL VIABILITY	
a. We operate from a balanced budget based on...	<input type="checkbox"/> operational income and over-all expenses <input type="checkbox"/> drawing from reserved funds <input type="checkbox"/> counting on bequests and or our annual fund <input type="checkbox"/> taking out loans <input type="checkbox"/> knowing we need to sell property in the near future <input type="checkbox"/> including assumed earnings from investments <input type="checkbox"/> we don't have a balanced budget <input type="checkbox"/> other?
b. To what extent are adequate funds dedicated to providing just salary and benefit packages for employees?	<input type="checkbox"/> minimally funded <input type="checkbox"/> adequately funded <input type="checkbox"/> competitively funded <input type="checkbox"/> inadequately funded Comment:
c. To what extent do you have highly competent people who understand Gospel values and Catholic Social Teaching working in the finance and human resource offices?	We have: <input type="checkbox"/> highly competent Gospel oriented people <input type="checkbox"/> we have good people who work hard and could grow in their understanding and appreciation for Catholic Social teaching, if we provided them that opportunity <input type="checkbox"/> we have skilled people who are not very familiar with Catholic values and are open to learning more <input type="checkbox"/> we need help in this area <input type="checkbox"/> we have people who are retiring and need assistance in replacing them with competent people who live out the Gospel

	message.
d. To what extent is your retirement plan for priests fully funded?	<input type="checkbox"/> fully funded <input type="checkbox"/> % <input type="checkbox"/> funded <input type="checkbox"/> minimally funded Comment on efforts made to help priest plan for their retirement: What options do priests have for housing/health care when they are elderly?
e. To what extent have you allocated funds for the continual formation of the bishop's advisory boards: Presbyteral Council? Diocesan Pastoral Council? Board of Consulters? Finance Council? Etc. Continuing education of clergy?	Comment as appropriate
f. What are your greatest funding needs?	
g. What are your greatest funding sources?	
h. When was the last time your diocese conducted a capital campaign? For what purpose? Amount raised?	
i. To what extent does your planned giving program achieve its goals?	<input type="checkbox"/> We raise about _____ annually. <input type="checkbox"/> We are struggling in this area. <input type="checkbox"/> We don't have a planned giving program.
j. In what ways does the use of your properties/facilities contribute to financial sustainability or are they a liability?	
k. To what extent are your "sponsored" ministries self-sustainable? (Catholic Charities? Catholic schools? Colleges? Seminary, etc.)	<input type="checkbox"/> they operate without financial assistance from the diocese <input type="checkbox"/> they are financially subsidized by the diocese <input type="checkbox"/> however, they rely on substantial annual fundraising and grants Comments:
l. Do you have outstanding debt?	<input type="checkbox"/> yes, we are paying it down at \$_____ per year and will have it paid off by _____ <input type="checkbox"/> no, we do not have outstanding debt.
m. Based on your current financial situation and projections for the future, for how many years will you be financially sustainable?	You may want to consider different scenarios in answering this question. If such and such happens, then... etc.

CHANGE, LOSS & GROWTH

<p>a. What are the major changes on the horizon for the diocese? (diminishing numbers of priests? Increased population, major capital expenditures needed, difficulty in finding highly educated staff from Catholic colleges/universities, etc.)</p>		
<p>b. How in the midst of change does the diocese honor the past?</p>		
<p>c. What are your current strengths as a “local church?” Your greatest challenges?</p>	Strengths	Challenges
<p>d. Where in your diocese do you see the need for addressing and healing past hurts? (such as closing of parishes, schools, sexual abuse, etc.)</p>		
<p>e. What are you already doing well that you want to grow stronger in your diocese?</p>		
<p>f. What are your top 2-3 dreams for the future of the Church in your diocese?</p>	1.	
	2.	
	3.	
<p>g. To what extent as a “local church” are change and loss integrated into your liturgical and spiritual lives?</p>	<ul style="list-style-type: none"> – As a “local church” we are very aware that living out the Paschal Mystery is an infinite source of helping us deal with change and loss. – The charism of our diocesan leadership engages us in the spirituality of change – We try to deal with change and loss in our unique prayerful and healthy ways – We could use more insights into how as a diocese to deal with change and loss. 	

LEADERSHIP RECRUITMENT, TRAINING AND RETENTION

<p>a. What are you doing to train</p>	
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and support your current ministry leaders?	
b. What kind of a succession plan do you have for recruiting and training future leaders in Catholic ministry? (liturgical, educational, catechetical, social outreach, etc.)	
c. How are you developing people to be administrators and spiritual leaders of parishes if and when priests are no longer available?	
d. What need do you have for identifying potential new leaders to create a sustainable future for the Church and her ministries?	
e. What kind of on-going formation programs for clergy and laity are subsidized and available through the diocese or in collaboration with local colleges?	

HEALTHY ORGANIZATIONAL CULTURE

a. To what extent are your diocesan offices and services consciously dedicated to promoting the mission of the Church (Word, Worship, Service and Administration)	
b. To what extent are your diocesan offices and services organized to work together effectively and efficiently in fulfilling the mission of the Church?	
c. What are the current communication challenges in your diocese?	
d. To what extent do you use electronic communication	<input type="checkbox"/> Our website is up to date and a primary communication tool <input type="checkbox"/> We use Facebook and Linked In

effectively?	<input type="checkbox"/> We could enhance our social media and electronic presence <input type="checkbox"/> Other
e. When conflicts arise, what approaches do you take to manage them?	
f. What do you do to promote shared decision making, dialogue and deepen mutual understandings?	
g. To what extent do your employment policies include just salaries and benefits, performance appraisals and opportunities for continual growth?	Our policies are: <input type="checkbox"/> comprehensive, fair and consistently implemented <input type="checkbox"/> adequate <input type="checkbox"/> need attention <input type="checkbox"/> we do not have formal policies Comments:
h. How are annual goals and action plans set? Who is involved? Who “owns” them? How are they evaluated?	
i. To what extent is team building part of your diocesan culture?	Team building is <input type="checkbox"/> deeply ingrained in our culture <input type="checkbox"/> modeled and used by our staff <input type="checkbox"/> not really part of our culture <input type="checkbox"/> other
j. To what extent do you collaborate with groups outside of the diocesan structure to accomplish your mission and enhance the common good?	<input type="checkbox"/> We collaborate with the following to accomplish our mission: <ul style="list-style-type: none"> • • • <input type="checkbox"/> We could do more in this area by... <input type="checkbox"/> We do little collaboration with other groups to accomplish our mission <input type="checkbox"/> Other

YOUR EMERGING CHALLENGES

a. What is your most pressing challenge at this time related to being a life-giving diocese rooted in the Gospel of Jesus Christ?	
b. Where might you need outside assistance to	

continue to be and “grow” with the help of the Spirit the local Church?	
c. On a scale of 1-5 with 5 being the highest, how would you rate how your diocese is perceived locally as an effective Gospel centered entity which proclaims in word and deed the Good News and is compassionate to those in need?	
d. What are the first three most important steps you can take to enhance your image, increase effectiveness in regard to the mission and become more sustainable?	

For assistance in using this Audit or for follow-up services, please contact

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