



Things to Consider – Collaborative Pastoral Plan

Parish Financial Services

RESOURCES

- **Resources that will be required to achieve each of the goals listed in the plan**
 - Financial
 - Staffing
 - Facilities
 - Materials
 - Include all relevant costs
- **Identify existing sources that could be used to fund the financial requirements or**
 - In house savings
 - Savings at RCAB
 - Loan
- **Is there funding or resources within existing budget?**
 - Steps necessary to allocate resources to this goal
 - How will resources be freed up, if necessary?
 - Need to identify new funding source?
 - Capital Campaign
- **Plan for staffing changes**
 - Timing
 - Training
 - Job Description
 - Competencies of staff
 - Financial commitment

OBJECTIVES / BENCHMARKS

- **For each goal listed identify the objective you are trying to achieve; ensure that objectives are clear and easily communicated/understood.**
 - Financial
 - Non - Financial
- **Evaluate the best way to measure the objectives**
 - Before and after \$\$'s
 - # of attendees
- **Set systems in place to track metrics**
 - Tracking mechanisms/systems needed
 - Will you need new technology to track results?
 - Who will be responsible to track results?
 - Make sure you have the tools and capabilities to effectively monitor results

EVALUATIONS

- **Evaluation methods and objectives should be known in advance so there are no moving targets**
- **Evaluate each goal/initiative separately to show direct correlation between resources and results**
- **Determine who will be responsible for overall oversight and accountability for each initiative**
- **Analyze the results from the tracking systems – determine who will be evaluating the results**
 - Pastoral Plan committee
 - Finance and Operations Manager
 - Finance Council
 - Others parish groups
- **Communication of the evaluation results to committees and parishioners**
 - Determine communication methods and frequency
 - Make transparency and accountability a top priority in communicating results
- **Evaluate the overall financial position of the collaborative parishes before and after the initiative**