



# Parish Mission Planning Team Facilitator Training



Parish Mission Planning  
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Diocese of  
Green Bay

## Role of the Team Facilitator and Tips for a Successful Meeting

### Role of the Team Facilitator

The Team Facilitator plays a key role in the development of the Parish Mission Plan (PMP). This person is responsible for organizing and managing each of the planning meetings as well as delegating certain tasks to members of the PMP team. They are responsible for the development and dissemination of each meeting agenda to the PMP team, securing the meeting location, coordinating snacks and beverages, collaboratively determining the schedule of the planning meetings, and making sure all notes and documents are completed and retained. Most importantly, they are responsible for making sure the final planning document is completed and distributed to all responsible parties.

### Organization

- Set the meeting agenda based on the 9 step workbook.
- Set the meeting start and end times.
- Use a timed format for each agenda item.
- Set the location of the meetings.
- Distribute the agenda electronically to the PMP and the Curia Support Team two days in advance of the meeting with a reminder of the date, time and location of the meeting.
- Select a scribe; someone who can take and retain notes of the meetings.
- Ensure all of the meeting notes, lists, and forms are being retained.
- Make sure that the PMP team has the Health of Leadership Survey, checklists, and MissionInsite data prior to the start of the first planning meeting. However, the pastor or pastoral leader is responsible to make sure the Health of Leadership Survey and the checklists have been completed. The Team Facilitator needs to make sure the surveys and checklists are completed prior to the first planning meeting.
- Make sure snacks and beverages are available.
- Distribute a worksheet at your first meeting asking for team members' name, address, phone number, and email address to give to the Curia Support Team.
- Keep the planning team focused on what needs to be completed.

### Delegation

- Assign tasks to members of the team.
  - Assign who is responsible for meeting prayers.
  - Appoint a scribe for each meeting.
  - Assign a timekeeper.
  - Assign who is responsible for refreshments for each meeting.
  - Assign someone to compile the final planning document.

### Scheduling

- Review quickly the nine steps and estimate the time needed to complete each step.
- You may determine that Steps 1 through 4 may require more time than the other steps.
- You will notice that Step 9 will not take very long to complete.
- Determine with the help of the PMP team when the final draft of the planning document will be published.
- Working backwards from the completion date, schedule out the work for each step.
- Make the necessary schedule adjustments as a result of vacations, sickness, snow, etc.
- Determine the beginning and end time of each team meeting.
- Distribute the meeting schedule to all members of the PMP team via email or paper copy.
- If your meetings are scheduled during the winter, it is recommended that you have a backup date in case of bad weather.

## Establishing the Agenda

- Start and end each meeting with a prayer.
- Use a timed agenda where each agenda topic has a beginning and end time.
- Stay within the time parameters indicated in the agenda.
- Identify and briefly state the meeting outcomes on the agenda.
- End the meeting on time or early, never go over the time allotted for the meeting. If you run out of time, table the discussion or assign work for the next meeting.

## Taking Notes, Compiling Information, and Printing the Plan

- Make sure you have a scribe at each meeting.
- The scribe does not need to be the same person for all of the meetings, but it is recommended.
- Make sure the scribe takes notes and collects any additional material at the end of each meeting.
- Make sure someone assumes the responsibility for compiling all of the work and transforms it into the final plan document.

## Hospitality

- Welcome everyone at each meeting.
- At the first meeting, identify the location of the restrooms to the team members.
- Make sure there are refreshments at every meeting.
- At the start of each meeting, check to see if the PMP team wants to take a 5 or 10 minute break during the meeting.

## Curia Support Team (CST)

- Each PMP team has a Curia Support Team (CST) to answer questions or concerns.
- Do not hesitate to contact your CST by phone or email with any questions or concerns throughout the planning process.
- Make sure you have the CST's contact information.
- Make sure the CST has the contact information for every member of your planning team.
- Schedule PMP team meetings with the main CST. It is recommended that both teams meet together at your meeting site at least once a month.

## Identifying the Priorities and Goals

- In Step 6, you will lead the team through the process of sorting through the list of observations and analysis compiled in Step 5. At this point members of the PMP team will decide on the top three (3) to five (5) priorities.
- Next, you begin categorizing the top three (3) to five (5) priorities for the Parish Mission Plan using the categories listed in Step 6.
- Those three (3) to five (5) items become the priorities that will be the focus of the Parish Mission Plan.
- Have the planning team scribe list out the three (3) to five (5) agreed upon priorities and convert them into concise goal statements per the instructions in Step 7.

## Working with the Action Worksheets

- Make sure your PMP team is familiar with the action worksheet found in Step 8.
- Have the scribe make multiple copies of the Step 8 Goal and Steps worksheet, distribute one or two copies to each subgroup, and have them write their assigned goal in the space indicated as GOAL: \_\_\_\_\_.
- Make sure the proper goal category (Attendance, Enrollment, Engagement, Participation, and Community Impact) is listed at the top of the worksheets (refer back to Step 7).

- Make sure only one goal is stated on each action worksheet. You can use more than one worksheet for one goal.
- Make sure all boxes are filled out for each step. If a step does not have a cost, fill in \$0.00 in the Financial Resource box.
- Make sure each step has a start and an end date.

### Working with the Parish Mission Planning Binder and Templates

- Feel free to write your notes, questions, and suggestions in your PMP binder.
- Keep all of your goal action step worksheets together (they are a critical part of your plan).

## Role of the Additional Team Support Members

### Role of the Communication Leader

The Communication Leader in a clear, timely, precise, and concise manner will:

- Ensure communication between the Curia Parish Mission Planning Team and the Parish Mission Planning Team.
- Disseminate information on the Parish Mission Planning process including the steps, goals and implementation to the Pastoral Council, Parish Committees, and Parishioners.
- Support communication among the Parish Mission Planning team members.
- Help convey core realities of PMP to all involved in a positive, proactive way.
- Help facilitate active listening to the parish community through invitation to direct communication with the Parish Mission Planning team, surveys, focus groups, etc.
- Call on the parish community to pray through the various stages of the Parish Planning Process to elevate its success.

### Responsible to:

- Pastor/Pastoral Leader
- Parish Mission Planning Team Facilitator

### Communicates with:

- Pastor/Pastoral Leader
- Parish Mission Planning Team
- Curia Parish Mission Planning Team (Curia Support Team)
- Pastoral Council
- Parish and School Committees
- Parishioners

### Types of Media to be Used:

- Email
- Church bulletin announcement or insert
- Pulpit announcement
- Social media

### Frequency of the Communication:

- Every two weeks while the planning is in process.

### Questions

- Please write down any questions you may have during the presentation for the Question and Answer time at the end of the workshop.

### School Principal or Liaison

- This person will assist the Team Facilitator leading the discussion related to the School and Parish Planning: Key Recommendations document.
- This person will assist the various planning subgroups in Step 4 in determining the priority within each of the five categories in the School and Parish Planning: Key Recommendations document.
- This person will also assist the Parish Mission Planning team to reduce the 15 to 20 items in Step 5 down to three (3) to five (5) priority items in Step 6.
- In the event the Team Facilitator is unable to make a meeting, the School Principal or liaison can function as the Team Facilitator during the meeting.

### Technical/MissionInsite Person

- Each Parish Mission Planning team is required to have a Technical/MissionInsite person.
- This person is responsible for acquiring the appropriate data from the MissionInsite program, putting it in the report format set by the Diocese, and distributing the report to the PMP team at least a week or two in advance of the Step 3 - Assessment of Parish and Community Data.
- This person will assist the planning subgroups in Step 3 to interpret the data and help identify areas that need improvement.

## MODEL AGENDA

### PARISH MISSION PLANNING

(PARISH NAME)

(PARISH ADDRESS)

(TIME AND DATE)

<b>6:00 – 6:05pm</b>	Prayer and Review of the Agenda
<b>6:05 – 6:35pm</b>	Assign Subgroups to Sections of the Data (Steps 1 – 4) or Individual Goals (Step 8). Work on Step ____
<b>6:35 – 6:50pm</b>	Discussion Regarding the Work Completed with Step ____ Group Worksheets for Step ____ handed into the Scribe
<b>6:50 – 7:20pm</b>	Work on Next Step ____
<b>7:20 – 7:25pm</b>	BREAK
<b>7:25 – 7:40pm</b>	Discussion Regarding the Work Completed with Step ____ Group Worksheets for Step ____ handed into the Scribe
<b>7:40 – 7:55pm</b>	Overview of What Was Accomplished at the Meeting Consensus Building (if appropriate) Questions and Answers
<b>7:55 – 8:00pm</b>	Next Steps Homework Assigned (if appropriate) Date and Time of Next Meeting Closing Prayer

## Leading the Team through The Nine Steps of Parish Mission Planning

### **STEP 1 ASSESSMENT – HEALTH OF LEADERSHIP SURVEY**

All ministry leaders, parish and school staff, board members, council members, committee members, and the PMP team members complete the Health of Leadership Survey regarding their perception of the parish's, the school's, and their own efforts in reference to evangelization, discipleship, leadership, and community impact. A list of the ten (10) or eleven (11) major areas for improvement will be made by the planning team.

#### **Step 1 - Team Facilitator Directions:**

The Team Facilitator (TF) breaks the PMP team into 2 to 4 subgroups and assigns each group a section of the Survey results. The TF hands out a copy of Step 1 to one member of each group. The subgroups are asked to focus on the Disagree and Strongly Disagree columns. They are to select the three questions with the highest percentage and number of responses in these two columns. The facilitator then asks the subgroup to write on the Step 1 worksheet the three items that need improvement.

Once this is completed, each subgroup turns in their Step 1 worksheet to the PMP team scribe.

### **STEP 2 ASSESSMENT – OPERATIONAL AND MINISTRY CHECKLISTS**

Appropriate personnel and school personnel are assigned the duty of filling out various checklists associated with parish and school operations and ministry areas. A list of the ten (10) major areas for improvement will be made by the planning team.

#### **Step 2 - Team Facilitator Directions:**

The Team Facilitator (TF) breaks the PMP team into 2 to 4 subgroups and assigns each group to separate checklists (assigning a quarter to a half of the checklist results to each subgroup). The TF hands out a copy of Step 2 to one member of each group. The subgroups are asked to focus on those items that are not checked off. They are to select the most important item on each separate checklist that should be checked off and written down on the Step 2 worksheet indicating this area needs to be completed or improved. This process is to be completed with all individual checklists.

Once this is completed, each subgroup turns in their Step 2 worksheet to the PMP team scribe.

### **STEP 3 ASSESSMENT – PARISH AND COMMUNITY DATA WORKSHEETS**

The PMP team will review their community and parish demographics and school and religious education enrollment. The team will identify observations in areas of youthfulness, faithfulness, contributions, and activity. A list of five (5) recommendations/strategies for improvement will be made by the planning team.

#### **Step 3 – Team Facilitator Directions:**

The Team Facilitator (TF) breaks the PMP team into 2 to 5 subgroups and assigns each group to a separate section of the Community and Parish Data Worksheet

(Youthfulness, Faithfulness, Contributions, Active Membership, and Community Involvement). The TF hands out a copy of Step 3 to one member of each group. The subgroups are asked to focus on the Parish and Community Data worksheet questions. The Data Worksheets are labeled and color coded. They are to identify a problem in the area they are assigned to and to come up with one or more suggestions on how to improve their area of focus. One member of each subgroup then writes down the solutions on the Step 3 worksheet.

Once this is completed, each subgroup turns in their Step 3 worksheet to the PMP team scribe.

#### **STEP 4 ASSESSMENT – STRATEGIC PLAN FOR CATHOLIC SCHOOLS**

The PMP team will review the *School and Parish Planning: Key Recommendations* document and determine which goals in this plan will be a focus in the development of the Parish Mission Plan. No more than five (5) goals that stress collaboration and cooperation between the parish and school should be identified by the planning team as a major focus.

##### **Step 4 – Team Facilitator Directions:**

The Team Facilitator (TF) breaks the PMP team into 2 to 5 subgroups and assigns each group to a separate section of the *School and Parish Planning: Key Recommendations* (Mission and Vision Alignment, Collaborative Leadership, Culture of New Evangelization, Culture of Missionary Discipleship, and Culture of Community Impact). The TF hands out a copy of Step 4 to one member of each group. The subgroups are asked to select one recommendation from their section that they feel would be most beneficial to the parish and school or school system. One member of each subgroup then writes down the recommendation for their section on the Step 4 worksheet.

Once this is completed, each subgroup turns in their Step 4 worksheet to the PMP team scribe.

**Note:** If your parish does not support a school or school system, they may want to substitute the word ‘school’ with ‘faith formation’ or ‘religious education’ and select a recommendation with this substitution in mind.

#### **STEP 5 OBSERVATIONS/ANALYSIS**

The PMP team compiles the lists developed in steps 1 through 4. This list should be no longer than twenty (20) items.

##### **Step 5 – Team Facilitator Directions:**

Prior to the third planning meeting, the Team Facilitator (TF) types up all of the items that the subgroups put together for Steps 1 through 4. There should be approximately 20 items on the Step 5 list. It is recommended that this list be sent electronically to all members of the PMP team prior to the meeting so they are familiar with the items and can print off the list in preparation for the next meeting.

At the meeting for Step 5, all of the PMP team will be asked to rank the items from 1 to 20 with 1 being the most important what they think are the priorities utilizing the Cultural Values and Categorize designations as an aid in this process. The TF will

take a tally of the items listed as priorities by the PMP team. Those items with the most votes become the top three (3) to five (5) priorities that will be used in Step 6.

## **STEP 6**

### **PRIORITIZATION, CLASSIFICATION, ALIGNMENT, AND MOBILIZATION TO MISSION**

The items listed in Step 5 are prioritized. The top three (3) to five (5) priority items are assigned under the following categories by the planning team: Enabling Evangelization, Empowering Collaborative Leadership, Expressing Abundant Sundays, and Equipping Spiritual Maturity.

#### **Step 6 – Team Facilitator Directions:**

The Team Facilitator (TF) has the PMP team scribe write out the top three (3) to five (5) priorities on the Step 6 worksheet placing them in the appropriate category (Enabling Evangelization, Empowering Collaborative Leadership, Expressing Abundant Sundays, Equipping Spiritual Maturity and Community Impact).

Once this is completed, the TF can direct the PMP team to begin Step 7.

## **STEP 7**

### **SET GOALS**

The PMP team takes the list developed in Step 6 and transforms the three (3) to five (5) priority items into goal statements. The goals are concise statements of what the parish and/or school will do over the next one (1) to three (3) years to accomplish evangelizing, forming disciples, and impacting the community in which the parish and school are located. The goals and corresponding action steps are to be SMART: Specific, Measurable, Achievable, Results-Focused, and Time-Bound. The goals are put into the appropriate categories of GROWTH, ENGAGEMENT, and COMMUNITY IMPACT. It is recommended that no more than three (3) to five (5) goals be identified.

#### **Step 7 – Team Facilitator Directions:**

The Team Facilitator (TF) has the PMP team break up into 2 to 5 subgroups and assigns each subgroup with a Step 6 priority and asks them to convert the priority into a goal statement starting with an infinitive verb (i.e. to develop, to expand, to prepare, to organize, to design, etc.) and write their goal statement on the Step 7 worksheet.

Once this is completed, each subgroup turns in their Step 7 worksheet to the PMP team scribe.

The scribe then compiles the Step 7 goal statements and makes the list available to the PMP planning team.

## **STEP 8**

### **ACTION STEPS**

The PMP team defines a set of action steps for each of the goals identified by: clearly stating each step, identifying the metric or evidence that will be used to show completion of the step, identifying the person(s) responsible for carrying out the step, identifying the human and financial resources necessary to complete each step, and defining the start and completion date for each step.



**Step 8 – Team Facilitator Directions:**

The Team Facilitator (TF) breaks the PMP team into 2 to 5 subgroups and assigns each group a goal or set of goals. The TF distributes copies of the Step 8 Goal and Steps worksheet to each group. The subgroups are asked to develop action steps for the goal or goals assigned to them.

Once each subgroup is finished developing their list of action steps for the goal they have been assigned, they turn in their Step 8 worksheet(s) to the PMP team scribe.

**STEP 9****IMPLEMENTATION AND PERIODIC EVALUATION**

First, set the date to implement the plan according to the plan's action steps. Make sure those responsible for the steps actually start work implementing the steps when they are scheduled. Communicate the start of the action step(s) to the appropriate oversight body and/or person. Second, establish a plan evaluation process and schedule. Third, report the progress made toward the plan's implementation to the appropriate oversight body and/or person according to the agreed upon schedule.

**Step 9 – Team Facilitator Directions:**

The Team Facilitator (TF) then leads the PMP team in a discussion regarding the appropriate oversight body and/or person that should be designated to insure that the Parish Mission Plan becomes a reality over the next year to three years. The pastor or pastoral leader will provide great insight into this process.

Once the oversight body and/or person has been designated, the TF has the PMP team look at the recommended calendar found under Step 9 in the 9 Step Planning Workbook and asks the team if the dates indicated or another set of dates should be used as to when the oversight person or body check on the plan's progress.

Once all of the above is completed, the TF asks the PMP team scribe to prepare the final copy of the parish's Parish Mission Plan. The plan document must include the following:

- Cover/Title Worksheet including the Parish Name, Logo, and the Date
- List of the PMP Team Members
- List of the three (3) to five (5) Parish Mission Planning Goals
- The Typed Step 8 Goal and Steps worksheets for each Goal.
- A short paragraph explaining which person or oversight body has the responsibility to ensure the plan is implemented and meets its goals.
- A calendar showing when a meeting or report will be produced and submitted to the appropriate person of oversight body regarding progress with the plan.

## Parish Mission Planning Meeting Recommendations

- At a minimum, schedule two PMP meetings per month.
- Schedule out all of the planning meetings at your first introductory meeting.
- If you can, schedule the meetings for the same day of the week and with the same start time. (i.e. the second and fourth Tuesday of the month starting at 6:00pm).
- Allow for enough time to review the directions for each step, analyze, discuss, come to consensus, and compile notes.
- Break the team into two to four subgroups to work through Steps 1 – 4 and assign them specific sections of the data to discuss, make conclusions, formulate suggestions, and write their solutions or ideas on the appropriate step worksheet. All of this work will be discussed and reviewed when the PMP team gets to Step 5.
- Allow for a break at each meeting. However, if the planning team wants to work straight through until all the steps assigned for a particular meeting are completed, that is fine.
- Limit meetings to no more than two hours, especially on weeknights.
- If the PMP team wants to meet on Saturdays, the length of the meeting can be much longer (i.e. 4 to 6 hours) and cover multiple steps.

### **1<sup>st</sup> Meeting - 6:00pm to 8:00 pm (Recommend the Curia Support Team assist at this meeting).**

#### **I. Introductions**

- a. Introductions of the whole PMP team
- b. Introduction of the Curia Parish Mission Planning Team/Curia Support Team
- c. Overview of the PMP process and materials
- d. Set the dates for subsequent PMP meetings
- e. Questions and answers

#### **II. Step 1**

- a. Review the findings of the Health of Leadership Survey.
- b. List out the areas that need improvement based on the data results.
- c. Narrow down the list to ten (10) areas in need of improvement.

#### **III. Step 2**

- a. Review the findings of the Operational and Ministry Checklists.
- b. List out the areas that need improvement based on the data results.
- c. Narrow down the list to ten (10) areas in need of improvement.

**Homework: The Team Facilitator has the PMP team read over the Parish and Community Data Worksheets and corresponding questions and reflections under Tab 6. They are to take notes regarding what trends and issues they see with the data and bring them to the next meeting.**

### **2<sup>nd</sup> Meeting - 6:00pm to 8:00pm**

#### **I. Step 3**

- a. Review the findings of the Parish and Community Data Worksheets found under Tab 6.
- b. List out the areas that need improvement based on the data results.
- c. Narrow down the list to five (5) areas.  
(Allow 1.5 hours for Step 3)

#### **II. Step 4**

- a. Review the findings of the School and Parish Planning: Key Recommendations document.

- b. List out the areas that need improvement based on the data results.
- c. Narrow down the list to five (5) areas.  
(Allow 0.5 hours for Step 4)

**Homework:** The scribe takes the results of Steps 1 – 4 at the end of this meeting and types all of the items in Step 5. The list should be no longer than twenty (20) items. The list is then distributed to the PMP team in advance of the 3<sup>rd</sup> Meeting.

### 3<sup>rd</sup> Meeting - 6:00pm to 8:00pm

#### I. Step 5

- a. The PMP team ranks the items in the Step 5 list from the most important to the least important. Discuss and settle on the priorities and then move on to Step 6.

#### II. Step 6

- a. Reduce the list of twenty (20) items down to five (5) based on an agreed upon priority framework and classify them according to categories on the Step 6 worksheet.

#### III. Step 7

- a. Taking the list of priorities listed in Step 6, the PMP team will now transform the priorities into goal statements on the Step 7 worksheet.

The goals are listed out under the appropriate categories of ENGAGEMENT, GROWTH, and COMMUNITY IMPACT (Attendance, Enrollment, and Participation).

### 4<sup>th</sup> Meeting - 6:00pm to 8:00pm

#### I. Step 8

- a. The PMP team develops action steps for each of the three (3) to five (5) identified goals determined in Step 8 utilizing the goal/action steps worksheet available in the workbook.

**Homework:** If the PMP team does not finish the work in Step 8, the TF can assign each goal to each subgroup, have them finish their work on the actions steps, and bring their finished action steps to the next meeting.

### 5<sup>th</sup> Meeting - 6:00pm to 8:00pm

#### I. Step 9

- a. If the PMP team has not completed the work in Step 8, the team continues to develop action steps for each of the three (3) to five (5) identified goals determined in Step 8 utilizing the goal/action steps worksheet available in the workbook.
- b. The PMP team, with the pastor's or pastoral leader's approval, then sets the date for implementing the plan. All aspects of Step 8 are determined.
- c. That action step that has the earliest start date within the plan is the date the plan's implementation begins.
- d. A plan is developed on how best to communicate the Parish Mission Plan to the whole parish as well as announce the implementation of the plan.
- e. The PMP team establishes a written plan evaluation process and schedule per the information outlined for Step 9 in the workbook. This becomes the last page in the Parish Mission Plan document.
- f. The PMP team determines how the plan will be compiled, printed, and distributed electronically and physically.