



**Mission Advancement Planning**

*Roman Catholic Diocese of Charleston*

# Parish Analysis

The purpose of this parish analysis is to establish a baseline for Parish Mission Advancement Planning. Estimates can be used when specific numbers are not available.

Name of Parish: \_\_\_\_\_

Parish Contact: \_\_\_\_\_

### 1. Parish Demographics

Total number of families: \_\_\_\_\_

How would you describe the population your parish regarding age and ethnicity? \_\_\_\_\_

\_\_\_\_\_

If your parish is diverse, how would you rate the level of unity? \_\_\_ High \_\_\_ Moderate \_\_\_ Low

Are more efforts needed to bring the parish together? \_\_\_ Yes \_\_\_ No \_\_\_ Unsure

What database is used to track parishioner census and giving (e.g. PDS)? \_\_\_\_\_

### 2. Parish Organizational Structure

Number of paid employees: \_\_\_\_\_

Is there a current organizational chart? \_\_\_ Yes (please attach) \_\_\_ No

How many formal and informal ministry groups exist within the parish? \_\_\_\_\_

Is there a ministry organization chart (ie. Aligned by Commission) ? \_\_\_ Yes \_\_\_ No

Does the parish have a functioning Pastoral Council? \_\_\_ Yes \_\_\_ No

Does the parish have a functioning Finance Council? \_\_\_ Yes \_\_\_ No

Does the parish have a functioning Stewardship Committee? \_\_\_ Yes \_\_\_ No

Does the parish have an association with (check all that apply):

\_\_\_ a Catholic School \_\_\_ Campus Ministry

\_\_\_ Prison Ministry \_\_\_ Catholic Charities or other Outreach Agency

### 3. Parish Pastoral Planning

Does your parish have (check all that apply):

\_\_\_ Parish mission statement \_\_\_ A Parish Pastoral Plan (please attach)

\_\_\_ Annual pastoral planning process \_\_\_ Planning process linked to your annual budget

What are the top pastoral priorities? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Mission Advancement Planning Parish Analysis

---

## 4. Parish Financial Planning

What is the fiscal year 2016-2017 offertory income? \_\_\_\_\_

Has the annual offertory income grown or declined over the last five years? \_\_\_ Grew \_\_\_ Declined

What best describes your current financial situation?

\_\_\_ Healthy annual net income \_\_\_ Barely making ends meet \_\_\_ Expenses exceed income

\_\_\_ Significant reserves \_\_\_ Some reserves \_\_\_ No reserves (Estimate:\$\_\_\_\_\_ )

\_\_\_ Significant debt \_\_\_ Some debt \_\_\_ No debt (Estimate:\$\_\_\_\_\_ )

Are there major capital needs? If yes, please estimate \$\_\_\_\_\_ and note: \_\_\_\_\_

Is there a long-term financial plan? \_\_\_ Yes (please attach) \_\_\_ No

Is budget planning informed by pastoral priorities and plans? \_\_\_ Yes \_\_\_ No

Is budget planning related to stewardship and development? \_\_\_ Yes \_\_\_ No

## 5. Parish Stewardship and Development

Briefly describe the parish's experience with Stewardship and Development: \_\_\_\_\_

What is the total number of active envelope users (at least once per month)? \_\_\_\_\_

Is the number of contributors growing or declining? \_\_\_\_\_

When was the last major campaign conducted, how much was raised, against what goal, and for what purpose? \_\_\_\_\_

Is there a legacy (planned) giving program? \_\_\_ Yes \_\_\_ No

How much does the parish have in Endowed Funds? \$ \_\_\_\_\_

Does the parish have an online giving program? \_\_\_ Yes (Provider: \_\_\_\_\_ ) \_\_\_ No

## 6. Parish Communications

Does your parish have (check all that apply):

\_\_\_ An active, currently maintained website (Provider: \_\_\_\_\_ )

\_\_\_ Parish Annual Report linking the financial story to the mission story

\_\_\_ Parish Brochure \_\_\_ Parish Ministry Booklet

\_\_\_ Parishioner E-mail News (i.e. Constant Contact) \_\_\_ Flocknote

\_\_\_ Parish App (Provider: \_\_\_\_\_ )

\_\_\_ Social Media ( \_\_\_ Facebook \_\_\_ Instagram \_\_\_ Twitter)