AN ASSESSMENT TOOL
FOR PARISH LEADERSHIP RELATIONSHIPS,
PARISH MINISTRY and MANAGEMENT:

To Identify Current Strengths
& Potential for Improvement

Version 7
August 8\textsuperscript{th}, 2008
An Assessment Tool for Parish Leadership Relationships, Parish Ministry and Management

A. Introduction

The National Leadership Roundtable on Church Management (NLRCM) is an organization of laity, religious and clergy working together to promote excellence and best practices in the management, finances and human resources development of the Catholic Church in the United States by greater incorporation of the expertise of the laity. The NLRCM Management Research Subcommittee has developed this assessment tool to assist parishes in discovering current strengths and opportunities for improvement in parish ministry and management and in discerning how best to strengthen and improve parish strategies and practices.

B. About This Assessment Tool

This tool includes two interdependent assessments. The Parish Leadership Relationship Assessment is a cultural and relational assessment of parish leadership introduced by Dennis Cheesebrow in 1999 and refined with Jim Lundholm-Eades in 2007. The Parish Ministry and Management Assessment is based on the Balanced Scorecard® methodology introduced by Robert Kaplan and David Norton in 1992. Although originally presented as a strategic planning tool in the private sector, the Balanced Scorecard® methodology has also proven valuable for not-for-profit and public sector organizations. As Drs. Kaplan and Norton have noted, since not-for-profit organizations “strive to deliver mission outcomes, not superior financial performance, […] these organizations need a comprehensive system of nonfinancial and financial measures to motivate and evaluate their performance.” As adapted in this assessment tool, Balanced Scorecard methodology makes available to parishes an easy-to-use process of structured consideration of mission, values, and strategic planning that links them to agreed-upon behavioral outcome measures.

C. Purpose of This Tool

Since church management practices occur in the cultural setting of the Catholic Church and implementation of any change needs to be in concert, and not in conflict, with Church teaching, tradition, and culture, this tool is intended to be used by parishes to direct attention to the assumptions underlying the preferences, words and actions of pastors, other staff, and other parish leaders as depicted in the Parish Leadership Relationship Assessment and all areas of effective pastoral ministry and operational management as identified in Parish Ministry and Management Assessment. Using the tool’s quantifiable measures of effectiveness, parish leaders can develop their own assessment “scorecard” of existing strengths and potential for improvement.

The parish can then combine the scorecard results in a fact-based profile of strengths it can build on and opportunities for improvement in continuing to discern how best to live out its gospel mission as Church. NLRCM offers interested parishes access to a growing knowledge base of proven practices and resources and contact information for highly-qualified providers and consultants ready to assist parishes in implementing sound practices of church management that match their unique profile.

How to Use The Parish Leadership Relationship Assessment Tool

Step One: Gather Your Assessment Team

For many parishes the assessment team will include priests, deacons, trustees, members of parish finance and pastoral councils, staff directors of ministries and administration and leaders of parish commissions and committees. In assembling your assessment team consider including parish leaders who can contribute diverse experiences and perspectives on the parish’s current vision, strategy, and consultative structures; demographics; ministries; facilities; finances; and future plans. Parishes with a relationship to a Catholic school will want to be sure the team can knowledgeably include the school’s performance and planning in the assessment.

Step Two: Begin with Prayer & Reflection

When the assessment team gathers to begin its work and after the facilitator introduces the process, a team member reads this bible passage for the group and then all keep a few moments of silence:

From a letter of Paul to the Galatians (3: 27- 28).

For all of you who were baptized into Christ have clothed yourselves with Christ. There is neither Jew nor Greek, there is neither slave nor free person, there is not male and female; for you are all one in Christ Jesus.

Then another team member reads this bible passage for the group and then all keep a few moments of silence:

From a letter of Paul to the Corinthians (1 Corinthians 12: 27- 31a).

Now you are Christ’s body, and individually parts of it. Some people God has designated in the church to be, first, apostles; second, prophets; third, teachers; then, mighty deeds; then, gifts of healing, assistance, administration, and varieties of tongues.

Are all apostles? Are all prophets? Are all teachers? Do all work mighty deeds? Do all have gifts of healing? Do all speak in tongues? Do all interpret? Strive eagerly for the greatest spiritual gifts.

After some silence the facilitator invites sharing of reflections prompted by the bible passages and these two questions:

• What is God calling our parish to be and do now and in the next few years?
• How close or far are we today from our sense of God’s call to our parish?

After a few minutes of sharing, the facilitator or another team member offers a prayer. Here’s one option:

Let us pray. (Pause for silent prayer.)

Direct our actions, O God, by your holy inspiration, and by your grace help us to carry them forward, that we may begin all our works in you and in your love bring them to successful completion, in the Holy Spirit of Jesus, our Christ now and forever and ever. Amen!

3 Adapted from Roman Missal, Thursday after Ash Wednesday, Opening Prayer; Liturgy of the Hours, Week I, Monday, Morning Prayer.
Step Three: Orientation to the “Communio”; an exquisite design for cultures in communion

In its Dogmatic Constitution on the Church, the Second Vatican Council teaches that all Church members in the diversity of their gifts and ministries are called to communion in the body of Christ:

In the Church not everyone walks along the same path, yet all are called to holiness and have obtained an equal privilege of faith through the justice of God. Although by Christ’s will some are appointed teachers, dispensers of the mysteries and pastors for the others, yet all the faithful enjoy a true equality with regard to the dignity and the activity which they share in the building up of the body of Christ. The distinction which the Lord has made between the sacred ministers and the rest of the people of God implies union, for the pastors and the other faithful are joined together by a close relationship. The pastors of the Church, following the example of the Lord, should minister to each other and to the rest of the faithful; the latter should eagerly collaborate with the pastors and teachers. And so, in their variety all bear witness to the wonderful unity in the body of Christ; this very diversity of graces, of ministries, and of works gathers the children of God into one, for “all these things are the work of the one and the same Spirit” (1 Corinthians 12: 11).

In the May 26, 2005 publication of Origins, Mercy Sister Sharon Euart, then President of the Canon Law Society of the United States, provides an excellent review and insight in the Church’s teaching on this subject in the article “Structures for Participation in the Church” which was based on her address for the annual conference of the Canon Law Society of Great Britain and Ireland in May 2005 in Glasgow, Scotland.

Consultation, in one form or another, has been part of church governance since the early days of the church. The chapter of canons, for example, which has evolved over history and exist today in only a few places in the world, was a legal (corporate) body of priests whose purpose was to assist the bishop as an advisory council. The chapter of canons was never established in the United States except for a brief period in New Orleans from 1793 to 1800. Instead, the Third Plenary Council of Baltimore established the structure of diocesan consultors, which ushered in a new approach to consultation in the church.

The Second Vatican Council’s emphasis on the church as communio has led, among other things, to new forms of “common responsibility” at all levels of church life. The idea of “active participation” in the church has led to a deepened awareness that we are all the church. The notion of communio, however, describes the church’s nature, its mystery, its participation in the Trinitarian communion of Father, Son and Holy Spirit. It is not a description of the church’s structure. For the structures of the church are not an end in themselves but a means for helping the church to be more clearly the sign and instrument of fellowship or communion with God and others.

The basis for structures of participation in the life of the church is theological, not the contemporary preoccupation with democracy or efforts to incorporate democratic procedures into the church. Structures for participation reflect the nature of the church itself as an assembly of the faithful, a gathering of believers. Consultation in the church is rooted in the theological principles that the church is the people of God, a people gathered around their bishop, a holy people incorporated into the body of Christ (Lumen Gentium, 11) with a share in the three-fold mission of Christ to teach, to sanctify and to govern (LG, 31). All members of the church share a common dignity and the same vocation to holiness. They enjoy a fundamental equality that arises from baptism in Christ (LG, 32), an equality that precedes any differentiation on the basis of diversity of function, charisms or ministries (LG, 32). They are called, each according to his or her own particular gifts, to exercise the mission which God has entrusted to the church to carry out in the world (LG, 30, 32).

This theological reality for consultative structures in the life of the church is mirrored in fundamental principles found is several canons of the Code of Canon Law. Canon 211, for example, states the duty and right of all the Christian faithful “to work so that the divine message of salvation more and more reaches all people in every age and in every land”. This call to mission is repeated specifically for lay-persons in Canon 225 and is the basis for the rights affirmed in other canons to form associations (Canon 215), to assemble (Canon 215), to take initiative in apostolic activity (Canon 216), and to a Christian education (Canon 217).

Canon 212, reflecting particularly Lumen Gentium, No. 37 and Apostolicam Actuositatem No. 6 specifies further the duty and right of the Christian faithful to participate in the inner life of the church. While obliged to follow what bishops declare as teachers of faith or determine as leaders of the church, Canon 212 expresses the rights of the faithful.

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to make known their needs and desires to the bishops and to express opinions on matters which pertain to the good of the church. Lumen Gentium further suggests that making known such opinions “should be done through the institutions established by the church for that purpose” (LG 37). These statements of the church’s magisterium are ecclesial rights that many lay people are not aware are theirs as baptized members of the church.

... Despite the many opportunities for lay involvement in consultative bodies within the diocese or parish, critics often describe the “merely consultative” role as second-class, pointing out that the decision-making power rests with the bishop or pastor. Such a criticism is accurate if one reduces the complex process of decision making simply to the act of making a choice about a course of action to follow. At the same time, such a criticism does not reflect the more nuanced understanding of how decisions in the church are made and what it means to share responsibility in that process.

... The notion of shared responsibility is derived from Vatican II’s ecclesiology of communion and its teaching on the basic equality of all believers, a unifying concept grounded in baptism which imparts to the believer responsibility for carrying forward the mission of the church in partnership with other members of the church, according to the gifts and functions of each person. Many discussions today on decision making in the church often seem focused on the notion of power. Persons who make decisions affecting the life and direction of the church are said to have power; those who have no part in making such decisions are said to be powerless or without significance or influence on the life of the church. Without this power, which many refer to as decision-making power, they believe they cannot truly “share responsibility” in the church. Shared responsibility comes to mean shared power, and efforts to implement shared responsibility become efforts to wrest such power from those who are considered to possess it, namely those in ecclesial office such as bishops and pastors.

Any assessment of Church ministry and management effectiveness needs to take account of the Catholic understanding of communion as the theological basis of how the Church lives its mission and carries out its ministries. One contemporary framework for understanding how this theology of communion is practiced in today’s Church distinguishes between Culture O, describing the culture of those Church members ordained as bishops, priests, and deacons, and Culture L, describing the culture of all other Church members who are laypeople.

According to this framework the Catholic Church functions with two distinct and interdependent cultures: the ordained and the laity, two different yet collaborative cultural groups with a common purpose and yet different roles, rights, and authorities. While all Church members have the responsibilities and rights that come from baptism and confirmation, the ordained (Culture O) have additional and exclusive responsibilities, rights, and relationships to each other that come from ordination.

As indicated in Canons 208, 209, and 211 above, all Church members (Cultures O and L) are considered truly equal in dignity and are expected to maintain communion with the Church, cooperate in building up the body of Christ, and bring the divine message of salvation to the world. Canon 212 offers examples of the distinction between Cultures O and L.

Culture L is bound to obedience to Culture O in its offices of teaching and governing. Within the boundaries of the integrity of faith and morals, reverence toward Culture O, and respect for the good of the Church and the dignity of persons, Culture L has the right and “even at times the duty” to make known to Culture O its needs, desires, and opinions.

This characterization is certainly not true for all ordained and laity, in every situation, at all times. It merely serves as a means for looking at a system in stark terms to illuminate practices and beliefs that otherwise might not be able to be framed and discussed. The two cultures are not to be judged as “good” or “bad”; both have their role to play in providing for the mission of the church and in sound management practices in the Church.

Cultures O and L both appear to currently operate largely through relationships, with little use of intentional feedback or appraisal and minimal oversight. Both use their primary authority when sensing challenge or threat. Culture O through its hierarchical offices of teaching and governing, and Culture L through choice, engagement and level of financial giving.

Culture O and Culture L members approach their work differently, depending not only on cultural affinity but also due to generational, geographical, and theological differences, and diversity of styles, practices, and preferences. The most effective priests, bishops, deacons, and lay leadership easily traverse Cultures O and L with clarity and servant leadership, and without inflated ego. Less effective leaders of Cultures O and L operate at the extremes of preference.

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5 Developed by Dennis Cheesebrow in 1999 and refined with Jim Lundholm-Eades in 2007.
If Culture L members attempt to disrespect and diminish Culture O, the response will usually be authoritarian, swift, and without apology. If Culture O members disrespect and minimize Culture L, the response will most likely be to disengage, withdraw financial support, and choose to practice the faith in more than one parish or even denomination. Culture L members may not leave the Church but choose to manage the relationship with what authority they possess—that of choice.

Membership in either Culture O or Culture L is determined by fact and condition, not by perception or opinion. A useful understanding of the impact and importance of this cultural context for sound church management emerges from the following considerations:

1. Consultation and the presence of communio is a theological construct in the Catholic Church and it assumes its presence, health and impact in the life of the Church.

2. Preferences and assumptions of both the ordained and the laity create a relationship dynamic through which the style and form of the Catholic Church is, in part, created and lived.

3. These preferences and assumptions can be assessed on related scales from high to low preference.

4. The combinations of these largely unspoken preferences and assumptions create predictable patterns of relationships.

5. The resultant patterns have a powerful influence on the life of the local diocese and parish.

6. The resultant patterns have a powerful influence on the willingness and ability to operate with sound church management practices.

7. A graphical model would provide value through:
   - The ability to “see and assess” at the individual, paid and volunteer staff, committee, council, and parish level;
   - The ability to dialogue and develop insight into current and desired preferences and assumptions;
   - The opportunity to move from unconscious to conscious preferences;
   - The hope for improved relationships and increased capacity to serve the mission of the Church;

8. Preferences of ordained and lay leaders and resultant patterns of relationships, ministry, leadership and management can be visualized on the graphic on page 6.

The greatest potential for sound church management practices and healthy relationships between Cultures O and L lies in the Robust Communio Zone. This potential decreases with the distance of these preferences and patterns from the center of the graphic; around its outer edges little potential for sound church management practices and healthy relationships exists.
Step Four: Conduct the Parish Leadership Relationship Assessment

The facilitator asks each assessment team member to place an “X” on the chart below, preferably reproduced on a large sheet of paper, to indicate where the member currently operates in terms of preference for Cultures O and L. Caution: many corporate four-square models place the “optimum” condition in the upper right quadrant; this assessment model does not make such an assumption.
Step Four: An Example of a Parish Leadership Relationship Assessment

The diagram illustrates a relationship assessment matrix based on preferences for culture and leadership role. The x-axis represents the preference for culture, ranging from low to high, while the y-axis represents the preference for leadership, also ranging from low to high.

- The top right quadrant indicates a high preference for both culture and leadership, labeled as XXX.
- The bottom right quadrant indicates a high preference for culture and low preference for leadership, labeled as XXX.
- The bottom left quadrant indicates a low preference for culture and low preference for leadership, labeled as XXX.
- The top left quadrant indicates a low preference for culture and high preference for leadership, labeled as XX.

The matrix helps in visualizing how different leadership and cultural preferences interact, potentially guiding the development of effective leadership strategies.
Step Four: Conduct the Relational Assessment—CONTINUED

The facilitator adds the descriptors below for the four quadrants and the center oval.

- **Increasing Unilateral Authority Zone**
  - Culture L Abdicated

- **Increasing Unhealthy Conflict Zone**
  - Cultures O & L in Conflict

- **Decreasing Cohesion Zone**
  - Culture O Abdicated

- **Decreasing Passion for Mission Zone**
  - Cultures O & L Abdicated

- **Robust Communio Zone**
  - Cooperation in Mutual Appreciation and Respect

Graphic developed by Dennis Cheesebrow & Jim Lundholm-Eades, 2007
The facilitator guides the group in exploring these key questions:

- What are the patterns and assumptions underlying our “map of cultural assumptions and relationships”?
- How have these patterns shifted over time with new pastors, new staff, and new parish leadership?
- In our parish history how well have we done and how healthy have we been when pastor, staff, or other parish leaders operate at the extremes of any of the quadrants?

Experience with this map in assessing a wide variety of parishes and schools indicates that operating at the extremes does not allow for sound parish ministry and management practices to be developed or employed with appropriate rigor, transparency, or effectiveness.
Step Four: Assessment Utilizing the Scorecards

This tool’s use of Balanced Scorecard® methodology enables parish leaders to frame their assessment in terms of the parish’s values in these seven dimensions of its ministry and management:

A. Quality of, Access to & Satisfaction with Ministry
B. Governance, Consultation, & Decision Making
C. Planning, Structure, & Systems
D. Communications: Internal & External
E. Participation in the Life of the Church
F. Financial Resource Development

Assessing ministry and management effectiveness in one or only some of these seven dimensions would not adequately reflect the whole life and experience of the parish. By looking at the “big picture” profile of results from all seven dimensions, parish leaders can better place each finding in the context of its relative impact and priority for strengthening or change. Together the seven dimensions offer a more systemic view of parish ministry and management.
<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Progress</th>
<th>5 Vision</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Overall quality of parish liturgy (including preaching, music, welcoming spirit)</td>
<td>40 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
<td>Highly rated in all categories by &gt; 55 % of parishioners</td>
<td>Highly rated in all categories by &gt; 70 % of parishioners</td>
</tr>
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<td>B. Overall quality of faith formation and religious education (all ages, all programs, including Catholic school if present)</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
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<td>Highly rated in all categories by &gt; 70 % of parishioners</td>
</tr>
<tr>
<td>C. Quality of pastoral care across all ages and circumstances of life</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
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<td>Highly rated in all categories by &gt; 70 % of parishioners</td>
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<tr>
<td>D. Quality service outreach and justice advocacy</td>
<td>20 %</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
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See next page for an example from a parish.
### Scorecard A: Quality of, Access to & Satisfaction with Ministry

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<td>Highly rated in all categories by &gt; 70 % of parishioners</td>
</tr>
<tr>
<td>Preaching</td>
<td>40%</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
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</tr>
<tr>
<td>Music</td>
<td>40%</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
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<td>Highly rated in all categories by &gt; 70 % of parishioners</td>
</tr>
<tr>
<td>Welcoming</td>
<td>40%</td>
<td>Moderate to highly rated in all categories by &lt; 30 % of parishioners</td>
<td>Moderate to highly rated in all categories by &lt; 40 % of parishioners</td>
<td>Moderate to highly rated in all categories by &gt; 40 % of parishioners</td>
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</tr>
</tbody>
</table>

### Scoring Examples

<table>
<thead>
<tr>
<th>Measure</th>
<th>Measure Scoring</th>
<th>Scorecard Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Measure A</td>
<td>3.5 X .40 (weight) = 1.40</td>
<td>3.1 out of a possible 5.0</td>
</tr>
<tr>
<td>Measure B</td>
<td>2.5 X .20 = .50</td>
<td></td>
</tr>
<tr>
<td>Measure C</td>
<td>4.0 X .20 = .80</td>
<td></td>
</tr>
<tr>
<td>Measure D</td>
<td>2.0 X .20 = .40</td>
<td></td>
</tr>
</tbody>
</table>
### Scorecard B: Governance, Consultation & Decision Making

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Sound Practice</th>
<th>5 Visionary</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Knowledge of and comfort with parish governance and system of consultation and authority: clarity of purpose, role, and relationship</td>
<td>20 %</td>
<td>Avoidance and/or denial of Catholic Church consultation and roles among ordained, staff, or lay leaders</td>
<td>Little knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, or lay leaders</td>
<td>Moderate knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, and lay leaders</td>
<td>Broad knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, and lay leaders</td>
<td>Broad knowledge and acceptance of Catholic Church consultation and roles among ordained, staff, lay leaders and parishioners</td>
</tr>
<tr>
<td>B. Parish consultative bodies and structure</td>
<td>20 %</td>
<td>Occasional meetings of consultative bodies of laity for finances only</td>
<td>Occasional meetings of consultative bodies of laity for ministry, finances, risk assessment, administration</td>
<td>Moderately active consultative bodies of laity for ministry, finances, risk assessment, administration</td>
<td>Moderately active and engaged consultative bodies of laity for ministry, finances, risk assessment, image management, administration</td>
<td>Highly active and engaged consultative bodies of laity for ministry, finances, risk assessment, image management, administration</td>
</tr>
<tr>
<td>C. Consultative bodies and structure</td>
<td>35 %</td>
<td>Lay bodies of consultation exist but operate with limited scope and purpose</td>
<td>Lay bodies of consultation are engaged in meetings to “listen”</td>
<td>Most lay bodies of consultation are engaged in critical questions formed by the pastor</td>
<td>All lay bodies of consultation are engaged in critical questions formed by the pastor and lay leadership and contribute in a demonstrable manner</td>
<td>Lay bodies of consultation are publicly noted by the pastor for their impact and value to the local Church</td>
</tr>
<tr>
<td>D. Decision-making includes</td>
<td>25 %</td>
<td>&lt; 50 % of critical planning, strategic, and financial decisions employ a – c</td>
<td>&lt; 70 % of critical planning, strategic, and financial decisions employ a – c</td>
<td>&gt; 70 % of critical planning, strategic, and financial decisions employ a – c with data and analysis supporting most/all key decisions</td>
<td>&gt; 80 % of critical planning, strategic, and financial decisions employ a – c with data and analysis supporting all key decisions</td>
<td>&gt; 90 % of critical planning, strategic, and financial decisions employ a – c with data and analysis supporting all key decisions</td>
</tr>
</tbody>
</table>
### Scorecard C: Planning, Structure, & Systems

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Sound Practice</th>
<th>5 Visionary</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Effectiveness of strategic plan for ministry, degree of alignment of</td>
<td>30 %</td>
<td>No strategic plan for ministry, evidence of personality-driven planning</td>
<td>Strategic plan for ministry without alignment of ministry, budget, and plan</td>
<td>Strategic plan for ministry with high degree of alignment of ministry, budget, and plan and with track record of some success</td>
<td>Strategic plan for ministry over time with high degree of alignment of ministry, budget, and plan and with track record of high levels of success</td>
<td>Strategic plan for ministry over time with high degree of alignment of ministry, budget, and plan and with track record of high levels of success and parishioner support</td>
</tr>
<tr>
<td>Operational practices</td>
<td>15 %</td>
<td>Policies, procedures and practices are to a great extent missing, ignored or deliberately avoided, or misaligned with planning, Canon law, and/or civic law</td>
<td>Policies, procedures and practices are rudimentary, not known, rarely used, and not aligned with planning, Canon law, and/or civic law</td>
<td>Policies, procedures and practices are rudimentary, somewhat known, sometimes used, and mostly aligned with planning, Canon law, and civic law</td>
<td>Policies, procedures and practices are well formed, known, used effectively, and aligned with planning, Canon law, and civic law</td>
<td>Policies, procedures and practices are well formed, known, used effectively, and aligned with planning, Canon law, and civic law and considered an asset of the parish</td>
</tr>
<tr>
<td>C. Human Resource Management</td>
<td>20 %</td>
<td>Human resource management meets none of the 4 criteria</td>
<td>Human resource management meets 2 of the 4 criteria</td>
<td>Human resource management meets 3 of the 4 criteria and policies &amp; procedures are regularly reviewed and updated; strategy, staffing and budget are aligned</td>
<td>Human resource management meets all 4 criteria; policies &amp; procedures are regularly reviewed and updated; strategy, staffing and budget are aligned</td>
<td>Human resource management meets all 4 criteria; policies &amp; procedures are regularly reviewed and updated; strategy, staffing and budget are aligned</td>
</tr>
<tr>
<td>D. Capacity:</td>
<td>20 %</td>
<td>Resource capacity in all 3 areas is less than 80% of existing and expected needs</td>
<td>Resource capacity in all 3 areas is 90% or less of existing and expected needs</td>
<td>Resource capacity in 2 of the 3 areas is at least 95% of existing and expected needs</td>
<td>Resource capacity in all 3 areas is at least 95% of existing and expected needs</td>
<td>Resource capacity in all 3 areas equals or exceeds existing and expected needs</td>
</tr>
<tr>
<td>E. Continuous Improvement through evaluation and refinement</td>
<td>15 %</td>
<td>Absence of evaluation and feedback for planning, ministry, and administration</td>
<td>Limited evaluation and feedback for planning, ministry, and administration</td>
<td>Some use of measurement and improvement in planning, ministry, and administration</td>
<td>Consistent use of measurement and improvement in planning, ministry, and administration</td>
<td>Consistent &amp; creative use of measurement and improvement in planning, ministry, and administration</td>
</tr>
</tbody>
</table>
### Scorecard D: Communications: Internal & External

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Number of channels (bulletin, web presence, etc.)</strong></td>
<td>40 %</td>
<td>Very limited (1–3) use of communication channels with little feedback as to effectiveness or perceived value from parishioners</td>
<td>Limited (3–5) use of communication channels with little demonstration of parish subgroup awareness or concern</td>
<td>Array of communication channels employed based on demonstrated understanding of parish subgroups and preferences</td>
<td>Array of communication channels employed based on demonstrated understanding of parish subgroups; data-based evaluation confirms effectiveness</td>
<td>Array of communication channels employed based on demonstrated understanding of parish subgroups; data-based evaluation and parishioner perceptions confirm effectiveness</td>
</tr>
<tr>
<td><strong>B. Level of connection and interactivity</strong></td>
<td>20 %</td>
<td>Absence of any form of substantive awareness, data, or analysis regarding connection to parishioners through communications</td>
<td>Demonstrated ability of communications to connect with at least 50 % of parish on a semi-monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 70 % of parish on a semi-monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 80 % of parish on a monthly basis</td>
<td>Demonstrated ability of communications to connect with at least 80 % of parish on a monthly basis through more than one communication channel</td>
</tr>
<tr>
<td><strong>C. Impact on planning, ministry delivery, and decision-making</strong></td>
<td>30 %</td>
<td>Outcomes from communications not being measured or assessed in any manner</td>
<td>Outcomes from communications considered to have a limited impact on planning, ministry delivery and decision-making</td>
<td>Outcomes from communications interpreted and considered to have impact on planning, ministry delivery and decision-making</td>
<td>Outcomes from communications clearly and positively impacting planning, ministry delivery and decision-making</td>
<td>Outcomes from communications clearly impacting positively and substantially planning, ministry delivery and decision-making</td>
</tr>
<tr>
<td><strong>D. Image and identity</strong></td>
<td>10 %</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating highly to moderately negative public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating negative to neutral public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating neutral to positive public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church creating moderate to highly positive public image and identity</td>
<td>Communications, perceptions and public relations regarding parish, diocese, and/or Church consistently creating moderate to highly positive public image and identity</td>
</tr>
</tbody>
</table>
### Scorecard E: Participation in the Life of the Church

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Sound Practice</th>
<th>5 Visionary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>A. Participation in leadership (councils, commissions, committees, etc.)</strong></td>
<td>10 %</td>
<td>&lt;2 % of adult registered parishioners engage in leadership annually</td>
<td>&lt;3 % of adult registered parishioners engage in leadership annually</td>
<td>&gt;3 % of adult registered parishioners engage in leadership annually</td>
<td>&gt;5 % of adult registered parishioners engage in leadership annually</td>
<td>&gt;8 % of adult registered parishioners engage in leadership annually</td>
</tr>
<tr>
<td><strong>B. Participation in ministry</strong></td>
<td>20 %</td>
<td>&lt;20 % of registered parishioners engage in ministry annually</td>
<td>&lt;30 % of registered parishioners engage in ministry annually</td>
<td>&gt;30 % of registered parishioners engage in ministry annually</td>
<td>&gt;40 % of registered parishioners engage in ministry annually</td>
<td>&gt;50 % of registered parishioners engage in ministry annually</td>
</tr>
<tr>
<td><strong>C. Participation in Sunday Mass (includes on Saturday evening)</strong></td>
<td>40 %</td>
<td>&lt;40 % of registered parishioners at Sunday Mass weekly</td>
<td>&lt;60 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt;60 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt;70 % of registered parishioners at Sunday Mass weekly</td>
<td>&gt;80 % of registered parishioners at Sunday Mass weekly</td>
</tr>
<tr>
<td><strong>D. Participation in financial stewardship</strong></td>
<td>30 %</td>
<td>&lt;50 % of HH</td>
<td>&lt;64 % of HH</td>
<td>64 – 69 % of HH</td>
<td>69 – 74 % of HH</td>
<td>&gt;75 % of HH</td>
</tr>
</tbody>
</table>

**Note on “Registered Parishioners”:**
This scorecard aims to quantify what percentage of the parish’s registered parishioners donate time, talent and/or treasure, or are “active” at the time this tool is utilized. Given the nature of parish life and the limited resources most parishes are able to spend on keeping an accurate database, it is assumed that “registered parishioners” include those who have moved away, may be registered at more than one parish, do not come to mass, who register but contribute neither time, talent, nor treasure, or who register simply to be able to celebrate a sacrament. It is also understood that many parishes have people who do contribute time, talent and/or treasure but are not formally “registered” with the parish. Therefore, the number of “registered” parishioners (the denominator), will be larger than the number participating in leadership, ministry, liturgy, or contributing financially (the numerator). The measures above are not mutually exclusive; it is expected that many of the same parishioners would be counted in more than one measure.
### Scorecard F: Financial Resource Development

<table>
<thead>
<tr>
<th>Measure</th>
<th>Weight</th>
<th>1 Intervention</th>
<th>2 Concern</th>
<th>3 Acceptable</th>
<th>4 Sound Practice</th>
<th>5 Visionary</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Parish and diocesan capital campaigns and stewardship programs operate within the context of mid and long term planning.</td>
<td>20%</td>
<td>There is no planning context.</td>
<td>Planning as a mission and vision, but little analysis of the current reality or roadmapping of the next 1-2 years.</td>
<td>Planning has mission, vision, some assessment of the current reality and roadmapping of the next 1-2 years.</td>
<td>Planning has clarity of mission, vision, assessment of the current reality, strategic directions, and roadmapping of the next 1-2 years.</td>
<td>Planning has clarity of mission, vision, assessment of the current reality, strategic directions, and roadmapping of the next 1-2 years, and benchmarks for progress.</td>
</tr>
<tr>
<td>B. Feasibility studies for capital campaigns are based in competent analysis and verifiable data.</td>
<td>30%</td>
<td>There is no data or analysis.</td>
<td>There is data but no analysis.</td>
<td>There is relevant data that is not verifiable and some analysis.</td>
<td>There is relevant verifiable data and competent analysis.</td>
<td>There is relevant verifiable data and competent analysis that estimates the potential for achieving goals based in research.</td>
</tr>
<tr>
<td>C. The most recent parish capital campaign met goals</td>
<td>25%</td>
<td>Campaign met less than 60% of goals.</td>
<td>Campaign met 60% of goals.</td>
<td>Campaign met 75% of goals.</td>
<td>Campaign met 100% of goals.</td>
<td>Campaign exceeded goals.</td>
</tr>
<tr>
<td>D. Parish stewardship program met goals.</td>
<td>25%</td>
<td>Stewardship program met less than 60% of goals.</td>
<td>Stewardship program met 60% of goals.</td>
<td>Stewardship program met 75% of goals.</td>
<td>Stewardship program met 100% of goals.</td>
<td>Stewardship program exceeded goals.</td>
</tr>
</tbody>
</table>
Step Five: Look at the Big Picture

After you complete all six scorecards, take some time to look back over the team’s assessments and consider questions such as:

- What surprises you?
- What confirms an impression you already had?
- What are your parish’s greatest strengths?
- What are the major areas for improvement?
- Based on the scorecard results, can you discern any rationale for your parish’s strengths or improvement needs?

Step Six: Next Steps

It’s important not to jump ahead to solutions too quickly. After your initial dialogue about your scorecard results, your parish leadership can consider how best to structure any work on potential improvements.

It would also be most helpful if the assessment team could offer some feedback on how this tool worked for you, aspects that you found most valuable, and aspects that were unclear or difficult to work through. The NLRCM Management Research Subcommittee very much appreciates your participation in this field test and hopes that this assessment tool has provided valuable information for your parish’s continuous improvement of its ministry and management.