

## Finance and Administration Commission (“FAC”)

### Initial Annual Plan

#### A. Commission Vision Statement

We envision a Finance and Administration Commission...

Where God is given the first of our fruits in time, talent and treasure, is loved above all else in our lives and praised in all things.

Where communication is plainly, regularly and openly provided to other commissions and parishioners.

Where new ideas are invited, activities are transparent and outcomes are beneficial for all stakeholders.

#### B. Commission Objectives and Action Plans

**Stewardship Vision:** To develop a sustainable Stewardship Committee/Plan which engages parishioners and increases giving in the parish to support our overall SVDP Vision.

Stewardship Objective:

- Short term (2011): to understand, document and make suggested improvements to the Annual Giving Process.
- Long term (2012 and beyond): to develop a strategy and multi-year roadmap for stewardship at SVDP

Action Plan (See NOTE 1):

- Scope: see short term objective above
- Current State Assessment: Feb – May 2011
- Future State and Gap Assessment: Jun – Aug 2011
- Implement: Sept – Nov 2011
- Control: Nov – Feb 2012

Indicators of Objective 2 Achievement

1. Increased giving of monetary support and increased participation
2. Executing plan/techniques designed for gaining increased stewardship

**Communication Vision:** To ensure all parishioners are aware of the financial state of the parish and receive a consistent message

Communication Objective:

- Short term (2011): to understand, document and make suggested improvements to the SVDP current financial communications
- Long term (2012 and beyond): to close gaps in communication

Action Plan:

- Scope: see short term objective above
- Current State Assessment: May 2011. Key Deliverable Communication Matrix

- Future State and Gap Assessment: June 2011 Key Input: Other Commissions, Norm and Father Jack. Include a survey, with the Stewardship group, to gather feedback on current communication and improvement that will improve stewardship.
- Implement: December 2011
- Control: March 2012

#### Indicators of Objective Achievement

##### 1. Meeting Deadlines

**Administrative Objective:** HR Manual (1) & Facilities Use Handbook (2). To review current manuals / processes with owners & staff, gather and learn best practices towards establishing a new framework to improve current process and documentation.

#### Action Plan:

- Scope: Re-assess objective after initial review to ensure achievement
- Current State Assessment: Research current process and written information. Interview current owners and staff to baseline the process. April 2011. Document the current process to establish a baseline June 2011
- Future State and Gap Assessment: Research best practices to formulate solution( Min 2 parishes or 2 books or equivalent). Meetings with owners & staff Oct. 2011
- Implement: establish committee or parish workgroup to implement; participate or lead when appropriate.
- Determine Controls/ measurement metrics 2012

#### Indicators of Objective Achievement

##### 1. Meeting Deadlines

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NOTE 1: The FAC decided that an effective and consistent way to approach each objective was to view it in the context of a 5 step process. The 5 steps of the process are defined as

STEP 1: SCOPE-properly determine the scope of the objective, making sure that the scope is not overly broad.

STEP 2: DEFINE CURRENT STATE-or the research phase, what are we currently doing? What are others doing?

STEP 3: FUTURE STATE-gap analysis, where do we want to be? what is the outcome that we want?

STEP 4: IMPLEMENTATION-the "how", training, roles

STEP 5: CONTROLS: establish measurements, how do we keep going?