

Best Practices for Responsible Financial Parish Planning

Every Pastoral Planning process should have the mission of the Church as its focus. However, available staff, finances and buildings change how that mission is fulfilled, and as resources shift, there should be regular, ongoing assessment by the Pastor/Pastoral Administrator, in consultation with the Pastoral and Finance Councils.

In order to be good stewards, to ensure healthy parishes, and to avoid fiscal crisis, it is recommended that:

- There is regular, ongoing assessment of the life of the parish, both pastoral and fiscal, that is communicated with the parishioners.
- To best advise the Pastoral Leader, regular and, ongoing recruitment of parishioners with strong financial, legal, and/or business experience occurs to ensure strong, active membership on the parish Finance Council.
- Shared staff and shared programs with other parishes are seriously considered, just as different sites now share a Pastor/Pastoral Administrator and a Finance Director.
- Parish Property Usage and Condition assessments occur on a regular basis.
- Parishes decide what property/buildings they truly need, based on ministries and usage. Unused or underutilized properties should be leased out or sold. The parish Buildings and Properties Committee, in collaboration with the Pastoral Council and Finance Council, should make recommendations to the Pastor/Pastoral Administrator.
- Parishes have an increased giving campaign every 3-4 years, preferably using a consultant for the initial campaign.
- Online giving is encouraged.
- Every 5-10 years, the parish is educated on Planned Giving.
- Funds that are not earmarked to be disbursed in the next 3 years are invested in Communis.
- Anytime the parish seeks to withdraw funds from Communis, a three-year financial forecast and plan are developed.