

Fiscal Year 2023 Pastoral Center Ministry Budget Report



Table of Contents

Summary Financial Budget	3
Summary Diocesan Strategic Plan	4
Chancery.....	6
<i>Office of the Bishop</i>	7
I. <i>Mission/Purpose:</i>	7
II. <i>Ministry Data and Statistics:</i>	7
<i>Office of the Chancellor</i>	7
I. <i>Mission/Purpose:</i>	7
II. <i>Ministry Data and Statistics:</i>	7
<i>Office of the Diocesan Tribunal</i>	7
I. <i>Mission/Purpose:</i>	7
II. <i>Ministry Data and Statistics:</i>	7
<i>Office of the Child and Youth Protection</i>	8
I. <i>Mission/Purpose:</i>	8
II. <i>Ministry Data and Statistics:</i>	8
<i>Office of Divine Worship</i>	8
I. <i>Mission/Purpose:</i>	8
II. <i>Ministry Data and Statistics:</i>	8
<i>Office of Pastoral Services</i>	8
I. <i>Mission/Purpose:</i>	8
II. <i>Ministry Data and Statistics:</i>	8
Catholic Charities	10
I. <i>Mission/Purpose:</i>	11
II. <i>Ministry Data and Statistics:</i>	11
III. <i>Situational Analysis:</i>	11
IV. <i>Key Strategic Goals:</i>	14
V. <i>Other Key Ministry Goals:</i>	15
VI. <i>Financial Impacts</i>	16
Catholic Education	17
I. <i>Mission/Purpose:</i>	18
II. <i>Ministry Data and Statistics:</i>	18
III. <i>Situational Analysis:</i>	18
IV. <i>Key Strategic Goals:</i>	20
V. <i>Other Key Ministry Goals:</i>	21
VI. <i>Financial Impacts</i>	22

Clergy, Consecrated Life and Vocations.....	23
<i>I. Mission/Purpose:</i>	<i>24</i>
<i>II. Ministry Data and Statistics:</i>	<i>24</i>
<i>III. Situational Analysis:</i>	<i>26</i>
<i>IV. Key Strategic Goals:.....</i>	<i>29</i>
<i>V. Other Key Ministerial Goals:</i>	<i>30</i>
<i>VI. Financial Impacts</i>	<i>32</i>
Communications	33
<i>I. Mission/Purpose:</i>	<i>34</i>
<i>II. Ministry Data and Statistics:</i>	<i>34</i>
<i>III. Situational Analysis:</i>	<i>35</i>
<i>IV. Key Strategic Goals:.....</i>	<i>36</i>
<i>VI. Financial Impacts</i>	<i>37</i>
Discipleship & Family Life Annual Ministry Budget Report – FY2023.....	38
<i>I. Mission/Purpose:</i>	<i>39</i>
<i>II. Ministry Data and Statistics:</i>	<i>39</i>
<i>III. Situational Analysis:</i>	<i>40</i>
<i>IV. Key Strategic Goals:.....</i>	<i>42</i>
<i>V. Other Key Ministry Goals:.....</i>	<i>43</i>
<i>VI. Financial Impacts</i>	<i>44</i>
Management Corporation	45
<i>I. Mission/Purpose:</i>	<i>46</i>
<i>III. Situational Analysis:</i>	<i>47</i>
<i>IV. Key Strategic Goals:.....</i>	<i>49</i>
<i>V. Other Key Ministry Goals:.....</i>	<i>51</i>
<i>VI. Financial Impacts</i>	<i>53</i>

Summary Financial Budget

In the spirit of transparency and accountability, the following Diocese of Toledo Pastoral Center Ministry Budget Report (Budget Report) represents the fiscal year 2023 (FY2023) summary financial budgets along with noteworthy operational and strategic matters for each of the related office ministries. The ministry budgets are prepared annually by each senior leader and their respective teams and are then reviewed and approved by the diocesan Controller, Chief Operations/Finance Officer, Vicar General, Accounting & Audit Committee, Finance Council, and finally the Bishop.

Should you have any questions on the Budget Report information herein, please feel free to contact either Phil Renda prenda@toledodiocese.org or Rene Schmidbauer rschmidbauer1@toledodiocese.org.

Pastoral Center Summary Budget FY2023									
	Chancery	Catholic Charities	Catholic Education	Clergy, Consecrated Life and Vocations	Communications	Discipleship and Family Life	Management Corporation	Total	
Revenue									
Program, donation and other rev/fees	\$ 1,186,083	\$ -	\$ 867,070	\$ 331,749	\$ 62,000	\$ 514,750	\$ 654,829	\$	3,616,481
Expense									
Salaries and benefits	972,733	-	427,119	400,670	339,354	581,450	1,606,921		4,328,247
General Office and Occupancy	888,830	-	38,721	55,047	38,196	63,723	724,211		1,808,729
Programs	728,001	735,800	677,530	939,529	63,000	411,543	209,250		3,764,653
Special Events	-	-	-	121,811	-	-	-		121,811
Total Expenses	<u>2,589,565</u>	<u>735,800</u>	<u>1,143,370</u>	<u>1,517,057</u>	<u>440,550</u>	<u>1,056,717</u>	<u>2,540,382</u>		<u>10,023,440</u>
Net Expense	\$ (1,403,482)	\$ (735,800)	\$ (276,300)	\$ (1,185,308)	\$ (378,550)	\$ (541,967)	\$ (1,885,553)		\$ (6,406,959)
Annual Catholic Appeal Funds (net)									2,800,000
Assessment Funds									<u>3,750,000</u>
Net Budget Surplus									<u>\$ 143,041</u>

Note: The above chart excludes the budgets of Central City Ministries (CCMT - two intercity diocesan schools), Catholic Charities (above reflects diocesan subsidy only), and all Trust entities due to the unique legal and governance structures of each.

Summary Diocesan Strategic Plan

The following represents an excerpt from the summary Diocesan Strategic Plan document. Each of the Pastoral Center office Budget Reports contained herein reflects its applicable strategic plan initiatives and goals. To learn more about the Diocese of Toledo Strategic Plan, please visit the Diocese website at <https://toledodiocese.org/diocesan-strategic-plan> or [click this link](#).



Diocese of Toledo · 2021-2024 STRATEGIC PLAN

VISION
To become a more faith-filled, united and vibrant Diocese of Toledo through fostering Holy Disciples, Holy Families and Holy Vocations



MISSION

We, the faithful of the Roman Catholic Diocese of Toledo, are called by Jesus Christ to proclaim the Gospel, celebrate the Sacraments and serve those in need, revealing to all the merciful face of the Father. Through prayer, fasting and almsgiving, we, the members of our parishes, schools and communities, strive with the help of the Holy Spirit, the intercession of Our Lady of the Rosary and fidelity to the Church, to be joyful witnesses to the love of God and neighbor.

CORE VALUES

CHRIST AT THE CENTER We seek, in all that we do, to imitate Jesus Christ who came to serve and not to be served	DEEPENING COMMUNION We strive to deepen the bonds of faith and charity with God, the Church and one another	INVITATION AND OUTREACH We will reach out to share the Good News of Jesus and His love and mercy for all people of every culture, age and need	OPEN AND EFFECTIVE COMMUNICATION We will communicate dynamically in a responsible, respectful and transparent way	EXCELLENCE AND ACCOUNTABILITY We will act with integrity and strive to be competent, efficient and passionate in all we do pastorally and operationally
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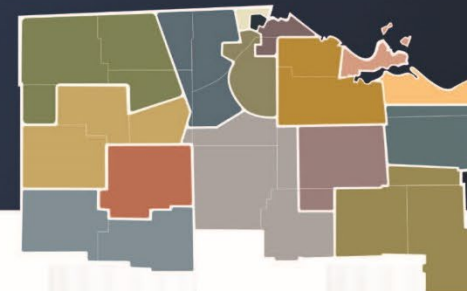
STRATEGIC PILLARS

SUPPORTING THE HEALTH OF PARISHES & CLERGY	INVIGORATING EVANGELIZATION & FORMATION	ENHANCING LAY LEADERSHIP	STRENGTHENING CATHOLIC EDUCATION	GROWING CATHOLIC CHARITABLE OUTREACH & ADVOCACY	DEVELOPING FINANCIAL RESOURCES
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Revised: January 5, 2022



Diocese of Toledo · 2021-2024 STRATEGIC PLAN



STRATEGIC PILLAR GOALS

SUPPORTING THE HEALTH OF PARISHES & CLERGY

Empower parishes through continuing formation, intentional planning, sharing best practices and providing for the care and well being of our clergy

- Establish **best practices among parishes** - ie Amazing Parish model, focused Sunday experience, quality of liturgy and music
- **Ministry to Priests Program:** Caring for our active and retired priests in a holistic way, guided by minister to priests
- Implement a diocesan-wide effort to **renew apostolic zeal** and encourage clergy development
- Assist parishes in **intentional planning** for the future
- Nurture healthy priestly vocations

INVIGORATING EVANGELIZATION & FORMATION

Share the Gospel through intentional discipleship, deepening our faith and growing in relationship with God and one another

- Create a **diocesan-wide evangelization knowledge-based platform** focused on invigorating the active, connecting the inactive, welcoming home the fallen away and receiving those of no or other faiths
- Revive and equip parish staffs to **proclaim and advance the gospel**
- Foster **intentional discipleship** of the Domestic Church through parish-wide religious education and ministries
- Evaluate, identify and implement impactful **youth ministry**
- Nurture **missionary disciples** through faith formation of parish catechists and formators

ENHANCING LAY LEADERSHIP

Form excellent lay leaders through education, training and skill development

- **Populate Franciscan at Home Institute** with lay leadership curriculum and rollout platform. **This will enhance leadership training, skills and development**
- Facilitate the development of performance management and **employee succession plans** for Pastoral Center, parishes and schools

STRENGTHENING CATHOLIC EDUCATION

Enhance faith formation of teachers and students, maintain educational excellence and instill Gospel values while promoting enrollment and sustainable funding models

- Develop and promote **sustainable school funding** models
- Inspire **parental and family engagement** and increase enrollment
- Strengthen **faith formation curriculum** and deepen Catholic culture
- Nurture **missionary disciples** through faith formation of school educators and staff

GROWING CATHOLIC CHARITABLE OUTREACH & ADVOCACY

Increase outreach and advocacy efforts throughout the Diocese to provide life-transforming opportunities for the poor, marginalized and those in need

- Evaluate and enhance resources that provide social services to **broaden Catholic Charities footprint** throughout the diocese.
- **Collaborate with parishes** in identifying particular needs in local areas of the diocese
- Build and foster a **culture of evangelization and social justice** in all of our outreach and advocacy efforts

DEVELOPING FINANCIAL RESOURCES

Promote generous giving and responsible stewardship to ensure sustainable mission and ministry

- Enhance and strengthen the **Annual Catholic Appeal (ACA)**
- Execute a diocesan-wide **capital campaign**
- Expand focus of Mission Advancement Office to **long-term fundraising and support of parishes** with a concentration on planned giving and fostering a culture of stewardship

STRATEGIC ACTIONS

Chancery

Annual Ministry Budget Report – FY2023



Chancery

Annual Ministry Budget Report – FY2023

Office of the Bishop

I. Mission/Purpose:

To carry out the duties of the Diocesan Bishop in governing the Diocese. Fulfilling the three-fold responsibilities of the bishop in governing, teaching, and sanctifying.

II. Ministry Data and Statistics:

Personnel: Bishop, Vicar General, Administrative Assistant

Office of the Chancellor

I. Mission/Purpose:

- To assist the Bishop in all canonical matters
- Oversees the Archives of the Diocese of Toledo
- Serves as canonical consultant to parishes, schools, and institutions
- Gathers and maintains statistical records for the Diocese of Toledo
- Assists in the interpretation of the particular law in the “Diocese of Toledo Pastoral Policy Handbook”

II. Ministry Data and Statistics:

Personnel: Chancellor and part time archivist.

Office of the Diocesan Tribunal

I. Mission/Purpose:

- Receives and investigates petitions for declarations of marriage nullity according to the laws of the Catholic Church (canon law)
- Issues declarations of marriage nullity and verifies the conditions for dissolutions of marriage by the Pauline Privilege
- Functions as a court of appeal (second-instance court) for the Diocese of Cleveland
- Facilitates ongoing formation for canon lawyers in the diocese and responds to questions regarding canon law
- Provides training and ongoing formation in the marriage nullity process to parish case sponsors and clergy

II. Ministry Data and Statistics:

Personnel: Judicial Vicar, two Judges, Notary and Administrative Assistant

Office of the Child and Youth Protection

I. Mission/Purpose:

- Works with compliance officers throughout the Diocese to keep updated records on background checks, etc.
- Receives any possible abuse claims
- Updates clergy status report
- Provides fingerprinting and background checks
- Keeps updated “Virtus” and “Selection.com”
- Administrative tasks for Diocesan Review Board
- Completes annual audit for USCCB

II. Ministry Data and Statistics:

Personnel: Coordinator of the Office and Fingerprinting/Administrative Assistant

Office of Divine Worship

I. Mission/Purpose:

- Works with Office of the Bishop regarding all liturgical events (Confirmations, Ordination, and Episcopal events)
- Oversees Diocesan Director of Liturgical Music
- Is a resource for parishes, schools and institutions

II. Ministry Data and Statistics:

Personnel: Director of the Office, Director of Liturgical Music, and Parish/School Liturgical Consultant

Office of Pastoral Services

I. Mission/Purpose:

- Oversees the facilities of the Pastoral Center office building
- Monitors all closed Diocesan properties
- Coordinates activities of various vendors (water, HVAC, gas, electric, etc.)
- Oversees building security

II. Ministry Data and Statistics:

Personnel: Coordinator of the Office, maintenance personnel, receptionist, and security personnel

III. Financial Impacts

The following represents the FY2023 summary financial budget for the related Chancery office ministries:

Summary Budget FY2023 Chancery												
	Revenues and Grants	Charities	Diocesan Pastoral Services	Chancery	Legal, Professional, CCO, USCCB, Holy See	Episcopal Residence	Cathedral	Pastoral Center	Archives	De Sales Outreach	Tribunal	Total
Revenue												
Donations and other revenue/fees	\$323,461		\$ 1,000	\$ 30,000	\$ 260,000	\$ 36,000		\$ 454,122	\$ -	\$ 59,500	\$ 22,000	\$ 1,186,083
Expense												
Salaries and benefits			103,757	254,659	-	82,851	100,571	205,416	9,636	49,125	166,719	972,733
General Office and Occupancy	62,400		11,243	105,948	-	106,516	-	460,208	39,015	47,459	56,041	888,830
Programs		735,800	17,500	52,000	465,475	-	167,276	-	-	3,000	22,750	1,463,801
Special Events				-	-	-	-	-	-	-	-	-
Total Expenses	<u>62,400</u>	<u>735,800</u>	<u>132,500</u>	<u>412,606</u>	<u>465,475</u>	<u>189,367</u>	<u>267,847</u>	<u>665,624</u>	<u>48,652</u>	<u>99,584</u>	<u>245,510</u>	<u>3,325,365</u>
Net	<u>\$261,061</u>	<u>\$(735,800)</u>	<u>\$(131,500)</u>	<u>\$(382,606)</u>	<u>\$(205,475)</u>	<u>\$(153,367)</u>	<u>\$(267,847)</u>	<u>\$(211,502)</u>	<u>\$(48,652)</u>	<u>\$(40,084)</u>	<u>\$(223,510)</u>	<u>\$(2,139,282)</u>

Note: The Charities column is shown separately on the summary chart on page 3.

Catholic Charities

Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Catholic Charities

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

OUR MISSION

Catholic Charities makes real the love of Jesus Christ and the Catholic Church by serving those, regardless of faith or background, with physical, emotional, and spiritual needs; assisting the neglected and forgotten; respecting and promoting life from conception to natural death; and nurturing and supporting the institution of family.

OUR CORE VALUES

We strive each day to be:

- Christ Centered in the way we serve and love our community, those who come to us for help, our volunteers, our donors, and each other.
- Life Transformational by assisting people in their journey by walking alongside them so, they can live God's plan.
- Operationally Excellent in all our efforts - to inspire confidence and increase the desire to support the valuable work of our ministries.

II. Ministry Data and Statistics:

- 47,590 meals served at shelters and Helping Hands of St. Louis
- 16,419 men, women, and children assisted across Northwest Ohio
- 9,849 shelter nights while families secure affordable housing
- 12,448 grocery and hygiene kits distributed
- 17,796 calls for assistance
- 1,345 services and assistance through Jail and Prison Ministries
- 2,647 received clothing, shoes, furniture, and household items
- 140 individuals assisted through Adult Advocacy Services

III. Situational Analysis:

Primary functions and programs of the ministry/office:
<p>Crisis Navigation Services - Our Crisis Navigators help families and individuals in Erie, Richland, Huron, and Lucas Counties who are struggling to manage finances, pay bills or maintain a suitable residence. Qualifying Richland County residents may receive financial assistance with rent or mortgage payments, medical bills, or prescription costs. Huron County residents may be eligible to receive assistance with transportation, housing, homeless prevention, case management, or health-related needs. Erie and Lucas County residents will receive intensive case management with the Crisis Navigator at our</p>

Sandusky and Toledo offices.

Helping Hands of St. Louis - Helping Hands of St. Louis, a ministry of Catholic Charities of the Diocese of Toledo, is located at 443 Sixth St., Toledo, Ohio, serves low-income and homeless families and individuals. The Outreach Center includes a Soup Kitchen, Food Pantry and Clothing Center. Additional services include providing hygiene packs to families and hot showers and hygiene and snack kits to the homeless.

HOPE Food Pantry - HOPE Food Pantry serves individuals and families in Richland County. HOPE Pantry is stocked through the generosity of the local community; through organizations, parishes, food drives, and individuals who want to make a difference. Volunteers help in the pantry, and we can always use volunteers. A guest-choice format allows our guests to choose food items according to their individual needs.

La Posada Family Emergency Shelter - La Posada Family Emergency Shelter offers temporary housing and supportive services to homeless families of all faiths and backgrounds in the Toledo area. Direct services through La Posada include shelter, food, clothing, personal hygiene products and case management.

Miriam House - Located in Norwalk, Miriam House is a transitional housing program that offers safe and stable housing to homeless women, pregnant women, and their children. Catholic Charities staff help residents identify issues that have contributed to their homelessness. Clients receive resources and guidance to rebuild their lives and to develop the skills necessary to regain self-sufficiency and to secure stable, independent housing.

Supportive Housing - Catholic Charities Permanent Supportive Housing program in Lucas County assists homeless individuals and families with housing. To qualify for the program the head of household must have a qualifying disability and the family's income has to be at or below poverty level. A qualifying disability may be a physical disability, mental illness or chemical dependency.

After the client is accepted into the program, they're assisted in finding housing. The housing need is met through securing fair market housing. Through case management support, the client is offered the necessary tools needed to maintain housing stability and become self-sufficient again.

Tenant Readiness - The Tenant Readiness Program partners with Lucas County landlords and tenants to help families improve their ability to manage the responsibilities of their households before they sign a lease. The tenant readiness program helps prevent evictions and help landlords secure their property investment. The goal is to help tenants who are financially vulnerable before they enter into a lease agreement.

Adult Advocacy Services - Catholic Charities Diocese of Toledo provides legal guardianship services for adults aged 55 and older who have no appropriate family to make decisions for their medical care and estate. Clients suffer from dementia or other illnesses that limit their decision-making capacity. In most cases, clients are impoverished and have been victims of elder abuse or financial exploitation. Many lived isolated lives before entering a nursing home. The probate court appoints Catholic Charities' volunteers as legal guardians to advocate for their care. However, guardianship becomes much more than advocacy – a volunteer guardian becomes a companion and a friend.

Respect Life - Catholic Charities works to create an awareness of the dignity of human life through supporting parish Respect Life groups, providing presentations on Respect Life issues, and publishing a bi-

weekly Respect Life e-newsletter with local and national news and events. Staff also provide training to those interested in sidewalk ministry to women outside abortion clinics.

Project Rachel Post Abortion Healing Ministries - Project Rachel is the Catholic Church's diocesan-based ministry to those suffering in the aftermath of abortion. The nationwide ministry helps mothers, fathers, family members, friends, and people of faith or no faith who seek compassionate, non-judgmental help. Priests, religious, counselors, and laypeople provide a team response of care that can help to heal those wounded by abortion.

The Joseph Ministry - The Joseph Ministry is created and designed to provide compassionate, non-judgmental healing help and support for all men who have suffered a loss due to abortion. Priests, religious, counselors, and laypeople provide a team response of care that can help to heal those wounded by abortion. Individual mentoring, small groups, one-day and weekend retreats, professional counseling, and spiritual guidance referrals are available.

Jail and Prison Ministries - Catholic Charities oversees Diocesan efforts to provide jail and prison ministries in various settings. Staff provide training for volunteers who serve at State prisons in Toledo, Lima, and Mansfield, and at county jails and treatment centers throughout the Diocese of Toledo. The ministries include worship services, retreats, Scripture study, Rite of Christian Initiation for Adults, and pastoral counseling. Ministry services vary depending on the facility. Volunteers participate in supporting returning citizens with rent assistance, food, and furniture delivery, mentoring and spiritual opportunities and "share the journey" support for families of the incarcerated. Other volunteer opportunities include the ALPHA program, retreats, Bible studies and Eucharistic Ministry.

Disaster Relief - Catholic Charities provides outreach to communities affected by natural disasters such as flooding or tornadoes. Catholic Charities may coordinate volunteer support personnel, provide case management, solicit donations, and may assist with long-term recovery. We strive to reflect God's mercy to the community at large. Regardless of race, religion, or socio-economic status. Catholic Charities may facilitate local collections in times of major natural disasters in other areas of the country and the world. These funds are distributed to local Catholic Charities agencies directly providing disaster response. No administrative fees are taken out by Catholic Charities Diocese of Toledo.

Furniture Ministry - Our Furniture Ministry is located in Erie County. We accept donations of used furniture – stored in our local warehouse – which we distribute free of charge to qualifying local families or individuals to help them settle into a stable living environment. Whether the victims of natural disasters, suffering from financial hardship, or transitioning back into productive society from incarceration or some other transitional circumstance, many people in Erie County find themselves without a bed to sleep on or a table to eat at and with no means to obtain those basic necessities. We do our best to address those needs through the generosity of donations from people like you and through the assistance of volunteers who cheerfully give their time and energy.

Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)

- Staff dedicated to helping change lives through 14 different ministries
- 108 years of service throughout our Diocese
- Focus on a "hand up" and not a "hand out" approach
- Increased number of people served the past 10 years from 20,000 to 40,000 a year

Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)
<ul style="list-style-type: none"> • Lack of Catholic Charities services especially in the western part of the Diocese • Improving staff engagement through staff appreciation efforts and added training and development opportunities • Staff retention for Residential Specialists at shelters • Effectiveness and efficiencies of serving people at Helping Hands of St. Louis in the current facilities
Opportunities (top internal or external events or conditions which benefit the ministry and those served)
<ul style="list-style-type: none"> • Increase geographic service footprint especially in the western part of the Diocese through Parish partnerships and support • Expand ministries such as Jail and Prison, Opportunity Kitchen, and Helping Hands of St. Louis • Increase awareness of services, volunteers, and Gift In-Kind efforts
Threats (top internal or external events or conditions which makes the ministry more difficult)
<ul style="list-style-type: none"> • Decrease in funding from various sources • Staff retention and improving work/life balance • Not being able to offer fair and competitive wages versus comparable ministries

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: Broaden footprint of Catholic Charities services especially the Western part of the Diocese.	
Purpose: Meet unmet needs in Parish communities where Catholic Charities currently does not have a presence.	
Measurement: Opening new locations in the Western part of the Diocese.	
Completion Date: June 30, 2023	Owner: Rodney Schuster
Goal 2: Engage, empower, and encourage staff and volunteers	
Purpose: Serve staff with appreciation, training, development, and activities.	

Measurement: Improved staff engagement and morale	
Completion Date: July 2022 and ongoing	Owner: Yvonne Tertel
Goal 3: Assess, improve, and expand our ministries	
Purpose: Assess needs in Western part of the Diocese and begin providing services	
Measurement: Opening new locations in western part of the Diocese	
Completion Date: June 30, 2023	Owner: Rebecca Owens
Goal 4: Manage and strengthen our financial capacity to serve with exceptional stewardship	
Purpose: Increase awareness of services through a speaker's bureau of staff and volunteers as well as increased number of volunteers and Gift In-Kind efforts	
Measurement: 1. Speaking engagements throughout the Diocese sharing the services Catholic Charities offers 2. increased number of volunteers 3. Increased Gift-In-Kind donations	
Completion Date: September 2022 – June 30, 2024	Owner: Tom Waniewski
Goal 5: Renovate and expand Helping Hands of St. Louis	
Purpose: To better serve people with dignity and respect and make it a more efficient and effective ministry	
Measurement: Complete design and construction of facilities	
Completion Date: June 30, 2024	Owner: Rodney Schuster

V. Other Key Ministry Goals:

The following represent other key ministry specific goals for the fiscal year, which more indirectly support the Strategic Plan - Pillar Goals/Actions. These are goals specific to the ministry's functionality/operations, and/or staff development.

Goal 1: Utilize receivable module for in accounting software for invoicing grants and recording grant receipts
Purpose: Reduce number of journal entries for all receipts and deposits.

Measurement: Full use of module and less time used to prepare journal entries.	
Completion Date: 12/31/22	Owner: Finance Director
Goal 2: Increase number of face-to-face major donor meetings to build/strengthen relationships by sharing how their support makes a difference.	
Purpose: Increase awareness of our services and further engage donors in our work.	
Measurement: Increase engagement through volunteering and other support.	
Completion Date: 6/30/2023	Owner: Tom Waniewski

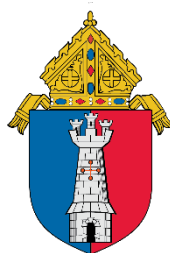
VI. Financial Impacts

The following represents the FY2023 summary financial budget for Catholic Charities:

Summary Budget FY2023 Catholic Charities		
Revenue		
Donations, grants, and other revenue	\$	5,178,406
Diocese Support		735,800
Expense		
Salaries and benefits		3,750,897
General Office and Occupancy		295,950
Programs		2,298,488
Special Events		-
Total Expenses		6,345,335
Net	\$	(431,129)

Note: Catholic Charities budget above is not combined with the Diocese of Toledo summary budget on page 3 of this report, due to its legal and governance structure.

Catholic Education Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Catholic Education

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

The mission of Catholic education, which is at the heart of the Church, is to form new disciples in spreading the good news. This is done primarily through the work of Catholic schools and parish schools of religion and supporting homeschool families. Catholic education participates in the Church's evangelizing mission of bringing the gospel to the ends of the earth. We work to make God known, loved, and served in our classrooms, parish halls, and communities.

II. Ministry Data and Statistics:

In the 2021-22 school year there were 15,907 students in a Catholic school from Pre-Kindergarten to grade 12.

This represents a 2.02% increase in total enrollment, the first positive enrollment point in over a decade. The areas of growth were Pre-school programs with 1,789 total students and K-8 programs with 10,176 total students. The areas of decline were grades 9-12 with 3,942 students a decrease of 141 students from the previous year or -3.45%

In the 2021-2022 school year 5,326 students received a state-based scholarship which represents 37% of students in grades K-12. On average the number of scholarship students in the past three school years has increased by 20% for Traditional Ed Choice (based on the family's assigned public school) and 15% for Ed Choice Expansion (based on the family's financial status).

We serve approximately 14,000 students in some type of religious education program.

We are unaware of the approximate number of Catholic students who are homeschooled in the Diocese.

III. Situational Analysis:

Primary functions and programs of the ministry/office:
<ul style="list-style-type: none">• Interact with, provide professional development to, and continue to help form exceptional parish catechetical leaders who lead others in the catechetical process in parishes.• Interact with, provide professional development to, and continue to help form exceptional Catholic school leaders who lead others in the academic pursuits and maintaining a vibrant Catholic culture in our schools.• Provide support to homeschool families.• Lead Catholic schools through the administrative process to be recognized as chartered non-public schools which includes the Ohio Catholic School Accreditation Association process, State of Ohio funding, federal funding (Title I, IIA, IV, IDEA-B, COVID Relief, etc.), licensure through the Ohio Department of Education, and compliance through the Annual Verification of Standards.• Lobby for and assist schools in navigating financial opportunities for families through state scholarships, grants, and tax-credit programs.

- Implement new legislation that affects non-public schools.
- Review, measure, evaluate, and encourage better Catholic school culture techniques and topics.
- Provide, evaluate, and manage a variety of academic services including the development of courses of study, Diocesan-wide assessments, religious education requirements, and governing board relations.
- Oversee and provide direct services to CCMT: Rosary Cathedral and Queen of Apostles Schools.
- Provided initial and ongoing professional development to teachers and catechists.
- Provide direct support to Catholic schools who enroll students with documented learning disabilities via Classroom 19:14.
- Provide direct support to Catholic schools who engage in early childhood education programs via the *Step-Up To Quality* standards.
- Manage and approve international student documentation and visas for Catholic high schools.

Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)

- There is a wealth of knowledge and experience and dedication to Catholic education. Since the onset of the pandemic, our department had never had more interaction with school leaders than it does now which has led to better communication and fostered relationships between the department and Catholic schools.
- The number of funding opportunities for attending Catholic schools is the most robust in the history of Catholic education in Ohio. With the expansion of Ed Choice, the amounts of the scholarships (\$5,500 for K-8; \$7,500 in 9-12; and \$27,000 for Jon Peterson) and the advent of a state tax credit program. One in three students receive a state scholarship.

Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)

- Our department is the smallest it has ever been. When compared to seven years ago and when comparing similar department responsibilities, there are currently six less staff members or approximately 54% less people in the department with only 1,500 less students or about 9.5% in Catholic schools today than in 2015.
- We are adding efficiencies like digital contracts, but we are in need of additional personnel and additional ways to be more efficient with determining compliance, training, and oversight to Catholic schools and parishes.
- Some schools are still not accepting the full amount of funds from the state scholarship, leaving thousands of dollars on the table.

Opportunities (top internal or external events or conditions which benefit the ministry and those served)

- In the next general assembly, it is likely that additional opportunities for school choice will be

achieved.

- The training for new teacher-ministers has been reformatted to include better content and paid, diocesan mentors for every new teacher.
- Reengaging with families is a popular idea with principals and religious education directors. This initiative has traction with leaders in schools and parishes, and there is a willingness to participate based on initial conversations.
- The Department has the potential to realize an additional \$420,000.00 of income in the upcoming fiscal year to administer the Auxiliary Service Funds Program for schools. This will allow for additional personnel, software, and a net income gain for the Department, if the decision is made to administer the program centrally.
- An increase in the number of students using a state scholarship could precipitate a more uniform pay structure for school employees.

Threats (top internal or external events or conditions which makes the ministry more difficult)

- There is lack of teacher-ministers and catechists which leads school leaders and directors of religious education to settle for less mission-oriented personnel while public school compensation continues to increase at significant rates. This is exacerbated by less compensation available to teacher-ministers in Catholic schools.
- There is a lack of interest in school and catechetical administration; it is very difficult to find, train, and retain talented leaders for schools and parishes.
- Parent and School/Parish relationships are strained. In general, parents lack an understanding of forming the whole person in Catholic education by either an apathetic approach or challenging the formation process between their child and the school.
- Catholic schools need to continue to evaluate and promote an intentional and strong Catholic school culture in the face of multiple secular attitudes that are in contradiction to the Church.

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: Holy Families Project	
Purpose: Affects family engagement in parishes and schools. Related to SA 2.2 in Strategic Plan	
Measurement: Implementation of initiatives and collection of survey data with Catholic education leaders.	
Completion Date: 5/1/22	Owner: Matt Daniels and Bret Huntebrinker

Goal 2: Deepen Catholic School Culture	
Purpose: Ensure Catholic schools are achieving key marks of a Catholicity.	
Measurement: <ol style="list-style-type: none"> 1. Assessment of Religious Knowledge data and growth tacking. 2. Implementation of virtue program. 3. Use of Catholic standards for non-religion courses. 4. Continued development of teacher and catechist formation programs and offerings. 5. Continued interaction with schools, parishes, and Culture Project International. 	
Completion Date: Begins in fall 2022.	Owner: Matt Daniels
Goal 3: Ensure better governance and policy compliance.	
Purpose: To ensure that the ways schools are governed is aligned to best practices, appropriate oversight, and Diocesan policy.	
Measurement: <ol style="list-style-type: none"> 6. Implementation of aligned student and faculty handbooks. 7. Review of diocesan policy for principal handbook. 8. Creation of Director of Religious Education handbook. 9. New Board Member trainings. 10. Implementation of governance bylaws. 	
Completion Date: Scheduled to be complete by December 2022.	Owner: Matt Daniels

V. Other Key Ministry Goals:

The following represent other key ministry specific goals for the fiscal year, which more indirectly support the Strategic Plan - Pillar Goals/Actions. These are goals specific to the ministry's functionality/operations, and/or staff development.

Goal 1: Homeschool Family Outreach	
Purpose: To serve homeschool families by providing resources.	
Measurement: <ol style="list-style-type: none"> 1. Hiring of new part-time employee. 2. Implementation of monthly newsletters. 3. Additional programing for families, as needed. 	
Completion Date: Planned start date in September with work continuing through June 2023.	Owner: New Employee

Goal 2: Grow Scholarship Granting Organization for additional scholarship opportunities.	
Purpose: To provide schools with additional opportunities for scholarship dollars that carry a tax credit for donors.	
Measurement: As a new program, the initial goal is to engage 3% of the total donor number of the ACA which is approximately 450 donors equating o \$338,000.00	
Completion Date: By December 31, 2022	Owner: To be determined.
Goal 3: Enhance the Catholic Identity goal for the accreditation process.	
Purpose: This change in accreditation policy will facilitate alignment to more lasting Catholic culture initiatives for Catholic schools.	
Measurement: With the input of the other dioceses in Ohio and the Ohio Catholic School Accreditation Association, this goal would be achieved by aligning school goals to areas that are defined by the Church as essential areas for Catholic schools.	
Completion Date: 6/30/23	Owner: Tim Mahoney/Matt Daniels

VI. Financial Impacts

The following represents the FY2023 summary financial budget for the Catholic Education office ministries:

Summary Budget FY2023 Catholic Education		
Revenue		
Program and other revenue/fees	\$	867,070
Expense		
Salaries and benefits		427,119
General Office and Occupancy		38,721
Programs		677,530
Special Events		-
Total Expenses		<u>1,143,370</u>
Net	\$	<u>(276,300)</u>

Clergy, Consecrated Life and Vocations Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Clergy, Consecrated Life and Vocations (CCLV)

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

The CCLV office ministries provide special pastoral services for and serves the priests, deacons, seminarians and religious of the Diocese of Toledo. It seeks to foster an “intimate sacramental brotherhood” (Presbyterorum Ordinis, #8, Ratio Fundamentalis #51) among the clergy. CCLV coordinates the work of Permanent Diaconate Formation, the cultivation, promotion of, and pastoral assistance to seminarians, as well as the ongoing formation of priests in the context of Days of Sanctification, Clergy Study Days, Retreats and Convocations. The Office follows closely the Code of Pastoral Conduct and the Policy for the Protection of Minors and Young People.

II. Ministry Data and Statistics:

There are four full-time employees of CCLV: The Senior Director for Clergy, Religious and Consecrated Life, The Director for Vocations, the Delegate for Religious, The Delegate for Deacons, and the Administrative Assistant.

Active and Senior Status Priests

- There are 83 active priests and 65 senior status priests

Vocations to the Priesthood

Annually:

- Vocation Director meetings with discerners. [**40 meetings**]
- Vocation Masses at local universities at least one weekend per semester (Lourdes, UT, BGSU). [**Total Attendance: 3,000**]
- Preach about vocations at non-university parish weekend Masses [**2 parishes**].
- Vocation talks, adoration, weekday Masses, etc. at local universities. [**Total Attendance: 150**]
- Visits to universities outside our diocese (Franciscan University of Steubenville, Hillsdale College). [**meetings with 10 men**]
- Seminary visits (once each semester to Detroit, Cincinnati, and Rome). [**meetings with 14 seminarians per semester; meetings with 15 seminary formation team members per semester**]
- College Discernment groups (once per month at UT and BGSU). [**30 participants**]
- Andrew Dinners (three per year at parishes in the diocese). [**90 participants and 25 priests**]
- Vocation events at parish schools (Mass and vocations fair and panel at Maumee St. Joseph; Mass at Bellevue ICS). [**550 students**]
- Vocation events at high schools (CCHS Mass and luncheon; SJJ Mass and small group discussion; Saint Francis de Sales HS speak to all senior theology classes; Tiffin Calvert Mass; speak to all senior students at Cardinal Stritch). [**1450 students**]
- Vocation events at parish religious education programs (Kalida; New Riegel). [**350 students**]
- Young adult group talks (Saint Patrick of Heatherdowns; Theology on Tap; Spirituality Tap-in). [**120 participants**]
- Provide materials for high school boys discernment groups. [**35 participants**]
- Pillar #1 Diocesan Strategic Plan meetings (Healthy Clergy and Healthy Parishes). [**4 meetings**]

- Email blasts to past event participants (and parents). [**295 email addresses**]
- Email blasts to priests. [**All priests**]
- Andrew Dinner and Retreat follow-up handwritten notes to participants and priests. [**140**]
- Seminary Application Process for new seminarians and those graduating from college seminary. [**2 new candidates; 1 graduating college seminarian**]
- Admissions/Formation Board Meetings. [**9 members**]
- Supervision of seminarian pastoral interns. [**1 seminarian**]
- Organize and pay for seminary education of diocesan seminarians (room, board, tuition, fees). [**14 seminarians**]
- Organize donations from K of C Councils and other groups to support seminarians' personal expenses. [**14 seminarians**]
- Review seminary formation reports. [**14 seminarians**].
- Process paperwork for seminarian departures (disaffiliation, leave of absences, etc.). [**2 seminarians**]
- Maintain toledopriesthood.org, annual seminarian profile videos, resource page, etc. [**6,600 visits, 20,000 page views**]
- Graduation gift (prayer book) to all high school discernment group seniors [**4 men**]
- Annual Events:
- High School Boys Summer Retreat Day (July). [**18 participants**]
- Seminarian Lunch and Afternoon with Bishop Thomas (July). [**14 seminarians; 3 priests**]
- Candidacy Mass and Dinner with Bishop Thomas and Seminarians (July). [**14 seminarians; 85 family members**]
- Seminarian Summer Convocation (August – 4 days). [**13 seminarians**]
- National Conference of Diocesan Vocation Directors (September – 5 days).
- Design, printing, and distribution/delivery of seminarian and men/women in formation for religious posters with prayer cards, lesson plans, and other resources (September). [**All parishes; all schools; all convents and religious houses; all parents of seminarians; all seminarians; all Knights of Columbus Councils**]
- Distribution of National Vocations Awareness Week Materials. [**All parishes, priests, schools, and youth ministers**]
- Presentation with national speaker for all school principals, DREs, etc. (November). [**100 participants**]
- Annunciation radio interviews (two or three times per year).
- Vocation talks at Tolton Play (November). [**500 participants**]
- Discernment Retreat for college-aged men (November at Lial). [**7 participants**]
- Christmas mailing to past event participants (December). [**266 men**]
- Formation reports for seminarian meetings with Bishop Thomas (December). [**14 seminarians**]
- Participate in NCDVD regional meeting (December).
- Advent Mass and luncheon with Bishop Thomas, seminarians, and families (December). [**85 participants**]
- Diaconate and Priesthood Ordination planning meetings (December).
- Seminarian Study Day [**14 seminarians**]
- NCDVD virtual PPF 6 seminar (January).
- Organize/present ACA Donor Thank You speeches (January). [**225 participants**]
- Meeting with Mercy CPE coordinator (February).

- Speak at diocesan youth ministers retreat (February). [**15 participants**]
- Identify and select summer seminarian parish assignments and pastoral internship parishes (April). [**14 assignments**]
- Attend NCDVD meeting in New York on new PPF (May).
- Host NCDVD two-day meeting (May). [**12 vocation directors**]
- Transitional Diaconate Ordination Mass (May). [**350 people**]
- Transitional Diaconate Ordination Reception (May). [**200 people**]
- Priesthood Ordination Mass (May/June). [**500 people**]
- Priesthood Ordination Reception (May/June). [**200 people**]
- Host Priests Vocation Summit (June). [**15 priests**]

Religious Communities

- There are currently 6 Religious Communities of men serving within the Diocese of Toledo
- There are currently 5 Religious Communities of Women with Mother Houses inside the Diocese of Toledo
- There are currently 9 Religious Communities of Women within the Diocese of Toledo with Motherhouse outside of the Diocese of Toledo.
- There is one Consecrated Virgin within the Diocese of Toledo.

Active and Senior Status Deacons and Deacon Candidates

- The delegate provides for the pastoral care of 110 deacons.
- There are currently 16 aspirants in the deacon formation program.

III. Situational Analysis:

Primary functions and programs of the ministry/office:
<ul style="list-style-type: none"> • Vicar for Clergy <ul style="list-style-type: none"> ○ Provides counsel and secures professional help for the spiritual and physical well-being of priests as necessary. ○ Advises the bishop on the placement for assignment, as well as the ministerial situation and needs of deacons and priests in the diocese. Chairperson of the Priest Personnel Board. ○ Coordinates funeral services for clergy and deacons ○ Coordinates the formation, education and other support for the diocesan seminarians ○ Coordinates the monthly dinners at the episcopal residence for priests and these monthly events are hosted by the Bishop. ○ Coordinates two annual picnics in the summertime for both deacons and their wives and for priests. ○ Coordination of events that create opportunities for deacons and priests respectively to grow fraternally, intellectually, and spiritually together. ○ The Vicar for Clergy collaborates and serves as a resource to the Diocesan Case Manager and Director of Human Resources in relation to any issues that arise that are directed to clergy. ○ Organizes the biennial Convocation which In the Summer of 2022 was conducted in the

form of a retreat with the assistance of ACTS XXIX, a lay group of faithful.

- Organizes study days, retreats for priests, and the annual Chrism Mass.

- **Director of Vocations**

- Cultivates and promotes vocations as well assist them with their needs in the formation process and integration into the parishes of the diocese through summer and pastoral year assignments.
- Chairperson of the Admissions and Formation Board
- Raises awareness and promote discernment of priestly vocations among young men in the Diocese of Toledo.
- Provide solid priestly formation for seminarians at accredited institutions.
- Delegate for Religious
- Assists the Religious Communities present in the diocese with canonical procedures regarding the election of Religious Superiors as necessary.
- Facilitates the communion of the leaders of religious communities in the diocese with the bishop.
- Assists the department with coordinating events and event planning.

- **Delegate for Deacons (part-time)**

- Provides for the pastoral care for Deacons both Active and Senior
- Coordinates the formation program for the aspirants and candidates in formation for the diaconate.
- Chairperson of the Deacon Personnel Board and the Deacon Council

- **Minister to Priests (part-time)**

- Provides outreach and support to priests serving in the Diocese of Toledo, both active and senior status, so as to promote their holistic health and well-being (spiritual, emotional, physical, social, and intellectual).
- As a member of the Clergy, Consecrated Life, and Vocations Department, the Minister to Priests reports to the Vicar for Clergy and assists the same department according to the needs stated by the Vicar for Clergy in carrying out his Ministry.

- **Administrative Assistant**

- Assists the offices within the department with administration by providing administrative and clerical support to ensure the efficient operation of the department consistent with the mission, vision and values of the Diocese of Toledo.
- Maintains the filing system for all Clergy.

Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)

- **Vicar for Clergy**

- There is a full annual calendar of priest events that is well structured: Jubilee Celebration.
- Experience in priestly formation, theological teaching, and administration in the Roman Curia.
- Experience with the practice of spiritual direction and ecclesial movements such as ACTS XXIX.
- Enthusiasm for ministry and service

- **Director of Vocations**
 - Experience
 - Psychological Expertise of Delegate for Religious and assistant to the Director of Vocations.
 - Excellent attendance at events
 - Enthusiasm for ministry and service
- **Delegate for Deacons**
 - Extensive Administrative experience in Higher Education
 - Teaching experience in Higher Education
 - Leadership and Management Experience
- **Minister to Priests**
 - Is a priest of the Diocese of Toledo for 40 years, with extensive preparation as Pastor of parishes.
 - Extensive knowledge and expertise in the art of spiritual direction
 - Facilitates an “intimate, sacramental, brotherhood” among the entire presbyterate and the bishop.

Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)

- **Vicar for Clergy**
 - Lack of Experience due to serving outside of the diocese for past sixteen years
- **Director of Vocations**
 - There is a lack of response of young people to priestly vocations
 - There is the increasing absence of the Domestic Church
 - Overall, in the nation there is a decrease in response to priestly vocations and a decrease in the number of young men studying for the priesthood.
- **Delegate for Deacons**
 - Lack of Experience
 - Need for more volunteer assistance from other deacons to fulfill the responsibilities.
- **Administrative Assistant**
 - Lack of experience

Opportunities (top internal or external events or conditions which benefit the ministry and those served)

- There is a great team assembled with a unified vision.
- There is a felt need for improved morale along with initial and ongoing formation.
- Senior Status Clergy are being more included and more deeply engaged.
- The newly created position of Minister to Priests is bringing a fresh energy to the pastoral care of priests.
- The Vocations Director is working with priests in cohorts to “train the trainers” in the art and practice of cultivating priestly vocations.
- The new Administrative Assistant is able to bring a fresh look at how administration is done in the office.
- The new Delegate for Deacons is able to give a fresh look at the position and how it may be fulfilled.

Threats (top internal or external events or conditions which makes the ministry more difficult)
<ul style="list-style-type: none"> • The recent resignations of priests does not help the priestly culture and morale. • Diminishing participation in parish life • Diminishing clergy available for priestly assignments. • Administrative demands on a limited number of priests.

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: The Vicar for Clergy collaborates with the Minister to Priests	
Purpose: The improve the spiritual, emotional, physical, social and intellectual well-being of the clergy and religious.	
Measurement: Bi-monthly meetings to assess the visitations and status of both active and senior status clergy.	
Completion Date: June 30, 2023	Owner: Msgr. Oxley
Goal 2: The Director of Vocations creates training modules for seminarians	
Purpose: <ol style="list-style-type: none"> 1. The implementation of the sixth edition of the Program for Priestly Formation 2. Provide better preparation for the reality of parish ministry in our diocese. 	
Measurement: <ol style="list-style-type: none"> 1. Attendance of the Director of Vocations at the National Vocations Directors Conference on PPF #6. 2. Research how other seminaries or dioceses are instituting the propaedeutic stage and synthesis stages of formation where it already exists. 3) Provide a summer course inclusive of a syllabus and outline. 	
Completion Date: June 30, 2023	Owner: Very Rev. Philip Smith
Goal 3: Implementation of the USCCB Visitation Report for the formation for the diaconate, and the ongoing formation of permanent deacons.	
Purpose: To improve the human and pastoral dimensions of the Diaconal formation program.	
Measurement: <ol style="list-style-type: none"> 1. Deacon Personnel Board 2. Deeper involvement of wives in the formation process 3. Deeper involvement of Pastors in the formation process 	
Completion Date: June 30, 2023	Owner: Delegate for Deacons

V. Other Key Ministerial Goals:

The following represent other key ministry specific goals for the fiscal year, which more indirectly support the Strategic Plan - Pillar Goals/Actions. These are goals specific to the ministry's functionality/operations, and/or staff development.

Goal 1: Vicar for Clergy creates training modules for new pastors	
Purpose: Organize the substantial mentoring of new pastors through quarterly meetings with key members of the Diocesan Pastoral Center in the area of Parish Administration. Introduce the new pastors to another priest in the Diocese for mentorship, and to members of the lay faithful who will accompany them in administrative matters.	
Measurement: After the first year of the training module, evaluating what has been helpful to the new pastors, and how future ongoing formation may be framed around ongoing mentorship.	
Completion Date: June 30, 2023	Owner: Msgr. Oxley
Goal 2: Vicar for Clergy creates training modules for new priests	
Purpose: Research other dioceses and develop a syllabus and curriculum outline for the mentorship of new priests by Pastors. Inquire with the newly ordained priests as to which pastors they would choose to be a mentor and begin to meet with the new priest and the mentor quarterly to develop a program for the mentorship of new priests.	
Measurement: After the first year of the mentoring pilot newly ordained priests, establish a program for mentorship of both newly ordained priests and new pastors which also includes participation from the lay faithful.	
Completion Date: June 30, 2023	Owner: Msgr. Oxley
Goal 3: Formation for newly arrived International Priests	
Purpose: To create a better and more efficient acclimation to American culture so that they may provide better pastoral care for the people of the Diocese of Toledo.	
Measurement: 1. Research other institutions that provide these services. 2. Selection of a program for use. 3. Establishing an initial cohort to attend the program	
Completion Date: June 30, 2023	Owner: Msgr. Oxley

Goal 4: Cultivating new Religious Communities	
Purpose: To enhance parish life in the Diocese of Toledo so as to enhance the coming of the Kingdom with charisms.	
Measurement: <ol style="list-style-type: none"> 1. Identify potential communities to invite to the Diocese of Toledo. 2. Identify parishes where the communities may reside and serve. 3. Conduct conversations with both religious communities and parishes. 	
Completion Date: June 30, 2023	Owner: Sr. Maria Lin- Delegate for Religious
Goal 5: The integration of the ACTS XXIX method for discernment into the deanery meetings by way of the ongoing formation of the deans.	
Purpose: To arrive at an approach to deanery meetings that is first based in relational prayer as opposed to mere functionality.	
Measurement: Speak with the Deans after the year to assess if the implementation of meditative prayer and group discussion regarding the fruits of the prayer has borne fruit in the deanery meetings.	
Completion Date: June 30, 2023	Owner: Msgr. Oxley
Goal 6: Vocations Promotion Training Event for Diocesan Priests	
Purpose: To teach diocesan priests how to promote vocations in their parishes, schools, and other institutions.	
Measurement: Two new cohorts (5 priests each) per year. Each priest will create a vocations promotion plan for his parish with follow-up meeting with the vocation director 12-months later.	
Completion Date: June 30, 2023	Owner: Fr. Smith

VI. Financial Impacts

The following represents the FY2023 summary financial budget for the CCLV office ministries:

Summary Budget FY2023 Clergy, Consecrated Life and Vocations												
	Vicar for Clergy	Priests Personnel Board	Coordinator Ecumenical Affairs	CCLV Dept	Deacon Formation	Priests Education	Delegate for Consecrated Life	Priestly Vocations	Delegate For Deacons	Seminarian Support	Global Mission	Total
Revenue												
Donations and other revenue/fees	\$ -	\$ -	\$ -	\$ -	\$ 41,850	\$ 35,150	\$ -	\$ -	\$ 26,750	\$ -	\$ 227,999	\$ 331,749
Expense												
Salaries and benefits	77,405	2,548	-	83,917	5,097	54,605	19,769	85,322	41,053		30,954	400,670
General Office and Occupancy	9,162	2,350	-	7,728	3,439	450	2,364	12,208	4,720	-	12,626	55,047
Programs	33,200	-	3,200	-	42,350	133,723	2,550	12,000	6,850	520,204	185,451	939,528
Special Events	<u>62,311</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>4,500</u>	<u>25,000</u>	<u>30,000</u>	<u>-</u>	<u>-</u>	<u>121,811</u>
Total Expenses	<u>182,078</u>	<u>4,898</u>	<u>3,200</u>	<u>91,645</u>	<u>50,886</u>	<u>188,778</u>	<u>29,183</u>	<u>134,530</u>	<u>82,623</u>	<u>520,204</u>	<u>229,030</u>	<u>1,517,056</u>
Net	<u>\$ (182,078)</u>	<u>\$ (4,898)</u>	<u>\$ (3,200)</u>	<u>\$ (91,645)</u>	<u>\$ (9,036)</u>	<u>\$ (153,628)</u>	<u>\$ (29,183)</u>	<u>\$ (134,530)</u>	<u>\$ (55,873)</u>	<u>\$ (520,204)</u>	<u>\$ (1,031)</u>	<u>\$ (1,185,307)</u>

Communications

Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Communications

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

The Communications office is the voice of the Diocese of Toledo. We protect and promote the brand, provide professional support and create exceptional written, visual and technical services that advance the mission of all Diocesan entities.

II. Ministry Data and Statistics:

Crisis communication and media relations

- Create, issue and manage **media inquiries** and proactive events including **crisis communication**
- Manage **diocesan mailbox and questions**
- Designed and created **external Toledodiocese.org**

Graphics, design and branding

- **85 Graphic Design projects for Diocesan Departments** (golf outing signage/program/flyer, seminarian poster, global missions calendar, flyers, certificates, logos, newsletter templates, Living Christ event invites/standup, etc.)
- **14 Graphic Design projects for Bishop and Communication/Diocese** (Fish fry guide, Festival guide, photo directories, Feast Day flyer, Christmas card, ads, etc.)

Social media and internal communication

- **377+ Social media posts and projects** (Daily posts (weekly average reach is 20,000. Significant custom posts include “Pray for Uvalde” (25,000), “Fish Fry Guide” (28,000), Pray for Ukraine (116,000), “Remembrance of 9/11” (33,000) and Priest Jubilees (42,000) – Monitored and shared significant stories from Vatican, USCCB, Parishes and Catholic Orgs. Researched issues on social media as needed. Designed flyers for Respect life, Intercultural ministries, Overview of ministries (Respect Life), etc.)
- **51 issues of Nuntius compiled**, designed toolkits and sent to parishes. Designed new Nuntius and moved from Constant Contact to Flocknote.
- Participated in activities and communication **initiatives of committees/teams** – Pastoral Conference Team, Pillar 1, Pillar 3, Eucharistic Revival Committee
- **Presented** at B-DOT, Youth Ministers, Seminarians
- Designed and created **internal Toledoparish.org** (with significant assistance uploading content from Evangelization) – constant updating (including HR jobs for most of FY22) and forwarding questions

Video production, editing and dissemination

- **56 Video production and editing** (Golden Apple, Bishop green screen, conferences and trainings, social media videos – Graceful Living/Priest Ordination)
- **52 episodes of Bishops Corner** (prepare, set-up, film, edit and post)
- **30 Live stream masses and YouTube uploads**
- **Photography** (Managed photo archive and transition to Google of estimated 20,000 photos), assisted 20+ stakeholders in locating photos, uploading images, adding identification, photos for badges, photograph Golden Apple)

Publications

- **2 *Graceful Living* issues** (art direct photoshoots, brainstorm/interview/write/edit articles, manage outside vendors (photo/writing), entire design layout, food design, advertising sales, design and share promotional material)
- **Liturgical Year at Home guide** (brainstormed, compiled, designed and created 60-page guide)
- Provide information for **Kenedy Directory (Official Catholic Directory)**

III. Situational Analysis:

Primary functions and programs of the ministry/office:
<p>Four employees work in the Communications Department:</p> <ul style="list-style-type: none"> • Senior Director of Communications responsible for crisis communication and media relations as well as special projects and managing department. • Manager of Creative Services responsible for graphics, design, and branding. Also does video production and editing and photo archive. • Communication and Social Media Specialist responsible for all social media activity and internal communication. • Sales and Production Specialist responsible for video production, editing and dissemination. Also responsible for advertising sales for publications.
Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)
<ul style="list-style-type: none"> • We have a very hardworking, skilled and dedicated team who do much more output than you would think possible with the numbers. • We have good equipment (that needs continual updating, see below). • Strong knowledge base on communication best practices and issues. • Strong relationships with media in which we usually control the message. • Mechanisms to tell the stories of the diocese (people, places through print and video)
Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)
<ul style="list-style-type: none"> • Our equipment is constantly in need of updating. While we try to stay “slim,” we are in future need of updating our Sling Studio (or another similar system as Sling does not seem to be producing products anymore), a good still camera (especially if Communication takes part in upcoming pilgrimage), and camera and computer equipment needs to be maintained (we use Mac products due to the video editing and graphic design that we need to do).
Opportunities (top internal or external events or conditions which benefit the ministry and those served)
<ul style="list-style-type: none"> • Highly skilled and functional team.

<ul style="list-style-type: none"> • Having the Cathedral put in livestreaming equipment. • Building stronger relationships with departments within the Pastoral Center. • Building relationship with priests and pastors. • The Communication Campaign Fund has allowed us to continue web redesign and magazine.
Threats (top internal or external events or conditions which makes the ministry more difficult)
<ul style="list-style-type: none"> • Current (or future) abuse issues that damage the trust in priesthood/diocese. • We have a good team in place, losing one to another opportunity would be hard. • The depletion of the Communication Campaign Fund.

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: Core Value: Open and Effective Communication	
Purpose: According to our Strategic Plan we will “communicate dynamically in a responsible, respectful and transparent way.” To fulfill this requirement, we need mechanisms that are readily available to the Catholic, and interested, community, will have responsive and proactive communication about issues and remember our ministry mission to evangelize by sharing the stories of the diocese and catechetical/educational information.	
Measurement: Continue to print Graceful Living and produce Bishop’s Corner, have opportunity for feedback through website, email, phone, etc., and assist departments with communication needs, especially those that evangelize the mission. Be responsive to and proactive with media inquiries.	
Completion Date: 6/30/23	Owner: Communication Team
Goal 2: Support Pillar 6	
Purpose: Pillar 6, developing financial resources is in the middle of the Living Christ campaign. Communications can help through its weekly donor newsletter, branded material, and placement in Graceful Living.	
Measurement: Complete newsletter and Graceful Living stories as well as any other periphery material requested.	
Completion Date: 6/30/23	Owner: Kelly Donaghy

Goal 3: Support Pillars 1 & 2	
Purpose: Support Pillar 1 (Supporting the Health of Parishes and Clergy) and Pillar 2 (Invigorating Evangelization and Formation) with a team member focused on communications.	
Measurement: Continue having Annie Lust on Pillar 1 to support evangelization and health of parishes and clergy with communication needs.	
Completion Date: 6/30/23	Owner: Annie Lust/Kelly Donaghy
Goal 4: Support Pillar 3	
Purpose: Support Pillar 3 (Lay Leadership) pillar team as its pillar team owner.	
Measurement: Pillar team activity moves forward on Franciscan at Home as well as creating new course material. Looking at potential to hire individual to help with these needs.	
Completion Date: 6/30/23	Owner: Kelly Donaghy

VI. Financial Impacts

The following represents the FY2023 summary financial budget for the Communications office/ministry:

Summary Budget FY2023 Communications		
Revenue		
Program and other revenue/fees	\$	62,000
Expense		
Salaries and benefits		339,354
General Office and Occupancy		38,196
Programs		63,000
Special Events		-
Total Expenses		440,550
Net	\$	(378,550)

Discipleship & Family Life Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Discipleship and Family Life

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

Helping parishes excel. Equip and inspire the parishes of the Diocese of Toledo to carry out the New Evangelization. Provide support to all who minister to and evangelize the people in the diocese.

II. Ministry Data and Statistics:

Diocesan Liturgical Celebrations

- Mass for Promoting Harmony with the Drum Major Awards recognizing Four individuals who support the Church's social teaching and racial justice, and a call for peace where there is conflict
- Open Arms Awards Annual Mass recognizing Three special needs individuals who demonstrate their faith through service in their parish and community at large
- Twelve ASL Masses annually at St. Francis de Sales High School presided by Fr. Michael Depcik
- Diocesan Feast Day Novena and Mass
- Mass on the Anniversaries of Marriage, 296 couples
- Our Lady of Guadalupe Diocesan Feast Mass

Diocesan Events

- Diocesan Pastoral Conference – The Domestic Church, 350+ attendees
- Hospitality Training, 140+ attendees
- RCIA Equipping Training Day, 60+ attendees
- Joy-Filled Marriage Engaged Couples Weekends, Thirteen, serving 191 couples throughout the diocese
- One Retrouvaille Weekend held in the diocese
- Two Youth Ministry Roundtables and One Youth and Young Adult Ministers Retreat, which served youth and young adult ministers from 60 parishes, Six schools, and Three universities
- 60 educators attended an inclusive training seminar for students with disabilities
- Diocesan Cedar Point Day – Persons with Disabilities, 100+ people attended
- Hispanic Catholic Leaders Institute, 35 attended monthly training and retreat days
- Diocesan Cedar Point Day – Youth and Family, 100+ people attended

Intentional Planning

- Eight Priest Consultation Sessions, which included 78 attendees
- Ten Parishes directly engaged with Intentional Planning Process
 - 30 meetings - counsels, staffs, and 1 on 1s
- Advised Priest Personnel Board to assign clergy in an unprecedented year with loss of pastoral leadership in 10% of parishes (4 priests to senior status, 1 priest left, 1 leave of absence, 1 medical leave, 1 return to associate, 1 order priest withdrawal representing 12 of 122 parish pastorates)

Best Practices and Training

- Natural Family Planning Resources updated and increased- online, in-person, and bilingual options now available
- Multiple Couples trained to present at diocesan Joy-Filled Marriage weekends
- Ten couples trained to present at parish-based engaged couple workshops

III. Situational Analysis:

Primary functions and programs of the ministry/office:

Provide and encourage pastors and parish staffs to learn and follow best practices, recommended resources, and training for parishes to Evangelize. i.e. Amazing Parish, ACTS XXIX, Divine Renovation, Revive Parishes, etc. We offer opportunities for networking, and professional development.

Intentional Planning and Evangelization

Assists parish leadership with best practices to formulate effective planning opportunities, strategies, training, resources, advisement, support their evangelization efforts and give pastoral care. Oversees efforts to foster among Catholics of the diocese an enthusiasm for their faith and a desire to share their faith, to further the mission of the Catholic Church.

Discerning a “best fit” structure in each area, inviting struggling parishes into planning and discernment, an accelerated process of adjusting leadership structures to match current realities, and a prayerful process of pastoral ministry. We will: examine current parish arrangements and explore new possibilities, decrease the number of pastorate positions, and increase the number of parochial vicar positions, assist parishes in any potential transitions and encourage the health of clergy, and provide more opportunities for priests to live in community.

Youth, Young Adult and Campus Ministry

Offer, develop, and implement best practices, training, opportunities for growth and collaboration, and programs to facilitate the success of youth, young adult and campus ministers in their individual parish or school.

Marriage and Family Life

Coordinate and manage programs and resources of the Diocesan Marriage and Family Life Office in accordance with official Church teachings, diocesan priorities and concerns, and dedication to the promotion of the ideals of Catholic family life and sacramental marriage. Major responsibilities of the coordinator of marriage and family life include ongoing development and maintenance of family ministry at parish, diocesan, regional, and national levels. Additionally, he/she implements policies which will contribute to the overall successful operation of the Marriage and Family Life Office.

Accessibility Ministries

Seeks to strengthen the unity of the Body of Christ while honoring and celebrating the cultural richness of the members of the Church. The Specialist is called to bring Persons with Disabilities to a deeper love of Jesus Christ, and of the Catholic faith.

Black Catholic Ministries

Assists in the development of specific programs, liturgies, and events to support parishes to reach Black

Catholics to bring about unity, awareness and inclusion into the local parish faith communities and the local church. Example: Head up the annual diocesan Mass for Promoting Harmony with the presentation of the Drum Major Awards, recalling the Legacy of Reverend Doctor Martin Luther King, Jr.

Hispanic Catholic Ministries

Assists in the development of specific programs, liturgies, and events to support parishes to reach Hispanic Catholics to bring about unity, awareness and inclusion into the local parish faith communities and the local church. Example: Head up the annual diocesan Our Lady of Guadalupe Celebrations.

Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)

- Strong relationships and collaboration with the priests and parish staffs.
- Strong Pastoral Center Intra and Interdepartmental support, specifically in our department for assistance with organizing, planning, and implementing events.
- Great online training resources available for free for parishes (Internal Website, Digital Map of Diocese, and Online Learning Platforms - Franciscan at Home, Revive Parishes, FORMED.org, etc.)
- Effective programs available for parishes to encourage evangelization in their community (ALPHA, The Search, Christ Life, etc.)

Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)

- Limited Staff with several responsibilities, making the shared work difficult at times. Limited Financial Resources and Limited Bandwidth.
- Pastors and parish employees are already very busy and overwhelmed maintaining their parishes. It is difficult for them to turn their focus to missionary activity.
- Communication within the Pastoral Center and to priests and parish staffs.
- Intentional Planning needs to work further ahead with parishes to allow for more time to carry out the process and in case of unexpected losses of priests.

Opportunities (top internal or external events or conditions which benefit the ministry and those served)

- The ACTS XXIX initiative in the diocese has the potential to shift parishes more significantly toward the apostolic mission.
- Lay Ministry Formation Program
- The Strategic Plan prioritizes the Domestic Church and will focus on ministering to families so that we form disciples from childhood through the adolescent years.

Threats (top internal or external events or conditions which makes the ministry more difficult)

- Scandals about the Church in the news.
- Active priests unexpectedly seeking leaves of absence.

- Senior status priests leave early due to health reasons.
- Religious Orders departing the diocese or reducing priests.
- Shared personnel between several ministries at the diocesan and parish level, burnout.

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: Move the Department of Discipleship and Family Life from a Staff to a Team to a Family. Implement ACTS XXIX principles in everything we do. (Pillar I)

Purpose: To better serve the bishop, pastoral center, priests and parish staff.

Measurement: Each of us have a deeper relationship with Jesus.

Completion Date: 6/30/23

Owner: Bret Huntebrinker

Goal 2: Carry out a diocese wide "From Christendom to Apostolic Mission" (FCAM) study for parish staffs between the priest retreat and the diocesan pastoral conference. (Pillar I)

Purpose: To prepare our parish employees to receive the teaching of ACTS XXIX at the diocesan pastoral conference.

Measurement: Promote FCAM study throughout diocese and provide resources to pastors and staffs to carry out the study with the goal of 50% of parishes carrying out the study.

Completion Date: 9/30/2022

Owner: Andrew Reinhart

Goal 3: Enhance lay leadership of youth ministers, young adult ministers, and adult faith formation while increasing the presenting couples for Joy-Filled Marriage programs (Pillar III) through training.

Purpose: Increase the number of presenting couples to ease the burden of the couples currently covering several weekends per year.

Measurement: An increase of 5% attending Youth Ministry Roundtables and presenting couples for Joy-Filled marriage weekends.

Completion Date: 6/30/2023

Owner: Renee Wesley

Goal 4: Continue Intentional Planning with pastors and parishes. (Pillar I)	
Purpose: Adjust parish leadership structures to anticipate declining clergy numbers. Parish Life Coordinator sitting on the priest personnel board.	
Measurement: Work with five parishes to help fill assignments in the summer of 2023.	
Completion Date: 6/30/2023	Owner: Andrew Reinhart
Goal 5: Inspire and equip youth ministers to proclaim the gospel and create Young Catholic Professionals chapter in our diocese. (Pillar II)	
Purpose: Help provide impactful youth and young adult ministry throughout our diocese.	
Measurement: Number of youth and young adult ministers attending in-person events and the creation of Young Catholic Professionals chapter in Toledo.	
Completion Date: 6/30/2023	Owner: Renee Wesley

V. Other Key Ministry Goals:

The following represent other key ministry specific goals for the fiscal year, which more indirectly support the Strategic Plan - Pillar Goals/Actions. These are goals specific to the ministry's functionality/operations, and/or staff development.

Goal 1: Draw more awareness to the annual diocesan celebrations including: Our Lady of Guadalupe Celebration, Mass for Promoting Harmony with the presentation of the Drum Major Awards, Open Arms Awards Annual Mass, Diocesan Feast Day, and Mass on the Anniversaries of Marriage	
Purpose: Recognize and honor members of our community.	
Measurement: 15+ nominations for each award celebration and well-attended Masses.	
Completion Date: 6/30/23	Owner: Alice Jacobs
Goal 2: Offer best practices to parish staffs in all we do.	
Purpose: Help parishes grow.	
Measurement: Stronger parishes in three years.	
Completion Date: 6/30/23	Owner: Bret Huntebrinker

VI. Financial Impacts

The following represents the FY2023 summary financial budget for the Discipleship and Family Life office ministries:

Summary Budget FY2023 Discipleship and Family Life				
	Discipleship and Family Life	CYO	Total	
Revenue				
Program and other revenue/fees	\$ 121,000	\$ 393,750	\$ 514,750	
Expense				
Salaries and benefits	380,601	200,849	581,450	
General Office and Occupancy	49,968	13,755	63,723	
Programs	225,500	186,043	411,543	
Special Events	-	-	-	
Total Expenses	656,069	400,647	1,056,717	
Net	\$ (535,069)	\$ (6,897)	\$ (541,967)	

Management Corporation Annual Ministry Budget Report – FY2023



Diocese
of Toledo

Management Corporation

Annual Ministry Budget Report – FY2023

I. Mission/Purpose:

Management Corporation Mission Statement:

We, the Diocese of Toledo Management Corporation (Management Corp), provide high value professional support and guidance, through responsive and faith-filled collaboration, to facilitate effective ministries throughout our diocese.

Management Corporation Purpose:

The Management Corp is a diocesan non-profit corporation and provides finance, accounting, audit, payroll, human resources, real estate, construction planning, legal/risk management, fundraising/development, and operational/strategic planning services to the Diocese, the parishes and schools within the territory of the Diocese, and various related entities pursuant to formal service agreements. Management Corp also provides support to the various staff, governance committees, and boards of related Diocesan entities as listed below:

- Roman Catholic Diocese of Toledo Corporation
- 122 diocesan parishes and 60 schools
- Catholic Charities
- Catholic Investment Trust
- Cemeteries Corporation
- Central City Ministries
- Deposit and Loan Trust
- Health Benefit Trust
- Perpetual Care Trust
- Pre-Need Trust
- Property and Casualty Trust
- Properties Trust
- Priest Retirement Plan
- Retirement Plan for Lay Employees
- Catholic Community Foundation
- Diocesan Finance Council & Committees

II. Ministry Data and Statistics:

- The Management Corp is comprised of 5 offices and 15 full-time and 1 part-time staff members
- The Management Corp serves 122 parishes, 47 elementary schools, 13 high schools in various ways including the following:
 - Assists annually with hundreds of legal and risk/employment management matters including:
 - Parish-vendor contract reviews
 - Diocesan/Parish real estate transactions
 - School parent/student matters
 - Parish/School employment matters
 - Property/Casualty claims processing
 - Estate/Gift matters
 - Provides various financial, accounting, and audit support to all 182 diocesan parishes and schools
 - Provides training materials for the hundreds of parish and school Finance Council volunteers throughout the diocese
 - Employee benefits support for over 4,800 full-time and part-time diocesan employees

- The Management Corp supports the various diocesan corporations, trusts, and other entities:
 - Provides administrative support to the numerous boards and committees in their oversight and governance roles
 - Investment management for entities including:
 - Catholic Investment Trust – 152 parishes/schools/other accounts
 - Deposit and & Loan Trust - 433 parishes/schools/other accounts
 - Oversees the management and administration of the Retirement Plan for Lay Employees and Priest Retirement Plan.
 - Oversees the management and administration of the various diocesan healthcare and property/casualty insurance programs.
- The Management Corp supports fundraising and development activities across the diocese as follows:
 - Record, maintain and utilize 84,000 plus database records of donors to the diocese
 - Engage and support parishes, schools, 140,000 households for Living Christ capital campaign, 23,000 Annual Catholic Appeal (ACA) donors, 600 major donors in diocesan and local fundraising and development
 - Process, record and thank 24,000+ gifts to the ACA, Perpetuate the Gift, CCMT, parish stock gifts, restricted parish and diocesan gifts and diocesan credit card gifts
- The Management Corp supports the functions of the Pastoral Center including:
 - Financial budget oversight and Human Resources support of the 7 pastoral center departments
 - Oversight and support provided to the 6 Diocesan Strategic Plan Pillar Teams
 - Information technology services provided for 90 Pastoral Center and Catholic Charities employees, and over 250 email accounts (which includes all active priests)

III. Situational Analysis:

Primary functions and programs of the ministry/office:
<p>Management Corp is comprised of five offices with primary functions as described below:</p> <p><u>Finance Office:</u></p> <p>Provides centralized accounting services for diocesan pastoral center offices and related entities (as listed in section I above), responsible for investment management, accountable for treasury activities of the diocese. Also provides audit and accounting services to parishes and schools. Serves as main contact for capital projects/loans for diocesan-wide entities. Consulting and training for pastors, administrators, finance councils and parish staff are provided as appropriate.</p> <p><u>Information Technology Office:</u></p> <p>Performs information technology services for the diocesan pastoral center and Catholic Charities employees.</p> <p><u>Human Resources Office:</u></p> <p>Provides for the implementation and administration of personnel policies and programs in the areas of recruitment, employment, compensation, benefits, payroll and employee relations. Provides consultation and guidance to diocesan pastoral center offices, parishes and schools, and other diocesan organizations on matters of employee management and personal development.</p> <p><u>Legal and Risk Management Office:</u></p> <p>Provides legal advice to the Bishop, the Diocese and all diocesan organizations. Supervises the Risk</p>

Management Program in support of all participating diocesan entities.

Office of Mission Advancement:

Responsible for advancing the diocesan mission through the facilitation of donor relations, major gifts, planned-giving, grants, annual giving, special events, communications, and stewardship. Supports the Annual Catholic Appeal, parishes and schools with capital campaigns, offertory enhancement programs and other fundraising efforts. Offers support to the various diocesan pastoral center offices and programs. Supports the utilization of the Catholic Investment Trust by parishes, schools and other ecclesiastical organizations of the Diocese.

Strengths of ministry/office (can be knowledge, personnel, experience, technology, funding, etc.)

- Experienced and professional leadership and staff, experts in respective areas of discipline and committed to the overall Diocesan and Management Corp Mission
- Goals management process to ensure alignment of focus and continuous improvement in engagement, support, and work products
- Implementation and use of technology solutions for financial reporting, accounting software, property management system, and benefits enrollment to increase efficiency and access for users and processes
- Self-funded insurance programs which provide excellent coverage and benefits to employers and employees, while being good stewards of diocesan/parish/school funds (No premium increases in health program since 2020 and 10-year average (2013-2022) annual premium increase of 2.3%).
- Technology support partner who provides a full off-site IT team to manage the network and data servers.
- Enhanced engagement, expertise and assistance to parishes and schools to support diocesan and local stewardship and development efforts.

Weaknesses to be addressed (areas of need to focus for improvement/efficiencies)

- Small staff size limits the ability to fully serve needs of parishes/schools and provide proactive engagement on temporal matters, all while maintaining focus on strategic initiatives.
- Lack of resources for an effective succession planning process for key Management Corp staff (or other key Pastoral Center Dept staff)
- Informal method of providing training and development to parish/school leaders in the areas of business and human resource best practices and compliance. Limited planned giving and bequest education and resources to grow pipeline of gifts/endowments.
- Limited educational and best practice tools for an effective culture of stewardship and development within the Diocese.

Opportunities (top internal or external events or conditions which benefit the ministry and those served)
<ul style="list-style-type: none"> Increased staff size would allow the Management Corp to more proactively support ongoing needs of diocese, parishes and schools (auditing, risk management, employee management, etc.). Improved technology tools allowing the Management Corp to promote efficiency and information sharing with parishes and schools, as well as to conduct or recommend trainings to benefit pastors, business managers, school leaders and other staff. Expanded use of Predictive Index – Department has access to a platform that provides tools and resources related to hiring and supervisor/employee/team engagement. Already being used at Pastoral Center and with Business Manager hiring, with potential for application in other areas (i.e., intentional planning, principal hiring) and enhanced use at the Pastoral Center. Provide greater engagement, education and collaboration with parish leaders and donors for supporting local and diocesan needs, and establishing a formal Diocesan planned giving program. Provide parishes stewardship education and promotional methodology and material.
Threats (top internal or external events or conditions which makes the ministry more difficult)
<ul style="list-style-type: none"> Continuous issues at poorly managed locations consume Management Corp time and resources to review and offer guidance, and limits proactive support elsewhere. Evolving challenges to those we serve (parish/school/etc.), such as cyber security and attacks on religious liberty. Decentralized leadership of parishes/schools and limited mandated policy allows for locally made decisions which can present legal, compliance, and operational risks. Staff turnover and difficulty recruiting for teachers/principals, ministerial, and professional positions due to national employment trends and below market salaries. Declining number of parishioners and thus parish offertory and potential donors.

IV. Key Strategic Goals:

The follow represents the most important and impactful ministry strategic goals for the fiscal year, which tie directly to the Diocesan Strategic Plan - Pillar Goals/Actions. These goals are listed because it is a key priority for either the Sr Director as the Pillar Owner, and/or the ministry.

Goal 1: Capital Campaign (Pillar 6)
Purpose: Secure \$65 million+ capital and endowment funds to support and ensure the sustainability and vitality of diocesan and parish ministries and capital needs.

Measurement: All 122 parishes conduct campaign in three waves. Achieve and surpass \$65 million campaign goal. Donors fulfilling campaign pledges with regular payments.	
Completion Date: Active campaign: June, 2023	Owner: Brian Doyle
Goal 2: ACA (Pillar 6)	
Purpose: Secure funding to support the daily operations/budgets of diocesan shared ministries.	
Measurement: Achieve/surpass the annual appeal \$3.25 million goal.	
Completion Date: December 31, 2022	Owner: Brian Doyle
Goal 3: Lay Leadership Platform (Pillar 3)	
Purpose: Provide and support a singular, faith-based learning platform to equip resources, skill development, and a centralized knowledge base for diocesan/parish/school leaders and staff.	
Measurement: <ul style="list-style-type: none"> Hire Learning and Formation Manager to identify needs and create and deploy training content for various leadership, ministerial, and temporal positions. Formal launch of Franciscan at Home Institute (FHI) to users throughout the diocese with at least one fully developed learning track (series of courses for a particular position). 	
Completion Date: Hire Learning and Formation Manager December 31, 2022 Recruitment/Enrollment effort to engage users throughout diocese March 31, 2023 Launch of learning track June 30, 2023	Owner: Meghan Reed
Goal 4: School Funding Models – Combine (Pillar 4)	
Purpose: Assist superintendent of Catholic Schools with reviewing funding models for Catholic Schools. Then develop and promote sustainable school funding models.	
Measurement: Funding model review is completed, and guidance provided for recommending a funding model. Individual plans developed and shared with highest risk schools.	

Completion Date: 1) December 31, 2022 – To review funding models and complete guidance. 2) March 1, 2023 – to develop and share individual financial plans with schools.	Owner: Rene Schmidbauer, Matt Daniels, and Jake Johnson
Goal 5: Stewardship Education	
Purpose: Promote and provide stewardship education to parishes, schools and diocesan entities and ministries.	
Measurement: Conduct at least 4 stewardship related awareness and learning events with parishes/schools and share related stewardship resources for the promotion and practice of stewardship by parish leadership and parishioners.	
Completion Date: June 30, 2023	Owner: Brian Doyle

V. Other Key Ministry Goals:

The following represent other key ministry specific goals for the fiscal year, which more indirectly support the Strategic Plan - Pillar Goals/Actions. These are goals specific to the ministry's functionality/operations, and/or staff development.

Goal 1: BDOT Mini Sessions	
Purpose: Enhance engagement and knowledge with diocesan business manager via training and education	
Measurement: Conduct at least one BDOT mini session webinar per quarter in FY2023	
Completion Date: June 30, 2023	Owner: Phil Renda/Amanda Fisher
Goal 2: PI Development Throughout Pastoral Center Depts	
Purpose: Enhance employee engagement throughout Pastoral Center Departments through use of Predictive Index platform and provide supervisors and staff with tools to understand their own and others' behavioral drives to better communicate, lead, and work together.	

Measurement: <ul style="list-style-type: none"> All Pastoral Center staff will take PI Assessment All Pastoral Center staff will have PI Readback Supervisors will be provided supervisor tools for each team member and trained on how to engage their staff using PI. Pilot PI Design Module (team engagement tools) with Management Corporation directors. 	
Completion Date: June 30, 2023	Owner: Meghan Reed
Goal 3: Mgmt. Corp Staff Retreat and Intentional Prayer	
Purpose: Enhance team engagement through prayer and fellowship	
Measurement: <p>Conduct one Management Corp staff retreat in FY2023 and find opportunities to enhance team prayer throughout the year</p>	
Completion Date: June 30, 2023	Owner: Meghan Reed/Phil Renda
Goal 4: OMA Best Practices	
Purpose: Document best practices and operations/procedures of stewardship and development functions of the OMA.	
Measurement: Top priority functions of a fully functioning development office are documented and available for reference and use.	
Completion Date: June 30, 2023	Owner: Brian Doyle/Nikki Morey
Goal 5: Implementation of Qvinci program	
Purpose: To provide analytical data to support intentional planning. Qvinci program will provide key metrics to compare locations to peers based on selected criteria. (Pillar 1)	
Measurement: Report provided to intentional planning team.	
Completion Date: June 30, 2023	Owner: Rene Schmidbauer
Goal 6: Enhance Cyber Security	
Purpose: Enhance cyber security protocols to further protect diocesan systems, data, and information	

Measurement: Complete implementation of specific software at the pastoral center and as applicable at parishes and schools	
Completion Date: June 30, 2023	Owner: Justin Combs
Goal 7: Parish/School Incorporation Project	
Purpose: To allow Diocesan ecclesiastical entities to more fully comply with canon law, while ensuring greater ease of operation and interaction with banks, financial institutions and the government, and better isolating civil law liability risks.	
Measurement: Corporate charter issued to all entities through Ohio Secretary of State	
Completion Date: June 30, 2023	Owner: Tom Antonini

VI. Financial Impacts

The following represents the FY2023 summary financial budget for the Management Corp office ministries:

Summary Budget FY2023 Management Corporation							
	Information Technology	Financial Services	Mission Advancement Office	Legal Services	Human Resources	Total	
Revenue							
Other revenue/fees	\$ 47,788	\$ 220,301	\$ 247,343	\$ 50,693	\$ 88,705	\$	654,829
Expense							
Salaries and benefits	69,212	691,605	410,497	168,261	267,346		1,606,921
General Office and Occupancy	116,178	163,045	370,059	28,398	46,530		724,211
Programs	-	-	179,000	-	30,250		209,250
Special Events	-	-	-	-	-		-
Total Expenses	185,390	854,650	959,556	196,659	344,126		2,540,382
Net	\$ (137,603)	\$ (634,349)	\$ (712,213)	\$ (145,967)	\$ (255,422)	\$	(1,885,553)