

Fiscal Year 2024 Pastoral Center Ministry Budget Report



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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 2024 (FY2024) 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 David Reed dreed@toledodiocese.org.

Pastoral Center Summary Budget FY2024									
	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	\$ 1,469,259	\$ -	\$ 1,046,344	\$ 374,214	\$ 70,000	\$ 562,880	\$ 847,027	\$	4,369,724
Expense									
Salaries and benefits	1,103,780	-	671,833	367,444	368,202	607,228	1,883,435		5,001,921
General Office and Occupancy	974,972	-	55,699	57,951	31,243	70,662	478,142		1,668,668
Programs	751,071	736,000	752,575	1,044,260	68,500	427,825	420,242		4,200,473
Special Events	-	-	-	77,400	-	-	-		77,400
Total Expenses	<u>2,829,824</u>	<u>736,000</u>	<u>1,480,106</u>	<u>1,547,054</u>	<u>467,944</u>	<u>1,105,714</u>	<u>2,781,820</u>		10,948,462
Net Expense	\$ (1,360,565)	\$ (736,000)	\$ (433,762)	\$ (1,172,840)	\$ (397,944)	\$ (542,834)	\$ (1,934,793)	\$	(6,578,738)
Annual Catholic Appeal Funds (net)									2,800,000
Assessment Funds									3,800,000
Net Budget Surplus								\$	21,262

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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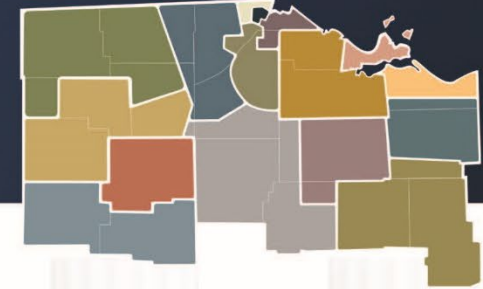
STRATEGIC PILLARS

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

INVIGORATING EVANGELIZATION & FORMATION

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

ENHANCING LAY LEADERSHIP

Form excellent lay leaders through education, training and skill development

STRENGTHENING CATHOLIC EDUCATION

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

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

DEVELOPING FINANCIAL RESOURCES

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

STRATEGIC ACTIONS

- 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

- 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

- **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

- 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

- 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

- 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

Chancery

Annual Ministry Budget Report – FY2024



Chancery

Annual Ministry Budget Report – FY2024

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 FY2024 summary financial budget for the related Chancery office ministries:

Summary Budget FY2024 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/fee	\$ 461,312		\$ -	\$ 31,500	\$ 266,000	\$ 39,600	\$ 25,272	\$ 560,375	\$ 700	\$ 62,500	\$ 22,000	\$1,469,259
Expense												
Salaries and benefits			108,394	294,482	-	77,700	169,803	175,791	73,681	39,809	164,119	1,103,780
General Office and Occupancy	59,500		10,176	125,081	-	122,503	-	524,422	45,940	50,275	37,076	974,972
Programs		736,000	19,045	44,000	476,000	-	167,276	-	-	2,000	42,750	1,487,071
Special Events				-	-	-	-	-	-	-	-	-
Total Expenses	<u>59,500</u>	<u>736,000</u>	<u>137,615</u>	<u>463,563</u>	<u>476,000</u>	<u>200,203</u>	<u>337,079</u>	<u>700,213</u>	<u>119,621</u>	<u>92,084</u>	<u>243,945</u>	<u>3,565,824</u>
Net	<u>\$ 401,812</u>	<u>\$ (736,000)</u>	<u>\$ (137,615)</u>	<u>\$ (432,063)</u>	<u>\$ (210,000)</u>	<u>\$ (160,603)</u>	<u>\$ (311,807)</u>	<u>\$ (139,839)</u>	<u>\$ (118,921)</u>	<u>\$ (29,584)</u>	<u>\$ (221,945)</u>	<u>(2,096,565)</u>

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

Catholic Charities

Annual Ministry Budget Report – FY2024



Diocese
of Toledo

Catholic Charities Diocese of Toledo

Annual Ministry Budget Report – FY2024

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.

OUR VISION

- We will become a more faith filled, united, and vibrant Catholic Charities in service to each other and the community.

II. Ministry Data and Statistics:

- **31,440** meals served at shelters and Helping Hands of St. Louis
- **11,153** men, women, and children assisted across Northwest Ohio
- **9510** shelter nights while families secure affordable housing.
- **14,926** grocery and hygiene kits distributed
- **15,346** calls for assistance
- **2620** services and assistance through Jail and Prison Ministries
- **4496** received clothing, shoes, furniture, and household items
- **160** individuals assisted through Adult Advocacy Services

III. Situational Analysis:

Primary functions and programs of the ministry/office:

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 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, and 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 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 the 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 helps landlords secure their property investments. 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 the 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
- 109 years of service throughout our Diocese
- Focus on a “hand up” and not a “hand out” approach
- Increased number of people served in the past 10 years from 20,000 to 40,000 a year

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

- 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 • Build a Catholic Counseling Network in our Diocese
Threats (top internal or external events or conditions which make 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 following 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 the footprint of Catholic Charities services especially the Western part of the Diocese	
Purpose: Meet unmet needs in Parish communities where Catholic Charities currently do not have a presence.	
Measurement: Opening new locations in the Western part of the Diocese.	
Completion Date: June 30, 2024	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 2023 and ongoing	Owner: Yvonne Tertel
Goal 3: Assess, improve, and expand our ministries	
Purpose: Assess needs in Parishes throughout our Diocese	
Measurement: Create a network of Catholic Counselors	
Completion Date: June 30, 2024	Owner: Rodney Schuster and Kevin Jorrey

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 the number of volunteers and Gift In-Kind efforts	
Measurement: 1. Speaking engagements throughout the Diocese sharing the services Catholic Charities offers 2. Increase the number of volunteers 3. Increased Gift-In-Kind donations	
Completion Date: September 2022 – June 30, 2024	Owner: Jennifer Lippus
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 the receivable module in accounting software for invoicing grants and recording grant receipts	
Purpose: Reduce the number of journal entries for all receipts and deposits.	
Measurement: Purchase new financial software.	
Completion Date: Completed	Owner: Jennifer Dykes
Goal 2: Increase the 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 and ongoing	Owner: Jennifer Lippus and new Development Director

VI. Financial Impacts

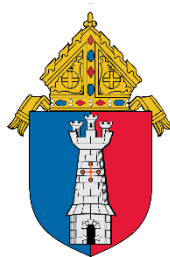
The following represents the FY2024 summary financial budget for Catholic Charities:

Summary Budget FY2024 Catholic Charities		
Revenue		
Donations, grants, and other revenue	\$	5,667,526
Diocese Support		736,000
Expense		
Salaries and benefits		3,271,031
General Office and Occupancy		578,191
Programs		2,799,211
Special Events		-
Total Expenses		6,648,433
Net	\$	(244,907)

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 – FY2024



Diocese
of Toledo

Catholic Education Department

Annual Ministry Budget Report – FY2024

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 2022-2023 school year, there were 15,854 students in a Catholic school from Pre-Kindergarten to grade 12.

This represents a 2.35% decrease in total enrollment, which is consistent with a decline over the past 9 years with 2021-2022 being an exception. Pre-school programs increased slightly with 1,862 total students, K-8 programs decreased slightly with 10,084 total students, and grades 9-12 also decreased slightly with 3,908 students a decrease of 34 students from the previous year or -0.86%

In the 2022-2023 school year, 6,865 students received a state-based scholarship which represents 43% of students in grades K-12. On average the number of scholarship students in the past three school years has increased by 22% for Traditional Ed Choice (based on the family's assigned public school) and 26% 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:

- Interact with, provide professional development to, and continue to help form exceptional parish catechetical leaders who lead others in the catechetical process in parishes with an emphasis on engaging the family.
- Interact with, provide professional development to, and continue to help form exceptional Catholic school leaders who lead others in academic pursuits and maintain 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 that enroll students with documented learning disabilities via Classroom 19:14.
- Provide direct support to Catholic schools that 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) a state tax credit program, and the advent of a universal school choice program.

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 ago and when comparing similar department responsibilities there are currently six fewer or approximately 54% fewer people in the department with only 1,500 fewer 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 of 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 upcoming state budget, we will likely see significant increases in scholarship award amounts, increases in the number of students eligible for a state scholarship, and additional changes to the tax credit program.
- The training for new teacher-ministers continues to include better content, monthly meetings with paid, diocesan mentors, and a review process for the end of their initial two-year formation program.
- Reengaging with families is a popular idea with principals and religious education directors. We plan on hiring an employee to oversee this process and introduce two key initiatives this fiscal year.

- An increase in the number of students using a state scholarship could precipitate a more uniform pay structure for school employees and rely less on parishes to subsidize a school exclusively.

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

- There is a 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 following 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: Continue the 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 including additional programming through a new position in the department.

Completion Date: 5/1/24

Owner: Matt Daniels and Bret Huntebrinker

Goal 2: Fostering an Intentional Catholic School Culture

Purpose: Ensure Catholic schools are achieving key marks of Catholicity.

Measurement:

1. Assessment of Religious Knowledge data and growth tacking, which began in the Spring of 2023 and will continue into the 2023-2024 school year. This also relates to the way parents are engaged with student formation in Goal 1.
2. Implementation of a virtue program to include a school-based virtue report card with an emphasis on the integration of virtue into the school's disciplinary program.
3. Standardize the use of Catholic lesson planning for non-religion courses.
4. Continued development of teacher and catechist formation programs and offerings including the first cohorts of an advanced catechist track.
5. Continued interaction with schools, parishes, and Culture Project International to affect a better

understanding of the Theology of the Body for students, faculty, and parents.	
Completion Date: Started in Spring 2023 and will continue with 2 additional cohorts in 2023-2024.	Owner: Matt Daniels
Goal 3: Ensure better governance and policy compliance.	
Purpose: To ensure that the ways schools are governed are aligned with best practices, appropriate oversight, and Diocesan policy.	
Measurement: <ol style="list-style-type: none"> 1. Implementation of a Scholarship Coordinator to assist with state scholarship and SGO functions. Ongoing formation for Board Members. 2. Implementation of the Director of Religious Education Handbook. 	
Completion Date: Scheduled to be completed by June 2024.	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 a new part-time employee. 2. Implementation of monthly newsletters. 3. Additional programming for families, as needed. 	
Completion Date: Planned start date in September with work continuing through June 2024.	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 to \$338,000.00	
Completion Date: By December 31, 2023	Owner: Jake Johnson

Goal 3: Continue to 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 through the Ohio Catholic School Accrediting Association.	
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: 6/30/24	Owner: Tim Mahoney/Matt Daniels

VI. Financial Impacts

The following represents the FY2024 summary financial budget for the Catholic Education office ministries:

Summary Budget FY2024 Catholic Education	
Revenue	
Program and other revenue/fees	\$ 1,046,344
Expense	
Salaries and benefits	671,833
General Office and Occupancy	55,699
Programs	752,575
Special Events	-
Total Expenses	<u>1,480,106</u>
Net	<u>\$ (433,762)</u>

Clergy, Consecrated Life and Vocations Annual Ministry Budget Report – FY2024



Clergy, Consecrated Life and Vocations Department

Annual Ministry Budget Report – FY2024

I. Mission/Purpose:

This Department provides special pastoral services for and serves the priests, deacons, seminarians, and religious of the Diocese of Toledo. The Vicar for Clergy seeks to promote prayer, fraternity, and identity, while at the same time seeking to foster an “intimate sacramental brotherhood” (Presbyterorum Ordinis, #8, Ratio Fundamentalis #51) among the clergy. The Office 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 the Department: 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 79 active priests and 56 senior status priests
- Clergy Picnic at Episcopal Residence **[75 priests]**
- Advent Day or Recollection for Priests with Dinner **[85 priests]**
- Priest Study Day for On-going Formation **[60 priests]**
- New Pastors Formation at Pastoral Center **[8 priests for quarterly meetings with prayer and lunch]**
- New Priest and New Pastor Mentorship Program **[5 Mentors, 5 Mentees for quarterly meetings]**
- Priest Formation Day for November 2023 Ballot Initiative **[55 priests and deacons]**
- Annual Celebration of Priest Jubilees Mass **[70 priests]**
- Annual Celebration of Priest Jubilees Dinner **[70 priests]**
- Annual Chrism Mass Celebration **[1,500 faithful]**
- Annual Chrism Mass Luncheon **[150 priests and Deacons]**
- Regular meetings with part-time Minister to Priests with both active and senior priests.

Vocations to the Priesthood

Annually:

- Vocation Director meetings with discerners. **[40 meetings]**
- Vocation Masses at local universities at least one weekend per semester (Ohio State University, UT, BGSU). **[Total Attendance: 3,000]**
- Preach about vocations at non-university parish weekend Masses.
- Vocation talks, adoration, weekday Masses, etc. at local universities. **[Total Attendance: 150]**
- Seminary visits (once each semester to Cincinnati and Rome). **[meetings with 11 seminarians per semester; meetings with 15 seminary formation team members per semester]**
- College Discernment groups (once per month at UT). **[25 participants]**
- Andrew Dinners (three per year at parishes in the diocese). **[125 participants and 25 priests]**
- Vocation events at parish schools **[550 students]**
- Vocation events at high schools (CCHS Mass and luncheon; SJJ Mass and small group discussion;

Saint Francis de Sales HS speaking to all senior theology classes; Tiffin Calvert Mass; speak to all senior students at Cardinal Stritch). [**1250 students**]

- Provide materials for high school discernment groups. [**15 participants**]
- Pillar #1 Diocesan Strategic Plan meetings (Healthy Clergy and Healthy Parishes). [**4 meetings**]
- Email blasts to past event participants (and parents). [**350 email addresses**]
- Email blasts to priests. [**All priests**]
- Andrew Dinner and Retreat follow-up handwritten notes to participants and priests. [**145**]
- Seminary Application Process for new seminary applicants.
- Admissions/Formation Board Meetings. [**8 members**]
- Supervision of seminarian pastoral interns. [**1 seminarian**]
- Organize and pay for seminary education of diocesan seminarians (room, board, tuition, fees). [**11 seminarians**]
- Organize donations from K of C Councils and other groups to support seminarians' personal expenses. [**11 seminarians**]
- Review seminary formation reports. [**11 seminarians**].
- Process paperwork for seminarian departures (disaffiliation, leave of absences, etc.). [**1 seminarian**]
- Maintain toledopriesthood.org, annual seminarian profile videos, resource page, etc. [**6,600 visits, 20,000 page views**]

Annual Events:

- Seminarian Lunch and Afternoon with Bishop Thomas (July). [**12 seminarians; 3 priests**]
- Candidacy Mass and Dinner with Bishop Thomas and Seminarians (July). [**12 seminarians; 70 family members**]
- Seminarian Summer Convocation (August – 4 days). [**12 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**]
- Catholic Radio Interview [**3 times per year**]
- Discernment Retreat for college-aged men (November at Lial). [**5 participants**]
- Christmas mailing to past event participants (December). [**325 men**]
- Formation reports for seminarian meetings with Bishop Thomas (December). [**12 seminarians**]
- Participate in NCDVD regional meeting (December).
- Advent Mass and luncheon with Bishop Thomas, seminarians, and families (December). [**75 participants**]
- Diaconate and Priesthood Ordination planning meetings (December).
- Organize/present ACA Donor Thank You speeches (January). [**225 participants**]
- Meeting with Mercy CPE coordinator (February).
- Speak at the diocesan youth ministers retreat (February). [**15 participants**]
- Identify and select summer seminarian parish assignments and pastoral internship parishes (April). [**11 assignments**]
- Host NCDVD two-day meeting (May). [**12 vocation directors**]
- Transitional Diaconate Ordination Mass (May). [**1000 people**]
- Transitional Diaconate Ordination Reception (May). [**500 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.
- World Day of Consecrated Life for Vocations Mass **[105 participating]**
- World Day for Consecrated Life Reception **[100 religious attending]**
- Visitation of five Religious Communities **[5 Visits]**

Active and Senior Status Deacons and Deacon Candidates

- The delegate provides for the pastoral care of 169 deacons.
- There are 108 Active Deacons in the Diocese and 61 Senior Status priests in the Diocese.
- There are currently 13 aspirants in the deacon formation program
- Clinical Education Experience for Deacons **[20 participants]**
- Preached Retreat for Deacons two times per year **[55 participants]**
- Evaluation of Deacons in Ministry recurring for select cohorts annually **[18]**

III. Situational Analysis:

Primary functions and programs of the ministry/office:

Vicar for Clergy

- 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.
- the past fiscal year the Vicar for Clergy was responsible for one priest funeral and three funerals for deacons.
- 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 priests.
- Coordination of events such as Study Days for On-Going Formation for Priests; Priest Days of Recollection; Jubilee Celebrations; Convocations.
- The Vicar for Clergy collaborates and serves as a resource to the Diocesan Case Manager and Director of Human Resources about any issues that arise that are directed to the clergy.
- Organizes the biennial Convocation which is being planned for the Summer of 2024 and will have as its theme the 2022 Apostolic Letter of Pope Francis, *Desiderio Desideravi*.
- Organizes study days, retreats for priests, and the annual Chrism Mass, Jubilees, and Days of Sanctification

Director of Vocations

- Cultivates and promotes vocations as well as assisting 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 promotes 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.
- Attends Funeral and Events on behalf of the Bishop.
- Provides notices of death and funeral information to the Religious of the Diocese.

Delegate for Deacons (part-time)

- Provides 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, 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

Vicar for Clergy

- New to the position in July of 2023
- 25 years of experience in priestly ministry and 17 years of experience as a Pastor, including a Parish on a College Campus.
- Knowledge of the spiritual life, pastoral practice, and the presbyterate.
- Direct experience and success with the cultivation of young men for priestly vocations, cultivation of young people for discipleship, and the formation of new families in the spirituality and morality of Catholic family life.
- Eager to embrace the bishop's vision for prayer, fraternity, and identity amongst the priests.
- Manifested administrative capabilities for supervising the Clergy, Consecrated Life, and Vocations Department.

Director of Vocations

- Six years of experience as the Director of Vocations
- Experience and knowledge of applicants for the seminary and of the presbyterate.
- Personal knowledge of the individual seminarians.
- Coordinates events for the cultivation of Vocations and the formation of Pastors for a culture of vocations.

<p>Delegate for Deacons</p> <ul style="list-style-type: none"> • Extensive Administrative experience in Higher Education • Teaching experience in Higher Education • Leadership and Management Experience <p>Minister to Priests</p> <ul style="list-style-type: none"> • 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)
<p>Vicar for Clergy</p> <ul style="list-style-type: none"> • First assignment working in the Pastoral Center <p>Director of Vocations</p> <ul style="list-style-type: none"> • There is a lack of response from young people to priestly vocations • There is an 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. <p>Delegate for Deacons</p> <ul style="list-style-type: none"> • Beginning only his second year and so he continues to familiarize himself with both the active and senior status deacons. • Need for more assistance in the visitation and pastoral care of senior status deacons. <p>Administrative Assistant</p> <ul style="list-style-type: none"> • Stabilization in the position as she begins her second year.
Opportunities (top internal or external events or conditions which benefit the ministry and those served)
<ul style="list-style-type: none"> • There is a great team assembled with a unified vision. • Senior Status Clergy are being more included and more deeply engaged. • The newly created position of Minister to Priests is bringing 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 has been able to bring a fresh look at how administration is done in the office through a deeper organization of essential files. • The new Delegate for Deacons is extraordinarily capable and organized and is bringing fresh energy to both the ongoing formation opportunities and retreats that are currently offered, as well as organizational management in keeping deacons accountable for their ongoing formation responsibilities each year.
Threats (top internal or external events or conditions which make the ministry more difficult)
<ul style="list-style-type: none"> • Recently three extern priests needed to return to their home dioceses and left their ministry in the Diocese of Toledo. • Diminishing participation in parish life • Two sets of twinned parishes were not able to be assigned Pastors due to priests being unavailable. • Administrative demands on a limited number of priests.

IV. Key Strategic Goals:

The following 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: Re-evaluate the Healthy Living Self-Assessment Tools after the Priest Study Day for On-going formation on October 5, 2023 – Fit from Faith.	
Purpose: The improve the physical, spiritual, and emotional well-being of the clergy.	
Measurement: An evaluation instrument will be distributed to priests after the October 5, 2023 Priest Study Day for On-Going Formation. There will be a discussion of the data at the Pillar One Strategic Planning meeting, and the Presbyteral Council if necessary.	
Completion Date: December 31, 2023	Owner: Fr. Michael Dandurand
Goal 2: Initiation of a Diocesan Prayer for Priests Initiative	
Purpose: To create Eucharistic based Cenacle Groups of Prayer to make a commitment to pray for their particular (and all) priests.	
Measurement: To first create a pilot program at Sacred Heart Parish in Fremont and to discuss the pilot in the Pillar One Strategic Planning meetings.	
Completion Date: December 31, 2023	Owner: Fr. Michael Dandurand
Goal 3: Create a Program for Ongoing Clergy Leadership Development	
Purpose: To assist priests in their use of best practices from forms of ecclesial leadership development.	
Measurement: A long-term priest leadership development plan to be supported by an ongoing formation program, inclusive of mentoring and resources for priests and deacons.	
Completion Date: June 30, 2024	Owner: Mr. Bret Huntebrinker

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: Evaluation and Revision of the training modules for new Pastors that were conducted from September 2022 until April 2023.	
Purpose: Providing Direct Administrative training from Diocesan Senior Officials to new Pastors.	
Measurement: Review the data from an evaluation instrument for those who participated in the module to review in Pillar One and prepare for the next module to begin in September 2024.	
Completion Date: December 31, 2023	Owner: Fr. Michael Dandurand
Goal 2: Revision and Evaluation of the new priest and Pastor mentorship program	
Purpose: Assisting new pastors and new priests with direct mentorship from a clergy member more senior to meet with quarterly to assess problems and struggles and needs administratively.	
Measurement: Vicar for Clergy meets with the mentors in the Summer of 2023 to assess and evaluate the continuation of the program or a revision of the program beginning in July of 2024.	
Completion Date: May 30, 2024	Owner: Fr. Michael Dandurand
Goal 3: Long Term Priest- Personnel Plan	
Purpose: To analyze the number of priestly ordinations per year, combined with the number of seminarians along with the number of priests entering into Senior Status in the past ten years and looking ten years into the future.	
Measurement: Use the data acquired from the annual Statement of Intent as well as from Intentional Planning as resources	
Completion Date: June 30, 2024	Owner: Fr. Michael Dandurand
Goal 4: Cultivating New Religious Communities	
Purpose: To enhance parish life in the Diocese of Toledo 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: December 30, 2023	Owner: Delegate for Religious
Goal 5: Advent Day of Reflection for Religious	
Purpose: Spiritual enrichment and building of fraternity amongst the Religious in the diocese.	
Measurement: In December of 2023 a Day of Recollection will be conducted which will be inclusive of a fraternal meal.	
Completion Date: December 5, 2023	Owner: Delegate for Religious
Goal 6: Ongoing Formation of Permanent Deacons, while expanding the roles of the Deacon Council and Deacon Personnel Board to minister to Senior Status Deacons and widows of Deacons, as well as continuing and improving the Deacon Evaluation Process.	
Purpose: To improve the quality of pastoral care and preparation of Permanent Deacons.	
Measurement: <ol style="list-style-type: none"> 1. Assessment by the Deacon Council and Deacon Personnel Board 2. Participation of Pastors, Parish Staff, and parishioners in the evaluation of current Permanent Deacons. 	
Completion Date: June 30, 2024	Owner: Deacon Daniel Brahier
Goal 7: Plan to cultivate priestly vocations in the Diocese of Toledo based on improved and strategic communication with discerners.	
Purpose: To provide consistent follow-up communication, catechesis, and discernment support to past vocation event attendees.	
Measurement: Evaluation of the current database program and, if necessary, transition to a new database. Adjust staffing workload to facilitate improved and more frequent communication. Identify target groups for prioritized communication	
Completion Date: June 30, 2026	Owner: Very Reverend Philip Smith

VI. Financial Impacts

The following represents the FY2024 summary financial budget for the Management Corp office ministries:

Summary Budget FY2024 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	\$ 18,714	\$ -	\$ -	\$ -	\$ 10,400	\$ 95,600	\$ -	\$ -	\$ 21,000	\$ -	\$ 228,500	\$ 374,214
Expense												
Salaries and benefits	90,093	-	-	51,864	-	22,179	20,112	126,772	36,313		20,112	367,444
General Office and Occupancy	9,668	1,850	-	7,174	3,083	2,200	2,523	13,345	5,358	-	12,750	57,951
Programs	31,700	-	3,200	-	42,000	179,050	1,825	13,375	7,075	583,259	182,775	1,044,259
Special Events	22,000	-	-	-	-	-	6,550	22,850	26,000	-	-	77,400
Total Expenses	<u>153,461</u>	<u>1,850</u>	<u>3,200</u>	<u>59,038</u>	<u>45,083</u>	<u>203,429</u>	<u>31,010</u>	<u>176,341</u>	<u>74,746</u>	<u>583,259</u>	<u>215,637</u>	<u>1,547,053</u>
Net	<u>\$ (134,747)</u>	<u>\$ (1,850)</u>	<u>\$ (3,200)</u>	<u>\$ (59,038)</u>	<u>\$ (34,683)</u>	<u>\$ (107,829)</u>	<u>\$ (31,010)</u>	<u>\$ (176,341)</u>	<u>\$ (53,746)</u>	<u>\$ (583,259)</u>	<u>\$ 12,863</u>	<u>\$ (1,172,839)</u>

Communications

Annual Ministry Budget Report – FY2024



Diocese
of Toledo

Communications Department

Annual Ministry Budget Report – FY2024

I. Mission/Purpose:

The Communications Department 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 the **diocesan mailbox and questions**.
- Manage, post, and help departmental posters with the **external website Toledodiocese.org**, and made the calendar active with 5-10 weekly posts.

Graphics, design, and branding

- **43 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.).
- **19 Graphic Design projects for Bishop and Communication/Diocese** (Fish fry guide, Festival guide, Priest/Deacon photo directories, congratulations ads, Christmas card, etc.).
- **Manage brand** – share correct branding throughout the diocese, manage stationary/bus. card store.

Social media and internal communication

- National Eucharistic Revival – Designed, created, and shared Eucharistic Revival materials for the Diocesan and Parish Years (prayer card, gatherings, relics tour, Parish Year guide, social media, webpage, etc.).
- **380+ Social media posts and projects** (Daily posts (weekly average reach is 20,000. Significant custom posts include “Dispensation for St. Patrick’s Day” (50,000), “Fish Fry Guide” (13,000), Pope Benedict’s death (18,000), “Relics tour” (15,000) – Monitored and shared significant stories from Vatican, USCCB, Parishes and Catholic Orgs. Researched issues on social media as needed. Designed flyers for Respect Life, transitional diaconate, March for Life, Evening of Remembrance, etc.) Shared fonts/color guidelines.
- **51 issues of Nuntius compiled** and designed toolkits for Jubilees, ordinations, Leading the Flock, Priest Deaths, etc. Designed new Nuntius and moved from Constant Contact to Flocknote, respond to questions, and toolkits for calendar items.
- Participated in activities and communication **initiatives of committees/teams** – Eucharistic Revival Committee, Pastoral Conference Team, Pillar 1, and Pillar 3.
- **Internal Toledoparish.org** – adding and updating items and forwarding questions.

Video production, editing, and dissemination.

- **24 Video production and editing** (Golden Apple, Bishop green screen, Living Christ campaign, social media videos, Christmas/Easter, CCMT, etc.).
- **52 episodes of Bishops Corner** (prepare, set up, film, edit, and post – pre-organize questions to save filming time).

- **10 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, priest convocation to get all photos updated, manage contract photographer).

Publications

- **2 Graceful Living issues** (art direct photoshoots, brainstorm/interview/write/edit articles, manage outside vendors (photo/writing), art direct photoshoots, entire design layout, food design, advertising sales (avg. \$30,000 per), editing, manage the mailing list, design and share promotional material).
- **Festival guide and Fish Fry 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 archiving. • The Communication and Social Media Specialist is responsible for all social media activity and internal communication. • The Sales and Production Specialist is 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 (which we will do with a donor directed donation), a good still camera (especially if Communication takes part in the upcoming pilgrimage), and camera and computer equipment needs to be maintained (we use Mac products due to the video editing and graphic design that need do).

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

- Highly skilled and functional team.
- Having the Cathedral put in livestreaming equipment.
- Building stronger relationships with departments within the Pastoral Center.
- Building relationships with priests and pastors.
- The Communication Campaign Fund has allowed us to continue web design and magazine.

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

- Current (or future) abuse issues that damage the trust in the 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 following 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: Find a way to print Graceful Living without using the Communication Campaign Fund, have the opportunity for feedback through the 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: 6/30/24

Owner: Communication Team

Goal 2: Support Pillar 6	
Purpose: Pillar 6, developing financial resources is in the middle of the Living Christ campaign. Now that CCS has completed its work, 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: 6/30/24	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: 6/30/24	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 to the phase of hiring an individual to help with training needs for the diocese.	
Completion Date: 6/30/24	Owner: Kelly Donaghy

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.

VI. Financial Impacts

The following represents the FY2024 summary financial budget for the Communications office/ministry:

Summary Budget FY2024 Communications		
Revenue		
Program and other revenue/fees	\$	70,000
Expense		
Salaries and benefits		368,202
General Office and Occupancy		31,243
Programs		68,500
Special Events		-
Total Expenses		<u>467,944</u>
Net	\$	<u>(397,944)</u>

Discipleship & Family Life Annual Ministry Budget Report – FY2024



Diocese
of Toledo

Department of Discipleship and Family Life

Annual Ministry Budget Report – FY2024

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 Peace and 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, held at St. Mary, Tiffin
- Open Arms Awards Annual Mass recognizing Three special needs individuals who demonstrate their faith through service in their parish and community at large, St. Mary, Sandusky
- Twelve ASL Masses annually at St. Francis de Sales High School presided by Fr. Michael Depcik, OSFS
- Diocesan Feast Day Novena and Mass
- Mass on the Anniversaries of Marriage, **236 couples**
- Our Lady of Guadalupe Diocesan Feast Mass, held at St. Patrick, Bryan with **over 300** who attended

Diocesan Events

- Diocesan Pastoral Conference – ACTS XXIX with **475+ attendees**
- Frontline Staff Retreat, **30+ attendees**
- Adult Ministry Round Table, **20+ attendees** Joy-Filled Marriage Engaged Couples Weekends, **Fourteen** Workshops serving **185 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 over **70 parishes, schools, and universities**
- Diocesan Cedar Point Day – Persons with Disabilities, **100+ people attended**
- Hispanic Catholic Ministry, **served over 500 people** with spiritual direction, engaged couples workshop, multiple Quinceanera preparations and celebrations, confession, and Mass in Spanish
- Diocesan Cedar Point Day – Youth and Family, **125+ people attended** Mass and enjoyed the park

Intentional Planning

- **Five** Priest Consultation Sessions, which included **62 attendees**
- **Twelve** Parishes engaged in Intentional Planning Process leading to the reconfiguration of **three** of the parishes.
 - **25 meetings** – parish communities, counsels, parish staffs, and 1 on 1s
- Led **four** parish/school staff retreats
- Assisted **four** parishes in strategic planning

Best Practices and Training

- ToledoParish.org continues to be updated with best practices in many different ministries
- Natural Family Planning Resources updated and increased- online, in-person, and bilingual options are now available
- **Five** new couples trained to present at diocesan Joy-Filled Marriage weekends
- Multiple couples trained to present at parish-based engaged couple workshops
- Provided resources for diocese wide study of the book From Christendom to Apostolic Mission
- Four Ways Forward: Becoming an Apostolic Parish in a Post Christian World book study, **25+ participants**
- Led the Pastoral Center through The Rescue Project

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 develops and implements 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 that 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 (The Rescue Project, 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 with priests and parish staffs.
- Intentional Planning need 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 make the ministry more difficult)
<ul style="list-style-type: none"> • 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 following 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: On-board new employees in the Department of Discipleship and Family Life using the 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: 6/30/2024	Owner: Bret Huntebrinker
Goal 2: Hold Evangelization Training with St. Paul Street Evangelization (Pillar II)	
Purpose: Equip parishes to serve their communities better.	
Measurement: 200+ attend event	
Completion Date: 6/1/2024	Owner: Andrew Reinhart
Goal 3: Help lay leadership (youth ministers, young adult ministers, and adult faith formation) collaborate and share resources to provide effective ministry. (Pillar III)	
Purpose: Ease the burden of individual parishes and schools, by providing events that promote an encounter with the Lord and build a deeper sense of community.	
Measurement: Increase the number of parishes working together, i.e. collaborative events deanery-wide young adult ministry, formation of parish PODS, XLT, etc.	
Completion Date: 6/30/2024	Owner: TBD

Goal 4: Continue Intentional Planning with pastors and parishes. (Pillar I)	
Purpose: Adjust parish leadership structures around metro-Toledo to anticipate declining clergy numbers. Design and implement a discernment process for struggling parishes.	
Measurement: Work with twenty parishes to help ensure continued ministry in our communities as the number of active priest decline.	
Completion Date: 6/30/2024	Owner: Andrew Reinhart
Goal 5: Build/Increase awareness of the Accessibility Ministry	
Purpose: Assisting parishes in the diocese with ministering and assisting persons with disabilities to be fully included in every aspect of the community of faith, especially in the reception of the sacraments.	
Measurement: Training for DREs, priests, and teachers in addressing the educational and spiritual needs of students with disabilities. Provide adaptive learning materials as needed.	
Completion Date: 6/30/2024	Owner: Lynn Priest

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: 6/30/2024	Owner: Alice Jacobs
Goal 2: Offer best practices to parish staffs in all we do.	
Purpose: Help parishes grow.	
Measurement: Mass attendance, as a diocese, goes up.	
Completion Date: 11/30/2023	Owner: Bret Huntebrinker

VI. Financial Impacts

The following represents the FY2024 summary financial budget for the Discipleship and Family Life office ministries:

Summary Budget FY2024 Discipleship and Family Life			
	Discipleship and Family Life	CYO	Total
Revenue			
Program and other revenue/fees	\$ 104,500	\$ 458,380	\$ 562,880
Expense			
Salaries and benefits	388,995	218,233	607,228
General Office and Occupancy	55,399	15,262	70,662
Programs	200,650	227,175	427,825
Special Events	-	-	-
Total Expenses	<u>645,044</u>	<u>460,670</u>	<u>1,105,714</u>
Net	<u>\$ (540,544)</u>	<u>\$ (2,290)</u>	<u>\$ (542,834)</u>

Management Corporation Annual Ministry Budget Report – FY2024



Diocese
of Toledo

Management Corporation

Annual Ministry Budget Report – FY2024

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 – Ohio
- Diocesan Finance Council & Committees

II. Ministry Data and Statistics:

- The Management Corp is comprised of **5 offices** and **16 full-time** and **1 part-time staff members**
- The Management Corp serves **122 parishes**, **47 elementary schools**, and **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 **4800 full-time and part-time diocesan employees**
 - Self-funded healthcare plan which allows for parishes/schools to offer a wide range of

- benefit options with the rate protections of a large group.
 - Optional dental, vision, and flexible spending account benefits.
- 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 – **500 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 the Living Christ capital campaign, **23,000 Annual Catholic Appeal (ACA) donors**, **800 major donors** in diocesan and local fundraising and development
 - Administer and support the pledge redemption process for more than **14,000 Living Christ capital campaign donors**
 - 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
- Supporting the Catholic Community Foundation – Ohio
 - Accounting and financial reporting for the Foundation
 - Provide support as acting Executive Director of the Foundation
- The Management Corp supports the functions of the Pastoral Center including:
 - Financial budget oversight, accounting, 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 **100 Pastoral Center and Catholic Charities employees**, and **over 300 email accounts** (which includes all active priests)

III. Situational Analysis:

Primary functions and programs of the ministry/office:

Management Corp is comprised of five offices with primary functions as described below:

Finance Office:

Provides centralized accounting services for diocesan pastoral center offices and related entities (as listed in section I above), responsible for investment management, and accountable for treasury activities of the diocese. Also provides audit and accounting services to parishes and schools. Serves as the 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.

Information Technology Office:

Performs information technology services for the diocesan pastoral center and Catholic Charities employees.

Human Resources Office:

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.

Legal and Risk Management Office:

Provides legal advice to the Bishop, the Diocese, and all diocesan organizations. Supervises the Risk Management Program in support of all participating diocesan entities.

Mission Advancement Office:

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 (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 provide excellent coverage and benefits to employers and employees while being good stewards of diocesan/parish/school funds. 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 the 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 the 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)

- Increased staff size would allow the Management Corp to more proactively support the ongoing needs of diocese, parishes, and schools (auditing, risk management, employee management, etc.).
- Improved technology tools allow the Management Corp to promote efficiency and information sharing with parishes and schools, as well as to conduct or recommend training 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
- Streamline Living Christ campaign donor Pledge Redemption and Pledge Delinquency Program for the next 5 years.
- Provide timely and professional direct support to donors and parishes through the new Donor Relations Associate, responding to inquiries, assisting with pledge fulfillment, and providing reports and regular communication to parishes and donors alike.
- Provide regular communication through various mediums to share how Living Christ campaigns are being utilized for diocesan ministries and parish capital and ministerial projects.
- Standardized payroll provider across all entities and committed vendor partners allow for opportunities for efficiency and accuracy of benefits and retirement administration.

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

- Continuous issues at poorly managed locations consume Management Corp's time and resources to review and offer guidance and limit 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 allow 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.
- The declining number of parishioners and thus parish offertory and potential donors.

IV. Key Strategic Goals:

The following 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: Secure Donor Pledged Funds for the Living Christ capital campaign	
Purpose: Collect pledged contributions by donors to the campaign over the next 5 years through a pledge redemption program, assisting donors in their fulfillment of committed pledges.	
Measurement: Twelve cycles of redemption letters, communication (monthly newsletter, social media, and email blasts), and personal outreach to donors. Donors fulfill campaign pledges with regular payments, achieving the highest percentage of pledge fulfillment that can be obtained.	
Completion Date: June 30, 2024	Owner: Director Mission Advancement
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, 2023	Owner: Director Mission Advancement
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 the 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 Dates: <ul style="list-style-type: none"> Hire Learning and Formation Manager July 31, 2023 Recruitment/Enrollment effort to engage users throughout the diocese September 30, 2023 Launch of learning track February 28, 2024 	Owner: Meghan Reed

Goal 4: School Funding Models – (Pillar 4)	
Purpose: Assist the Senior Director of Catholic Education with transforming diocesan schools as a result of the State of Ohio EdChoice funding changes by providing financial analysis related to funding increases and evaluating Teacher-Minister compensation and providing recommendations on salary scales.	
Measurement: Report containing meaningful data and guidelines/recommendations for schools related to both parish subsidy and teacher salaries presented to parish and school leadership for consideration for FY2025 budgets.	
Completion Date: <ol style="list-style-type: none"> 1) October 31, 2023 – Analysis of current Teacher-Minister salaries in comparison to local public school data. 2) November 30, 2023 –Financial analysis of parish subsidy rates for schools. 3) February 29, 2024 –develop and share data and recommendations with parish and school leaders. 	Owner: David Reed, Meghan Reed (with assistance from the Catholic Education Department)
Goal 5: Stewardship Education	
Purpose: Promote and provide stewardship education to parishes, schools, and diocesan entities and ministries.	
Measurement: Engage parishes and schools once a quarter (4 times a year) through webinars/in person meetings to promote the practice of stewardship.	
Completion Date: June 30, 2024	Owner: Director Mission Advancement

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: Explore alternatives to the annual BDOT meeting in the future by working with a group of business managers.
Purpose: Increase participation at the parish level through continued improvements in content, marketing, development of business manager certification, and meaningful networking and spiritual development opportunities.
Measurement: Engaged with business managers and form a consensus on plans for the Fall 2024 BDOT.

Completion Date: March 31, 2024	Owner: Phil Renda
Goal 2: Enhanced Retirement Plan Administration	
Purpose: Enhance tools to educate current and prospective employees about the benefits available through the diocesan pension plans – The Retirement Plan for Lay Employees (RPLE) and 403(b) Tax Deferred annuity. Establish automated processes to ensure accurate and timely transfer of data from participating employers and Plan administrator, Nyhart.	
Measurement: <ul style="list-style-type: none"> • Update Summary Plan Description to include all recent amendments (11/30/2023) • Produce promotional materials for current and prospective participants (11/30/2023) • Provide a process for automated transfer of participant information, i.e. enrollment, termination, and contributions, from payroll provider to Plan administrator (3/31/2024) 	
Completion Date: March 31, 2024	Owner: Meghan Reed
Goal 3: Mgmt. Corp Staff Retreat and Intentional Prayer	
Purpose: Enhance team engagement through prayer and fellowship	
Measurement: Conduct one Mgmt. Corp staff retreat and Mgmt. Corp Leadership Team gathering in FY2024 and find opportunities to enhance team prayer throughout the year.	
Completion Date: June 30, 2024	Owner: Meghan Reed, Phil Renda, Amanda Fisher
Goal 4: Mission Advancement Standard Operating Procedures	
Purpose: Document the standard operating procedures of stewardship and development functions of the Mission Advancement Office.	
Measurement: Complete documentation of three per quarter standard operating procedures.	
Completion Date: June 30, 2024	Owner: Director Mission Advancement
Goal 5: Further development of Qvinci implementation with standardized reporting available.	
Purpose: To provide standard reports that can be used by parishes in their finance council reporting.	
Measurement: Reporting rolled out to Parishes.	
Completion Date: March 31, 2024	Owner: David Reed/Richard Miazga

Goal 6: EDR Implementation for Parishes and Schools	
Purpose: Enhance cybersecurity protocol and ensure insurance coverage continues because of higher risk with online activity and higher cybersecurity standards put forth by insurance companies.	
Measurement: All parish schools have EDR implemented.	
Completion Date: March 31, 2024	Owner: Justin Combs
Goal 7: Parish/School Property Management Project	
Purpose: To continue the ongoing effort to enhance risk management and in particular with regard to the management of property at all Diocesan locations, through increased use of technology (Origami) to capture property data, strategic planning related to loss control visits and remedial measures, and improved documentation related to property values.	
Measurement: Origami dashboard updated and 3-5 year schedule of loss control visits and/or property appraisals established.	
Completion Date: June 30, 2024	Owner: Tom Antonini

VI. Financial Impacts

The following represents the FY2024 summary financial budget for the Management Corp office ministries:

Summary Budget FY2024 Management Corporation						
	Information Technology	Financial Services	Mission Advancement Office	Legal Services	Human Resources	Total
Revenue						
Other revenue/fees	\$ 55,012	\$ 326,086	\$ 292,822	\$ 60,013	\$ 113,094	\$ 847,027
Expense						
Salaries and benefits	75,275	904,861	441,434	171,970	289,896	1,883,435
General Office and Occupancy	105,395	166,077	145,449	25,127	36,094	478,142
Programs	-	-	374,807	-	45,435	420,242
Special Events	-	-	-	-	-	-
Total Expenses	<u>180,670</u>	<u>1,070,938</u>	<u>961,690</u>	<u>197,097</u>	<u>371,425</u>	<u>2,781,820</u>
Net	<u>\$ (125,658)</u>	<u>\$ (744,852)</u>	<u>\$ (668,868)</u>	<u>\$ (137,083)</u>	<u>\$ (258,331)</u>	<u>\$ (1,934,793)</u>