



## **MISSION / PURPOSE**

Facilities Management is committed to serve and support those around us by maintaining a safe, pleasant, and functional environment that meets the needs and expectations of our staff and customers. We strive to provide cost effective and responsive service for maintenance and operation of facilities, grounds, and other related support functions that help maintain the comfort and security of the Catholic Pastoral Center and other Diocese properties.

## **SITUATIONAL ANALYSIS**

The daily and ongoing responsibilities of the Facilities Management office, although often unseen, are vital to building function. Our primary role is to maintain and optimize the efficient operation of the building, with the goal of minimization of operational life cycle costs.

### **1. Strengths:**

- a. Building envelope is in a structurally sound state.
- b. Building Automation System has been maintained and improved and affords a lower than usual maintenance staffing level than compared with comparable 240,000 square foot facilities.
- c. Adequate funding for facility improvements on an annual basis.
- d. Quality and value from internal maintenance team.

### **2. Weaknesses:**

- a. Denser population in the envelope.
- b. Different modules to add more density.
- c. Ascension – space utilization.

### **3. Opportunities:**

- a. As we continue, aggressive Capital investment in previously deferred areas for the next three to four years. This will greatly reduce utility consumption, operational costs, and “level” future capital outlay while lessening the risk of unplanned outage expense.

- b. Make internal customers aware of their energy usage and footprint daily, highlight the importance of energy reduction, and provide suggestions as to how they can affect change.

#### **4. Threats:**

- a. Failure to adequately fund scheduled improvements. This can have a wide variety of significant ramifications that could prove to be more costly down the road if not prevented, causing potential loss of facilities revenue.

### **CORE STRATEGY ELEMENTS**

1. Setup and regularly evaluate planned preventive maintenance on all operational equipment.
2. Identify and prioritize needed capital improvements based on the life cycle analysis of all operational equipment.
3. Complete and review staff rating of Customer Work Orders.
4. Handle the scheduling of building resources needed to support the numerous events held at various locations within the facility.
5. Manage and oversee all Contractors/Contracted Services (parking, janitorial services, concierge, facility reception desk, security and safety, etc.).
6. Support off-site properties with Facility Issues and Project support as requested

### **KEY TACTICAL PROGRAMS**

#### **1. Preventative Maintenance:**

- a. Building AHU, FCU, VAV filters changed semi-annually with new pleated filters. To be completed in Spring and Late Fall 2021-2022.
- b. Air Handler coils inspected and preventive maintenance during this time
- c. Belts inspected and changed as needed on all air handlers annually in Spring
- d. Chiller Plant (3) preventive maintenance Spring and Mid-Summer
- e. Pump preventive maintenance Spring and Fall
- f. Generator Preventive maintenance in Fall
- g. Cooling Tower preventive maintenance Spring
- h. Boilers taken offline and preventive maintenance Annually. Spring/Fall
- i. Fire Alarm System preventive maintenance Annually
- j. Fire Detector System preventive maintenance Annually
- k. Kitchen Exhaust Hood preventive maintenance Annually
- l. Backflow Preventers Tested Annually
- m. Roofs Inspected, Drains cleaned – Quarterly

- n. Outside Lighting preventive maintenance Annual Inspection – Fall
- o. Irrigation Line preventive maintenance – Spring; winterize in Fall
- p. Corridor Lighting done throughout year and per work order
- q. Building Controls UPS preventive maintenance completed annually
- r. Custodial walkthrough to identify any issues.

**2. Completion of Customer Work Orders:**

- a. Non-Emergency work orders to be completed weekly on Fridays
- b. Work Order completion based on age of work order or criticality
- c. Schedule breakers such as building emergency are always priority

**3. Scheduling of Building Resources to support many events.**

- a. This includes HVAC, Doors, Lighting, Custodial support, and Security

**4. Managing of Contractor and Contract Services**

- a. Negotiate best pricing for all Facility contracted services
- b. Grounds, Maintenance, Pest Control, Custodial and any physical needs
- c. Vendor supplied materials

**5. Capital Improvements**

- a. Project Design Scope, ITB (Invitation To Bid), project management completed in-house by Facilities Manager
- b. To be completed based on Building Outage Schedule, Weather and Contractor Availability
- c. To be completed within Fiscal Year 2021-2022

**MEASUREMENT, TRACKING AND FOLLOW-UP**

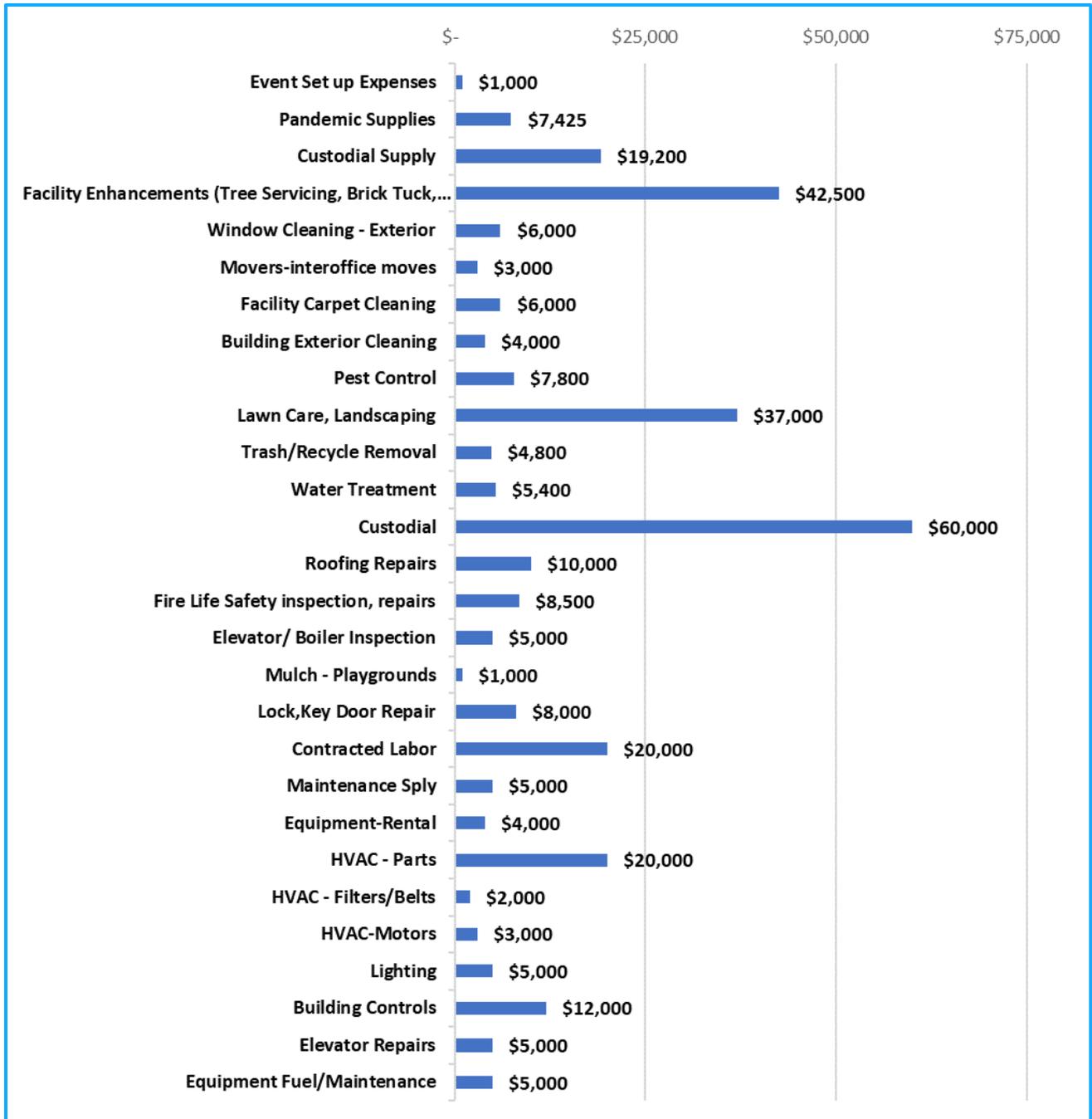
- 1. Monthly review of General Ledger expenses
- 2. Monthly update meetings with Paul
- 3. Noticeable Building enhancements
- 4. Building's functional ability (mechanics etc.)
- 5. Tracking of Service Request - monthly

## FINANCIAL IMPACTS

### 1. Annual Operating Budget

Item:	Annual
Equipment Fuel/Maintenance	\$ 5,000
Elevator Repairs	\$ 5,000
Building Controls	\$ 12,000
Lighting	\$ 5,000
HVAC-Motors	\$ 3,000
HVAC - Filters/Belts	\$ 2,000
HVAC - Parts	\$ 20,000
Equipment-Rental	\$ 4,000
Maintenance Supply	\$ 5,000
Contracted Labor	\$ 20,000
Lock, Key Door Repair	\$ 8,000
Mulch - Playgrounds	\$ 1,000
Elevator/ Boiler Inspection	\$ 5,000
Fire Life Safety inspection, repairs	\$ 8,500
Roofing Repairs	\$ 10,000
Custodial	\$ 60,000
Water Treatment	\$ 5,400
Trash/Recycle Removal	\$ 4,800
Lawn Care, Landscaping	\$ 37,000
Pest Control	\$ 7,800
Building Exterior Cleaning	\$ 4,000
Facility Carpet Cleaning	\$ 6,000
Movers-interoffice moves	\$ 3,000
Window Cleaning - Exterior	\$ 6,000
Facility Enhancements (Tree Servicing, Brick Tuck, Carpeting, Lighting, Pavement Repairs	\$ 42,500
Custodial Supply	\$ 19,200
Pandemic Supplies	\$ 7,425
Event Set up Expenses	\$ 1,000
<b>Total:</b>	

## 2. Annual Operating Budget – CPC Facilities & Grounds



### 3. Annual Operating Budget – Capital Budget

Location	Trade	Project	Fiscal Year 2021-2022	Notes
<b>Sagrado</b>	HVAC	Chiller Replacement	<b>\$225,000</b>	32 years old. Provides all cooling for 14 ice tanks which cool GSO, Sagrado, TN Register, Mater Dei, CPC Education Room, Archives, Sagrado Classrooms, Stage Light Dimmer Rack Room, Server Room.
<b>Youth Office to CSO</b>	Re-model	Carpet, Paint, Trim, Lighting, Blinds, Electrical	<b>\$150,000</b>	Remodel Youth Offices to become Schools Offices.
<b>Briley Sign</b>	Sign	Briley Sign	<b>\$100,000</b>	Get new bids for sign
<b>Ascension</b>	Update Event Space	Ascension - Make Over	<b>\$90,000</b>	Make over, paint, new carpet, new chairs blinds, sound
<b>Bishop's Hall</b>	Audio/Video	Bishop's Hall Audio Video	<b>\$35,000</b>	TBD
<b>Total 2021 - 2022:</b>				
<b>The below will be deferred until the following year:</b>				
<b>CPC</b>	Transformation	Ascension Balcony Transformation into office space	<b>\$175,000</b>	TBD - Waiting to see if structurally this can be completed.
<b>University Catholic</b>	Re-model	University Catholic 3 Bathroom Remodels	<b>\$45,000</b>	Total of 3 Bathroom Remodels (2-bathroom remodels + 1 bathroom remodel less extensive)
<b>CPC</b>	Replace	Replace Multizone AHU with new fan wall unit and Reheat Coils	<b>\$165,000</b>	47 years Old. 1974 Air Handler. Original to building. Replace with new fan wall, controls, valves, Re-heat Coils. Existing unit has blower wheel coming apart.
<b>CPC</b>	Replace Bishop's Hall Air Handler	CPC - Replace Bishop's Hall Air Handler	<b>\$125,000</b>	47 years Old. 1974. Air Handler. Replace Bishop's Hall AHU, piping, controls, with fan wall AHU. ** Needs to be completed with Multizone AHU Project. Located behind Multizone. No access.
<b>Total:</b>				





## **MISSION / PURPOSE**

The Development Office serves the people of the Roman Catholic Diocese of Nashville by building relationships with parishes and parishioners and equipping diocesan ministries with the resources needed to impact the lives of those served. The goal is to provide each ministry with the tools necessary to draw more people to the good news of Jesus Christ.

## **SITUATIONAL ANALYSIS**

### **Strengths:**

For three years in a row, funds raised by the Bishop's Annual Appeal has increased. Our pastors have seen that lofty goals can be met and exceeded when we all work together. Relationships have been deepened between the diocesan offices and parish offices. Due to this, there is an even stronger sense of community and trust between the diocese and parishes. COVID-19 allowed our office to provide additional support to our parish pastors, staffs, and parishioners. It has been a time to bond during tough and uncertain circumstances. We have also had a successful planning and recruitment phase for our Capital Campaign. We have great leadership and engagement throughout our Executive Committee, Pastor Committee and Campaign Cabinet. These groups have helped us prepare the building blocks for a successful campaign and have shown tremendous financial support as we have raised almost \$12 million dollars through mid-April 2021. Long-time supporters as well as new major donors seem energized and excited to make this campaign successful and to help build a Legacy of Faith, Hope and Love for our Diocese. We have continued to improve our donor relations through prompt, frequent, and intentional communication. Our Development Office is in the process of growing, as we look to add two new staff members in the coming weeks. After 2 ½ years, our office has a better understanding of the bigger development picture and has had an opportunity to build good working relationships with all our stakeholders. We have also made great strides in increasing our database over the past year, which allows many new opportunities to engage donors and educate them about our diocesan ministries. Our parish staffs and pastors have been influential in making this happen.

### **Weaknesses:**

Our biggest weakness that we will look to address in the coming year is staffing inadequacies. As development has become more effective, we have too many responsibilities and not enough staffing. Adding two new members to our team will allow us to be more efficient and effective in the work we do and will broaden our bandwidth to increase the support we are able to provide the ministries in our diocese. Increased staffing and hopefully, an improving COVID situation, will allow us more time to spend in our parishes working directly with staff and meeting personally with donors and potential donors. Extra staff should allow more time to make sure we are able to make these important visits. Our office also needs to further develop and mature. I feel that we are heading in the right direction, but we can still improve on many different areas, such as providing donors with more information on ways to make planned gifts, more promotion of giving through stocks and securities. I also would like our office to continue to grow through professional development in all things development related so we are continually improving in every facet of what we do. Personally, I would like to spend more time on strategic and advanced planning for the office. We will continue to identify and address any weaknesses in our office as they arise so we can continue to promote the good work of our ministries.

### **Opportunities:**

There are many opportunities that our office can capitalize on. The first of which is to build relationships with our church and school leaders along with our donors to help form partnerships that could benefit us greatly in the future. While we have made progress over the past year, we still have room for growth in improving our donor relations and donor communications practices. With continued projected growth in the Middle Tennessee area, we should have an increased number of prospects with capacity to give gifts of significance. With an annual population growth of 2.8%, Williamson county is the fastest growing county in the state, followed closely by Wilson county at 2.6%, Rutherford county at 2.4% and Putnam County at 2.1%. The fact that we haven't had a capital campaign in about 20 years is an opportunity for us in a couple of ways. As we proceed with this campaign, we will likely uncover many new donors and potential leaders in the church. Another positive is that our current donors haven't been tapped out by diocesan campaigns in the recent past, and this gives us the chance to mobilize, energize, and get buy-in from our donor base. Another big opportunity for our office is the growth and continued development of our planned giving program.

### **Threats:**

There are various threats our office is facing. The most daunting is an uncertain economy. With many people still affected by the impact of COVID-19, a portion of our population has had a tough year. Parts of Nashville's booming economy has slowed and with this uncertainty. It is important to carefully continue to express the need for our diocesan ministries, while at the same time be compassionate and sensitive to our

current economic status. We wish to move forward cautiously, with a clear sense of purpose and direction. Our political climate is still a threat, with people aligned more to the left and right than the middle. It is important that we communicate clearly and focus on ministry needs rather than getting involved in political issues.

## **CORE STRATEGY ELEMENTS**

### **1. Annual Operating Support**

Annual giving opportunities are the backbone of support for diocesan ministries. They help provide ministries with operating funding that allow them to achieve their ministries' goals. Annual operating support is obtained through partnership with our local churches.

### **2. Diocesan Capital and Endowment Projects**

Capital and endowment projects allow the diocese to move forward with larger initiatives that can have a significant impact on the diocese both now and in the future. These projects can create new ministries or expand existing ministries to impact people for many years to come. Capital Campaigns may last several years and require collaborative assistance from individuals and churches within the diocese.

### **3. Planned Giving Program**

Along with a Capital Campaign, planned giving can help ensure the solvency of the diocese. Planned gifts provide supporters the opportunity to make an often, once in a lifetime gift, that can be transformative, while also providing the donor with certain tax benefits. The program can provide continued support for churches and the diocese in the long-term.

### **4. Donor Relations and Moves Management**

Donor Moves Management is the process through which supporters of the diocese are identified, engaged, and welcomed to become more involved in the ministries of the diocese. To meet future fundraising goals, Moves Management must be a vital part of the Development Office.

### **5. Database Management**

Database Management involves the way we collect and use data to carry out our mission. The way we use our database will be key to our future growth not only for the Development Office, but for the Diocese as a whole.

## **KEY TACTICAL PROGRAMS, FINANCIAL IMPACTS, MEASUREMENT, TRACKING, AND FOLLOW-UP**

### **1.1 Bishop's Annual Appeal for Ministries:**

The Bishop's Annual Appeal for Ministries kicked off in February and gifts can be made throughout the year. The goal is to tighten the campaign window so pledges are collected, and the overall goal is met by early summer. We continue to transition more of our donors to recurring gifts each year. This provided a solid base for our Appeal and makes donor reacquisition less of an issue. The Bishop's Annual Appeal will provide supporters with a variety of ways to participate. Direct mail, in-pew pieces, emails, Tennessee Register stories, social media, text-to-give, and other electronic forms of communication will all be utilized to help reach the stated goals. Donor-centered fundraising will be a focus of the appeal. This will keep donors engaged and excited about all diocesan ministries. Educating the public about the ministries the Bishop's Appeal supports is a major part of all forms of communication.

### **1.2 Seminarian Education Dinner and Auction:**

The Seminarian Education Dinner and Auction directly supports the education of our diocesan seminarians. The dinner is hosted by the Serra Club and Knights of Columbus with administrative support from the Diocesan Development Office. Proceeds from the dinner and auction are sent to the Diocesan Office for Vocations, specifically for educational expenses of the seminarians. The Diocesan staff typically meets with the Serra Club/Seminarian Dinner Planning Committee on a monthly basis leading up to the event. This year, the event will occur online again due to the COVID-19 Pandemic. Mailings, electronic and social media communication and church support are used to market the event and encourage attendance and financial support. The Serra Club/Seminarian Dinner Planning Committee, along with Diocesan staff, help gather auction items and secure sponsorships for the event. There is also a direct ask from Father Gilstrap to solicit donations at the dinner's conclusion.

### **1.3 Grant-Writing Program:**

Grants can be an effective tool to obtain additional annual support for certain programs and ministries within the diocese. Research to find potential funders is the first step to establish the program. Next, matching current diocesan needs and initiatives with the appropriate funders' guidelines will guide the application process. Attention to detail and meeting deadlines are crucial to the application process. Over the past year, we have identified some potential funders for our Hand-in-Hand Options (HIHO) program. Our office has worked with our Catholic Schools Office and Catholic Charities to help identify some potential funding opportunities. As we move forward with a capital campaign, Steier Group will help us identify organizations that might be a good fit for our priorities. Grants with Catholic Extension will also continue to be pursued, as they have been very supportive of our diocese in the past.

## **2.1 Continued Campaign Planning and Major Gift Phase:**

In October 2020 we moved forward with our campaign planning process. During this planning phase, we identified and recruited leadership for the campaign. We also developed our Case for Support for the campaign. The case is the crux of the campaign. It lays out the importance of the campaign initiatives, educating potential donors, and generating excitement for the upcoming campaign. Solicitation training for our Executive Committee and Campaign Cabinet are preparing these groups to solicit our major gift prospects. A lot of time and planning will go into making sure the campaign communication plan is effective. Final targets and goals for the campaign and parishes will also be set during campaign planning. Major gift asks will also occur during this time period and will continue throughout the campaign. Preparation for our Parish Waves will happen in the coming months to make sure that our Parish leadership is ready to launch a successful campaign in their own church.

## **2.2 Active Campaign Process and Parish Waves:**

Following the quiet phase of the campaign, which includes solicitation of major gifts, parish waves will begin. Lead gifts will boost momentum and energy before moving on to the public phase of the campaign. The parish waves will occur in three different waves. This will include additional volunteer and parish staff training, and preparation of new materials and marketing strategies to make sure the public phase is a success. The parish waves will last through the Fall of 2022.

## **3.1 Planned Giving Education:**

Planned giving starts with education. Many people are unaware of all the planned giving options that they have and the tax benefits that go along with them. Most people do not realize that they are able to make a substantial gift, while still adequately caring for their family. The Development Office sets out to educate the people of the diocese of their planned giving options. This will be done through various forms of communication including: website, Tennessee Register articles, digital and mailed forms of communication, and parish visits by the Development Staff or experts in the field of planned giving. Active solicitation of planned gifts is also a part of the plan. This would be an opportunity to ask people to think about making their parishes and the diocese a part of their estate plans. Our capital campaign will include conversations about planned giving options and will provide donors with the opportunity to make significant gifts that would help fund the initiatives of the campaign far into the future.

## **3.2 Active Solicitation of Planned Gifts:**

Active solicitation of planned gifts could be a game-changer for the diocese. As mentioned above, a capital campaign is a natural way to begin soliciting planned gifts that will benefit the diocese for years to come. Private conversations with major donors will be part of the silent phase of the campaign. As the campaign moves to the public phase, it would be important to continue to educate the

diocesan community about planned gift options. We would partner with parishes to encourage those interested in discussing a planned gift for their parish and the diocese to meet with their planned giving professional. The professional would be able to advise the donor about the type of planned gift that best fits their current circumstances. This could greatly increase the number of planned gifts that our parishes and diocese receive going forward.

### **3.3 Continued Donor Stewardship:**

Once we have a planned giving program established, it is important to continue to steward these donors. People who have made a planned gift to an organization are more likely to give more to that organization moving forward through other fundraising campaigns. A newsletter, specifically designed to keep those that have made planned gifts informed about the ministries of the diocese, will remind them that they have invested well. Having some of these donors share their story of why they gave could also be an effective tool to keep them engaged. We can use these stories to help promote future planned gifts from other prospects.

### **4.1 Identifying Current and Potential Donors:**

One of the most important pieces regarding fundraising is to identify potential donors and donors already contributing who can increase their involvement in the organization. The Development Office will use data to increase participation. By examining past and current giving we can see trends that will help us identify those individuals who may be prospects to become more involved and involved in other ways such as planned giving. Getting to know our Catholic community and growing our network will help us identify potential donors who are not yet involved. We also conducted a wealth screening, as part of our capital campaign planning study that provided our office with a lot of useful information about the donor base and the potential capacity of many of our faithful who are already in the database. Building relationships with each of the groups listed above is paramount. They must trust our staff and have faith that we are competent and helpful.

### **4.2 Progression of Donor Involvement:**

To increase donor participation, we need to ask the right people the right question. We will ask past supporters of the Bishop's Annual Appeal to increase their giving through mailed solicitations. We are also asking supporters whose giving has decreased to join us at their previous giving level. Building trust is just as important to increase donor involvement as it is to obtain new donors. Identifying donor interests is also of great value. The planning study garnered important information as to which ministries are important to our major donors. As we begin to ask donors to become more involved in giving through capital endeavors, we can match their ask with the things they are passionate about. We also strive to continually touch our donors in "non-ask" ways by communicating without making a solicitation. Increasing digital communication is a tool that has been used to accomplish this

over the past year. Keeping donors informed about our work will help them remain engaged and moving up the Moves Management ladder.

### **5.1 Database Maintenance:**

Over the past year, our office has spent a lot of time, money, and effort to update and clean our database. This effort has paid off in a big way and we have added numerous households into our database, along with increasing the number of emails and phone numbers we have. The key now is to maintain that database with annual updates from parishes and continual revisions at the diocesan level. This will assist us with our annual fundraising and communications strategies.

### **5.2 Use of Data:**

Now that our database is cleaned up and expanded, it allows for broad-based ministry, marketing, and fundraising to take place. We now have the ability to reach a broad number of people to promote our mission of “Living and Proclaiming the Good News of Jesus Christ, Welcoming All!” With a robust database, sharing diocesan events with the general public is possible. This provides us with a communication platform that gives us a wider reach to quickly and effectively share information. Individual ministries can now reach more people and share the great things that are happening within the diocese. This sets up our fundraising efforts perfectly, as we can have several “non-ask” touches for each ask that we make. For others to be able to see all the great work that is going on around the diocese and connect that with our fundraising efforts is a win-win.

## **FINANCIAL IMPACTS**

- 1.1** The goals for the 2021 Bishop’s Annual Appeal for Ministries (including Priesthood Sunday) this year are to raise \$3 Million and have at least 7,825 donors. The expenses for the appeal are expected to be \$130,700. Most of the expense should occur between January and October. The funds generated will probably fluctuate month-to-month, with the highest collections in February, March, April, May, November and December. The rest of the months should be pretty level. As we continue to move more donors to recurring gifts, the monthly collections will hopefully become more stable.
- 1.2** The goal for the 2021 Seminarian Education Dinner and Auction is to raise about \$260,000. Most of the funds will be generated in May. Expenses for the event are typically around \$35,000. These expenses will occur primarily between January through June.
- 1.3** Some grant writing services would be included in our campaign contract with Steier Group. This work would help identify potential funders for our capital campaign priorities. The development office will continue to explore grant opportunities with Catholic Extension, who have proven to be very generous to our

diocese. We will also work with the Catholic Schools Office to help identify potential grants that would benefit our schools and any of their programs. There should be little to no additional cost for these grant opportunities. With additional support in the Development Office from additional hires, we should be able to put a little more time into grant writing.

- 2.1** The expense of the monthly campaign fee is approximately \$65,000-\$70,000 per month. This phase will continue throughout the fiscal year. These costs will be covered by a corporate donation.
- 2.2** The monthly expense of the campaign waves is the same as the campaign planning and major gift phase.
- 3.1** Much of our planned giving education efforts can be at little or no cost, by adding information to our website and pushing out electronic communications, and by setting up informational meetings at parishes. Educational efforts alone, should generate an increase in planned gifts received. The time it takes to see the fruit of these efforts could be years into the future. With an active capital campaign underway, we will likely see confirmation of some of these gifts as the solicitation process takes place. While we will not immediately realize these gifts, we will have a better idea of what impact planned gifts may play in the future.
- 3.2** It is estimated that over the next 25 years nearly \$6 trillion will transfer to charitable organizations through bequests. 90% of planned gifts are bequests. Focusing time and efforts on those interested in making a planned gift could have enormous future financial implications.
- 3.3** Moving forward with our planned giving program, stewarding this group would have a very minimal impact on budget.
- 4.1** There are very few additional financial costs with identifying our donors, but the possible benefits are endless. The capital campaign and our work with Prenger Solutions Group will allow us to continue to discover new donors.
- 4.2** The main cost with increasing donor involvement is time. The additional time spent on this is well worth the benefits that are possible through increased donor participation. Added staffing in the Development Office will allow more of this to happen.
- 5.1** Our database maintenance will be a continual process. Our ongoing annual cost for our Database Management and Entry services that will keep the data uniform and clean will be approximately \$60,000.
- 5.2** With the database features that we currently have in place and the resources at our disposal, there should not be any additional costs to putting newly captured data to use. There is potential to see increased donor engagement in a significant way, and in the future, this could also lead to financial savings in the way we fundraise.

## MEASUREMENT, TRACKING AND FOLLOW-UP

- 1.1 If the Bishop's Annual Appeal for Ministries raises \$3 million and has 7,825 donors, it will be viewed as a success. Donor feedback and metrics will be key in finding ways that we can continue to improve our processes to make it even more successful next year.
- 1.2 The Serra Club Dinner and Auction will be viewed as a success if the net raised is \$260,000 or more, and the group attending the event has a positive experience. This will be based on feedback we get regarding the event. It will be nice to hopefully have this event in-person again in May 2022.
- 1.3 Our grant program will be viewed as a success if we are able to find new funding partners for the priorities that will be highlighted in our capital campaign and for other diocesan initiatives. Continued support from Catholic Extension is also an important indicator of success.
- 2.1 To determine a successful campaign planning and major gift phase, we would like to raise approximately \$25,000,000.
- 2.2 A successful capital campaign would meet all the monetary goals (\$50,000,000) and would also excite our donor base and set the stage for the future.
- 3.1 Initial indications of the effectiveness of our planned giving education efforts would be an increase in planned giving prospects that are identified in our outreach efforts.
- 3.2 An indicator of success in our planned giving efforts would be the number of confirmations we receive about planned gifts that have been made.
- 3.3 Quality, timely communications to those who have made a planned gift to the diocese, along with an increase in their annual giving would be viewed as a success in stewarding this group.
- 4.1 An increase in first-time donors and reacquisition of past donors for the year would indicate success in this area.
- 4.2 Data showing that our average \$ per gift has increased from last year among our repeat donors will show us if we have achieved success in increasing donor involvement.
- 5.1 A decrease in donor calls and emails pointing out mistakes in their contact information after a fundraising mailing goes out would indicate success in this area.
- 5.2 Implementing a solid coordinated plan to share ministry updates, information about special events, and conduct fundraising pushes to the entire diocese as a whole within one database platform would show success in this area.

## SUMMARY MATRIX

	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN
<b>Core Strategy: Annual Operating Support</b>												
Bishop's Annual Appeal for Ministries				\$2,569,300								
Seminarian Education Dinner and Auction									\$225,000			
Grant-writing Program									\$0 - Part of Capital Campaign and Development Office Work			
<b>Core Strategy: Diocesan Capital and Endowment Projects</b>												
Continued Campaign Planning and Major Gift Phase					\$9,984,000							
Active Campaign Process and Parish Waves												
<b>Core Strategy: Planned Giving Program</b>												
Planned Giving Education												
Active Solicitation of Planned Gifts												
Continued Donor Stewardship												
<b>Core Strategy: Donor Moves Management</b>												
Identifying Current and Potential Donors												
Progression of Donor Involvement												
<b>Core Strategy: Database Management</b>												
Database Maintenance												
Use of Data												



## OFFICE OF VOCATIONS FR. AUSTIN GILSTRAP



### **MISSION / PURPOSE**

The mission of the Office of Vocations and Office of Deacon formation is to support and promote both current and future vocations to the Priesthood and Permanent Diaconate in the Diocese of Nashville. We endeavor to supply and support a dynamic and successful formation program through a partnership with each of the five seminaries that we are currently using.

### **SITUATIONAL ANALYSIS**

The ministry of the Office of Vocations is primarily charged with the day-to-day operation and support of each of the 14 men who are currently in formation for the Permanent diaconate and the 20 men who are currently in formation for the priesthood. Secondly, we are charged with efforts to promote and support future men answering God's call in both of these groups and the proper screening of future candidates.

### **Situational Analysis of Permanent Deacon Formation Program (PDFP)**

The COVID-19 pandemic certainly affected our ability to execute all of the initiatives that we had planned for this past year; however, we still were able to offer a robust formation experience, including virtual classroom modules and virtual formation for the men. Additionally, the restrictions and uncertainty surrounding the pandemic in April 2020 lead us to postpone the start of the second PDFP class from August 2020 to August 2021.

We are now five semesters into the new PDFP program, and we have been very pleased with the partnership that we have developed with St. Meinrad as the primary source of intellectual formation for our program. At the request of Bishop Spalding and through our partnership with St. Meinrad, we ask that our candidates earn a Masters of the Arts in Theology. We continue to make exceptions for this prerequisite if the candidate speaks a second language that is useful to ministry in the diocese. Of our 14 candidates, seven are

currently working toward the master's in theology, and the remaining 7 speak a foreign language.

We are continuing to utilize our formation committee for the PDFP. The formation committee is made up of five deacons and the Directors of Deacons and Deacon Formation (ex officio). The five deacons are serving for this class as "mentors" meet with the deacon candidates monthly to ensure their good discernment and to serve as a resource for the men during the formation process. In addition to the monthly meetings with their assigned candidates, the mentors meet together with the Directors of Deacons and Deacon Formation periodically and report on the progress of each of the candidates. Annually, with the Director of Deacon Formation, the mentors recommend the candidate to either continue or leave the program based on their discernment throughout the year.

We are looking forward to beginning a new class of deacon formation in the fall of this year. The applications are well underway, and we are anticipating a new class of 20 men.

### **1. Strengths - PDFP:**

- a. We are very pleased with our partnership with St. Meinrad, and we believe that they are able to provide an excellent intellectual formation for our deacon candidates.
- b. We are leveraging the expertise and talents of individuals within the Diocese of Nashville to provide a thorough practical formation in areas of human development, Pastoral praxis, spiritual theology, and intellectual rigor. Bishop Spalding has asked that we continue to grow this program beyond the current class of deacon candidates, and we intend to begin the next class in August of 2021.
- c. Current prerequisites of a bachelor's degree or fluency in a useful modern language will give us a better opportunity to parse through the candidates applying to the PDFP and find the men who are going to be most helpful to the diaconal ministry of the diocese.
- d. Over the course of the last 18 months, we have worked with MaLinda Oden and Paul Netter to remodel and furnish two dedicated classrooms and a new chapel for the deacon formation program. While we have not yet been able to use these spaces because of social distancing requirements, we believe that they will be well suited to the program's needs.

### **2. Weaknesses - PDFP:**

- a. As we continue to grow this program over the next fiscal year, we anticipate a great need to help our Spanish-speaking candidates navigate the PDFP. We are not able, at this time, to accommodate men who are not comfortable in the English language. In the future, we hope to continue to support these men through new initiatives with St. Meinrad to run a parallel program in the Spanish language.

- b. There is still a need to develop a program for the deacon candidate's wives. It has been expressed by several of the current members of the diaconate and their spouses that the formation received by the candidates can often create a certain spiritual disparity on the part of the wife of a candidate. The candidate receiving formation can, in a sense, "move beyond" his spouse rather than with his spouse through his formation.

### **3. Opportunities - PDFP:**

- a. Through our partnership with St. Meinrad, we have the opportunity to present the Curriculum Vitae of possible future professors we have identified through our own internal vetting process for the PDFP. This allows us to utilize local talented individuals in both our clergy and laypeople to provide for the formation of these men in the coming generations. Over the last three semesters, we have recruited two priests from our diocese and one layperson to help in this effort, and we hope to continue to recruit new faculty and resources in the years to come.
- b. Additional consideration into the opportunity of targeting specific Spanish-speaking individuals is necessary as we continue to develop and predict the needs of the future. Substantial growth in our Latino population requires that we continue to promote vocations to the diaconate amongst our Spanish-speaking communities in the coming years, and we are exploring possible avenues for this promotion.

### **4. Threats - PDFP:**

- a. At this time, there are no reasonable and discernable threats to the PDFP.

## **Situational Analysis of Office of Vocations to the Priesthood**

The office of Vocations is charged with the oversight of the men in formation for the priesthood. In our new structure, we have the goal of updating and creatively working toward a robust formation program with at least 30 men in seminary formation. Currently, we have 20 men in formation and expect to have 24 in formation next fiscal year. While the pandemic affected our work and the men in formation, the only significant change that occurred as a result was the fact that we were required to postpone some of our initiatives for another year.

### **1. Strengths - Office of Vocations:**

- a. Candidate Evaluation Process: One of our primary roles in the office of Vocations is the evaluation of candidates for the priesthood. The evaluation is ongoing and begins with the application process and continues throughout the time that a man is in the formation program. Through the thorough vetting that we are able to accomplish in the application process, we have been very pleased with the ease at

which we are able to evaluate potential candidates for the priesthood. Also, through the partnerships that we have developed with our seminaries, we have continued to hone the evaluation process to ensure that every man is receiving the resources he needs to make a good discernment and also to discern with the man the best path forward in his formation process.

- b. **Operational Structure:** The operational structure for the Office of Vocations continues to be built, and we have seen the positive effects of this newly built substratum over the past year. The coordinating efforts between the office and our men discerning and pursuing the vocation to the priesthood have helped to create and follow guidelines of policies, procedures, and communication that have proven quite effective. The office has benefited from the addition of the Assistant Director of Vocations being able to take on some of the day-to-day tasks of the Director of Vocations. While we still can improve in our communication and division of labor, the office itself is operating at a fairly high level.
- c. **Developing Content:** Discernment and promotion has always been a part of the Office of Vocations; however, in light of the ever-growing "tech" culture and ways in which young people are engaging the world, we believe that our best efforts to reach young men interested in discerning the priesthood is through interactive video and media on a professional, robust website and through social media. This has been especially true this past year with the rolling lockdowns and the continued drive toward online presence. We continue to work with KGV studios and our own "in-house" resources to develop engaging content for both our website and our social media presence.
  - i. **KGV Studios:** The Nashville-based production company KGV Studios has presented a number of proposals for the vast majority of the rest of the Content for our website. These include high-quality videos of our Priests speaking about their experience of the priesthood, its challenges as well as its great joys. Our seminarians are discussing their own path of discernment and giving advice to young men interested in following the call. Other videos will include parents and other members of our community speaking about their own experience with men discerning the priesthood. The overall project that KGV is contracted to do is to develop the Content of NashVocations.org so that it might be a resource for those potential candidates who would otherwise not have the opportunity to delve deeply into their own discernment. This had been slated to be completed last year; however, due to COVID difficulties, we were unable to complete these video projects and expect to finish them this year instead.
  - ii. **Social Media:** At the outset of the pandemic, it was clear that every industry had to pivot to a greater online presence, and social media was an engine that drove this presence. Due in large part to previous efforts, the office of vocations was able to make this pivot very quickly

and efficiently. In the previous fiscal year, we significantly expanded our social media presence and online Content to include podcasts, daily multi-platform posts, online bible studies lead by seminarians, and greater development of Content by the men rather than simply by members of the office.

- d. **Seminary Visits:** One of the most important roles that a Director of Vocations can play in the formation and discernment of candidates for the priesthood is the role of directly overseeing their discernment through visiting the seminaries and spending time with the men in the environment of their formation. Aside from meeting and directing the application process for new candidates, this is the primary role of the Director of Vocations. Due to the pandemic, this has been very difficult this year; however, during the greatest restrictions, we still made an effort to have virtual visits with the Seminarians and staff/faculty of the seminaries. Also, in this academic year, both the Asst. Director of Vocations and the Director of Vocations were able to travel to every seminary that allowed visitors.

## **2. Weaknesses - Office of Vocations:**

- a. **Promotion:** The perennial weakness in the Office of Vocations is continually reviewing efforts at Vocations promotion. This is something with which many offices around the country struggle, and it is certainly something that will need to be addressed in the coming years. It is important to remember that unlike the military or a corporation or sports team, promotion of Vocations is ultimately a work of the Holy Spirit and not a work of man. However, we are charged with being the cooperators of the Holy Spirit in this work, and therefore there are certain efforts that must be made in bettering our promotion of the integral vocation to the priesthood.
- b. **Parish Collaboration:** In order to continue to both support the promotion of vocations and the formation of the men in the formation process, we must strive for greater collaboration with all of the parishes throughout the diocese. We are proud of the strides that we have made in the last years. However, we know that there are still ways in which we need to grow in that parish collaboration inviting the priests, deacons, and laypeople of the diocese to join in the work of the Office of Vocations.

## **3. Opportunities - Office of Vocations:**

- a. **Latino Vocations:** One of the greatest identifiable needs for the Office of Vocations is the promotion of vocations among our Spanish-speaking young men. In trying to address this need, we have discovered a number of problems. First and foremost, we must be able to address the issues of a language barrier and immigration status. There is only so much that we can do under our current immigration laws; however, if it is possible to pursue a legal avenue for some of our young men who are currently "without papers," it is incumbent on us to try to afford them the opportunity to discern the call to the priesthood.

- b. Quo Vadis Days: Many young men find themselves hearing a call to the priesthood and are outside of some of the larger institutional support systems that are already provided by the Diocese (SEARCH, Father Ryan and JPII, Fraternus, Melchizedek Projects, etc.) In an effort to reach these young men on the so-called periphery of the diocese many other dioceses have instituted a sort of summer camp called "Quo Vadis days". These are a few days over the summer months that young men from ages 14-18 are invited through their parish priests, schools, or directly by a member of the faithful to consider going away and having a time of more intense formation and discernment with the staff of the Office of Vocations and local priests and seminarians. For most of these young men, this would be the first and best opportunity for them to encounter a seminarian and have the opportunity to speak with him about discernment.
- c. St. Andrew's Dinners/Dinners with the Bishop: Another initiative that has found a good deal of success in dioceses around the country are St. Andrew's dinners, or also some dioceses call them Dinners with the Bishop. Essentially these are dinners with a simple program where pastors of parishes in a specific deanery are asked to identify three to four young men between the ages of 16-25 from their communities and personally invite them to a dinner with the Bishop. On the appointed night, the pastor would then come with his men to a dinner hosted by Bishop Spalding where there would be prayer, a short testimonial or talk, a message from the Bishop about discernment, and an opportunity for the men to have a personal encounter with the Bishop himself.
- d. Master Server Program: If the average seminarian is asked, "Where did you first hear God's call for you to discern the priesthood?" inevitably, a great number of them will note that it was the times when they are serving mass at their local parish or school. There is something that God is able to do with a man's heart when he is serving at the altar that allows him to be open to the call of the Spirit. It is important that we afford as many men as possible this opportunity, and so in some dioceses, they have implemented a Master Server Program. This program is found on the parish level and, when properly implemented, can have lasting effects on the number of men who are interested in answering the call that God is placing on their hearts. The practice is fairly simple: in a given parish or school, the pastor/chaplain identifies a number of men who he believes have the proper virtue and temperament to be able to discern. After identifying these men, he invites them to participate in the Master Server Program, where they receive some specialized training in being Masters of Ceremonies at each of the weekend Masses of the parish. They also serve as the "Special Mass" servers for the High Holy Days of the liturgical year, such as the Easter Triduum, Christmas, Pentecost, and Patronal Feast Day of the Parish, etc. Men wish to belong to something greater than themselves, and this often comes about when someone they trust and respect personally invites them.
- e. Pastoral/Propaedeutic Year Housing: This year, we had the advantage of having several men who needed to spend the year in the diocese in order for us to get to know them and also to ensure that their discernment was going well. In

anticipation of the release of the Program of Priestly Formation 6th ed., we decided to use this time also to begin formulating a pastoral/propaedeutic year program for future classes of candidates. While this was largely very successful, it also revealed a need for a more permanent housing solution in the future. In essence, we will need housing for 5-10 men (individual bedrooms, bathroom facilities, chapel, kitchen, social/living room, meeting parlor) as well as at least one (preferably two) priest suite(s) (bedroom, sitting room/office and private bathroom) in the very near future. There are some spaces in the diocese that would be possible candidates. However, it would also be very helpful if this facility were close to the Catholic Pastoral Center as this is the center of activity and the location of all of the diocesan offices that would support the program. This is a current weakness in the program but would be elevated to a threat in the future if we do not plan strategically in the next 2-3 fiscal years.

#### **4. Threats - Office of Vocations:**

##### **a. Promotion/Outreach:**

- i. Priestly Vocations Culture: It is extremely important that we reach out to as many young men and give them an opportunity to ask the question, "is God calling me to the priesthood?" A single priest or even a Bishop will never be successful if they are the only person asking this question. We must have a "culture of Vocations promotion" where every priest, deacon, and a layperson is praying for Vocations to the priesthood and encouraging all young men to consider this great call. In order to foster this culture of vocations, it is very important to have good dynamic priests in our high schools, CYO, and in some of our larger parishes. It is also important that these priests feel empowered to promote Vocations throughout the diocese.
- ii. Fatherhood: In order for a young man to become a good father himself, whether biologically or spiritually through the priesthood, he must have a good example of fatherhood from his own father or from some other father figure. This is possibly the greatest threat to men discerning the priesthood in the future because of the sharp decline in intact familial structures and the prolonged adolescence of young men because of these broken families.

- b. COVID-19 – While we are very hopeful that the global pandemic is stabilizing, it is clear that the ramifications of COVID will be with us throughout the year. It is very important that we continue to try to mitigate the effects of the pandemic on both the seminary formation program and the PDFP.

## CORE STRATEGY ELEMENTS

- 1. Promotion:** One of the core requirements of both the Office of Vocations and the Office of Deacon Formation is the cultivation and promotion of future vocations to the Priesthood and Diaconate.
- 2. Application/Vetting/Evaluation:** At the most practical level, a good deal of our efforts are in the application and vetting processes for new candidates and the evaluation of existing candidates. The application and vetting process needs to be effective in identifying men who have the gifts and talents needed by the diocese while also the freedom in their state in life to respond generously to that need. After acceptance, we must be vigilant in regularly evaluating our candidates for the priesthood and diaconate to ensure that they both receive and take advantage of the formation process.
- 3. Formation:** Formation is the process of taking a man from being accepted as a candidate to ordination. No man coming to the Church seeking ordination is fit to be ordained right away. It is for this reason that the Church has guidelines on the formation of clerics. The office of Vocations is charged with overseeing and providing this formation for the seminarians and deacon candidates.

## KEY TACTICAL PROGRAMS

- 1. Website Development (NashVocations.org)**
  - a. Ongoing development of exciting fresh content
  - b. "Being a Priest" – Finalizing this project – Summer 2021– editing and roll-out at the end of the summer.
  - c. "Becoming a Priest – B-roll shooting (Fall 2021)
  - d. "Who We Are" – (Summer/Fall 2021)
- 2. Seminary Visits/Summer Assignment Visits**
  - a. Asst. Director will make a site visit to each of the Summer Assignments to evaluate the seminarian and lend support to the pastor in the Summer Formation program.
  - b. Director of Vocations or Asst. Director will make a seminary visit to each of the seminaries each semester to evaluate the seminarians studying there and lend support to the formation faculty in their respective formation programs.
- 3. PDFP Formation Program**

The Director, Assist. Director and Coordinator of Deacon Formation will continue to recruit and organize the logistics for the monthly Deacon formation program to continue to offer the best formation possible to our Deacon Candidates and their families.

#### **4. Deacon Candidate Spouse Formation**

In order to try to address this possible disparity between the candidate and his wife, we have entered into a discussion with the Office of Faith Formation to offer a program of spiritual formation for the candidates' wives. This is not going to be a requirement; however, we hope that it will prove helpful and supportive as they participate in the discernment with their husbands and families in the coming years.

#### **5. Annual Seminarian Retreat**

In order to be able to bring the men together for both spiritual growth and fraternity, we will have an annual retreat in August at a location still to be determined.

#### **6. St. Andrew's Dinners/Dinners with the Bishop:**

We would like to launch the St. Andrew's dinners in the 2021/2022 Academic year by deanery. This will require the groundwork both in organizing the dinners and scheduling them with the various pastors and the Bishop himself.

#### **7. Melchizedek Projects**

Currently, we have this Program at University Catholic and would like to continue to support it. We have a goal of starting new groups through the diocese. Plans are underway to start a Spanish-speaking group at Sagrado Corazon before the beginning of the summer.

#### **8. Fraternus/HAWC**

Currently, there are Fraternus Chapters at St. Edward, Church of the Nativity, Our Lady of the Lake, and St. Rose. In order to fully support the young men who will potentially discern in the future, we would like to plant a number of new chapters in the future to widen the scope of Fraternus throughout the diocese.

#### **9. School's Office implementation of Vocations Days and 5th/11th Grade Masses**

- a. Ongoing development of exciting fresh content
- b. "Being a Priest" – Finalizing this project – Summer 2021– editing and roll-out at the end of the summer.
- c. "Becoming a Priest – B-roll shooting (Fall 2021)
- d. "Who We Are" – (Summer/Fall 2021)

#### **10. Pastoral Year Program**

- a. The Pastoral Year Program creates the opportunity for an intensive formation experience within the diocese that is analogous and complementary to seminary formation.
- b. The program is organized and directed by the Associate Director of Vocations under the supervision of the Director of Vocations.

- c. The Pastoral Year Program is based on well-ordered community life that includes substantial elements of formation in each of the four dimensions: human formation, intellectual formation, spiritual formation, and pastoral formation.
  - i. Given the nature of the pastoral year, human formation and pastoral formation receive special emphasis.
  - ii. Emphasis will also be given to those aspects of formation that are particularly relevant for pastoral life in the Diocese of Nashville, e.g., Hispanic ministry, diocesan and parish governance, practical application of intellectual formation, intensive human formation.
  - iii. As much as possible, the Associate Director of Vocations would live with the men in order to be regularly engaged in their lives and formation, just as a formator in the seminary. The day-to-day contact is essential for developing the trusting relationships from which constructive guidance can be given.
  - iv. Community life includes common prayer twice a day, one shared meal per day, household chores, and communal recreation, among other activities.
- d. At the beginning of the year, under the guidance of the Associate Director of Vocations, each seminarian will create a personal formation plan for the year that includes relevant goals and objectives in each area of formation.
  - i. This document will be used at regular meetings (weekly to monthly, depending on the need) with the Associate Director of Vocations to evaluate and direct their growth and progress.
  - ii. The Director of Vocations will also meet once a semester with the seminarians to oversee their formation.
- e. For Pastoral Formation, every seminarian will receive hands-on formation through direct engagement with parish activities at Our Lady of the Lake.
  - i. Seminarians may be assigned to one of the Faith Formation offices at the parish (religious education, youth, adult, Hispanic ministry). They may also be assigned to assist with other parish responsibilities: accounting/finance, safe environment, sacramental records, parish registration, altar servers, etc. The assignment of each seminarian will be based on his needs and the opportunities available at the parish.
  - ii. Periodically, seminarians will also be assigned to assist with Diocesan pastoral activities: youth retreats, March for Life, serving Confirmations or other Diocesan liturgies, etc.
- f. Intellectual and Pastoral Formation: seminarians will also take a two-semester Spanish course. They will also be expected to use their Spanish to engage with the Hispanic ministry office at Our Lady of the Lake.

- g. The Office of Vocations will organize regular formation conferences for the seminarians that introduce them to key aspects of priestly life and ministry. Topics will cover all four dimensions of formation as listed above.
  - i. Given the nature of the pastoral year, these conferences will focus on aspects of formation that are particularly relevant for life in the Diocese of Nashville.
  - ii. These conferences are also intentionally organized to introduce the seminarians to many of the members of the Diocesan MSO as well as to a variety of priests in the diocese serving in different parishes and ministries.
  - iii. In large part due to these conferences, seminarians will "get to know" the Diocese of Nashville while receiving helpful direction in their formation.
- h. The Pastoral Year will also provide a healthy foundation for the spiritual life of each seminarian.
  - i. Seminarians will be required to meet regularly with a Spiritual Director approved by the Director of Vocations.
  - ii. The Office of Vocations will also organize an annual retreat for the seminarians.
- i. The Pastoral Year may also include other formational components as required by the individual needs of the men.
  - i. This could include things such as academic courses, language courses, psychological counseling, etc.
  - ii. All of these activities will be coordinated and overseen by the Associate Director of Vocations.

## **FINANCIAL IMPACTS**

1. 51-1 Vocations Office \$240,646
  - \$125,500 in salaries (52%)
  - \$50,258.00 in Travel, Meals, Lodging and Conferences (20%)
  - Remaining 28% represents benefits, program and office supplies, and general promotion
2. 51-0 Seminarians \$1,457,769 (based on 24 Seminarians)
  - \$126,984 in Seminarian Stipends (8%)
  - \$962,463.00 in Tuition, Room and Board (66%)
  - \$49,000.00 on Summer Programs(3%)
  - The remaining 23% represent benefits, professional services, books/periodical reimbursements, and travel, meals, lodging, and conferences.

3. 52-0 Permanent Deacon Formation \$220556.98
  - \$1000 in Professional Services (psychological examination)
  - \$115,438.98 in Tuition (52%) (includes 21 men in Masters Program)
  - \$70,780.00 in Travel, Meals, Lodging, and Conferences (32%)
  - \$27,518 in Chapel and Classroom Creation (not including stained glass) 12%
  - Remaining represents general expenditures.

## **MEASUREMENT, TRACKING, AND FOLLOW-UP**

### **1. NashVocations.org**

- a. Web Structuring
- b. Editing and design placement of created media
- c. SEO placement of KGV/Diocese of Nashville Office of Vocations Media in order to drive traffic in all web-based searches across multiple marketing platforms
- d. Optimize images and backlinks weekly to provide for a better user experience
- e. Track analytics of website monthly
- f. Evaluate user entry for website (mobile vs. desktop) and update design accordingly

### **2. The Application Process for PDFP**

- a. Coordinate with St. Meinrad and continue to process of setting up the new 2021 Deacon Class.

### **3. Seminary Visits**

- a. Logistics and Planning for one visit per semester to each seminary utilized by the Director or Assistant Director of Vocations
- b. Coordinate with each seminary calendar to ensure proper time and avoid conflicts.

### **4. PDFP Formation Program**

- a. Coordinate all of the formation presenters for the 2021/2022 academic year.
- b. Follow – up each month with presenters.

### **5. St. Andrew's Dinner**

With the launch of these Dinners, we will begin to build our database of contacts, both young men and their parents, which will allow us access for future vocations events and communications, such as Quo Vadis days.

## **6. Melchizedek Project**

- a. Follow – up quarterly with each of the priests running their projects and check to see if there are any needs that are not being met at that time.
- b. Offer help to any parish priest willing to begin a new Discernment Group in his parish.
- c. Track clicks through Nashvocations.org in the "Are You Ready" section to gauge interest in Discernment groups.

## **7. Fraternus/HAWC**

- a. Support the formation efforts of these programs through sacramental assistance at "Frat Nights" as well as the quarterly excursions and Ranch.
- b. Quarterly conversations with Fraternus leadership.

## **8. School's Office Vocation's Days**

Opening lines of communications in the schools and "getting on the same page" with pastors, principals, and teachers will afford us the opportunity not only to identify students showing interest in vocations but also contact information for parents. Opening these lines of communication would further cultivate the culture of vocations within our diocese.

## **9. Pastoral Year Program**

- a. The targeted goal of the Pastoral Year Program may vary significantly based on the reason that any given seminarian is taking a pastoral year.
- b. Generically, the goal is for the seminarian to reach a place of maturity in all aspects of formation sufficient for him to proceed to the next year of seminary or to discern that he is not prepared to continue in formation at this time.
  - i. Regular meetings with the Associate Director of Vocations and semesterly meetings with the Director of Vocations in light of the seminarian's personal formation plan, culminated by an annual evaluation, will be the means for assessing the man's preparedness to continue in seminary.
- c. Additionally, by attending the regular formation conferences and participating in the life of the Diocese, seminarians will have a more intimate knowledge of the Diocese of Nashville.
- d. After two semesters of Spanish courses, seminarians are expected to reach at least B-1 proficiency in Spanish. With a future Spanish immersion, all men should possess basic competency for Hispanic ministry in the diocese.



## NEW MEDIA EVANGELIZATION

### WILLIAM STALEY

---

#### MISSION / PURPOSE

Our efforts in New Media Evangelization are aimed to reignite the faith in Catholics and propose our faith to those who are unchurched. Everything we do is an amplification of our diocesan mission, *Living and Proclaiming the Good News of Jesus Christ, Welcoming All*.

#### SITUATIONAL ANALYSIS

Being a vast minority in the “buckle” of the bible belt, we aim to bring awareness of the Gospel, teachings and traditions in addition to promoting the beauty, truth, and goodness of the Catholic Church of Middle Tennessee.

**Strengths:** We have already taken off with some very successful endeavors which include the *Catholic Minute with Bishop Spalding* on Titans Radio and Predators Radio. We have launched a new magazine, *Catholic Awakenings* and have an extremely strong social media following, being in the top 45 dioceses/archdioceses in the country and third per capita. Nashville Catholic Radio has very strong support and we hope with new programming to take it to new levels with new partnerships.

**Weaknesses:** We do not have a comprehensive media strategy and resource allocation yet. Equipment does experience quite a bit of wear and tear, so there is always something that needs replaced.

**Opportunities:** We look to bolster Nashville Catholic Radio and offer more localized programming. There is no shortage of qualified individuals, and we have all the equipment we need to accomplish this.

**Threats:** Our biggest threat is not being nimble and humble enough to recognize where our faithful and those on the peripheries are consuming content and being part of that arena wherever that may be.

## CORE STRATEGY ELEMENTS

- 1. Airwaves and Streaming:** By leveraging Nashville Catholic Radio (NCR) and our streaming services/podcasts, we can make content interchangeable and reach more folks on whichever medium is their preference. We have a new podcasting studio and a mobile unit that can capture audio with guests at the CPC or anywhere in the world. We have worked with all users to create content that is within certain time caps so that it can be radio-ready and hit the airwaves on 100.5FM or at NashvilleCR.com. In addition, we take all of our recordings with the NFL and NHL radio networks and make them available on SoundCloud.com.
- 2. Leveraging Digital Media & Marketing to Reach the Faithful:** Pope Benedict XVI coined our new frontier of ministry as the “great digital continent.” And we must be missionaries in this new virtual space. People are spending more and more time in front of a screen and 66% of Americans now have a Facebook account according to September 2017 Pew Report on New Use Across Social Media Platforms.  

Authentic human social encounters are waning compared to past generations. In addition, stories of social media and the internet serving as avenues for conversion are on the rise. Platforms such as YouTube, Facebook, and Instagram provide gateways to dialogue, writings of the early church fathers, and powerful evangelists like Bishop Robert Barron. Using engagement strategies, partnering with others to create quality spiritual content, and building an audience suitable for the digital dissemination of the Good News is our newest and most exciting opportunity for ministry. We are striving to seek best practices and wish to pursue staff certifications from social media experts.
- 3. Print Media:** By creating a quality, quarterly magazine, we can tell the “good news” with good news going on in our diocese. Print isn’t dead and this piece will live on families’ coffee tables and be shared among friends around the diocese. Our goal is a tangible piece of art that uses beauty, truth, and goodness to share heartwarming activities and happenings of the faithful.
- 4. Videography:** If a picture is worth a thousand words, a video is worth a million. We have entered the phase of our diocese’s history where we will never not need videography services for our ministries and events. From CapScratch Videos to KGV, we are able to capture our story and share it widely. And we’re not producing junk—our videos are winning awards and reaching hundreds of thousands on social media.
- 5. Staying Knowledgeable and Continuing Innovation:** Gatherings for formation, dialogue, and strategic direction are what have sustained the church into the 1.3-billion-member entity that it is today. Our diocese is becoming a front-runner and model for other dioceses, and we need to keep that edge. This can be accomplished by cross training with other digital media professionals on location, attending conferences, and centering ourselves and our strategies through guided retreats.

## KEY TACTICAL PROGRAMS

- 1. Catholic Minute—going beyond our Catholic community:** By partnering with professional NHL and NFL teams here in Tennessee, we are reaching hundreds of thousands of people. I record and edit these in house with Bishop Spalding in our Saint Oscar Studio and transfer them to our partners at Cumulus who make them radio-ready. We then get the final cut and post it to our SoundCloud account and post the link to social media. From random Uber drivers to calls coming in from the public asking for a copy of the recording, we are reaching fans in a forum where they never expected to encounter Christ.
- 2. Leveraging Digital Media & Marketing to Reach the Faithful:** According to a 2012 USCCB report, 53% of Catholics are “unaware of any significant presence of the Catholic Church online.” Meaning there is ample opportunity to evangelize digitally. Through our Facebook, Twitter, and Instagram accounts (all free of charge!) we are able to connect with over 10,000 people in an instant. By continuing our contract with CapScratch Videos, we are reaching people and making them proud to be Catholic while encouraging them to join us in our diocesan mission. We are also able to support many other departments in video production. On Facebook alone, we have over 10,800 followers—over 55% of the Tennessee Register’s total circulation.
- 3. Nashville Catholic Radio:** Through means of NCR 100.5FM, SoundCloud.com, and Podbean (podcasting service to Apple, Spotify, etc.), we wish to engage the public more in areas where they would be delightfully surprised to hear messages of hope, inspiration, and encouragement from our Bishop, staff, and other faithful Catholics. Developing these partnerships and using these vehicles will allow the Good News of Jesus Christ to impact more people and develop a following throughout middle Tennessee.
- 4. Catholic Awakenings Magazine:** Our new quarterly magazine’s first issue is out and the second issue has been published. It was well-received and focuses on ways to prime our readership with upcoming opportunities for them to assist us in our mission. Catholic Awakenings tells the good news through the lens of our faith and offers a different perspective from the doom and gloom of traditional news outlets.

## FINANCIAL IMPACTS

### 1. Catholic Minute on Titans Radio:

Revenue: None

Expenses:

- \$37,000 estimated cost (have not received contract yet for Fall 2021 Season)
- \$0 Recording done by Bill Staley
- \$0 Editing done by Cumulus Radio

**Total:** (\$37,000)

### 2. Nashville Predators Radio:

Revenue: None

Expenses:

- \$32,000 estimated cost (have not received contract yet for 2022 Season)
- \$0 Recording done by Bill Staley
- \$0 Editing done by Predators Radio

**Total:** (\$32,000)

### 3. 94.5FM Hippie Radio:

Revenue: None

Expenses:

- \$12,000 estimated cost (have not received contract yet for FY 2021-22)
- \$0 Recording done by Bill Staley
- \$0 Editing done by Hippie Team

**Total:** (\$12,000)

### 4. Catholic Awakenings Magazine:

Revenue: None

Expenses:

- \$70,000 estimated cost (have not received contract yet for Fall 2021 Season)
- \$10,000 Copywriters, designers, support

**Total:** (\$80,000)

### 5. Video Production: CapScratch Videos:

Revenue: None

Expenses:

- \$35,000/yr. Filming & Editing

**Total:** (\$35,000)

## **6. Digital Formation, Marketing, & Social Media Engagement:**

Revenue: None

Expenses:

- \$20,000 Facebook Ads for various campaigns

**Total:** (\$20,000)

## **7. Staying Knowledgeable and Continuing Innovation:**

Revenue: None

Expenses:

- \$4,000 Professional Development/Conferences

**Total:** (\$4,000)

## **8. New Opportunities:**

Revenue: None

Expenses:

- \$18,000 Professional Development/Conferences

**Total:** (\$18,000)

## **MEASUREMENT, TRACKING, AND FOLLOW-UP**

**1. NCR:** Included in their Ministry Plan

### **2. Leveraging Digital Media & Marketing to Reach the Faithful:**

- Continued increase in view count
- Continued rise in followers for Diocese of Nashville
- Monitor Ad Campaigns through Facebook Business Manager
- Parish social media consultations/coaching event
- Goal: 11,000 followers on diocesan page by July 1
- Goal: 90 days of content constructed
- Goal: Branch out into new platforms

### **3. Videography:**

- Use production meetings to cover more topics/events/stories
- Figure out better scheduling of videography team's time between departments
- Goal: Wean people off of live-stream and encourage them to come in-person while still capturing event for future airings.

#### **4. Print Media:**

- Complete first year's cycle on target production timelines
- Incorporate Development's new donor database into mailing list
- Goal: Increase paper quality.

#### **5. Staying Knowledgeable and Continuing Innovation:**

- Follow up and unpack experiences
- Implement into strategic planning
- Awareness of key changes or innovations taken to parishes
- Goal: Social Media Certification
- Goal: Leadership Training for Ministry Team/CPC Staff.



## TRIBUNAL FR. JOHN HAMMOND AND ERIN STRACENER



### MISSION / PURPOSE

As required by law, the office of the tribunal, as an extension of the bishop's judicial ministry, is responsible for the administration of justice within the Diocese of Nashville. The tribunal serves as a means of delineating responsibilities and protecting the rights of the faithful.

In discharging its responsibilities, the tribunal offers particular guidance to the faithful of the Diocese of Nashville who seek to resolve their canonical status, often in order to restore or maintain their sacramental relationship with the Church, through a petition seeking a declaration of nullity regarding a failed marriage. The tribunal also serves as the appellate court for marriage cases that originate in the Diocese of Memphis, and provides additional legal and administrative services to various diocesan offices and entities, the diocesan parishes and clergy, and the Christian Faithful.

### SITUATIONAL ANALYSIS

The tribunal provides necessary and sensitive services to the Bishop of Nashville, to the diocesan clergy, and to lay faithful who seek our intervention to clarify and define their canonical status within the Church. The Tribunal office processes petitions for declarations of nullity, assists the local ordinaries of the Diocese in responding to requests for permissions and dispensations, and provides miscellaneous administrative support to diocesan offices and officials.

1. The **Strengths** of the tribunal begin with an outstanding staff who competently provide for the operational needs of the office with above-average competence and efficiency as compared to their peers in other tribunals. With the Diocese of Knoxville officially starting their own tribunal, this tribunal's efficiency and quality have continued to improve steadily. We have also significantly enhanced our training and outreach programs. An outstanding relationship is maintained with the other tribunals of the province, in particular with the relevant officials of the Dioceses of Knoxville and Memphis. The legal quality of the tribunal's output is high and is respected within the diocese and beyond it.

2. **Weaknesses** largely relate to the continued paucity of available canonical staff. The pool of available canon lawyers is extremely limited, and those we have are heavily engaged in other ministries. The key to success in upcoming years is continuing to prepare future canonists while activating non-canonist staff to the maximum extent possible, given the requirements of law and the abilities of those staff members. Another major weakness is the backlog related to an insufficient number of expert witnesses, who evaluate the case or the parties to the marriage. We are working to identify new expert witnesses to fill this gap and help further the efficiency of the process. Further, lack of sufficient staff and case sponsors who are proficient in Spanish is a weakness for our office.
3. A significant corps of **Opportunities** continues because of the start of operations of the proper tribunal in the Diocese of Knoxville. In light of our caseload based only on the Diocese of Nashville and appeal cases from the Diocese of Memphis, we believe our staffing to be quite stable and plan to continue ongoing training and experience-building for them. Our non-canonical staff have attempted to engage more intentionally and intensively with parishes, clergy, and case sponsors. Our next deliberate outreach to the parishes will be a formal case sponsor training, which will coincide with the release of our new documents, forms, and website. Finalizing and implementing these new forms will help set the tone for the ministry we wish to provide our parishes. We are also continuing to work closely with our two canonists-in-training to provide them with ample practical knowledge and experience.
4. The major **Threats** to our ongoing vitality pertain once again to staffing and administrative transitions and concerns. While we have had a modest decrease in the number of incoming cases due to the transition of the tribunal of the Diocese of Knoxville, we continue to process the Knoxville cases that remained in our Tribunal after July 1, 2020. We will continue to monitor the remaining elements of this transition. Serving as the Second Instance Court to the Diocese of Memphis, our number of appellate cases has doubled. Maintaining this increase in cases will require continued diligence and further attention to processing these cases well and in a timely manner.

#### CORE STRATEGY ELEMENTS

1. Continue development and training of new and future staff.
2. Continue to enhance canonical integrity of our processes.
3. Continued improvement of the quality of tribunal assistance to parishes and other entities.
4. Continued focus on cost effective stewardship of tribunal.

## KEY TACTICAL PROGRAMS

- 1. Continued Staff Development:** We hope to continue developing the capabilities and experience of our staff to take on additional roles and responsibilities. Our monthly staff meetings are coupled with continuing education opportunities. As soon as The Institute on Matrimonial Tribunal Practice: Summer Workshop is available, we will be sending Sandra Perez to this two-week training.
- 2. HORIZON - August 1, 2022 (Staffing):** On this date the Diocese anticipates the availability of two additional canonists within the diocesan presbyterate. Until that time, we will remain significantly understaffed in terms of available canon lawyers but will continue the development of non-canonist staff as robustly as possible.
- 3. Tribunal Staff Training/Education:** The tribunal staff is its key resource for successfully discharging its canonical responsibilities and implementing its strategies. Accordingly, the tribunal has renewed its efforts to provide opportunities for continuing education and professional development, such as holding monthly staff meetings to review difficult cases and explore strategies for resolving the difficulties; providing semi-annual staff training for the study of canon law and tribunal procedures; providing opportunities to participate in canon law conferences, attend lectures and canonical educational programs; and an annual spiritual retreat.
- 4. Clergy Training/Education:** The tribunal provides regular training to priests, deacons, seminarians, and deacon candidates to enhance their canonical knowledge and understanding of the laws and procedures for marriage cases and to provide direction for assisting the faithful when submitting a case to the tribunal.
- 5. Parish Assistance and Education:** The tribunal provides a case sponsor training program to certify laypersons at the request and recommendation of their individual pastors, to provide qualified persons ready to assist the faithful with preparing and submitting a marriage case to the tribunal.
- 6. Outreach:** Members of the tribunal staff will also continue to make themselves available proactively to speak in local parishes regarding the nullity process and to assist parishioners, RCIA candidates and catechumens with preparing a petition and submitting a marriage case to the tribunal.
- 7. Website Development:** We will be creating a more interactive and useful website, which will include online training videos and a portal for use by our priests, deacons, and case sponsors. This will allow for continuing education at the ease of the case sponsors, and it will also be cost effective.
- 8. Document Revision:** In order to increase our canonical integrity and to benefit those using the services of the Tribunal, we will finalize our new forms, documents, and decrees. Once complete, we will host a case sponsor training for our priests, deacons, and lay case sponsors to communicate these new changes and provided continued support to them, as they assist petitioners in preparing cases to be submitted to the Tribunal.

- 9. Spanish Language Focus:** We will be focusing on the needs of our Spanish speaking petitioners, respondents, and witnesses in several ways. One of our staff members, Heather Mendiola, will begin working on her degree in Spanish in May 2021. We will also be completing the translations of all documents and forms that are not already available in Spanish. Lastly, we will further engage case sponsors with Spanish language proficiency.

**MEASUREMENT, TRACKING AND FOLLOW-UP**

1. Processing time – Goal: 85% of all tribunal cases processed (decided) in less than 12 months.
2. Maintain a low cost per case -- Goal: \$2000 per case, which is a decrease from the previous year (\$2200). We expect the per-case number to go decrease further in coming years.
3. Finalize defined and written procedures in place for all cases, and revisions in place for all decrees, letters, and forms.
4. Create and release a new interactive website with a case sponsor portal, which will provide direct and immediate access to documents, forms, and training videos.
5. Offer petitioners (who receive affirmative decisions) the opportunity to contribute financially to the Tribunal to offset the cost of processing cases.

**SUMMARY MATRIX**

<b>CORE STRATEGIES</b>	<b>TACTICAL PROGRAMS</b>	<b>MEASURABLES &amp; FINANCIALS</b>
<b>Staff Development</b>	2022 Horizons Proactive Training of Staff	Engagement with CL Students Staff Meetings and other ongoing Continuing Education
<b>Canonical Integrity</b>	Finalize Major Review and Revision	Decrees, Letters, Forms Written Procedures
<b>Serving the Parishes</b>	Parish Assistance/Education New Website	Parish programs continued and enhanced Interactive Website with Documents, Forms, and Training Videos
<b>Effective Stewardship</b>	Continued Efficiency	Expenses are close to prior level Processing time: 85% <12 months