

MISSIONARY LEADER

Update

Archdiocese of Milwaukee
Office of Missionary Planning & Leadership

The *Update* is sent monthly via email. The Newsletter is designed to inspire, inform, engage, and empower leaders in the Archdiocese of Milwaukee so that they are equipped for mission-driven/data-informed planning and leadership.



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Planning and the Disciple Maker Index During a Pandemic

By Rich Harter, M.T.S.
Director of Missionary Planning and Leadership

Having participated in the three *Called For More* webinars designed to help leaders access, interpret, and apply their Disciple Maker Index data, I found a number of thoughts rising in my mind.

“Wow, this is a lot to take in?” “Can someone walk me through this more slowly?” “I’m still overwhelmed by the pandemic; how can I think of anything else?” “Is now really the time for planning?” “Do we really need another ‘team’ for planning and implementation?”

Maybe you had these or similar thoughts as you went through the trainings. Well, I have good news for you! My colleague, Laura Engel, and I are here to support you and answer your questions. We are committed to accompany you, however you need, both now and in the months ahead. Consultants come and go, but we are here to stay!

We can walk you and your leaders through all the webinar content at a pace and depth that works for you. For example, maybe the whole data interface looks like Greek to you and is simply overwhelming. You might be saying, “Where and how do I begin?”

We have an app for that! We can walk you through an introductory “what” and “why” of your information. We can help you with beginning steps or help you take a deeper dive. (**See Laura’s companion articles.**)

“Is now really the time for planning?” If you are overwhelmed by the pandemic and in a “survival mode” at the parish, you may not have the bandwidth to deal with any of this right now. That is fine! We will be here to work with you when you are ready. If you want to focus on planning right now due to the usual activities being cancelled, we are ready to work with you right now!

Here’s the last bit of good news! Planning with the Disciple Maker Index can be as simple or as in-depth as you desire it to be. If you want to get moving right now by working on just one thing without forming a new “planning team” and going through a long complex process, we can help you do that! If you want to take a deep dive and embark on systematic planning for mission, we can assist you with that as well!

So there’s lots of good news for you as leaders related to planning and the DMI! We are here to walk with you, answer your questions, and assist you in planning based on your needs and desires. Just contact Laura and me!

DMI Survey Results – Quick Start Guide

By Laura Engel, Associate Director, Missionary Planning and Leadership

Congratulations - you've decided to start analyzing your Disciple Maker Index survey results! And now you're asking, "How do I find meaningful answers and insights in these survey responses?" With a few simple steps, you can easily start reviewing some key data points and start conversations within your parish teams. And if that still seems intimidating, we can walk with you through the data and conversations!

Our hope for the *Called For More* survey project is to provide you and your parish a resource to help you better understand your parish's unique role and opportunities as a faith community. These survey results are a significant input in this process and in your parish planning, but they are not the only input.

The results can help you identify any barriers or opportunities in your outreach and understand your members' spiritual growth and engagement with your parish. If you have already started planning processes or have a strategic or pastoral plan, the DMI survey results can help validate your plans and goals or provide insight to make your current plans that much stronger.

QUICK START GUIDE TO DMI

Accessing Results

Your survey results can be accessed online using Tableau, a software tool that turns your data into a visual display. Follow these steps:

1. WEB ADDRESS: <https://sso.online.tableau.com/public/idp/SSO>
2. USERNAME: milwaukeeemi@gmail.com
3. PASSWORD: disciplemaker2020
4. Click on DMI Data Visualizations & Findings
5. Click on tab 2 – *High Level Dashboard*
6. Click the drop-down arrow under Parish and click on your 4-digit parish code

Who Responded

After choosing your parish code, you will see the Grand Total of responses from your parish on the Dashboard. Our hope is that the total is 8-10% of your parish Mass attendance. If your response rate is less than 8%, the data will still be helpful for discussion, but may not be as conclusive as if you had a higher response.

Before continuing to review your data, click on tab 10 - *All Survey Items* to explore the demographic overview of who responded. Clicking on the Survey Item drop-down list and scrolling to the bottom, you'll see multiple demographic categories starting with Age. Click on each of these to review the data and formulate a profile of those who answered the survey in your parish. Are the respondents reflective of your parish members? In addition to the response rate, consider this respondent profile when reviewing the data.

Here's a tip – hover your cursor over a bar in the chart to see the survey question, number of respondents to that question, and percent of respondents choosing that specific response.

With an understanding of how many and who responded to the DMI survey in your parish, you can begin to peruse the other data tables to explore some of their answers that reflect their attitudes and beliefs, and participation and relationship with your parish.

Let me know how I can help you analyze, interpret, and apply your Disciple Maker Index survey results. I look forward to hearing from you. You can reach me at engell@archmil.org.

DMI Survey Results – A Deeper Analysis

By Laura Engel, Associate Director
Missionary Planning and Leadership

If you have familiarized yourself with the overall results of the Disciple Maker Index survey at your parish and want to explore the data more deeply, a good place to start is to look at outcomes, promoters, and drivers.

Outcomes

Outcomes are specific, measurable statements that let you gauge progress and success towards your goals. After facilitating and tabulating more than 214,000 surveys, Catholic Leadership Institute (CLI) has identified three survey questions that are significant outcomes for parishes:

1. I would recommend my parish to a friend.
2. My parish helps me grow spiritually as a Catholic.
3. I shared my personal witness story with another person.

Your parish results to these questions are shown on tab 2 – *High-level Dashboard*, the same screen as the number of respondents. To compare your parish responses with the top parishes nationally, parishes of similar size and setting, and all parishes in our Archdiocese, go to tab 11 – *Base Dashboard* and select the various Survey Items from the drop-down list.

Promoters

Promoters are your most “loyal customers” and a term widely used as a standard concept in customer satisfaction surveys. Promoters influence other customers and are likely to recommend a company. In our DMI survey results, a promoter is one who responded “strongly agree” to a question and will positively influence another person’s behavior with wholehearted endorsement.

A Net Promoter Score is a management tool that gauges loyalty and the willingness of customers to recommend a company’s products or services, or in our case recommend their parish. Net promoter scores are calculated by subtracting those who responded “strongly disagree,” “disagree,” or “neither agree nor disagree” (called detractors) from those who responded “strongly agree.” I am happy to share that these calculations are done for you for each survey question and can be reviewed by going to tab 14 – *Net Promoter Score*. Technically, any score above zero can be considered a “good” score, since that implies that you have more promoters than detractors.

Continued on next page

Talk Back

What is your biggest concern or question about how to use the Disciple Maker Index in your parish?

Each month we will list a new **Talk Back** question and we hope to hear from you. Email your answer, however short or long, to: planningcouncils@archmil.org.

NOTE: If any answers are posted in a future issue, no source will be listed. All answers are anonymous.



Talk Back August Responses

Here is the response from last issue’s articles.

I’m concerned with the current needs of families involving schooling and caring/monitoring of children as parents need to return to work and children cannot go back to school as in the past, etc. I see that as a huge need in our parishes that may not fit into normal parish functions BUT fits into the REAL current needs of families.

We appreciate all comments!

Updated Reports Available

Two reports have been updated with 2019 figures. Check out:

-) [Parish Baptism Report](#) – 3-year report of parish baptisms, sorted by the number of baptisms, largest to smallest, for birth to six years.
-) [Parish Membership Report](#) – 15-year summary report of parish membership by deanery.

To access these and additional resources, go to [Missionary Strategic Planning web page](#) and click on the appropriate report.

DMI Survey Results – A Deeper Analysis - continued

Drivers

What parish qualities determine if our promoters would recommend their parish? What drives, or motivates, people to respond to those three outcome questions mentioned earlier with either strongly agree or high frequency? Survey research can identify relationships between those outcome questions and other survey questions where respondents answered “strongly agree.” Those other questions are considered “drivers.” If a parish focuses on these “drivers,” it is likely that more people will answer “strongly agree” to these top three outcome questions.

The drivers for growth (recommend parish and parish helps me grow) are a welcoming parish, the Sunday Mass and parish information is easy to find. Drivers for sharing my witness story are strongly agreeing that my parish equips me to have faith conversations (six questions) and believing scripture is the word of God.

If you are ready for a data challenge, go to tab *I2 – Cross Tab-Bar Chart*. Select one of the driver questions in the drop-down list for Question #1, and select one of the outcome questions in the drop-down list for Question #2. The result shows those who strongly agree to both the outcome *and* driver question – revealing how strongly your promoters feel about those “drivers!”

Reviewing these outcome and driver questions, as well as your parish net promoter scores is a great way to dive deeper into the analysis of your data. The fruit of your analysis will be the interpretation and application of the data that will develop during conversations you have within your parish teams.

Let me know how I can lend my support as you analyze, interpret, and apply your Disciple Maker Index survey results. I look forward to hearing from you. You can reach me at engell@archmil.org.

Update and Submit Your Council Appendices

Archbishop Jerome E. ListECKI approved the new Norms for the Finance Council and Pastoral Council on March 2, 2020. You can access them (in both English and Spanish) on the [Finance Council and Pastoral Council Norms web page](#). We suggest that you print a hard copy for your parish files.

Along with the updated Norms, we have updated the instructions and templates for the appendices that go with the Norms (available on the same web page). *Norms never change; the appendices have sections to update to fit your parish or multi-parish community.* The pandemic disrupted council meetings. However, as meetings resume, each parish Finance Council and Pastoral Council should review and complete the appropriate appendix.

NOTE: Multi-parish communities may have a combined Pastoral Council and, therefore, a combined Pastoral Council Appendix. Every parish must have its own Finance Council and Finance Council appendix.

WHEN OPENING THE DOCUMENTS

When some people click on the document it opens as you would expect. However, some have contacted us with problems.

If you get a message that *this file does not have an app associated with it for performing this action*, you can still access the form(s) with some additional steps, basically, because the computer doesn’t know how to open the file (even though it is a Word document). If you receive that message:

-) Go back to the downloaded form that appears at the bottom of your screen.
-) Right click on it and choose “*show in folder.*” This will bring up your “*Download*” folder.
-) Double-click on the document. That will bring up a box asking how to open the file.
-) Click on “*Word 2016*” and “*OK.*” That will open the file.

All parishes should submit the appendices no later than December 31, 2020 to Susan Skibba, Project & MissionInsite Coordinator. Contact her with any questions at either skibbas@archmil.org or 414-769-3355.

Office Services of Missionary Planning and Leadership

The Office of Missionary Planning and Leadership serves parishes in the following ways:

- Provide vision and training for centering a parish on mission
- Provide training to equip leaders for missionary leadership
- Provide coaching on organizational best practices and team-building
- Provide strategic missionary planning for parishes
- Walk parishes through the Building Commission proxy process
- Provide parishes with MissionInsite “Big Data” reports
- Walk with leaders through mergers, multi-parish configurations, and transitions
- Provide norms for parishes on Pastoral Councils, Finance Councils, and Parish Committees
- Provide manuals and training to Pastoral Councils, Finance Councils, and Trustees

The Office of Missionary Planning and Leadership serves the archdiocese in the following ways:

- Articulate and implement a parish and school plan for Post-2020
- Coordinate the Archdiocesan Pastoral Council

Missionary Planning and Leadership Contact Information

For questions or to request services, please contact:

Director of Missionary Planning and Leadership
Rich Harter, harterr@archmil.org, 414-758-2215

Associate Director of Missionary Planning & Leadership
Laura Engel, engell@archmil.org, 414-769-3354

Project and MissionInsite Coordinator
Susan Skibba, skibbas@archmil.org, 414-769-3355

Know that you can always come to us

Contact Susan Skibba at skibbas@archmil.org if you know someone who would be interested in receiving the *Missionary Leader Update*.

The Catholic Comeback

The times they are a-changing. To keep on top of all of the information periodically check out the [Catholic Comeback web page](#) for its many useful resources, including:

-) [Updates for Parishes](#)
-) [Updates for Schools](#).

MissionInsite Musings Council Meetings & QuickInsite

After the closures due to the pandemic, Parish Council meetings should be restarting again. Now is a perfect time to get to know your parish better.

Discussing the QuickInsite Predefined Report and the QuickInsite Worksheet is another tool in your arsenal of resources when planning and strategizing.

Continued on next page

MissionInsite Musings Council Meetings & QuickInsite - *continued*

Why is this an important tool?

Using the two pieces leads you on a road to discovery about your parish and the surrounding neighborhood. For example, one parish discovered that more than half of the neighborhood was Hispanic. The Whites (Anglos) only comprised 35% of the neighborhood. To be a vital part of the neighborhood, this parish needs to include the Hispanic population in its missionary outreach. It could be Spanish Masses or bilingual religious education classes or more. What are the age groups of your neighborhood? How do family households with children break down? Are there more married couples or single mothers or fathers? This and more can be determined by using the worksheet and report together.

Share copies of the QuickInsite Worksheet and QuickInsite Predefined Report with your Council members. It's easy.

- J Once logged into MissionInsite, go directly to the maps page.
- J On the Navigation (bottom) bar, click on "Help." On the Control Center (right bar) under *System and Reports* click on *QuickInsite Worksheet*. Print sufficient copies of this 4-page document for your meeting
- J Next, run the *QuickInsite report* for your parish or school area. You can do this from either the maps page (click on "Demographics" on the Navigation Bar and then go to Predefined reports) or from the front page, with cubes (click on "Generate Demographics Report").
- J If you need more help, go to our [MissionInsite web page](#) and scroll to the bottom for step-by-step instructions.

At your meeting, distribute the Worksheet first and follow the steps. (Although the worksheet lists three steps, I see step two as broken into three parts.)

- J **Step 1** – Everyone completes the first two pages of the worksheet, answering the questions to the best of their ability.
- J **Step 2 Part 1** – Split into small groups of no more than five and create a group perception based on the themes in the first two pages.
- J **Step 2 Part 2** – Return to the large group and share the perception reports.
- J **Step 2 Part 3** – Return to the small groups and distribute the QuickInsite Report. Using the Perception Report and the QuickInsite Report, spend 10 minutes reflecting on the two discussion questions listed on page 3 of the Worksheet.
- J **Step 3** – Still in the small groups, answer the questions under Step 3, which is "Determine Your Mission Opportunity." You will want to share the small group responses with the full group.

You now have discussion points on how you can best serve your area – are there missed opportunities, are there areas that can be expanded, what are the greatest needs in the area, etc.

Use this as it works best for your parish. This may be a separate meeting dealing only with QuickInsite, or maybe you want to split the steps into different meetings. It's up to you. The important thing is that you can use MissionInsite to give you a better grasp of your parish community.

As always, if you have any questions or would like to see a MissionInsite topic covered, contact Susan Skibba, Project & MissionInsite Coordinator, at either 414-769-3355 or skibbas@archmil.org.