



**ST. JOSEPH’S CATHOLIC CHURCH**  
**PARISH STRATEGIC PLAN 2007—2025**

**PART A – STRATEGIC PLANNING**

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## PREFACE

BY FR. JOSEPH ILLO, PASTOR

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Our parish of St. Joseph, a beautiful gift of God to all people living in East Modesto, has flourished in response to the population growth of its region. It has been granted to me not only to enter the Third Millennium with this parish family, but also to grow with our “family of families” into the New Millennium. St. Joseph’s has continued developing into a thriving parish community with a pronounced diversity of cultures. We have all rejoiced in the many large, young families who have become an integral part of the parish fabric, complementing the middle-age and senior pillars of the community.

No growth comes without cost, and parish leadership has struggled to meet the needs of the people by developing an infrastructure of services, planning, staffing, and facilities. Through all this development, we try to be faithful to our Parish Mission Statement of *evangelization through the Holy Eucharist*, and the Universal Church’s threefold mission of teaching God’s word, conferring Christ’s sacraments, and serving the poor with heartfelt charity. We, who are Christ’s co-workers, approach this joyful mission as stewards, adopting more each day a spirituality of stewardship, truly a way of life. Convicted that everything we have has been given by God, our greatest joy is to give it back to Him, *with interest!*

The 20-year strategic plan that follows this preface is our response to God’s gracious blessings, a “stewardship plan” to accomplish his saving mission. It is the fruit of 18 months of consultations with every constituency of our large parish: all-day sessions with the Parish Pastoral Council and Finance Council, focus groups, parish wide “Towne Hall” meetings, all-day staff meetings, two comprehensive surveys, and finally deep integration with the Diocesan Synod Decrees of 2006. This plethora of data was consolidated into a strategic pastoral plan by our consultant Tracy Andrus and our staff over many hours of hard work.

I wish to make three conclusions to preface the executive summary and detailed reports that follow. First, evangelization is the essential purpose of St. Joseph’s: to bring everyone and anyone to a free and wholehearted submission to the loving person of Christ. We do this in three ways: word, sacrament, and charity, as Pope Benedict so clearly describes in his encyclical *Deus Caritas Est* (number 22). Every use of time or money must contribute to evangelization in one of these three ways. Second, our approach to the fiscal management is marked by stewardship, that is, not banking more money than necessary to accomplish the task of evangelization. We trust that God will provide, as He always has! And third, the leadership and I have decided, based on this analysis, that we must engage growth rather than shrink from it. That is, we plan to enlarge our parking and seating capacities, even as we have already enlarged our hall and meeting spaces. I am personally convinced that God would have us build a new church, simply because the parish has never built a sacred building but rather converted the first social hall into the present church. Not only do we need a larger church, but we need to build a properly inspired and dedicated “House of God.” The community itself must decide, ultimately with our checkbooks, if and how my recommendation is to be accepted.

I wish to thank all who have labored these many months on this strategic plan: especially our dedicated staff, our Parish Pastoral and Finance Councils, our key volunteers, and the hundreds who attended open meetings. We trust in the mercy of God, the intercession of Blessed Mary, St. Joseph, and all the saints, and the charity of the brethren, to make this plan fruitful.

## **I. EXECUTIVE SUMMARY**

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St. Joseph's Catholic Church has experienced significant growth over the past five years, placing stress on infrastructure, services, and personnel. As a result, the pastor, Fr. Joseph Illo and the Parish Council commissioned development of a strategic plan that would look at the next 25 years to gauge future growth rates and provide guidance for dealing proactively with the needs of an expanding parishioner family.

Any expansion of facilities to address crowding will require a minimum 3-year window in which to address alternatives with parishioners, develop a comprehensive site plan in accordance with parishioner input, conduct a capital campaign, and complete construction of approved facilities and site improvements. This strategic plan is the first step in such a process, developing long-term goals and accompanying initiatives in accordance with the church's mission and parishioner-voiced needs, assessing the parish's membership and Mass attendance outlook and the impact of each on existing infrastructure, and appraising the financial base available to support current operations as well as desired enhancements.

The following plan reaches four specific conclusions. 1) Demographic analyses indicate that by the year 2010, St. Joseph's parish will have reached a crisis point in overcrowding. Even should the parish be able to maintain its current eight weekend Masses, the parish must provide more parking and seating within three years. 2) National trends indicate diminishing numbers of priests, and St. Joseph's may well lose one of its three priests in the next five years. One third less priests means one third less Masses, requiring more seating and parking for remaining Masses. 3) While annual income has grown steadily, annual expenses have grown slightly faster. To finance the building projects indicated above, the parish will have to limit further expenses and increase annual revenues. 4) Finally, while St. Joseph's counts about 15,000 registered members, only 28% of them attend Sunday Mass regularly. This "inactive" 72% represents a tremendous membership potential. To realize needed development, the parish must engage these peripheral members to a greater degree.

### **Parish Mission, Vision, and Priorities**

To provide the foundation for its long-range plan, the leadership of St. Joseph's developed a mission statement, vision statement, and nine parish priorities supported by corresponding goals, directing principles, and strategic initiatives. St. Joseph's parish priorities incorporate the ten decrees of the 2000-2006 Diocesan Synod and reflect distinct priorities to meet specific needs of St. Joseph's community. Please refer to Appendix H for a partial list of our parish response to the Synod Decrees. This 18-month process incorporated the efforts and input of clergy, lay leadership, staff, volunteers, and parishioners at large. Parishioner participation came through a series of October 2006 focus groups followed by a comprehensive online survey in November and a Towne Hall meeting on December 5. The final mission statement, vision, and strategic pastoral goals – reflecting refinements made from feedback received throughout that process – were then presented to and approved by the Parish Council on December 12, 2006. The following statements of purpose, vision, and intentions will thus direct the efforts of St. Joseph's as it strives to meet its call from Christ and the needs of its parish family.

#### ***Mission***

*To Evangelize God's People beginning with the Gift of the Holy Eucharist.*

## Vision

*We believe God's will for His Church is clearly given to us in Scripture and the documents of the Second Vatican Council. Called to communion with God, St. Joseph's desires to be a family of families who serve God through beautiful and reverent worship: a sacred haven where people know they are welcomed and loved by Jesus. We strive to be a responsive parish through effective and transparent management of resources.*

*In this way, we hope to become disciples who, in our daily lives, represent Christ to our neighbors through word and deed.*

<b>Parish Priorities</b>	
<b>Worship</b>	<i>We will glorify God in our Sunday worship, sacramental life, and personal prayer.</i>
<b>Education</b>	<i>We will continually develop our knowledge of Sacred Scripture and Church doctrine, seeking a deeper relationship with God.</i>
<b>Charity</b>	<i>We will serve others with Christian love, especially the neediest.</i>
<b>Family</b>	<i>We will strengthen family life (at home and parish) by practicing our Catholic faith in daily life.</i>
<b>Communication</b>	<i>We will deliver a consistent message about the parish mission, activities, and leadership opportunities.</i>
<b>Stewardship</b>	<i>We will increase understanding of Catholic Stewardship among our parishioners.</i>
<b>Leadership</b>	<i>We will recruit, train, and support strong parish leadership.</i>
<b>Planning</b>	<i>We will determine and present ongoing initiatives and objectives consistent with the parish mission and vision.</i>
<b>Administration</b>	<i>We will provide quality management and reporting of parish financial, human, and operational resources.</i>

## Growth

All indications are that St. Joseph's will continue to experience significant growth. Modesto city planners estimate that 75% of city growth over the next 25 years will come from east and northeast developments located within a 3-mile radius of St. Joseph's, either inside its boundaries or in closer proximity to it than to any other existing parish. In addition, 7% average annual growth in Mass attendance over the past five years shows no signs of slowing, potentially resulting in parishioner attendance consistently exceeding church capacity at 6 of the 8 weekend Masses by 2010.

Several environmental trends could potentially impact St. Joseph's projected growth, on both mitigating and augmenting bases. First, the new Holy Family Church under development in Northwestern Modesto could alleviate – to some degree – projected growth by siphoning a portion of the 12% of existing parishioners (approx. 545 families) who reside within Holy Family's newly created boundaries. Future growth projections, however, do not include any expansion of membership from within Holy Family's boundaries. Currently, three Masses are held each weekend in temporary locations while planning continues on \$2 million in site development work. No date for groundbreaking of the church or associated facilities has been projected.

Second, the Diocese of Stockton currently owns land in Northeastern Modesto and has indicated an interest in establishing a mission church within that area. Should such a mission be developed, it

could have a significant impact on St. Joseph's since it lies within one of the high-growth areas projected to contribute as much as 40% of parishioner growth over the next 15 years. However, the Diocese is unlikely to move quickly on such a project since the newly created Holy Family parish has yet to initiate its site development work or fundraising for its permanent structures. In addition, historical development timetables indicate movement from discussion of establishing a mission to actual construction of a full-service church would take a minimum of 10 years, placing any easing impact well beyond the needs of St. Joseph's more imminent problem.

A final and significant trend that must be considered is that of the continued decline in availability of priests, especially American-born priests. St. Joseph's pastor, Fr. Illo, and his two foreign-born associate pastors have reached a site-limited eight weekend Masses averaging approximately 525 attendees per Mass. Eight weekend Masses allows only a few minutes between Masses to clear the parking lot for the next service, exacerbating an already crowded facility. Should the shortage of priests result in an expected reduction of one of the associate pastor positions, St. Joseph's would be forced to reduce its weekend Masses to six, placing projected attendance at all weekend Masses an average 20% above capacity.

## Facility Needs

St. Joseph's undertook a comprehensive study of parishioner attitudes toward its existing facilities and overcrowding issues in July and August, 2006. Surveys were distributed at three consecutive Sunday Masses as well as being mailed directly to all registered parishioner homes. Over 17% of parish households participated, eliciting 1,000 separate responses. (*See Exhibit E in the Appendix for details.*)

Parishioners were asked to rate the general condition of existing parish buildings and parking. Parking ranked as the existing site amenity in greatest need of improvement with 44% of respondents rating it Poor or Very Poor. As would be expected, the Parish Hall – one of the newest buildings on campus – fared best with 93% of respondents rating it as Good or Very Good. Meeting rooms and classrooms scored in the midrange, seen as just Adequate by nearly a third of respondents. The church itself received high marks with 76% rating its condition Good or Very Good.

However, the issue of capacity within the church ranked as the parish's second greatest need by 59% of respondents, right behind parking which was ranked as the No. 1 need by 72%. An updated analysis of church seating determined the effective total seating capacity of the Naeve (main church) to be 590 with an incremental 60 seats available for overflow in the Cry Room and Chapel. For purposes of the analysis, effective capacity was defined as the total number of 18" pew seats offering kneeler space and visibility of the Altar from the adjacent Chapel and Cry Room.

Prior to the survey, a Towne Hall meeting was held on June 6, 2006, to discuss church facility needs with parishioners. As a result of the input from that gathering, parish architects Hyndman & Hyndman were asked to develop the four scenarios listed below – one that would leave existing structures as they are while addressing mitigation of parking issues (status quo) and three that would address church seating, parking, and other facility/campus issues along the lines of the various visions espoused at the Towne Hall. All scenarios, except for the status quo, were to allow for the potential of phased construction of needed modifications over time and eliminate the previous single-focus projects that frequently resulted in inefficient use of total campus space.

- **Status Quo – 590 seating**
  - Improve and increase parking
  - Make some improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits
- **Remodel – 1,000 seating**
  - Remodel existing church to expand effective seating to 1,000
  - Improve and increase parking
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits
- **New Church on Site of Existing Structure – Seating to be determined**
  - Construct a new church on the site of the existing church
  - Improve and increase parking
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits
- **New Church and Remodel of Existing Structure – Seating to be determined**
  - Construct a new church, preserving existing church for alternate use
  - Modify surrounding campus to allow for more parking – remove existing office building
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits

As part of the July/August survey, parishioners were asked their favored approach to addressing church overcrowding – renovation of the existing church versus new construction. Originally, respondents were essentially split with 40% favoring new construction and 38% favoring renovation. However, when told that architects estimated renovation would save a maximum of 25% over new construction but would also limit the parish’s ability to address design issues like seating, Altar visibility, and overall sound quality, respondents favored new construction by a margin of 47% to 27%.

All four scenarios, along with parishioner survey responses, were shared with parish members at a second Towne Hall meeting on September 19, 2006.

## **Capital Campaign**

Should the parish collectively determine renovation or new construction to be an appropriate avenue for dealing with its growing membership, the Parish Council will select a final site plan based on parishioner input and planning will commence for a capital campaign to fund the parishioners’ chosen vision. Such a campaign would be targeted to begin within six months of a decision to build.

As part of the summer 2006 survey, parishioners were asked if they would support a capital campaign to address church overcrowding. Half (49%) said Yes, 18% said No, and nearly one-third were Unsure. Two-thirds of those unsure said it was important to know how the new money would be spent and over half wanted a commitment to oversight that would guarantee the money would be spent as proposed. Additional comments focused on the desire for more information with regard to how previous campaign money was spent, finding out whether a mission or other new parish would alleviate crowding, and addressing perceived inequities in giving stemming from low parishioner participation in the previous campaign.

Should a capital campaign be pursued, research clearly indicates the need for significant communication and education components to both increase the campaign's potential for success and allay the fears of prospective contributors that future expansion costs will be borne by the few while enjoyed by the many. One other finding of note, neither supporters of the previous capital campaign nor persons currently serving in parish ministries or programs were disproportionately inclined to support a new campaign.

Survey respondents were asked to indicate the level of financial commitment they would be willing to make to a 3-year capital campaign in an effort to get a preliminary feeling for the parish's parishioner-based fundraising capacity, excluding major capital gifts. Survey responses suggested support in the range of \$3.0 million to \$4.7 million depending on several assumptions detailed in the Capital Campaign section of this report (*see Fundraising Potential on page 30*).

***It is important to note*** that the level of giving a parishioner might indicate in a survey is not necessarily a commitment to give at that level nor is it a reliable determinant of total parishioner donations. Such a projection must come from a comprehensive survey and interview process followed by a sophisticated analysis conducted by a reputable Catholic fundraising firm with enough historic experience to translate parishioner survey data into a dependable giving forecast. Should renovation or new construction be determined as St. Joseph's appropriate future path, selection of such a campaign consultant and timeline and initiation of such an investigative process should be undertaken to more accurately assess total fundraising potential.

## Financials

An analysis of St. Joseph's financial performance over the past four years was conducted to project future net operating funds available to address growth related issues confronting the parish, including: (1) expansion of services to a growing parishioner base and the personnel to deliver those services, (2) growth in charitable giving, (3) growth in reserves to address heightened operating costs resulting from possible campus facility expansion, and (4) growth in reserves to allow for debt service that might arise from possible financing of any future facility improvements or expansions.

From fiscal years FY2002-03 to FY2005-06, growth in Ordinary Expense (OE) outstripped that of Ordinary Income (OI) by almost a full percentage point (8.9% vs. 8.1%), resulting in compounded average net income (NI) declines of 31.7% per year, from \$183,512 in FY2002-03 to \$58,531 in FY2005-06. Operating Income grew steadily from year to year as parish membership and Mass attendance increased. However, average income per registered family barely held steady when adjusted for an estimated 3-4% annual rate of inflation. Expense drivers over the past four years have come largely from two categories, growth in staff (from 23 in FY2002-03 to 33 in FY2005-06) and growth in the annual parish tithe (from \$28k in FY2002-03 to \$92k in FY2005-06).

St. Joseph's has 33 approved employee positions at an estimated personnel expense of \$880k for FY2005-06. Over the past three years, salary and benefit costs have increased at a compounded average growth rate of 9.1%, outpacing Ordinary Income growth and increasing personnel expense as a percent of Ordinary Income from 57.9% in FY2002-03 to 59.4% in FY2005-06. In FY2005-06, growth in personnel expense outstripped that of Ordinary Income by two and a half percentage points (10.6% vs. 8.1%).

To meet the continued challenges of its rapidly growing parishioner base, St. Joseph's must continually assess its staffing to most efficiently meet the administrative, educational, and

operational needs. However, additional workforce expansion – absent a significant increase in income or decline in other expenses – would continue the march of personnel expenses well above its current high of almost 60% of Ordinary Income. Should personnel expense as a percent of Ordinary Income be capped at its current level, incremental dollars to fund those desired positions may not be available for three years while income growth catches up with personnel additions made over the past two years.

It is a parish goal to grow the Parish Tithe (direct parish charitable giving) as a percent of the prior year's Sunday offertory by one-half percentage point per year until it reaches 10.0% for FY2010-11. Beginning at \$28k in FY2002-03, the Parish Tithe grew an average 49% and \$22k each year to \$92k (7% of Ordinary Income) in FY2005-06. Continuing forward, the Parish Tithe will increase expenses an average 15% and \$18k through FY2010-11 when it reaches its goal of 10%, accounting for a collective increase in expenses of \$237k over the next five years.

For St. Joseph's to build net income to a level sufficient to fund the increased operating expense of a significantly larger campus, it must decrease the growth rate of its expenses while maintaining income growth. For example, should the parish continue its one-half percentage point annual increase in the annual Parish Tithe, the differential between income and expense growth on all other items must be at least one percentage point. Even at that, estimated net income by FY2010-11 would just top \$200k, enough to pay for the increased operating costs of a larger facility but not sufficient to cover debt service on any potential facility loans. For that, assuming annual debt service of \$311k on a hypothetical \$3 million 20-year loan at today's 8.25% prime rate, net income would need to approach \$400k, an unlikely scenario without significant modifications in growth of all expense categories, including operating expenses, the annual Parish Tithe, and annual capital expenditures. (*For a more detailed look at various net income scenarios, see Exhibit 41 on page 36*).

## II. ENVIRONMENTAL TRENDS

### Social

***St. Joseph's demographics will be largely impacted over the next 20 years by two disparate factors: aging housing stock within its central core and significant new growth and development along its northeast and easterly boundaries.***

City of Modesto planners predict that 75% of city growth over the next 20 years will come from developments along the city's northeast and eastern boundaries, resulting in over 65,000 new residents within 3 miles of St. Joseph's church. This influx of new and relatively affluent residents may be offset, however, by a significant percentage of existing housing stock to the church's west that will near or exceed 50 years of age.

***Recent growth in St. Joseph's Hispanic population is expected to taper off near its present 25-28% ethnicity mix and remain slightly under Modesto's 32% rate.***

Despite the rapid growth of St. Joseph's Hispanic population over the past five years, from less than 5% of total parishioners in 2001 to an estimated 25–28% in 2006, parish leadership expects its Hispanic concentration to level off and the need for additional Spanish Masses beyond its current single Mass to expand to no more than two – if at all – for several reasons:



- City of Modesto population concentration maps show the greatest Hispanic influence inside St. Stanislaus and St. Jude parish boundaries, south of Yosemite Boulevard and west of Highway 99 (St. Stanislaus) as well as South of the Tuolumne River (St. Jude).
- Both St. Stanislaus and St. Jude have responded to their significant Hispanic populations by offering five Sunday Masses in Spanish.
- The new parish under development in neighboring northwestern Modesto will be headed by Fr. Ramon Bejarano, a highly charismatic Hispanic priest.
- Ethnicity reports from Modesto's Sylvan Union School District (largely within St. Joseph's boundaries) show 28% of area children enrolled in elementary and middle schools are Hispanic.
- The majority of St. Joseph's growth over the next 20 years will come from development planned in Modesto's higher socioeconomic east and northeast areas which tend to have lower Hispanic concentrations.
- Many of the Hispanics moving to Modesto's newer developments are English speaking.
- 

## Family

### **Unfettered growth in apostolates and services will significantly stress limited parish staff resources.**

Each new apostolate or service implemented by the parish requires incremental clergy and/or staff time and stresses already limited resources. If each of the existing 90 apostolates and services requests just one hour per month of staff time and one hour per quarter of clergy time, total man hours would exceed 6 months of staff time and two months of clergy time.

***Convalidating Non-Sacramental Marriage:*** The return of inactive Catholics to parish life has brought an increased need for specialized services like annulment. Approximately 150 cases a year now require an average four hours each from one of the parish's eight tribunal aides and another two hours each from a parish priest for a total annual program time of 600 lay hours (75 per aide) and 300 clergy hours (100 per parish priest). Should the parish's annual growth rate of 6% continue for the foreseeable future, and should the need for such services remain steady, required parish time could exceed 1,100 hours per year by 2010 (95 per aide and 126 per priest).

### **Future programs and services must recognize the life-simplification needs of today's families.**

More than 60% of women now work outside the home, and 70% of those who work do so year round. Add increasing commute times for working urban parents and the tremendous growth in activities for youth, and the time pressures felt by today's families have never been greater. Service companies led the way in recognizing people's increasing need for speed, convenience, and simplicity. Wells Fargo Bank reports that more than 50% of all transactions are now carried out through online banking; debit cards have all but replaced checks; and, ATM machines available 24/7 have resulted in a significant reduction in the need for tellers. Educational institutions have made similar strides toward simplification and convenience, especially in the areas of Internet-based enrollment, payment of fees, and communications with students and their parents.

## Church

### **The number of parishioners served per priest will continue to grow.**

According to the Diocese of Stockton, the availability of American-born priests will continue to decline while the number of Catholics in the U.S. continues to grow, especially in areas such as

Stanislaus County where Hispanic immigration brings significant growth to the local Catholic population. The Reverend Monsignor Richard Ryan, Vicar General of the diocese, spoke of the aging priest population at a meeting on April 3, 2006, noting that the average age of Stockton Diocese priests is 57. Looking solely at priests within parishes, the average age drops just slightly to 53.

Msgr. Ryan's comments are consistent with a November 17, 2003, article by Joe Feuerherd for the National Catholic Reporter in which Mr. Feuerherd reported:

There are more American priests over age 90 than under age 30; by 2010 the number of active diocesan clergy (just over 15,000) will be less than the country's 19,000 parishes (assuming no widespread parish closures). The number of "priestless parishes" -- those without a resident priest -- will rise from the current 3,000 (16 percent of U.S. parishes), even as seminaries graduate only one new priest for every three clerics (average age approaching 60) who retire, die or resign.

Compounding the priest shortage and increasing the need for larger parishioners-per-priest ratios is a continued escalation in the cost of opening new parishes. Msgr. Ryan reported that the Diocese of Stockton will be required to spend \$2 million in preliminary development costs for its planned parish in northwestern Modesto before ground is ever broken.

**Reliance on foreign-born priests will likely grow and the roles assigned within parishes will expand, creating a need for parish pastors to have greater say in screening and selection.**

As parishes become larger, parish priests will be compelled to delegate more responsibilities to their foreign-born associate pastors across a broader spectrum of pastoral duties serving both English and non-English speaking parishioners. Therefore, the working relationship between pastors and their associate pastors will become increasingly critical to the successful functioning of a given parish, and the ability of pastors to participate in the screening and selection of their soon-to-be closest aides will be paramount to affecting a successful outcome.

Communication, mobility, and training have become significant issues in assuring a successful role for foreign-born priests. As parishes increase in size, the ability of all clergy to speak fluent English has become critical since American-born, English-speaking parishioners resist relationships with clergy who possess limited English language skills. In addition, the ability of all parish priests to provide for their own transportation needs is essential to fulfilling the support role so badly needed by busy parish pastors. Finally, formal training programs at the parish level are crucial to assuring that new clergy blend into the parish structure in a cohesive and complementary manner.

**Limited availability of priests, American and foreign-born, will drive an increasing role for lay leadership within parishes.**

The increasing shortage of ordained priests has resulted in increasing roles for lay ministers and administrators in parishes throughout the country. According to a study by the Center for Applied Research in the Apostolate at Georgetown University which was featured by Joe Feuerherd in his November 17, 2003, article for the National Catholic Reporter, enrollment in lay ecclesial ministry programs has more than tripled – from 10,500 to more than 35,000. While Feuerherd's article addressed the mixed feelings of respondents regarding the trend, its validity and the reality of its continuation was unquestioned. Msgr. Ryan also spoke to the increasing role of lay leadership, citing experimentation in Southern California with traveling priests saying weekend Masses while lay leadership manages day-to-day parish affairs.

**Diocesan interest in addressing growth needs through development of small missions under the direction of existing parish priests is somewhat paradoxical to the previously discussed trends and could irreparably strain existing resources unless additional clergy are added.**

Fr. Joseph Illo and his two associate pastors currently offer one Saturday and seven Sunday Masses at St. Joseph's Catholic Church of Modesto with an average attendance of approximately 525. Addition of a ninth Mass at a separate location would likely stretch existing priests and their support systems beyond capacity.

## **Diocesan / Community Relationship**

**A strong parish relationship with the Bishop and his leadership team is critical to St. Joseph's achieving its goals.**

St. Joseph's has enjoyed a strong and respectful relationship with the Diocese of Stockton, and in particular, The Most Reverend Stephen E. Blaire, Bishop of the Diocese of Stockton, and Msgr. Ryan. The strength of these relationships will become even more important as the parish moves forward with its plans for expansion, in part due to the need for diocesan approval of all capital improvement projects, but mostly due to diocesan plans to launch its own capital campaign by the end of 2007.

The capital campaign planned by the Diocese of Stockton provides St. Joseph's a unique opportunity to combine parish and diocesan strengths. Msgr. Ryan has expressed an interest in partnering with one or more local parishes to initiate a multi-level campaign targeted at raising funds for parish and diocesan needs simultaneously. Toward that end, the Diocese is currently interviewing national campaign consultants who would be charged with assessing campaign potential as well as managing the process through to a successful outcome. Partnering with the diocese in such a venture could harness powerful complementary forces. Conversely, choosing to pursue an independent campaign in the midst of a diocesan effort would likely bring significant challenges, both political and practical.

**Targeted community relationships could be an invaluable asset to St. Joseph's as it seeks to navigate the regulatory environment impacting its building plans and solidify a support base for the fundraising efforts necessary to bring those plans to fruition.**

St. Joseph's planned expansion, as well as its role as a leader of the Modesto area Catholic community, requires the cultivation of strategic relationships with targeted Modesto government, business, and community leaders. A census should be taken across parish leadership to document existing relationships and expertise within targeted arenas, expose strategic voids, and assign issue-specific leadership, facilitating consistent and coordinated interactions with important community resources.

## **Legal**

**The Safe Environment Program will continue to play a central role in assuring that children and youth who worship, study, or participate in activities sponsored by the Catholic Church can do so in the safest and most secure settings possible.**

The Safe Environment Program is a legally required obligation of the Church that requires training of parents, ministers, educators, church personnel, volunteers and others regularly involved with minors (estimated at 36% of all current volunteers) regarding the issue of child abuse, including

sexual abuse. Continued adherence to program training requirements is essential to both the protection of parish youth as well as the prevention of time-consuming and costly litigation. This program will continue to require a significant commitment of parish resources.

### III. PARISH DESCRIPTION

#### Parish Profile

St. Joseph’s Catholic Church of Modesto is one of three parishes within the Modesto city limits, and one of five within the greater Modesto/Riverbank/Ceres area. A priest has been named to a sixth territorial parish in the northwestern area of Modesto, Holy Family Catholic Church. Three Holy Family Masses are held each weekend in temporary locations while planning continues on site development, estimated at a cost of \$2 million, and ultimately, initiation of a capital campaign to build a church and other parish infrastructure. No date for groundbreaking has been projected.

The Diocese also owns ground for a seventh parish in northeast Modesto to address planned growth between St. Joseph’s and St. Francis of Rome in Riverbank. No timing has been established for development of the northeast site although the Diocese has asked Fr. Illo from St. Joseph’s to consider staffing a mission church in that area at some undetermined time in the future. Parish boundaries are listed in Exhibit A in the Appendix.

St. Joseph’s served 4,695 registered families as of 12/31/05, under half of which reside within parish boundaries. Fifteen percent reside within St. Stanislaus boundaries, 12% within the boundaries of the new Holy Family parish, and 8% within Our Lady of Fatima boundaries.

St. Joseph Registered Families’ Home Parishes							
St. Joseph’s	St. Stanislaus	Holy Family	Our Lady of Fatima	Frances of Rome (Riverbank)	St. Jude (Ceres)	Other	Total
2,169	694	545	350	178	117	642	4,695
46%	15%	12%	8%	4%	3%	14%	100%

Exhibit I. Registered families’ home parishes. Derived from parish registration data as of 12/31/05.

#### Registration and Growth Statistics

In order to analyze the role of St. Joseph’s parish within the greater Modesto Catholic community, a series of assumptions must be made. According to the Glenmary Research Center, 23.6% of the population of Stanislaus County is Catholic. And, according to a 2005 study by the Center for Applied Research in the Apostolate (CARA), 59% of all Catholics register at a parish. Therefore, using California Dept. of Finance population projections for 2005 and Modesto City Planning estimates of average household size (2.91), the Catholic population of Modesto could be estimated at 28,911, or 9,935 households, giving St. Joseph’s 3,873 families living within city limits an approximate 39% share of Modesto Catholic households.

	%	Population	Hhlds	Ave. Hhld Size
Modesto Population 2005	100.0%	207,634	71,352	2.91
Modesto Catholics	23.6%	49,002	16,839	
Registering Catholics	59.0%	28,911	9,935	
St. Joseph's Registered Families in City Limits <sup>1</sup>			3,873	
<b>Share of Modesto Registered Catholic Households</b>			<b>39.0%</b>	

Exhibit 2. St. Joseph's share of Modesto registered Catholics.

<sup>1</sup>Calculated from parish registration map.

### Demographics

The demographic composition of St. Joseph's parishioners differs little from that of Modesto as a whole.

- **Gender** – Nationally, women represented 50.9% of the population in 2000. Both Modesto city and St. Joseph's parish have slightly higher female concentrations, with St. Joseph's the highest at 52.5%.

Gender	Modesto	St. Joseph's
Female	51.5%	52.5%
Male	48.5%	47.5%

Exhibit 3. Gender mix of registered parishioners.

- **Household Size** – For purposes of this analysis, multi-person households are assumed to be traditional parent/child combinations. As might be expected, St. Joseph's has a significantly larger percentage of families with two or more children, and thus a higher average household size, than the general Modesto population (3.2 vs. 2.9). When looking only at households with 3 or more people, the average number of members is nearly identical at 4.25 for Modesto and 4.24 for St. Joseph's.

Household Size	Modesto	St. Joseph's
1	23.9%	17.4%
2	26.5%	23.3%
3	17.0%	16.6%
<b>Families of 4 or more</b>	<b>32.6%</b>	<b>42.7%</b>
4	16.3%	23.0%
5+	16.3%	19.7%
Families w/Children, Ave Size	4.25	4.24
Average Household Size	2.91	3.18

Exhibit 4. Household size of registered parishioners.

- **Age** – The age distribution of St. Joseph's parishioner population is strikingly similar to that of the greater Modesto area with approximately 31% of the population under the age of 19 and 60% aged 25 or more. St. Joseph's median age is slightly older than the population in general due largely to increased membership among adults aged 45 to 64. St. Joseph's also

appears to be drawing a slightly larger college-aged population than might be expected based on Modesto's average age distribution.

Age	Modesto	St. Joseph's
0-11	19.8%	16.9%
12-15	6.9%	8.1%
16 - 18	4.9%	5.6%
<b>Under 19</b>	<b>31.6%</b>	<b>30.6%</b>
19 - 24	8.1%	9.2%
<b>Adult 25+</b>	<b>60.3%</b>	<b>60.2%</b>
25 - 34	13.5%	13.9%
35 - 44	15.5%	14.5%
45 - 54	12.8%	13.5%
55 - 64	7.6%	8.7%
<b>Seniors 65+</b>	<b>11.1%</b>	<b>9.6%</b>
65 - 74	5.6%	5.2%
75+	5.5%	4.5%
<b>Median Age</b>	<b>32.7</b>	<b>33.9</b>

Exhibit 5. Age distribution of registered parishioners.

- **Ethnicity** – Just over 25% of Modesto area households listed themselves as being of Hispanic ethnicity in the 2000 census. Six years later, Modesto's Sylvan Union School District documents 28% of its enrollment as coming from Hispanic households.

Research conducted by St. Joseph's in 2006, however, showed just 18% of respondents identifying their primary racial identity as Hispanic American/Latino. Several possible explanations could account for this disparity. If St. Joseph's parishioner family is, in fact, significantly less representative of the overall area Hispanic population, the lower penetration could be reflective of St. Joseph's single Sunday Spanish service in comparison to five such services offered each Sunday at both St. Stanislaus and St. Jude. It is also feasible that survey respondent ethnicity simply reflects a lower inclination of Hispanic parishioners to participate in the aforementioned study. Further study would be required to determine actual parish ethnic composition.

- **Language Spoken** – Seventy-two percent of Modesto area households list English as their principle language. Of the remaining 28% of households, 17.4% list Spanish, although 80% of those households either understand English or have a family member that assists in translation. Only 19% of Spanish households, representing 4% of the total population, list themselves as linguistically isolated.

Again, St. Joseph's recent research shows a significantly greater 89% of parishioners stating that English is the primary household language. And of the 5% primarily Spanish speaking parishioners, 65% state they are fluent in English with another 30% indicating a good or fair understanding of the language. Once again, however, it must be cautioned that this data could be biased by a disproportionately lower participation of Spanish speaking parishioners in this particular survey.

No demographic data specific to St. Joseph’s was available on the following measures. However, due to the significant level of similarity between Modesto and St. Joseph’s on many other measures, the following Census 2000 data for Modesto should be indicative of St. Joseph’s parishioners.

- **Household Income** – Approximately 30% of Modesto area households have annual incomes under \$30,000, with just over half of that (16%) reporting incomes under \$20,000. Approximately 20% of households have annual incomes greater than \$75,000 with half of that (10%) reporting annual incomes greater than \$100,000.
- **Education** – Twenty percent of Modesto’s white population did not graduate from high school. Within the Hispanic community, 47% of adults have no high school degree. Eighteen percent of the white population has a bachelor degree or better versus just 6% of the Hispanic population.

## Leadership Profile

St. Joseph’s parish leadership structure is headed by Fr. Joseph Illo. Fr. Illo came to St. Joseph’s in 1999 as temporary administrator before being named as the parish’s fourth pastor on June 1, 2000. Fr. Illo’s management team consists of two associate pastors, a parish administrator, and three senior staff members who collectively direct a team of 33 full and part-time employees. In addition, Fr. Illo works closely with the Parish Council and its standing committees, each of whose chairmen sits ad hoc on the Parish Council. A current organization chart for the parish is included as Exhibit B in the Appendix.

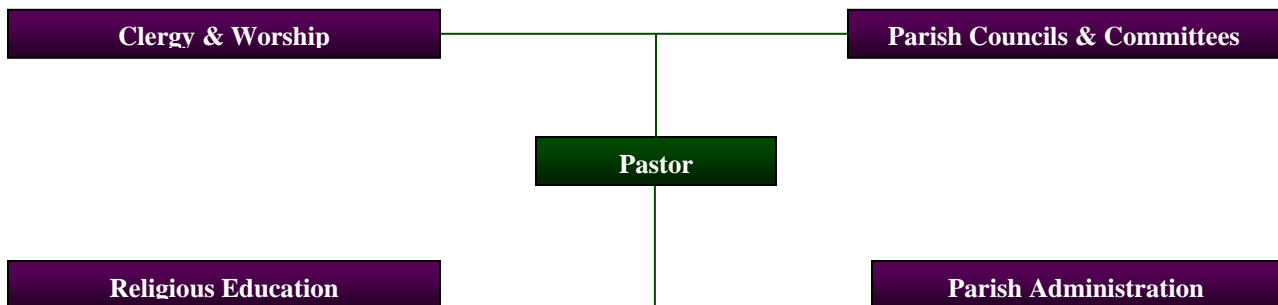


Exhibit 6. Parish leadership model.

## Concentric Circles of Influence

In addition to the leadership team, Fr. Illo and his staff work closely with numerous groups of parishioners who influence the planning, development, and execution of parish ministries, programs, services, and ongoing operations. Those circles of influence – emanating from Fr. Illo and his leadership team outward – include:

- **Parish Core**
  - Staff
  - Ministry Heads
  - Council Members
- **Parish Committed**

*Attend Mass regularly and participate in a parish ministry.*

  - Parish Committee Members
  - Apostolates
  - Volunteers

- **Parish Members**  
*Attend Mass but not actively involved in any parish ministry.*
- **Parish Catholics**  
*Non-practicing Catholics who live within parish boundaries.*
- **Parish Community**  
*Individuals open to developing a deeper relationship with God.*

## IV. PARISH MISSION, VISION, & PRIORITIES

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### **Message from Fr. Joseph Illo, *Pastor***

The late John Paul II wrote in his 1981 document *Familiaris Consortio* that a family is a God-given “communion of persons.” We all yearn for this sense of belonging, to know that we are loved in a family than can never disown us, beyond mere human friendship. Mother Teresa of Calcutta often said that the most terrible poverty is to feel abandoned, unloved, and forgotten by others. God has already given each of us a place in our parish family – a *Family of Families* – thousands of people called to deep communion that begins and ends with Holy Communion, the Sacred Eucharist.

God wishes us to recognize the deep communion He has given us, beyond similar interests and mutual attractions. We are members of the Church family not because we have chosen, but because God has chosen us to belong to each other. Within this communion, the love of Christ impels us to go out and “make disciples of all peoples...teaching them to observe everything I have commanded you” (Matthew 28: 19-20).

Given this theological foundation, the leadership of St. Joseph’s parish has developed the following mission, vision, strategic pastoral goals, directing principals, and initiatives in order to fulfill the command of Christ.

### **Mission**

*To Evangelize God’s People beginning with the Gift of the Holy Eucharist.*

### **Vision**

*We believe God’s will for His Church is clearly given to us in Scripture and the documents of the Second Vatican Council. Called to communion with God, St. Joseph’s desires to be a family of families who serve God through beautiful and reverent worship: a sacred haven where people know they are welcomed and loved by Jesus. We strive to be a responsive parish through effective and transparent management of resources.*

*In this way, we hope to become disciples who, in our daily lives, represent Christ to our neighbors through word and deed.*

### **Parish Priorities:**

The parish priorities that follow are the result of an 18-month process that incorporates the collective input of St. Joseph’s clergy, lay leadership, staff, volunteers, and parishioners at large. Beginning with a framework constructed by the Parish Council and staff in early 2006, the priorities, goals, directing principles, and strategic initiatives contained herein were shared with hundreds of parish members and were systematically refined as a result of feedback received through a series of focus



groups, a comprehensive planning survey, and a Towne Hall meeting before receiving final approval from the Parish Council on December 12, 2006. *Complete survey results can be seen in Appendix Exhibit D.*

Our Diocese has also been planning strategically in its Synod of 2000-2006 which produced ten decrees. As the Diocese progresses in its discernment, each pastor is allowed license to determine distinct priorities to address the most common or specific needs of their community. Please refer to Exhibit H which identifies how St. Joseph's Parish Priorities and Goals address each and every decree of the Diocesan Synod.

## Parish Priority: Worship

**Parish Goal:** *We will glorify God in our Sunday worship, sacramental life, and personal prayer.*

Directing Principles	Strategic Initiatives
Actively engage parishioners in Liturgical life through homiletics, music, and ministerial hospitality that is spiritually enriching.	<ul style="list-style-type: none"> <li>▪ Preach today's reality to help Catholics live their faith and daily life as one.</li> <li>▪ Provide clearer teachings on specific Church doctrines in homilies.</li> <li>▪ Encourage full active and conscious participation in the Mass by use of authentic Catholic music which is familiar and within "singable" ranges, encouraging us to sing the Mass.</li> <li>▪ Encourage family and friends to attend Mass together regularly.</li> <li>▪ Construct a welcoming atmosphere at Mass that instills a sense of family and communal worship.</li> <li>▪ Encourage a more reverent and quiet atmosphere in the vestibule and church.</li> <li>▪ Promote the merits of building a church structure in accord with authentic Catholic liturgy.</li> <li>▪ Encourage more reverent attire and behavior at Sunday Mass.</li> </ul>
Increase parishioner reception of the Sacraments.	<ul style="list-style-type: none"> <li>▪ Increase reception of the Sacraments through education, outreach, and improved accessibility.</li> </ul>
Make prayer a part of every parish activity.	<ul style="list-style-type: none"> <li>▪ Train clergy and lay leadership to open every parish activity with biblical prayer.</li> <li>▪ Train all parishioners to develop a richer prayer life at home.</li> </ul>

Exhibit 7. Worship directing principles and strategic initiatives.

## Parish Priority: Education

**Parish Goal:** *We will continually develop our knowledge of Sacred Scripture and Church doctrine, seeking a deeper relationship with God.*

Directing Principles	Strategic Initiatives
Promote the Bible's importance in parishioners' daily lives.	<ul style="list-style-type: none"> <li>▪ Encourage and support the "Domestic Church" where parents, by their word and example, are the first teachers of the faith to their children.</li> <li>▪ Craft homilies to illuminate contemporary messages embodied by weekly readings, encourage active use of Bibles during Mass, and advocate the reading of Vatican II and other Church documents.</li> <li>▪ Read and pray with the Bible or other tools (e.g. Magnificat) that makes the Bible accessible</li> </ul>
Support and promote Church doctrinal formation.	<ul style="list-style-type: none"> <li>▪ Provide opportunities for parishioners to review the basics of their faith and the Mass and discover more about the social teachings of the Church.</li> <li>▪ Promote the Catholic doctrine of social justice, emphasizing the consistency of policy and action with respect to the rights of individuals and families in society.</li> <li>▪ Help youth learn how to apply faith to their daily lives.</li> <li>▪ Help high school teens stay engaged in their faith after celebrating Confirmation.</li> </ul>
Broaden evangelization efforts to reach all Catholics within parish boundaries.	<ul style="list-style-type: none"> <li>▪ Develop small parish communities to facilitate charity, prayer, and education.</li> <li>▪ Train parishioners to become better evangelizers in their daily circumstances.</li> <li>▪ Organize group evangelization (door-to-door).</li> </ul>
Maintain a sense of orthodoxy in doctrine and worship.	<ul style="list-style-type: none"> <li>▪ Educate parishioners about the Mass.</li> <li>▪ Promote ongoing education and spiritual development for clergy, catechists, and other parish leaders.</li> </ul>

Exhibit 8. Education directing principles and strategic initiatives.

## Parish Priority: Charity

**Parish Goal:** *We will serve others with Christian love, especially the neediest.*

Directing Principles	Strategic Initiatives
Expand pastoral and human services to the needy within our parish community.	<ul style="list-style-type: none"> <li>▪ Find ways to identify the specific needs of individuals from within the parish.</li> <li>▪ Make those in need aware of existing programs and how to access them.</li> <li>▪ Strengthen clergy availability to direct pastoral care of individuals in the parish family and throughout the community.</li> <li>▪ Pray specifically for and with the needy.</li> </ul>
Promote ministry outreach beyond the parish community, including sponsoring and/or collaborating with existing support groups.	<ul style="list-style-type: none"> <li>▪ Educate parishioners about parish programs in which they can personally serve the needy.</li> <li>▪ Educate and empower parish staff, volunteers, and parishioners to serve as resource ambassadors for those in need, directing parishioners and other community members in need to appropriate resources within the parish and wider community.</li> </ul>

Exhibit 9. Charity directing principles and strategic initiatives.

## Parish Priority: Family

**Parish Goal:** *We will strengthen family life (at home and parish) by practicing our Catholic faith in daily life.*

Directing Principles	Strategic Initiatives
Create a sense of the “Catholic Parish Family” that includes all parish members.	<ul style="list-style-type: none"> <li>▪ Provide a consistent message of welcoming and belonging from parish priests, lay leadership, staff, and volunteers.</li> </ul>
Evangelize and support families through an authentic Catholic culture.	<ul style="list-style-type: none"> <li>▪ Encourage nuclear and extended families to participate together in liturgical celebrations: devotions, novenas, feasts, and other celebrations.</li> <li>▪ Encourage and facilitate family participation in parish events and activities: Fall Festival, dinners, dances, and picnics, Works of Mercy, and other parish events and activities.</li> </ul>
Support family unity and healthy child/teen development through creation of a comprehensive family and youth ministry.	<ul style="list-style-type: none"> <li>▪ Focus on reaching youth and parents through programs designed to help families to live their life and faith as one.</li> <li>▪ Help families learn to pray together.</li> <li>▪ Initiate programs to serve broken families and at risk youth.</li> <li>▪ Grow the Family Life Conference program through enhanced marketing, inclusion of high profile speakers, expansion of associated evangelical events, and the addition of quarterly supplementary programs. Achieve attendance of 2,000 at the annual conference by 2010.</li> </ul>

Exhibit 10. Family directing principles and strategic initiatives.

## Parish Priority: Communication

**Parish Goal:** *We will deliver a consistent message about the parish mission, activities, and leadership opportunities.*

Directing Principles	Strategic Initiatives
Develop and maintain an effective system of communication to ensure delivery of a consistent message to the entire parish family.	<ul style="list-style-type: none"> <li>▪ Develop a comprehensive strategy for communications improvement, increasing the quantity and quality of parish communications across a broad and complementary array of mediums</li> <li>▪ Increase use -web-based technology as a primary communication method for reaching parishioners with important parish notices and announcements.</li> <li>▪ Establish parish standards for all communication elements, including graphics, structure, content, and tone.</li> <li>▪ Develop procedures within the existing parish structure to ensure consistency of parish messages.</li> </ul>
Systematically seek parishioner participation in development of	<ul style="list-style-type: none"> <li>▪ Implement annual parishioner satisfaction surveys to facilitate parishioner feedback and track parish performance against objectives.</li> </ul>

parish goals and strategic initiatives as well as subsequent feedback on implementation and performance.	<ul style="list-style-type: none"> <li>▪ Seek issue-specific input on topics of importance to the parish through periodic surveys</li> <li>▪ Utilizing web-based technology to deliver surveys. Provide a paper option for those without Internet access.</li> <li>▪ Conduct Towne Hall and facilitate annual meetings, meetings on issues of importance where parishioner dialog is essential to crafting an appropriate parish-wide strategy.</li> </ul>
Improve parishioner access to key parish information through increased marketing and outreach.	<ul style="list-style-type: none"> <li>▪ Expand awareness of and participation in parish events and activities through increased marketing and outreach, both within the parish and throughout the community.</li> <li>▪ Maintain a current and comprehensive online calendar of all parish activities and events, including ministry meetings.</li> <li>▪ Use the parish website to promote parishioner involvement in apostolates through publication of missions, meeting times, and contact information.</li> <li>▪ Provide online access to current bulletins and the results of recent parishioner surveys.</li> </ul>
Foster communication between apostolates, department leadership, and staff.	<ul style="list-style-type: none"> <li>▪ Produce web-based and printed newsletters and periodic communications to increase information flow to all parishioners and their apostolate activities.</li> <li>▪ Provide tools to maximize effectiveness at regular staff, leadership, and ministry meetings.</li> <li>▪ Develop intra-group communication methodology that enhances dynamic interaction between various parish groups.</li> </ul>

Exhibit 11. Communication directing principles and strategic initiatives.

## Parish Priority: Stewardship

*Parish Goal: We will increase understanding of Catholic Stewardship among our parishioners.*

Directing Principles	Strategic Initiatives
Promote stewardship as a way of life, returning to God first fruits of time, talent, and treasure with which He has blessed us.	<ul style="list-style-type: none"> <li>▪ Establish a Stewardship Committee under the auspices of the Parish Council to lead parish development and implementation of a comprehensive stewardship spirituality.</li> <li>▪ Encourage parishioners to set a 5-year goal to embrace the biblical title of 5% of their income to the parish, 1% to the diocese, and 4% to other charities.</li> </ul>
Become more of a welcoming parish	<ul style="list-style-type: none"> <li>▪ Develop comprehensive registration process for new households.</li> <li>▪ Found an apostolate which will greet and inform visitors at Mass about St. Joseph's.</li> </ul>
Train and empower lay leadership, clergy, staff, and ministry heads to practice the principles of stewardship and promote it to the parish at large.	<ul style="list-style-type: none"> <li>▪ Benchmark proven strategies from successful stewardship parishes.</li> <li>▪ Develop ongoing educational activities that instruct parishioners in the Church's teachings of stewardship and encourage them to share their gifts as a faith response.</li> <li>▪ Receive parishioners through hospitality and evangelization.</li> </ul>

Exhibit 12. Stewardship directing principles and strategic initiatives.

## Parish Priority: Leadership

*Parish Goal: We will recruit, train, and support strong parish leadership.*

Directing Principles	Strategic Initiatives
Recruit, train, and affirm parish leadership.	<ul style="list-style-type: none"> <li>▪ Encourage recruitment of volunteers and future leaders from all ethnic and socio-economic strata.</li> <li>▪ Construct an atmosphere of inclusion among lay ministries, apostolates, and committees, ensuring that new volunteers are actively recruited, welcomed, and trained.</li> <li>▪ Develop an ongoing training program for all clergy, lay leadership, employees, and volunteers, constructing standardized training modules across all aspects of parish service and then customizing implementation according to specific individual or program needs.</li> <li>▪ Recognize and affirm parish leaders, employees, and volunteers throughout the year both publicly and in meaningful personal interactions.</li> </ul>
Provide leaders access to resources.	<ul style="list-style-type: none"> <li>▪ Assure parish volunteers continued access to resources through ongoing support, and development of the Volunteer Center.</li> </ul>

Exhibit 13. Leadership directing principles and strategic initiatives.

## Priority: Planning

**Parish Goal:** *We will determine and present ongoing initiatives and objectives consistent with the parish mission and vision.*

Directing Principles	Strategic Initiatives
Coordinate long-range planning done by Parish Council and its three primary committees – Finance, Building, and Planning.	<ul style="list-style-type: none"> <li>Establish a planning committee under the auspices of the Parish Council with the responsibility to manage the implementation the parish’s long-range strategic plan.</li> <li>Develop a process for annually updating Parish Council long-range plans that includes participation of clergy, lay leadership, parish employees, ministry heads, and parishioners.</li> <li>Publish highlights of long-range plan updates at annual parish meetings and in annual reports.</li> </ul>
Ensure long-range planning includes regional collaboration (with other parishes, the Diocese, and city and county agencies).	<ul style="list-style-type: none"> <li>Annually convene a meeting of our Deanery for discussion of long-range planning issues with potential regional implications.</li> <li>Meet annually with Diocesan officials to discuss long range planning and Synod decrees implementation.</li> </ul>
Communicate consistent planning messages to the parish.	<ul style="list-style-type: none"> <li>Empower the Communications Department to work with the Parish Council to review and approve all parishioner planning communications in order to assure consistency of message and tone.</li> </ul>

Exhibit 14. Planning directing principles and strategic initiatives.

## Parish Priority: Administration

**Parish Goal:** *We will provide quality management and reporting of parish financial, human, and operational resources.*

Directing Principles	Strategic Initiatives
Establish policies and procedures that ensure effective management and communicate fiscal accountability.	<ul style="list-style-type: none"> <li>Review existing policies and procedures to improve efficiencies and efficacy.</li> <li>Review annual parish operational plan in comparison to actual performance.</li> <li>Expand reach of fiscal and operational information through development and distribution of written annual reports and mid-year updates or other means of communication.</li> </ul>
Foster team spirit among parish staff and volunteers.	<ul style="list-style-type: none"> <li>Build a systematic and active approach to develop, nurture, and promote team spirit among parish staff and volunteers through retreats, training, and workforce enrichment.</li> </ul>
Establish a collaborative environment by utilizing lay leaders, colleagues, committees, and professionals that seek best practices benchmarks to optimize performance.	<ul style="list-style-type: none"> <li>Build a network of lay leaders and colleagues to collaborate in development of best practices benchmarks.</li> <li>Continue to implement policies and procedures to ease the administrative burden on clergy, allowing them to focus their efforts direct pastoral service.</li> </ul>

Exhibit 15. Administration directing principles and strategic initiatives.

## V. PLAN UPDATE PROCESS

Long-range planning is a fluid and ongoing process. Environments change and needs evolve. Goals are attained or modified and new ones emerge to reflect current realities. Change is a constant that is predicted and prepared for, and when necessary, allowed to alter existing initiatives to better respond to a changing landscape.

To be effective, a long-range planning process must include research, discussion, agreement, documentation, delegation of responsibilities (ownership), publication, performance tracking against measurable goals, post-performance assessment, and systematic re-evaluation taking into consideration changing circumstances. Input from all affected groups is essential to both the quality of the plan and the success of its execution.

The further a long-range plan reaches into the future, the more difficult it becomes to accurately predict the variables that will impact it. Therefore, most plans do not attempt to address more than a 3 to 5-year timeframe. St. Joseph's existing need to address facility requirements over a significantly longer horizon has necessitated the current 20-year planning process. However, narrowing the span of specific program-focused goals and objectives would likely result in a more useful and effective plan.

Key discussion elements of a typical long-range plan include:

- **Environmental Analysis.** What social, family, church, political, and legal issues on the horizon will likely need to be addressed in the types of programs offered and the manner in which they're delivered?
- **Mission and Vision Check.** Is the current mission and vision still appropriate or are alterations necessary to remain current?
- **Parishioner Check.** How do parishioners view parish performance in terms of St. Joseph's areas of emphasis – worship, education, charity, family, communication, stewardship, leadership, planning, and administration? Are there other issues of importance to parishioners that aren't being adequately addressed?
- **Market Check.** Is St. Joseph's definition of its target market unchanged from its last review, and is it effectively reaching all sectors of its target?
- **Goal, Initiative, and Program Review.** How has the parish performed against its goals and should they be modified going forward to reflect environmental changes? What programs need to be modified or added? Which ones might have outlived their usefulness or would be better addressed by another institution?
- **Administrative and Financial Performance Assessment.** How is the parish structure performing? Is it meeting its financial goals and will such performance adequately address future needs? If not, what must be done to ensure adequate capital to fund growth and planned initiatives.

Long-range planning processes are best done on a standard cycle. For some entities, updates are annual. For others, updates occur only at the conclusion of the document's span. A good and practical approach for an entity like St. Joseph's would be to conduct long-range planning updates on an every-other-year (biennial) basis. Such a schedule would reduce the administrative burden on a lean parish staff while still allowing updates on a timely basis.

## **VI. PLAN IMPLEMENTATION**

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Process becomes an important element in the successful development of long-range plans. It must be scheduled and structured while still allowing for the free flow of divergent opinions and talents. And, while carried out by a trusted core of both internal and external advisors, it must ensure that input from all affected groups is incorporated.

Key implementation elements include:

- **Leadership and Participation.** One individual should be ultimately responsible for process execution, document creation, and final publication. In addition, a core team of planning participants representing all key issue areas should be named.
- **Schedule.** The implementation process should flow according to a defined and published schedule.

- **Parishioner Survey.** An parishioner survey should be conducted to gauge parish performance against established goals and seek input to both annual and long-range planning processes.
- **Off-site Planning Session.** Annually, a one to two-day planning session should be held offsite, away from telephones, emails, and other interruptions. Use of a professional moderator is encouraged to promote active participation from all team members, protect against inordinate influence by individual agendas, and ensure all elements of the implementation process are thoroughly addressed.
- **Document Preparation and Review.** A draft document and the goals and initiatives it contains should be reviewed within each major stakeholder group (e.g. parish departments, committees, key volunteers) to assess reaction, gain additional input, and help assure ultimate buy-in.
- **Approval.** The suggested implementation plan should be reviewed by the Parish Council and submitted to the Pastor for acceptance.
- **Publication.** Publication and broad distribution of a formal document to all interested parties helps ensure collective support toward the successful implementation of program and service initiatives.

It is recommended that the Parish Council appoint a Planning Committee who's primary duty is to oversee implementation of the Parish Strategic Plan: to exercise accountability for the Pastor and Parish Administrator (the primary implementers of the plan), to provide support for the parish staff, and to facilitate biennial (every other year) plan updates. A draft Charter for the Planning Committee of the Parish Pastoral Council is attached in Exhibit I.

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## PART B – SUPPORTING ANALYSIS

### VII. MEMBERSHIP OUTLOOK

#### Demographic Projections

Stanislaus County is projected to grow an average 1.68% between 2006 and 2030, adding more than 235,000 residents to the county and increasing its total population by over 46%. The City of Modesto, representing 37% of county population, is projected to follow a similar pattern, adding 107,000 residents and growing by 52% to reach a 2030 census of almost 315,000.

Geographic Area	Information Source	Years						Cumm
		2005	2010	2015	2020	2025	2030	
Stanislaus County	Dept of Finance	508,753	559,051	604,592	653,841	697,746	744,599	744,599
	CAGR <sup>1</sup>		2.62%	1.58%	1.58%	1.31%	1.31%	1.68%
Modesto	City & Dept of Fin	207,634	236,297	255,564	276,402	294,987	314,821	314,821
	CAGR <sup>1</sup>		2.62%	1.58%	1.58%	1.31%	1.31%	1.68%
	Population Growth		28,663	19,267	20,838	18,585	19,835	107,188

Exhibit 16. Stanislaus county and Modesto city population projections.

<sup>1</sup>Compounded average growth rate.

Modesto city planners estimate that 75% of city growth over the next 25 years will come from developments along the eastern and northeastern edges of the city, developments located within a 3-mile radius of St. Joseph's and either inside its boundaries or in closer proximity to it than to any other existing parish. Utilizing proximity and individual development population projections (see Exhibit 18), St. Joseph's share of growth within the northeast and eastern impact area is estimated to be 84%. Thus, assuming 59% of those new Catholics aligning with St. Joseph's will register with the parish (CARA statistic for registering Catholics), and absent any other parish being built in northeastern Modesto, St. Joseph's membership could more than double over the next 25 years from the current 14,930 to almost 30,000.

		%	2005	2010	2015	2020	2025	2030	
<b>Modesto</b>	Modesto 5 Year Growth			28,663	19,267	20,838	18,585	19,835	
	Impact Area Growth	75.0%		21,497	14,450	15,628	13,939	14,876	
	St. Joseph's Growth	84.0%		17,961	12,073	13,058	11,646	12,429	
	Non Hispanic Hshlds	72.0% <sup>1</sup>		12,932	8,693	9,401	8,385	8,949	
	Hispanic Hshlds	28.0% <sup>1</sup>		5,029	3,380	3,656	3,261	3,480	
	Non Hispanic Catholics	23.6% <sup>2</sup>		3,052	2,051	2,219	1,979	2,112	
	Hispanic Catholics	72.6% <sup>3</sup>		3,651	2,454	2,654	2,367	2,527	
	St. Joseph's Potential New Members				6,703	4,506	4,873	4,346	4,638
	Registering Members	59.0% <sup>4</sup>			3,955	2,658	2,875	2,564	2,737
	<b>Cumulative Total</b>			<b>14,930</b>	<b>18,885</b>	<b>21,543</b>	<b>24,418</b>	<b>26,982</b>	<b>29,719</b>

Exhibit 17. Modesto growth impact on St. Joseph's membership through 2030.

<sup>1</sup>Ethnicity ratios taken from current Sylvan Union School District statistics.

<sup>2</sup>Percentage of Catholic households in general population taken from Glenmary Research Center statistics for Stanislaus County.

<sup>3</sup>Percentage of Catholic households in Hispanic population taken from 2002 report by U.S. Conference of Catholic Bishops.

<sup>4</sup>Percentage of Catholic households registering with a parish from Center for Applied Research in the Apostolate (CARA) 2005 research.

Another key demographic indicator from Exhibit 8 is the disproportionate percentage of Hispanic households that are Catholics. Despite the fact that 72% of St. Joseph's growth is expected to be from non-Hispanic households, the weight of the Hispanic leaning to Catholicism results in the parish adding more Hispanic members than non-Hispanic by almost 20%. Looking exclusively at known developments within the impact area (Exhibit 18 below) over the next 14 years, projections are about 20% lower due to the narrower definition of potential growth sources. However, estimates still predict parish growth of 30% by 2020.

Planned Development	Planned Units	Comp Units	Rmng Units	St. Joseph's Est. Impact		Non-Hisp Hshlds 72%	Hisp Hshlds 28%	Total Cath Hshlds	Growth @ 2.91 <sup>1</sup> Per Hshld
				%	#				
<b>St. Joseph's Boundaries</b>	<b>5,646</b>	<b>3,465</b>	<b>2,181</b>	<b>100%</b>	<b>2,181</b>	<b>1,570</b>	<b>611</b>	<b>742</b>	<b>2,158</b>
Village One (2012 Build Out)	5,646	3,465	2,181						
<b>St. Frances of Rome Boundaries</b>	<b>3,100</b>	<b>-</b>	<b>3,100</b>	<b>100%</b>	<b>3,100</b>	<b>2,232</b>	<b>868</b>	<b>1,054</b>	<b>3,068</b>
Tivoli Subset of Roselle-Claribel (2017 Build Out)	3,100	0	3,100						
<b>Holy Family Parish Boundaries</b>	<b>319</b>	<b>-</b>	<b>319</b>	<b>0%</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
Pelandale/McHenry (2012 Build Out)	319	0	319						
<b>St. Stanislaus Boundaries</b>	<b>3,638</b>	<b>-</b>	<b>3,638</b>	<b>67%</b>	<b>2,437</b>	<b>1,755</b>	<b>682</b>	<b>829</b>	<b>2,412</b>
Johansen-Empire No (2020 Build Out)	3,638	0	3,638						
<b>Potential Catholic Growth by 2020</b>	<b>12,703</b>	<b>3,465</b>	<b>9,238</b>	<b>84%</b>	<b>7,718</b>	<b>5,557</b>	<b>2,161</b>	<b>2,625</b>	<b>7,638</b>
<b>Registering Catholics</b>									<b>4,507</b>
<b>Existing Parishioners</b>									<b>14,930</b>
<b>Potential Parishioners by 2020</b>									<b>19,437</b>
<b>% Growth</b>									<b>30.2%</b>

Exhibit 18. N.E. and E. Modesto Comprehensive Planning District (CPD) forecasted housing growth.

<sup>1</sup>Modesto city planning reported rate of persons per household.

## Mass Attendance Projections

St. Joseph's attendance at Mass increased an average 6.8% annually for the past five years to 4,200 in January 2006. In round numbers, an average 225 additional parishioners attended Mass each year. Looking forward, the annual increase in Mass attendees is predicted to rise to about 275 through 2010 and then average about 150 for the remainder of the planning horizon, in line with declining city growth rates. The annual rate of increase through 2010 will remain around 4.8% and then is predicted to drop to about 2.3% over the remainder of the planning horizon, slightly above projected population growth of 1.4% per year (2010 to 2030).

Existing parish attendance data indicates an average 28% of St. Joseph's registered parishioners attend weekend Mass. Should that trend continue, attendance is predicted to almost double by 2030. However, long-range plans by parish staff to increase the percentage of parishioners attending Mass could significantly shorten the timeline for doubling attendance. For example, an increase to 35% attendance would result in an incremental addition of 69 new attendees per year through 2010 (on top of those already projected at a 28% attendance rate), increase the average annual growth rate to



7.8%, and shorten the timeline for doubling attendance by 5 years to 2025. Moving to 40% parishioner attendance would add an incremental 118 attendees annually through 2010, pushing the growth rate over 8.3% for the next four years and resulting in a doubling of Mass attendance by approximately 2020.

Source	2006	2010	2015	2020	2025	2030
New Members <sup>1</sup>		3,955	2,658	2,875	2,564	2,737
28% Attending Regularly		1,107	744	805	718	766
<b>Total Attending Regularly</b>	<b>4,200</b>	<b>5,307</b>	<b>6,052</b>	<b>6,857</b>	<b>7,575</b>	<b>8,341</b>

Exhibit 19. Mass attendance projections.

<sup>1</sup>See Exhibit 8 for new member calculations.

St. Joseph's recently added an 8<sup>th</sup> weekend Mass to address capacity issues in its 590-seat church. Census data taken from July 2005 (*latest data available*) showed individual Mass attendance ranging from a low of just over 400 at evening and early morning Masses to a high of 700 at the 10:00 a.m. Mass. Given a continuation of the existing attendance distribution, attendance at all but the early morning Sunday Masses will likely exceed church seating capacity by 2010.

Weekend Masses	Ave. 2005 Census	Ave. Share	Est. Share	Jan. 2006	2010	2015	2020	2025	2030
Est. Attendance	3,658	100%	100%	4,200	5,307	6,052	6,857	7,575	8,341
Saturday, 5:30p	433	12%	11%	462	584	666	754	833	918
Sunday, 8:00a	421	12%	9%	378	478	545	617	682	751
New Mass		--	9%	378	478	545	617	682	751
Sunday, 10:00a	712	20%	17%	714	902	1,029	1,166	1,288	1,418
Sunday, 12:00p	602	17%	16%	672	849	968	1,097	1,212	1,335
Sunday, 1:30p Spanish	569	15%	14%	588	743	847	960	1,060	1,168
Sunday, 5:30p Youth	503	13%	13%	546	690	787	891	985	1,084
Sunday, 7:30p	418	11%	11%	462	584	666	754	833	918

Exhibit 20. Estimated attendance by specific weekend Mass.

Plans to increase church capacity to 1,200 would significantly ease crowding until around 2025 if the parish continues to hold eight weekend Masses. However, should the number of Masses be reduced to seven by eliminating one of the existing Sunday morning Masses, crowding beyond the planned 1,200 seat capacity could again become an issue at the 10:00 and noon Masses as early as 2015. Further, should Diocesan predictions of a reduction in priests reduce St. Joseph's clergy to two in the next five years, maximum possible Masses would be reduced to six (3 per priest), placing all weekend Masses at an average 150% of existing capacity (590) by 2010.

Projections do not reflect the potential easing effect of the creation of a new northeastern Modesto parish. However, historical development timetables indicate movement from discussion of establishing a mission to actual construction of a full-service church would take a minimum of 10 years, placing any easing impact well beyond the needs of St. Joseph's more imminent problem.

## School of Religion Projections

Over 14% of registered families have an average 1.9 children enrolled in St. Joseph's Parish School of Religion (PSR). Growing an average 15% per year, catechetical program growth has far surpassed that of all other segments over the past three years. Enrollment for FY2005-06 is at 977, 53% and 340 students beyond its enrollment just three years ago. Confirmation class enrollment has grown at a slower but still strong pace, averaging 5% growth for the past three years with a FY2005-06 enrollment of 302 students.

	2002-03	2003-04	2004-05	2005-06	CAGR
Registered Parishioners	11,186	11,751	12,671	14,930	6.2%
<b>Registered Families</b>	<b>3,925</b>	<b>4,123</b>	<b>4,446</b>	<b>4,695</b>	<b>6.2%</b>
Ave Persons per Family	2.85	2.85	2.85	2.85	
Families in Religious Education	-NA-	-NA-	623	670	
<b>% Registered Families</b>			<b>14.0%</b>	<b>14.3%</b>	
Total Children Enrolled	<b>897</b>	935	1,151	1,279	
<b>Catechetical Program Enrollment</b>	<b>637</b>	<b>695</b>	<b>878</b>	<b>977</b>	<b>15.3%</b>
% Registered Families	16%	17%	20%	21%	
<b>Confirmation Program Enrollment</b>	<b>260</b>	<b>240</b>	<b>273</b>	<b>302</b>	<b>5.1%</b>
% Registered Families	7%	6%	6%	6%	
# Children registered in RE per Participating Family	-NA-	-NA-	1.8	1.9	

Exhibit 21. PSR historic enrollment growth.

Should PSR growth follow parish growth over the planning horizon, catechetical program enrollment would reach an estimated 1,234 students by 2010, with confirmation class counts at 382. However, projecting a continuation of growth trends experienced by the two programs over the past three years would result in catechetical enrollment topping 1,700 by 2010 (a 77% increase over current enrollment) and confirmation enrollment approaching 370 (a 22% increase from current level).

	2005-2006	Projected CAGR <sup>1</sup>	Growth at Parish Projections					Growth at Past 4-Year Rate		
			2010	2015	2020	2025	2030	2010	2015	2020
Registered Parishioners	14,930	4.8%	18,885	21,543	24,418	26,983	29,719	18,885	21,543	24,418
<b>Registered Families</b>	<b>4,695</b>	<b>4.8%</b>	<b>5,939</b>	<b>6,775</b>	<b>7,679</b>	<b>8,485</b>	<b>9,346</b>	<b>5,939</b>	<b>6,775</b>	<b>7,679</b>
Ave Persons per Family	2.85		3.18	3.18	3.18	3.18	3.18	3.18	3.18	3.18
<b>Families in Religious Ed</b>	<b>670</b>		<b>849</b>	<b>969</b>	<b>1,098</b>	<b>1,213</b>	<b>1,336</b>	<b>1,101</b>	<b>2,104</b>	<b>4,088</b>
% Registered Families	14.4%		14.3%	14.3%	14.3%	14.3%	14.3%	18.5%	31.1%	53.2%
Total Children Registered	1,279		1,616	1,837	2,089	2,304	2,541	2,095	3,991	7,776
<b>Catechetical Programs</b>	<b>977</b>	<b>15.3%</b>	<b>1,234</b>	<b>1,403</b>	<b>1,596</b>	<b>1,760</b>	<b>1,941</b>	<b>1,727</b>	<b>3,519</b>	<b>7,170</b>
% Registered Families	21%		21%	21%	21%	21%	21%	29%	52%	93%
<b>Confirmation Program</b>	<b>302</b>	<b>5.1%</b>	<b>382</b>	<b>434</b>	<b>493</b>	<b>544</b>	<b>600</b>	<b>368</b>	<b>473</b>	<b>606</b>
% Registered Families	6%		6%	6%	6%	6%	6%	6%	7%	8%
# Children registered in RE per Participating Family	<b>1.9</b>		<b>1.9</b>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>	<b>1.9</b>

Exhibit 22. PSR enrollment projections.

<sup>1</sup>Compounded average growth rate.

## VIII. STAFFING & VOLUNTEER GROWTH

### Staffing

St. Joseph's has 33 approved employee positions at a personnel expense exceeding \$880,000 for the most recent fiscal year. Over the past three years, the number of full and part-time positions has increased by 43% (+10), contributing to salary and benefit cost increases at a compounded average growth rate (CAGR) of 9.1%. During the same period, Ordinary Income (OI) has grown at a slower pace (8.1%), increasing personnel expense as a percent of Ordinary Income from 57.9% in FY2002-03 to 59.4% for FY2005-06. It is important to note that in the most recent fiscal year, growth in personnel expense outstripped that of Ordinary Income by over two percentage points (10.6% vs. 8.1%).

Part of the driving force behind increasing staff numbers has been the significant growth in registered parishioners over the past few years and the commensurate demand for additional services. However, with registered families growing at a Compounded Average Growth Rate of 6.2% and Ordinary Income growing at 8.1%, it is important to note that income per registered family is barely holding steady when adjusted for an estimated 3-4% annual rate of inflation.

	Jul 2002 - Jun 2003	Jul 2003 - Jun 2004	% Chg	Jul 2004 - Jun 2005	% Chg	Jul 2005 - Jun 2006	% Chg	3 Yr. CAGR
<b>Total Ordinary Income</b>	<b>\$ 1,172,735</b>	<b>\$ 1,232,573</b>	<b>5.1%</b>	<b>\$ 1,369,848</b>	<b>11.1%</b>	<b>\$ 1,481,013</b>	<b>8.1</b>	<b>8.1%</b>
<b>Approved Positions</b>	<b>23</b>	<b>24</b>		<b>32</b>		<b>33</b>		
<b>Personnel Expense</b>								
<b>Clergy</b>	\$ 74,901	\$ 84,085	12.3%	\$ 108,751	29.3%	\$ 131,633	21.0%	20.7%
<b>Rectory, Sacristy, Outreach</b>	\$ 17,317	\$ 18,877	9.0%	\$ 26,456	40.2%	\$ 34,582	30.7%	25.9%
<b>Administration</b>	\$ 224,317	\$ 215,565	-3.9%	\$ 232,314	7.8%	\$ 289,725	24.7%	8.9%
<b>Building, Grounds &amp; Landscape</b>	\$ 114,390	\$ 121,188	5.9%	\$ 120,138	-0.9%	\$ 132,649	10.4%	5.1%
<b>Music Ministry</b>	\$ 83,390	\$ 86,127	3.3%	\$ 89,983	4.5%	\$ 93,202	3.6%	3.8%
<b>Religious Education &amp; Youth Ministry</b>	\$ 164,287	\$ 195,709	19.1%	\$ 218,209	11.5%	\$ 198,220	-9.2%	6.5%
<b>Total Personnel Exp.</b>	<b>\$ 678,588</b>	<b>\$ 721,550</b>	<b>6.3%</b>	<b>\$ 795,851</b>	<b>10.3%</b>	<b>\$ 880,010</b>	<b>10.6%</b>	<b>9.1%</b>
<b>% of Ord. Income</b>	<b>57.9%</b>	<b>58.5%</b>		<b>58.1%</b>		<b>59.4%</b>		

Exhibit 23. Historic personnel expense growth.

Merit increases have historically been limited to approximately 4% of salary, leaving new hires as the explanation for growth rates in excess of that level. For example, the addition of the parish deacon in FY2003-04 is reflected in increased clergy expenses both in that and the succeeding year. And the significant growth in rectory, sacristy, and outreach is attributable to the addition of a parish nurse and the sizeable growth in the hours attributable to that position over the past two years. While percentage growth in administrative salaries lagged that of other departments for much of the review period, personnel changes and salary adjustments in the most recent fiscal year resulted in a 29% increase and account for 75% of dollar growth in the current year.

Looking forward, a Human Resources position is desired to meet some of the growth challenges facing St. However, should the parish decide to cap personnel growth at 60% of Ordinary Income, incremental dollars to fund that position may not be available for two years while income growth catches up with the restructuring begun in 2005 and the addition of a new parish administrator in 2006.

	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11
<b>Total Ordinary Income</b>	\$1,481,013	\$1,600,975	\$1,730,654	\$1,870,837	\$2,022,375	\$2,186,187
<b>Projected Expense for Current Employees<sup>1</sup></b>	\$ 880,010	\$1,026,408	\$1,061,087	\$1,100,026	\$1,140,422	\$1,189,391
<b>% of Ordinary Income</b>	59.4%	64.1%	61.3%	58.8%	56.4%	54.4%
<b>Dollars Available for Additional Positions with 60% Cap</b>		\$ (65,823)	\$ (22,695)	\$ 22,476	\$ 72,963	\$ 122,321

Exhibit 24. Projected personnel expense growth and available growth dollars.

<sup>1</sup>Includes known personnel changes as well as merit increase.

## Volunteers

Volunteers are an essential component of the St. Joseph's family, both for their commitment to the parish and its mission and for the significant role they play in augmenting parish staff. On May 16, 2006, St. Joseph's opened its Volunteer Center to provide volunteers access to the resources they need to be successful, to give them a place to be productive and network with fellow volunteers, and to serve as a statement to both employees and volunteers of the importance of the ongoing contribution being made by this indispensable group.

As the need for services grows and parish financial resources are stretched, St. Joseph's volunteers will become ever more valuable, and opportunities to recruit, train, and affirm this group must be systematically cultivated.

## IX. FACILITIES

St. Joseph's undertook a comprehensive study of parishioner attitudes toward its existing facilities and overcrowding issues in July and August, 2006. Surveys were distributed at three consecutive Sunday Masses as well as being mailed directly to all registered parishioner homes. A Spanish translation was distributed at the Spanish Mass and made available upon request. The survey could be completed online via a published link or by using one of several computer stations made available at parish offices. Paper surveys could be dropped at several campus locations or returned via postage-paid mail. Over 17% of parish households participated, eliciting 1,000 separate responses. (See Exhibit E in the Appendix for details.)

### Existing Facilities

Survey respondents were asked to rate the general condition of parish buildings. By far, parking fared worst with just 26% rating it as Good or Very Good and an overwhelming 44% saying parking was Poor or Very Poor. As would be expected, the Parish Hall – one of the newest buildings on campus – fared best with 93% of respondents rating it as Good or Very Good. The church received 76% Good and Very Good responses with just 5% rating it as Poor or Very Poor. And finally, the meeting rooms in the John Paul II Center and the classrooms in Fr. O'Hare Hall rated midrange marks with 62 and 64% Good or Very Good and 8% and 5% Poor or Very Poor ratings, respectively.

Please rate the general condition of existing parish facilities.					
	Very Good	Good	Adequate	Poor	Very Poor
Church	38%	38%	19%	4%	1%
Adoration Chapel	37%	37%	20%	5%	1%
Parish Hall	65%	28%	7%	0%	0%
Classrooms in Fr. O'Hare Hall	22%	42%	31%	4%	1%
Meeting Rooms in John Paul II Center	19%	43%	30%	7%	1%
Parking	7%	19%	30%	34%	10%

Exhibit 25. Survey responses to existing facilities condition.

## Facility Needs

After rating the facilities, respondents were asked what they viewed as the parish's top three most pressing facility needs. As might be expected, parking came up as the overwhelming No. 1 issue (72%) followed by More Church Seating (59%). Well back of the two front-runners was More Traditional Church Design (32%).

What do you see as the parish's TOP THREE most pressing facility needs?	
More church seating	59%
More traditional church design	32%
More parking	72%
More meeting/religious education space	9%
Larger and quieter Adoration Chapel	24%
More outdoor devotional space	7%
Preschool program	20%
Youth center/gymnasium/athletic field	21%
More library space	3%
Other	19%

Exhibit 26. Survey responses to most pressing facility needs.

Almost 20% of respondents provided additional comments across a broad spectrum of issues. Church-focused statements comprised the largest single grouping, asking for a better sound system, more/better restrooms, more handicapped access and seating, improved air conditioning (*survey taken in July and August*), and more choir practice space. Several comments indicated a feeling that use of the chapel and/or altar for choir storage was inappropriate. The second largest groupings of comments were divided into two divergent camps... those wanting improved parking and those wanting to leave things the way they are. Beyond the standard "too crowded" parking statements, several respondents talked of the need for improved handicapped parking, ramps, and access. Those that voiced a desire for the status quo indicated a certain level of frustration with a perceived parish focus on "more and bigger."

Parish management has had significant discussions with regard to the need for a preschool program, so its relatively low 20% sixth place ranking in the research was further investigated. As would be expected, support went up with family size, although families of three showed no heightened interest. Families of four and five showed the greatest interest at 27% and 37%, respectively, although the issue continued to lag significantly behind more parking and church seating and at its best tied with a desire for more traditional church design.

## Remodeling vs. New Construction

The July/August 2006 research probed parishioner views on whether any future expansion should occur through renovation of the existing church or new construction. Respondents were nearly equally split with 40% favoring new construction and 38% wanting to renovate the existing church. In addition, new construction responses were also equally split between razing the existing church and building on its site (19%) and building elsewhere on campus and renovating the existing church for alternative uses (21%). Nearly one-quarter of parishioners said they would prefer to leave things as they are.

In general, which approach would you favor to address church overcrowding?	
Renovate the existing church	38%
Build a new church on the site of the existing church	18%
Build a new church and renovate the current church for alternate parish use	21%
Leave things as they are	23%

Exhibit 27. Survey responses to expansion strategies – unaided.

Following the initial renovation/new construction question, respondents were given additional information about the cost/design tradeoffs between the two options: *St. Joseph’s architectural consultants have estimated that renovation will save approximately 25% over the cost of building a new church but will limit the parish’s ability to address design issues like seating, larger support columns blocking visibility of the altar, and overall sound quality that could be solved with new construction.*” Given the new information, nearly one-quarter of renovation supporters moved their support to new construction resulting in 47% support for new construction, 27% for renovation, and 26% for the status quo.

...Given that information, would you favor...	
Renovate the existing church	27%
New Construction	47%
Leave things as they are	26%

Exhibit 28. Survey responses to expansion strategies – aided.

Prior to the survey, a Towne Hall meeting was held at the church on June 6, 2006, to discuss church facility needs with parishioners. As a result of the input from that gathering, parish architects Hyndman & Hyndman were asked to develop four site plans, one that would leave existing structures as they are while addressing mitigation of parking issues and three that would address church seating, parking, and other facility/campus issues along the lines of the various visions espoused at the Towne Hall. All plans except for the status quo were to allow for the potential of phased construction of needed modifications over time and eliminate the here-to-fore single-focus projects that frequently resulted in inefficient use of total campus space.

- Status Quo – 590 kneeling seats maximum**
  - Improve and increase parking
  - Make some improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits

- **Remodel – 1,000 kneeling seats maximum**
  - Remodel existing church to expand maximum seating to 1,000
  - Improve and increase parking
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits
- **New Church on Site of Existing Structure – 1,200 seating maximum**
  - Construct a new church on the site of the existing church
  - Improve and increase parking
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits
- **New Church and Remodel of Existing Structure – 1,200 seating maximum**
  - Construct a new church, preserving existing church for alternate use
  - Modify surrounding campus to allow for more parking – remove existing office building
  - Make significant improvements to pedestrian walkways and green areas
  - Modify parking lot entry and exits

## X. CAPITAL CAMPAIGN

Three quarters (76%) of participants in the 2006 facilities survey thought St. Joseph’s had a parking problem, and 60% thought there was an overcrowding issue. Not surprisingly, opinions on the issues differed significantly by the Mass respondents attended, with 10:30 a.m. and 7:30 p.m. attendees the most convinced that crowding and parking issues exist.

Do you think there is an overcrowding issue at St. Joseph's church during weekend Masses?									
	Total	Which weekend Mass do you usually attend?							
		Saturday at 5:30 p.m.	Sunday at 7:30 a.m.	Sunday at 9:00 a.m.	Sunday at 10:30 a.m.	Sunday at 12:00 noon	Sunday at 1:30 p.m. Spanish	Sunday at 5:30 p.m.	Sunday at 7:30 p.m.
Yes	60%	51%	42%	63%	<b>79%</b>	58%	48%	51%	<b>73%</b>
No	35%	42%	50%	34%	19%	34%	44%	39%	25%
Don't Know	5%	7%	8%	3%	2%	8%	8%	10%	2%

Exhibit 29. Survey responses to overcrowding.

It should also be noted that even those Masses eliciting the weakest beliefs in overcrowding responded affirmatively to the existence of parking issues by a margin of 2:1 to 3:1.

Do you think there is a parking issue at St. Joseph's?									
	Total	Which weekend Mass do you usually attend?							
		Saturday at 5:30 p.m.	Sunday at 7:30 a.m.	Sunday at 9:00 a.m.	Sunday at 10:30 a.m.	Sunday at 12:00 noon	Sunday at 1:30 p.m. Spanish	Sunday at 5:30 p.m.	Sunday at 7:30 p.m.
Yes	76%	68%	60%	80%	<b>89%</b>	71%	68%	77%	<b>83%</b>
No	21%	27%	31%	18%	9%	24%	32%	23%	15%
Don't Know	3%	5%	9%	2%	2%	5%	0%	0%	2%

Exhibit 30. Survey responses to parking.

When asked if they would support a capital campaign to address church overcrowding, half of surveyed parishioners said Yes, 18% said No, and nearly one-third responded Don’t Know. Looking at the 33% Don’t Knows in greater detail, two-thirds said it was important to know how the new

money would be spent and over half wanted a commitment to oversight that would guarantee the money would be spent as proposed. Additional comments from the Don't Knows focused on wanting more information with regard to how previous campaign money was spent, finding out whether a mission or other new parish would alleviate crowding, and addressing perceived inequities in giving stemming from low parishioner participation in the previous campaign. It should also be noted that neither supporters of the previous capital campaign nor persons currently serving in parish ministries or programs were disproportionately inclined to support any future campaign.

Would you support a capital campaign to address church overcrowding?									
	Total	Which weekend Mass do you usually attend?							
		Saturday at 5:30 p.m.	Sunday at 7:30 a.m.	Sunday at 9:00 a.m.	Sunday at 10:30 a.m.	Sunday at 12:00 noon	Sunday at 1:30 p.m. Spanish	Sunday at 5:30 p.m.	Sunday at 7:30 p.m.
Yes	49%	35%	43%	60%	58%	46%	43%	63%	51%
No	18%	28%	28%	12%	11%	19%	14%	10%	13%
Don't Know	33%	37%	29%	28%	31%	35%	43%	27%	36%

Exhibit 31. Survey responses to capital campaign support by Mass attended.

Almost half of those responding negatively to campaign support said they were not convinced of the need and another 11% said they were still unsure how previous monies were spent, indicating a significant need for additional education of parish members before any such endeavor is undertaken. Just 17% of the “No’s” said they could not afford to give. Of the 23% who provided additional comment, nearly half focused on the previous campaign, stating they were unsure how money was spent and expressing feelings that earlier campaign promises had not been met.

Why wouldn't you support a new capital campaign?	
Not convinced of the need	49%
Can't afford it	17%
Not sure how the last funds raised were used	11%
Other	23%

Exhibit 32. Survey responses to negative capital campaign support.

## Fundraising Potential

Parishioners were queried as to their views with regard to the level of support that might be forthcoming from the total parish membership as part of a possible capital campaign. Just under half (48%) believed that 50% or more would be supportive. However, once again over one-third said they “Didn’t Know,” demonstrating a significant need for outreach and education prior to commencement of any campaign.

Thinking of the parish as a whole, how do you think fellow parishioners will respond to a new capital campaign to expand church seating and available parking?	
Most will support some level of sacrificial giving	23%
Two-thirds will support	6%
Half will support	19%
One-quarter will support	17%
Don't know	35%

Exhibit 33. Survey responses to negative capital campaign support.



Survey respondents were also asked to indicate the level of financial commitment they would be willing to make to a capital campaign over a 3-year period in an effort to get a preliminary feeling for the parish’s parishioner-based fundraising capacity, excluding major capital gifts. It is important to note before proceeding, however, that *the level of giving a parishioner might indicate in a survey is not necessarily a commitment to give at that level nor is it a reliable determinant of total parishioner donations. Such a projection must come from a comprehensive survey and interview process followed by a sophisticated analysis conducted by a reputable Catholic fundraising consulting firm with enough historic experience to translate parishioner survey data into a dependable giving forecast.*

That said, current survey data could be viewed as suggesting base parishioner support in the range of \$3.0 million to \$4.7 million over a period of three years. To reach that estimate, the following assumptions were made.

**Parishioner Universe.** For purposes of the following calculations, St. Joseph’s parishioner base is estimated to average 5,598 families through a 3-year campaign period of FY2007-08, FY2008-09, and FY2009-10, assuming parish growth continues at an average 6% per year through 2010.

	Base Yr	Current Yr	Fundraising Years			Average
Growth Rate: 6.0%	'05-06	'06-07	'07-08	'08-09	'09-10	'07-10
Registered Families	4,695	4,977	5,275	5,592	5,927	5,598

Exhibit 34. Estimated parish membership during fundraising years.

**Parishioner Participation.** Respondents predicted a weighted average campaign participation rate of 35% to 53%, depending on how one weights participation levels within the “Don’t Know” category. Assuming that all Don’t Knows would abstain from participation results in a 35% overall rate. Assuming Don’t Knows participate at 50% leads to the higher 53% rate. One would typically select a number between the two extremes. However, since the previous campaign’s participation rate was an estimated 18%, even a 35% participation rate would be a significant improvement over prior experience and a 53% rate is likely out of reach without a significant change in campaign tactics over the prior effort.

Survey Giving Category	Category Percentage	Survey Predicted Participation	Weighted Participation
Most	75%	23%	17.3%
Two Thirds	67%	6%	4.0%
Half	50%	19%	9.5%
One Quarter	25%	17%	4.3%
Don't Know – A	0%	35%	0.0%
Don't Know – B	50%	35%	17.5%
Total Estimated Participation – A		100%	35.0%
Total Estimated Participation – B		100%	52.5%

Exhibit 35. Estimated fundraising participation.

***Parishioner Giving Levels.*** Average giving per household per month is estimated between \$42 and \$45. When asked what financial commitment they would be willing to make over a three-year period, over half (57%) said \$50 or less, with almost one quarter saying they were only comfortable contributing \$10 per month. Just 18% felt comfortable giving \$100 per month or more. Again, assumptions were made for the 18% of respondents providing individual responses within the “Other” category, and based on a reading of those comments, a range of \$10 to \$25 appeared most appropriate overall.

Surveyed Per Month Giving Levels	Annualized Giving Levels	3-Yr. Campaign Levels	Predicted Participation	Weighted Annual Giving Per Family	Weighted Campaign Giving Per Family
\$ 300	\$ 3,600	\$ 10,800	1%	\$ 36	\$ 108
\$ 200	\$ 2,400	\$ 7,200	4%	\$ 96	\$ 288
\$ 100	\$ 1,200	\$ 3,600	13%	\$ 156	\$ 468
\$ 75	\$ 900	\$ 2,700	2%	\$ 18	\$ 54
\$ 50	\$ 600	\$ 1,800	15%	\$ 90	\$ 270
\$ 25	\$ 300	\$ 900	19%	\$ 57	\$ 171
\$ 10	\$ 120	\$ 360	23%	\$ 28	\$ 83
\$ -	\$ -	\$ -	5%	\$ -	\$ -
<b>Other - \$10</b>	\$ 120	\$ 360	18%	\$ 22	\$ 65
<b>Other - \$25</b>	\$ 300	\$ 900	18%	\$ 54	\$ 162
<b>Total @ \$10</b>			100%	\$ 503	<b>\$ 1,507</b>
<b>Total @ \$25</b>				\$ 535	<b>\$ 1,604</b>

Exhibit 36. Estimated giving per parish family.

Thus, a range of individual giving of \$3.0 to \$4.7 million was calculated. This number does not take into account large donor contributions or those from outside the parishioner base. Nor does it take into account the potential impact of an aggressive education and solicitation campaign. That said, it must be seen as a realistic assessment of surveyed parishioners’ current comfort levels for participation in any upcoming capital campaign. It should also be noted that parishioners willing to participate in such a survey likely represent a more involved, informed, and supportive cross-section of the overall parishioner base, making their stated commitment levels a Best Case scenario at the current point in time.

Parish Households	% Participation	Households Giving	Ave. Per Family Per Month	Ave. Per Family for Campaign	Total Dollars per Year	Total Dollars for Campaign
5,598	35%	1,960	\$42	\$1,507	\$ 984,523	<b>\$2,953,568</b>
5,598	35%	1,960	\$ 42	\$ 1,604	\$1,048,040	<b>\$3,144,121</b>
5,598	53%	2,940	\$ 45	\$ 1,507	\$1,476,503	<b>\$4,429,509</b>
5,598	53%	2,940	\$ 45	\$1,604	\$1,571,761	<b>\$4,715,284</b>

Exhibit 37. Estimated funds raised through monthly parishioner giving.

## Desired Campaign Information

Finally, survey respondents were asked what information they thought parishioners require when determining the merits of any proposed capital campaign. Over half (54%) wanted to know how the new money would be spent with almost that many (45%) asking for a commitment to oversight that would guarantee the money raised would be spent as promised and a third (35%) still desiring information on how the money from the previous campaign was spent... all indicators of a

generalized perception that money raised during the previous campaign was to be spent on parking and seating... two items central to the current campaign discussion.

Over a third of respondents (38%) also wanted more information on the basis for forecasted growth within the parish, reflecting the fact that only those parishioners who attend Sunday masses at 9:00, 10:30, noon, and 7:30 p.m. showed a strong belief that a crowding issue actually exists at weekend Masses. Open-ended comments to the question followed several themes:

**Financial:** questions about previous funds raised, concerns about ensuring that future construction costs would be minimized and well managed, and a desire for more knowledge of the proposed budget.

**Alternatives:** questions about the possibility of answering crowding through development of new parishes or movement of St. Joseph's to another site.

**Design:** desires to see any new construction resulting in a traditional Catholic church design, and a feeling that potential answers to the parking issue have not yet been fully explained.

**Support:** desires to see both verbal and financial support from the Diocese and concerns over low parishioner participation in the previous campaign.

## **XI. FINANCIALS**

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Ordinary Income for the parish has grown at a healthy Compounded Average Growth Rate (CAGR) of 8% over the past three years, with Sunday offertory surpassing \$1.3 million in the most recent fiscal year (ending June 30, 2006). All offertory income – Sunday, Christmas, and Easter – has averaged annual growth in the strong 8-10% range. Total Income growth, however, has been slower at a Compounded Average Growth Rate of just under 7% due to flat Miscellaneous Income and substantial declines in Other Income in FY2003-04 and FY2004-05.

Ordinary Expense has been running at 96-98% of Ordinary Income and has grown more quickly over the past three years than Ordinary Income by almost a full percentage point (9% vs. 8%). Comparing Total Income to Total Expense the average expense growth exceeded average income growth by 4 percentage points (11% vs. 7%), due in large part to growth in capital expenditures from \$14,000 two years ago to almost \$81,000 in the most recent fiscal year.

	2002-03	2003-04		2004-05		2005-06		3-Year
	\$	\$	Chg	\$	Chg	\$	Chg	CAGR
<b>Ordinary Income</b>								
Sunday Offering	1,065,789	1,120,653	5%	1,241,913	11%	1,330,302	7%	7.7%
Christmas Offering	49,069	49,285	---	57,096	16%	64,605	13%	9.6%
Easter Offering	48,782	53,540	10%	56,560	6%	64,780	15%	9.9%
Other	9,095	9,095	---	14,279	52%	21,326	49%	32.9%
<b>Total Ordinary Income</b>	<b>1,172,735</b>	<b>1,232,573</b>	<b>5%</b>	<b>1,369,848</b>	<b>11%</b>	<b>1,481,013</b>	<b>8%</b>	<b>8.1%</b>
<b>Total Ordinary Expense</b>	<b>1,121,109</b>	<b>1,199,280</b>	<b>7%</b>	<b>1,313,772</b>	<b>10%</b>	<b>1,449,378</b>	<b>10%</b>	<b>8.9%</b>
<b>Net Operating Income</b>	<b>51,626</b>	<b>33,293</b>	<b>-55%</b>	<b>56,076</b>	<b>68%</b>	<b>31,635</b>	<b>-44%</b>	<b>-15.1%</b>
% of Ordinary Income	4%	3%		4%		2%		
<b>Miscellaneous Income</b>								
Bookstore - Net	3,458	3,929	114%	5,721	146%	6,698	17%	24.7%
Votive Candles - Net	6,607	8,697	132%	8,076	93%	7,355	-9%	3.6%
Festival - Net	25,268	15,406	61%	35,522	231%	20,212	-43%	-7.2%
<b>Total Misc Income</b>	<b>35,333</b>	<b>28,032</b>	<b>-21%</b>	<b>49,319</b>	<b>76%</b>	<b>34,265</b>	<b>-31%</b>	<b>-1.0%</b>
% Total Income	3%	2%		3%		2%		
<b>Capital Expenditures<sup>1</sup></b>	<b>-</b>	<b>13,807</b>	<b>---</b>	<b>62,506</b>	<b>353%</b>	<b>80,733</b>	<b>29%</b>	<b>141.8%<sup>2</sup></b>
% Prior Year Excess		8%		60%		94%		
<b>Other Income</b>	<b>96,553</b>	<b>56,782</b>	<b>-41%</b>	<b>42,887</b>	<b>-24%</b>	<b>73,364</b>	<b>71%</b>	<b>-8.7%</b>
% Total Income	7%	4%		3%		5%		
<b>Total Income</b>	<b>1,304,621</b>	<b>1,317,387</b>	<b>1%</b>	<b>1,462,054</b>	<b>11%</b>	<b>1,588,642</b>	<b>9%</b>	<b>6.8%<sup>1</sup></b>
<b>Total Expense</b>	<b>1,121,109</b>	<b>1,213,087</b>	<b>8%</b>	<b>1,376,278</b>	<b>13%</b>	<b>1,530,111</b>	<b>11%</b>	<b>10.9%</b>
% Total Income	86%	92%		94%		96%		
<b>Net Income</b>	<b>183,512</b>	<b>104,300</b>	<b>51%</b>	<b>85,776</b>	<b>82%</b>	<b>58,531</b>	<b>-32%</b>	<b>-31.7%</b>
% Total Income	14%	8%		6%		4%		

Exhibit 38. Historic financial performance.

<sup>1</sup>Defined as any non-salary expense in excess of \$1,000.

<sup>2</sup>2-year Compounded Average Growth Rate .

Net Income dropped from a high of \$183,512 in FY2002-03 to \$104,300 in FY2003-04 due to two significant and ongoing increases in expenses: (1) the addition of the Bishop's Ministry Appeal (BMA) – an incremental \$35,000 expense in FY2003-04 and a \$53,000 expense in FY2004-05; and (2) a significant expansion in the annual Parish Tithe, moving from 3% of prior year Sunday offertory in FY2002-03 to 5% in FY2003-04, 6% in FY2004-05, and 7% in FY2005-06. It is a parish goal to grow the annual Parish Tithe another percentage point in FY2006-07 and then ½ percentage point per year until reaching 10.0% of prior year Sunday offertory in FY2010-11. A detailed listing of parish income and expenses is provided in Exhibit F in the Appendix.

## Projected Offering & Program Income

Looking forward, parish income has been projected to continue growing at 8.1% through FY2010-11 as a result of sustained parishioner growth and a belief that increased focus on overall parish financial performance will reverse historic declines in the considerably smaller but important Miscellaneous and Other income categories. However, unabated crowding at weekend Masses could translate into decreased parishioner growth rates, and consequentially, decreased income growth as well.

As forecasted Modesto area growth rates slow after 2010 and the probability of a new parish increases, projected income growth rates slow as well, first to 6.0% and then to 5.0%, allowing for more modest parishioner growth in the 2-3% range and an anticipated 3% inflation factor. Opportunities for enhanced income growth exist – and should be explored – in all three Miscellaneous Income categories as well as in Other Income, where the development of a comprehensive gifting program could move the category well beyond its historic 3% of revenues.

	Projected Fiscal Year Income								
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2015-16	2020-21	2025-26
<b>Ordinary Income</b>			Income growth @ 8.1%				Inc 6.0%	Inc 5.0%	Inc 5.0%
Sunday Offering	1,330,302	1,438,057	1,554,539	1,680,457	1,816,575	1,963,716	2,627,895	3,353,934	4,280,565
Christmas Offering	64,605	69,838	75,495	81,610	88,220	95,366	127,622	162,881	207,882
Easter Offering	64,780	70,027	75,699	81,831	88,459	95,625	127,967	163,322	208,445
Other	21,326	23,053	24,921	26,939	29,121	31,480	42,128	53,767	68,621
<b>Total Ordinary Income</b>	<b>1,481,013</b>	<b>1,600,975</b>	<b>1,730,654</b>	<b>1,870,837</b>	<b>2,022,375</b>	<b>2,186,187</b>	<b>2,925,612</b>	<b>3,733,904</b>	<b>4,765,513</b>
<b>Miscellaneous Income</b>									
Bookstore - Net	6,698	7,240	7,827	8,461	9,146	9,887	13,232	16,887	21,553
Votive Candles - Net	7,355	7,951	8,595	9,291	10,044	10,857	14,529	18,543	23,666
Festival - Net	20,212	21,849	23,619	25,532	27,600	29,836	39,927	50,958	65,037
<b>Total Misc Income</b>	<b>34,265</b>	<b>37,040</b>	<b>40,041</b>	<b>43,284</b>	<b>46,790</b>	<b>50,580</b>	<b>67,688</b>	<b>86,388</b>	<b>110,256</b>
% Total Income	2%	2%	2%	2%	2%	2%	2%	2%	2%
<b>Other Income</b>	<b>73,364</b>	<b>79,307</b>	<b>85,730</b>	<b>92,675</b>	<b>100,181</b>	<b>108,296</b>	<b>144,923</b>	<b>184,964</b>	<b>236,066</b>
% Total Income	5%	5%	5%	5%	5%	5%	5%	5%	5%
<b>Total Income</b>	<b>1,588,642</b>	<b>1,717,322</b>	<b>1,856,425</b>	<b>2,006,796</b>	<b>2,169,346</b>	<b>2,345,063</b>	<b>3,138,223</b>	<b>4,005,256</b>	<b>5,111,835</b>

Exhibit 39. Projected income.

## Projected Overhead & Program Expenses

Expense growth has been projected at a full percentage point below revenue growth throughout the planning period to create a net income level sufficient to support the increased operating and maintenance expenses of an expanded church and enhanced campus. And while growth of 7% through FY2010-11 may seem unrealistic in light of growth rates of 11-13% for each of the past two years, it is an attainable goal if parish administration tackles a few key expense drivers, most notably capital expenditure growth, administrative cost increases, and buildings & grounds cost increases (with 3-year Compounded Average Growth Rates of 142%, 11%, and 10%, respectively).

	Projected Fiscal Year Expenses								
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2015-16	2020-21	2025-26
<b>Ordinary Expense</b>			Expense growth @ 7.1%				Exp 5.0%	Exp 4.0%	Exp 4.0%
Program Expenses	1,357,678	1,447,810	1,552,676	1,664,020	1,783,361	1,911,270	2,451,660	3,008,755	3,675,972
Parish Tithe	91,700	106,424	122,235	139,909	159,643	181,657	247,915	319,422	407,673
% Prior Year Offertory	7%	8.0%	8.5%	9.0%	9.5%	10.0%	10.0%	10.0%	10.0%
<b>Total Ordinary Expense</b>	<b>1,449,378</b>	<b>1,554,234</b>	<b>1,674,911</b>	<b>1,803,929</b>	<b>1,943,004</b>	<b>2,092,927</b>	<b>2,699,575</b>	<b>3,328,178</b>	<b>4,083,645</b>
<b>Capital Expenditures</b>	<b>80,733</b>	<b>29,266</b>	<b>33,456</b>	<b>37,015</b>	<b>41,463</b>	<b>46,220</b>	<b>80,396</b>	<b>125,500</b>	<b>192,515</b>
% Prior Year Net Inc	94%	50%	25%	25%	25%	25%	25%	25%	25%
<b>Total Expense</b>	<b>1,530,111</b>	<b>1,583,500</b>	<b>1,708,367</b>	<b>1,840,944</b>	<b>1,984,467</b>	<b>2,139,147</b>	<b>2,779,971</b>	<b>3,453,678</b>	<b>4,276,160</b>
% Income	96%	92%	92%	92%	91%	91%	89%	86%	84%

Exhibit 40. Projected expenses.

Capital Expenditures – defined by the parish as any non-salary expense in excess of \$1,000 – have ranged from \$14,000 to \$81,000 over the past three years and accounted for as much as 94% of the prior year’s Net Income... a measurement used by the parish to monitor the relative impact of capital spending vis-à-vis financial reserves. Clearly, continued capital spending approximating the entirety of the prior year’s net income will significantly impair the parish’s ability to grow its financial reserves in anticipation of a possible future campus expansion. For purposes of this planning model, capital expenditures have been cut to 50% of prior year net income for the FY2006-07 fiscal year (a 64% decline in budgeted dollars) and then allowed to grow from there at approximately 10% per year, significantly below historic growth rates but faster than projected increases for other operating overhead expenses. It should also be noted that due to planned growth in Net Income, the rate of capital expenditures in relation to the prior year’s net income is projected to settle at an average 25% beginning in FY2007-08.

## Net Income Available for New Facility Operating Costs

For St. Joseph's to build net income to a level sufficient to fund the increased operating expense of a significantly larger campus, it must grow its revenues faster than its expenses by at least a percentage point over the next 10 years. And, should expansion plans include the potential of debt service on a facility loan, the requisite variance would be greater and the time period over which it would be required would likely extend to the outer edges of the planning horizon. For example, debt service on a \$3 million 20-year loan at today's prime rate of 8.25% would require annual interest and principal payments of approximately \$311,000.

A number of income and expense growth scenarios are depicted in the following table to further illustrate the importance of attaining a consistently higher growth rate for income than expenses. All scenarios assume income growth at the projected 8.1% rate through FY2010-11, followed by 6% through FY2015-16, and 5% thereafter. All scenarios also include the previously discussed reductions in capital expenditures. Scenarios I-IV assume continuation of planned growth in the Parish Tithe to 10% in FY2010-11. The variable in each is the growth rate of all other parish expenses.

The hypothetical goal of this exercise is to achieve a net income of \$200,000 by FY2010-11 when church and campus expansion would potentially add significantly to facility and grounds operating and maintenance expenses.

	Actual	Projected Fiscal Year net income Performance							
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2015-16	2020-21	2025-26
<b>I: Income &gt; Expense by 1.0% through 2015-16<sup>1</sup></b>	58,531	133,822	148,059	165,852	184,879	205,916	358,252	551,578	835,675
% of Total Income	4%	8%	8%	8%	9%	9%	11%	14%	16%
<b>II: Income = Expense<sup>2</sup></b>	58,531	121,249	124,144	128,158	131,647	134,951	174,874	196,978	260,834
% Total Income	4%	7%	7%	6%	6%	6%	6%	5%	5%
<b>III: Expense &gt; Income by 0.5%<sup>3</sup></b>	58,531	114,962	112,092	109,030	104,442	98,429	77,108	166	(69,710)
% Total Income	4%	7%	6%	5%	5%	4%	2%	0%	-1%
<b>IV: Expense &gt; Income by 2.0%<sup>4</sup></b>	58,531	96,102	75,560	50,506	20,427	(15,410)	(242,420)	(678,911)	(1,267,241)
% of Total Income	4%	6%	4%	3%	1%	-1%	-8%	-17%	-25%
<b>V: Scenario I w/changes to the Parish Tithe<sup>5</sup></b>	58,531	147,125	166,304	192,381	220,258	251,569	366,366	548,736	836,667
% of Total Income	4%	9%	9%	10%	10%	11%	12%	14%	16%

Exhibit 41. Projected net income scenarios.

<sup>1</sup>Income:expense growth at 8.1:7.1% through 2010-11; 6.0:5.0% through 2015-16; 5.0:4.0 thereafter.

<sup>2</sup>Income:expense growth at 8.1:8.1% through 2010-11; 6.0:6.0% through 2015-16; 5.0:5.0% thereafter.

<sup>3</sup>Income:expense growth at 8.1:8.6% through 2010-11; 6.0:6.5% through 2015-16; 5.0:5.5% thereafter.

<sup>4</sup>Income:expense growth at 8.1:10.1% through 2010-11; 6.0:8.0% through 2015-16; 5.0:7.0% thereafter.

<sup>5</sup>Scenario I modified to hold the Parish Tithe (direct charitable giving) at 7% through 2010-11, then growing at ½ percentage point per year until reaching 10% in 2016-17.

Scenario I, with a reduction of expense growth to one percentage point below that of revenues is the only scenario to achieve a net income of \$200,000 by FY2010-11 while maintaining current parish tithing guidelines. While Scenario II's even growth assumptions appear to show but steady net income growth, actual growth remains flat after being adjusted for a 3% inflation rate. Scenario IV was added only to highlight the problem created by continued expense growth well ahead of income growth. While expense growth in FY2005-06 surpassed income growth by 2.0 percentage points (11% vs. 9%), the 3-year compounded growth rates for each differ by more than 4 points (10.9%

expenses vs. 6.8% income). Scenario IV shows the long-term implications of continuation of just a 2-point differential.

Scenario V illustrates the potential for significant improvement in net income growth in the next five years – critical to preparations for campus and church expansion – by freezing the Parish Tithe at its current 7% of prior year's offertory until FY2010-11 and then continuing a one-half percentage point escalation until achieving the parish's 10% goal in FY2016-17.

See Exhibit G in the Appendix for a detailed listing of projected income and expenses based on Scenario I above.

## **XI. APPENDIX**

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- A. Modesto Area Parish Boundaries
- B. St. Joseph's Organization Chart for Fiscal Year FY2006-07
- C. Apostolates & Services
- D. Pastoral Planning Survey
- E. Parish Facilities Survey
- F. Financial Performance FY2002-03 to FY2005-06
- G. Projected Financial Performance FY2006-07 to FY2025-26
- H. St. Joseph's Response to the Diocesan Synod Decrees
- I. St. Joseph's Parish Council Planning Committee Charter



EXHIBIT A  
**Modesto Area Parish Boundaries**

**St. Joseph's**

**On the North:** Intersection of Claremont Avenue and Sylvan Avenue, east to the Santa Fe railroad tracks.

**On the East:** Intersection of the Santa Fe railroad tracks and Sylvan Road, south on the Santa Fe railroad tracks to Dry Creek.

**On the South:** Intersection of Santa Fe railroad tracks and Dry Creek, west along Dry Creek to Scenic Drive to Bodem Street

**On the West:** Intersection of Bodem Street and Scenic Drive, north to Lucerne Avenue, east on Lucerne Avenue to Sunrise Avenue to Sheffield Lane, north to Sheffield Lane to Rumble Road, west on Rumble Road to Claremont Avenue, north on Claremont Avenue to Sylvan Road.

**St. Stanislaus**

**On the North:** Junction of Highway 99 and the Stanislaus River, southeast along Highway 99 to Toomes Road, south on Toomes Road to Beckwith Road, east on Beckwith Road to Highway 99, southeast on Highway 99 to Needham Street, east along Needham Street, Downey Avenue and H Street to Scenic Drive, east along Scenic Drive to Claus Road.

**On the East:** Junction of Scenic Drive and Claus Road, south along Claus Road to Yosemite Blvd., west along Yosemite Blvd. to Garner Road, south along Garner Road (projected) to Tuolumne River.

**On the South:** Junction of Garner Road (projected) and Tuolumne River, west along Tuolumne River to the junction of Tuolumne and San Joaquin Rivers.

**On the West:** Junction of Tuolumne and San Joaquin Rivers, northwest along San Joaquin River to Stanislaus River, northeast along Stanislaus River to Highway 99,

**Our Lady of Fatima**

**On the North:** Intersection of Highway 99 and Beckwith Road, northeast to Standiford Avenue, east on Standiford Avenue to Sylvan Avenue, east on Sylvan Avenue to Claremont Avenue.

**On the East:** Intersection of Sylvan Avenue and Claremont Avenue, south on Claremont Avenue to Rumble Road, east on Rumble Road to Sheffield Lane, south on Sheffield Lane to Sunrise Avenue, south on Sunrise Avenue to Bodem Street, south on Bodem Street to Scenic Drive.

**On the South:** Intersection of Bodem Street and Scenic Drive, west on Scenic Drive to Downey Avenue to Needham Avenue, along Needham Avenue to Highway 99.

**On the West:** Intersection of Needham Avenue and Highway 99, along Highway 99 to Beckwith Road.

## Holy Family

**On the North:** Intersection of Highway 99 and Stanislaus River, east on Stanislaus River to intersection of Stanislaus River and Old Oakdale Road (projected).

**On the East:** Intersection of Stanislaus River and Old Oakdale Road (projected), south on Old Oakdale Road to Patterson Road, west on Patterson Road to Coffee Road, south on Coffee Road to Sylvan Avenue

**On the South:** Intersection of Coffee Road and Sylvan Avenue, west on Sylvan Avenue to Standiford Avenue, west on Standiford Avenue to Beckwith Road, west on Beckwith Road to Toomes Road.

**On the West:** Intersection of Beckwith Road and Toomes Road, north on Toomes Road to Highway 99, north on Highway 99 to Stanislaus River.

## St. Frances of Rome (Riverbank)

**On the North:** Intersection of McHenry Avenue and Jones Avenue, east along Jones Avenue (projected) to Orange Road, east on Orange Road to Sutlife Road, south on Sutlife Road to River Road, east along River Road to Victory Road.

**On the East:** Intersection of Dry Creek and Church Street, north on Church Street to Milnes Road, east on Milnes Road to Langworth Road, north on Langworth Road (projected) across Highway 108 (Oakdale-Riverbank Road) to Stanislaus River, west on Stanislaus River to Victory Road, north on Victory Road to River Road.

**On the South:** Intersection of Sylvan Avenue and Coffee Road, east on Sylvan Avenue to Claus Road, south on Claus Road to Santa Fe railroad tracks, southeast along Santa Fe railroad tracks to Dry Creek, east on Dry Creek to Church Street.

**On the West:** Intersection of Sylvan Avenue and Coffee Road, north on Coffee Road to Patterson Road, east on Patterson Road to Old Oakdale Road, north on Old Oakdale Road (projected) to Stanislaus River, northwest on Stanislaus River to McHenry Avenue, north on McHenry Avenue to Jones Avenue.

## St. Jude (Ceres)

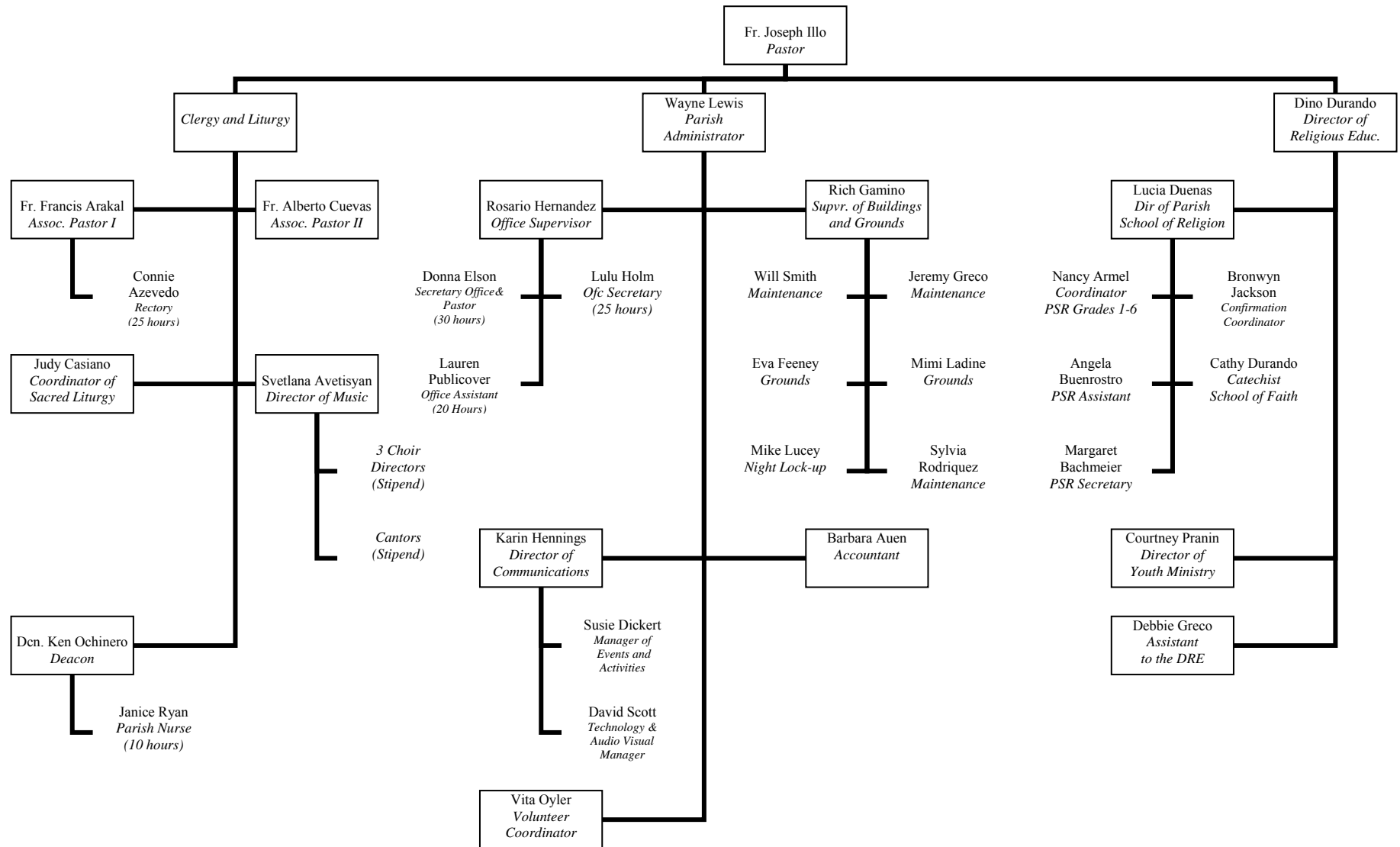
**On the North:** The Tuolumne River from Shiloh Road, east to Washington Road.

**On the East:** From the Tuolumne River, Washington Road, south to Grayson Road, east on Grayson to Mt. View, south on Mt. View to Keyes Road.

**On the South:** Keyes Road from Mt. View, west to Crows Landing Road, south on Crows Landing Road to Fulkerth, west on Fulkerth to the San Joaquin River.

**On the West:** The San Joaquin River from Fulkerth to Shiloh Road, north on Shiloh Road to the Tuolumne River.

**EXHIBIT B**  
**St. Joseph's Organization Chart for Fiscal Year FY2006-07**



**EXHIBIT C -  
Apostolates and Services**

**WORSHIP (THE SACRAMENTS)**

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**I. Prayer & Spirituality –**

1. Daily Mass
2. Sunday Mass
3. Confessions
4. First Friday Holy Hour w/confessions
5. Children's Adoration w/confessions
6. Perpetual Adoration
7. Militia Immaculatae Prayer Group
8. Watch & Pray Small Bible Study/Prayer Groups
9. Charismatic Prayer Group
10. Intercessory Prayer Group

**II. Music –**

1. Children's Choir (*12:00 Noon Sundays*)
2. Adult Choir (*10:30 a.m. Sundays*)
3. Youth Choir (*5:30 p.m. Sundays*)
4. Contemporary Ensemble (*7:30 p.m. Sundays*)
5. Spanish Choir (*1:30 p.m. Sundays*)
6. Cantors Program
7. Organists & Accompanists

**III. Liturgy –**

1. Extraordinary Ministers of Holy Communion
2. Lectors
3. Altar Servers
4. Ushers
5. Greeters
6. Altar Guild Society
7. Environment Team (*Interior Design & Decoration of Church*)
8. Wedding Coordinator
9. Quinceañera Coordinator
10. Children's Liturgy of the Word
11. Parking Lot Attendants

**EDUCATION (THE WORD)**

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**I. Parish School of Religion**

1. Children's Catechesis, 1-12
2. Special Education Catechesis, 1-12
3. Catechesis for Parents (*School of Faith*)
4. 2-Year Confirmation, Grades 7-12

**II. Rite of Christian Initiation** (*For Those Wanting to Become Catholic*)

1. Adult Catechumenate (RCIA)
2. Teen Catechumenate (RCIT)
3. Children's Catechumenate (RCIC, *ages 7-12*)

### **III. Adult Faith Formation**

1. Baptism preparation for parents of children to be baptized
2. Marriage preparation classes for engaged couples
3. Adult Basic Bible Study
4. Adult Intermediate Bible Study
5. Spanish Adult Bible Study
6. Small group Bible Studies
  - Mothers, Fathers, Teens, Singles, Women, etc.
7. Adult Apologetics (*Basic Catholic Teachings*)

### **IV. Youth Ministries**

1. High School & Jr. High Retreats & Activities
2. STAR – Students Traveling & Rejoicing (*Grades 1-6*)
3. Vacation Bible Retreats
4. Teen Bible Study Fellowship
5. Young Adult Group
6. World Youth Day Pilgrimages

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## **OUTREACH (ECCLESIAL CHARITY)**

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### **I. Pastoral Services –**

1. Legion of Mary (*Wks w/Shut-ins, Prisoners, Hospitals*)
2. Bereavement Ministries
3. Parish Bookstore
4. Crown Ministries (*Christian Financial Planning*)
5. Light Weight Workshop (*Scripture-based Weight Loss*)
6. Landings (*Fellowship & Formation for Returning Catholics*)
7. Alcoholics Anonymous
8. Retrouvaille (*support for troubled marriages*)
9. Chronic Pain Sufferers Support Group
10. Communion Ministers to the Sick & Homebound
11. Rosary Makers
12. Parish Bulletin Stuffers
13. Tribunal Aides

### **II. Social Action & Service –**

1. Sister Parish Team (*St. Joseph's Parish Vladivostok, Russia*)
2. Modesto Interfaith Ministries (*Citywide Service to Poor*)
3. Family Promise (*Periodic Housing for Homeless on Parish Campus*)
4. St. Vincent de Paul Society (*Assistance to Needy*)
5. Respect Life (*Advocacy for Unborn, Post-abortion Counseling*)
6. Prison Outreach
7. St. Joseph's Bread (*Meals for City Homeless Shelters*)
8. English & Citizenship Classes for Immigrants
9. Parish Health Ministries (*Parish Nurse*)
10. Project Rachel (*Spiritual Healing After Abortion*)

**III. Family Life Ministries –**

1. Annual Family Life Conference
2. Natural Family Planning Teachers
3. St. Joseph's Covenant Keepers (*Catholic Men's Fellowship*)
4. Support Group for Divorced Adults
5. Support Group for Mothers
6. Couples for Christ (*Family Fellowship*)
7. Toddler Time (*Sunday Mass Childcare*)
8. Tribunal Aides (*helps those seeking annulments*)
9. Martha's Meals (funeral receptions)
10. Military Support Ministry

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**COMMUNITY**

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**Lay Leadership –**

1. Parish Pastoral Council
2. Parish Finance Council
3. Building Committee
4. Planning Committee
5. Music Advisory Board
6. Hispanic Advisory Board
7. Liturgy Advisory Board

**Parish Life –**

1. Special Events
2. Speakers
3. Parish Lenten & Advent Mission
4. Concerts & Theatrical Presentations
5. Pilgrimages
6. Novenas, Feast Day Celebrations, Devotions

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**SOCIAL ORGANIZATIONS**

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1. Knights of Columbus (*Catholic Men's Order*)
2. Serra Club (*Professional Club to Promote Vocations*)
3. Journey in Christianity (*Sponsors Catholic Formation Weekends*)
4. Catholic Daughters of America
5. St. Joseph's Seniors (*Fellowship for those 55+*)
6. Active Adults Adventure Group
7. Boy Scout Troup & Cub Scout Pack

**EXHIBIT D**  
**Pastoral Programs Survey Results**

**Survey #2 Pastoral Programs 11/4/2006**



**Results Overview**

Date: 11/28/2006 9:02 AM PST

Responses: Completes

Filter: No filter applied

St. Joseph's mission statement reads: To Evangelize God's People beginning with the Gift of the Holy Eucharist. - To serve that mission to the best of our ability, we have established 9 parish priorities and a number of supporting initiatives. This survey seeks your input on each of those priorities and supporting initiatives in order to finalize our long-term strategic plan. Your input is valued and appreciated.

The first series of questions will focus on St. Joseph's WORSHIP and PRAYER life.

**1. Please rate the following initiatives in importance to IMPROVING WORSHIP and PRAYER LIFE at St. Joseph's.**

Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Highest Priority	Important Priority	Medium Priority	Low Priority	Not a Priority
Encourage the "Domestic Church": deepen parishioner prayer life at home as well as at Mass	180 42%	167 39%	58 14%	14 3%	5 1%
Increase overall parishioner reception of the Sacraments	202 48%	155 37%	51 12%	7 2%	5 1%
Encourage family and friends to attend Mass together on a regular basis	195 46%	146 34%	65 15%	13 3%	7 2%
Make prayer a part of every parish activity	218 52%	136 32%	56 13%	9 2%	3 1%
Make people feel more welcomed at Mass	168 40%	160 38%	70 17%	18 4%	6 1%
Advocate a sense of orthodoxy in Worship	108 27%	135 33%	116 29%	30 7%	18 4%
Provide more opportunities for fellowship after Mass	61 15%	154 37%	145 35%	46 11%	13 3%

**2. What 3 IMPROVEMENTS would you most like to see made at SUNDAY MASSES? (Please check 3 only.)**

More people singing and responding in Mass	208	49%
Clearer or louder sound, especially during the readings, homily, and announcements	102	24%
A more reverent and quieter atmosphere in the vestibule and church	179	42%
A more sacred appearance in church (stained glass, candles, statues, etc.)	130	31%
More respectful parishioner attire	192	45%
Better prepared Mass-goers: a congregation that UNDERSTANDS the Mass	263	62%
Other, please specify (50 character maximum)	94	22%

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

3. What 3 IMPROVEMENTS would you most like to see made to HOMILIES? (Please check 3 only.)			
Better connection between homilies and the readings		153	36%
Clearer teaching on specific Church doctrines		232	55%
More homilies that address today's reality and issues for people living their faith		347	82%
Improved consistency of weekend homily messages between parish clergy		77	18%
Stronger adherence to Church doctrine		115	27%
More parishioner input in homiletic themes		37	9%
Speech training for clearer articulation and accent reduction		119	28%
Other, please specify (50 character maximum)		59	14%

4. With regard to SACRED MUSIC at St. Joseph's, what ideas are of most interest to your family? (Please check up to 3.)			
Increase use of traditional Catholic music		181	43%
Continue offering varied music styles for varied worship styles		260	61%
Develop a music training center		42	10%
Teach parishioners how to sing the Mass		101	24%
Use less performance-style music and use more "singable" congregational music		193	46%
Select more songs that are within the singing range of the average person		238	56%
Other, please specify (50 character maximum)		59	14%

The next series of questions will focus on St. Joseph's EDUCATION programs and services.

5. Please rate the following initiatives in importance to DEEPENING PARISHIONER KNOWLEDGE of Sacred Scripture and Church Doctrine.					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Highest Priority	Important Priority	Medium Priority	Low Priority	Not a Priority
Support parishioners in ongoing Catholic faith formation	198 47%	169 40%	41 10%	5 1%	5 1%
Assist parishioners in discovering the Bible's importance in their daily lives	209 50%	150 36%	47 11%	8 2%	4 1%
Educate parishioners about Vatican II (the most important event in the Catholic Church in the last 100 years...) and other papal documents	165 40%	169 41%	60 14%	17 4%	6 1%
Advocate a sense of orthodoxy in Church Doctrine	110 27%	146 36%	103 26%	27 7%	15 4%
Broaden evangelization efforts to reach Mass-only and non-practicing Catholics	134 32%	172 42%	77 19%	19 5%	12 3%
Encourage the "Domestic Church" where parents, by their word and example are the first teachers of the faith to their children	232 59%	118 30%	34 9%	3 1%	4 1%



**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

6. How old are your children living at home? (Check all that apply.)			
I don't have children living at home		238	57%
0-4 years old		51	12%
5-10 years old		78	19%
11-13 years old		53	13%
14-18 years old		77	18%
19-22 years old		38	9%
7. Please check any YOUTH EDUCATION programs your children (or grandchildren) CURRENTLY attend at St. Joseph's.			
I don't have any children (or grandchildren) at St. Joseph's		240	66%
Religious Education, grades 1-6		72	20%
Religious Education, grades 7-12		35	10%
Preparation for First Confession		16	4%
Preparation for First Holy Communion		25	7%
Preparation for Confirmation		40	11%
Preparation for Baptism over age 7 (RCIC/RCIT) with Confirmation and First Holy Communion		7	2%
Children's Liturgy of the Word (CLOW) at Sunday Masses at 9:00am or 10:30am		33	9%
Children's Adoration on First Fridays		32	9%
High School Life Nights on Sunday evenings		12	3%
8. What 3 programs for CHILDREN/YOUTH do you feel are important to our parish and would be of greatest interest to your family? (Please check 3 only.)			
Year-round catechism classes (Parish School of Religion – PSR)		33	8%
Help children learn how to pray		115	29%
Learn how to apply faith to the daily lives of children/youth		182	46%
Educate children about the Mass		155	39%
Help High School teens stay engaged in their faith after celebrating Confirmation		222	56%
Help parents teach their children the faith at home		159	40%
Optional programs for Jr. High students IN ADDITION TO Confirmation preparation		52	13%
Organized acts of Charity; help children engage in Works of Mercy		141	35%
Sports activities		42	10%
Wellness education to develop a balance of physical, psychological, and spiritual well being		74	18%
Other, please specify (50 character maximum)		31	8%

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

9. Which forms of Catholic ADULT EDUCATION did you participate in during the PAST YEAR? (Check all that apply.)			
One or more of St. Joseph's 3 week Short Courses		79	21%
Watch and Pray, the Lenten small group Bible study		78	21%
Lenten Parish Mission with Fr. Wade Menezes, C.P.M.		139	37%
St. Joseph's Family Life Conference in January 2006 with Christopher West		78	21%
Parish offsite Spiritual Retreat in February 2006 with Fr. Illo		16	4%
EWTN Catholic television		199	53%
Catholic print media (newspapers and magazines)		214	56%
Catholic websites or blogs other than St. Joseph's		137	36%
Independent reading of Catholic books on the faith		240	63%
Immaculate Heart Radio, Catholic radio 1230 AM		179	47%
Other, please specify (50 character maximum)		84	22%

10. What 3 programs would you most like to see added to the current ADULT EDUCATION program? (Please check 3 only.)			
Program for Catholics who want to review the basics of their faith		240	58%
Programs given by speakers from other parts of the country		97	23%
Programs to educate parents about chastity/teen sex issues		87	21%
Apologetics classes		108	26%
Ongoing weekly Bible studies		133	32%
Short course (3-4 sessions) on the Early Church Fathers		60	15%
Short course (3-4 sessions) on Church History		131	32%
Program to educate and promote the social teachings of the Church (Right to Life, service to the poor, economics, etc.)		123	30%
Classes in Spanish		13	3%
Classes for those who will serve as Confirmation sponsors for teens		23	6%
Programs to support and educate parents who homeschool		35	8%
Program for young adults/college students		87	21%
Other, please specify (50 character maximum)		28	7%

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

11. What 3 kinds of EDUCATION FORMATS would you most likely use? (Please check 3 only.)			
3-week Short Course		94	22%
Small group study in homes		58	14%
Parish Advent or Lenten Mission (5 continuous evenings)		101	24%
I don't need more education, I already know the faith very well		3	1%
Special lectures		132	31%
Onsite Conference (Friday evening and all day Saturday)		54	13%
Spiritual Retreat (Friday evening through Sunday afternoon)		70	17%
EWTN Catholic television		95	23%
Immaculate Heart Radio, Catholic radio 1230 AM		65	15%
Catholic print media (newspapers and magazines)		88	21%
St. Joseph's website and receiving email information		137	32%
Other Catholic websites or blogs		23	5%
St. Joseph's weekly bulletin and bulletin inserts		242	57%
Independent reading of Catholic books on the faith		120	28%
12. Which days of the week and time of day is BEST for you to ATTEND ADULT EDUCATION programs?			
Weekday Daytime (Monday-Friday)		91	22%
Weekend Daytime (Saturday-Sunday)		53	13%
Weekday Evenings (Monday-Thursday)		222	54%
Weekend Evenings (Friday-Sunday)		46	11%
<b>Total</b>		<b>412</b>	<b>100%</b>

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

The next questions focus on FAMILY initiatives at St. Joseph's.					
13. Please rate the following initiatives in importance to STRENGTHENING PARISHIONER FAMILY LIFE, at home and in the parish.					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Highest Priority	Important Priority	Medium Priority	Low Priority	Not a Priority
Create a sense of family and welcoming that includes all parish members	211 51%	146 35%	39 9%	12 3%	4 1%
Focus resources on supporting individual family units within the parish	102 26%	157 40%	119 30%	15 4%	2 1%
Encourage family units to participate together in parish devotions, novenas, feasts and other celebrations	150 37%	175 43%	61 15%	17 4%	3 1%
Expand the Family Conference in terms of programs/speakers offered	71 18%	167 43%	126 32%	17 4%	10 3%
Increase attendance at the Family Conference from within the parish	94 24%	161 40%	117 29%	20 5%	6 2%
Increase attendance at the Family Conference from throughout the community	51 13%	164 42%	132 34%	29 8%	10 3%
Reach at-risk youth from within the parish	193 48%	161 40%	42 10%	4 1%	5 1%
Reach at-risk youth from throughout the community	146 36%	147 36%	96 23%	17 4%	5 1%
Continue to expand the offerings of the parish youth ministry	162 40%	171 42%	63 15%	10 2%	4 1%
14. Which of the following FAMILY ACTIVITIES would you or your family members desire to participate in? (Check all that apply.)					
Works of Mercy (organized acts of Charity such as feeding the hungry, visiting rest homes, pro-life prayer, etc.)		259		63%	
Annual Parish Picnic		185		45%	
Sporting events attended as a parish family		78		19%	
Family trips (fun and faith building)		121		29%	
Scouting		22		5%	
Parish Dinners		270		65%	
Attend Parish Fall Festival		294		71%	
Volunteer at Parish Fall Festival		169		41%	
Family movie nights in Fr. O'Hare Hall		138		33%	
Other, please specify (50 character maximum)		29		7%	

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

15. Which of the following FAMILY SUPPORT GROUPS would you or your family members desire to participate in? (Check all that apply.)			
Parents of troubled teens		50	19%
Practical parenting and family leadership skills		116	45%
Program for men on fathering skills		81	31%
Program for women on mothering skills		64	25%
Homeschoolers support group		30	12%
Homosexuals seeking to lead chaste lives		22	9%
Single parents		36	14%
Youth program for children affected by divorce		60	23%
Youth program focusing on real-life teen issues		108	42%
Other, please specify		45	17%

The next series of questions focuses on St. Joseph's ECCLESIAL CHARITY... to serve others with an outreach of Christian love.			
16. If you had a SPIRITUAL need, would you feel comfortable turning to St. Joseph's for help?			
Yes		361	88%
No		49	12%
<b>Total</b>		<b>410</b>	<b>100%</b>
243 Responses			

17. Please rate the following initiatives in importance to helping the parish more effectively SERVE THE NEEDY. (We are not looking for you to rate them in comparison to any of the other listed initiatives. If several sound alike and you wish to rate them the same, that is fine. If, however, you feel much stronger about one initiative than another, then we would like you to reflect that in your ratings as well.)					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Highest Priority	Important Priority	Medium Priority	Low Priority	Not a Priority
Make all parishioners aware of existing programs and how to access them	213 51%	155 37%	44 11%	4 1%	2 0%
Educate parishioners on ways they can serve the needy	150 36%	193 47%	57 14%	9 2%	3 1%
Find ways to identify specific needs of individuals	109 27%	174 43%	96 24%	20 5%	7 2%
Refer those with needs beyond our resources to existing social agencies	149 36%	172 42%	80 19%	9 2%	2 0%
Increase the number of parishioners who personally serve the poor in our outreach programs	137 33%	187 45%	74 18%	12 3%	2 0%
Develop more hands-on service programs to serve the needy (e.g. our homeless shelter and food distribution program)	139 34%	186 45%	66 16%	15 4%	5 1%
Pray specifically for and with the needy	136 33%	176 43%	78 19%	13 3%	5 1%
Assist the needy to get a highschool and/or college education	92 23%	158 39%	114 28%	33 8%	7 2%
Provide Christian-based financial management training	64 16%	145 36%	120 30%	56 14%	14 4%

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

18. Is there a Charitable program currently NOT offered by St. Joseph's that you would like to see developed?			
Yes		53	14%
No		323	86%
<b>Total</b>		376	100%
67 Responses			

Now we have a few questions focusing on your understanding of CATHOLIC STEWARDSHIP.

19. Which 1 phrase below best describes your definition of the term "Catholic Stewardship"?			
Volunteering		44	10%
Fundraising		7	2%
Return of God's blessings		130	31%
Giving of first fruits		13	3%
Discipleship		35	8%
Evangelism		3	1%
Sharing my gifts		102	24%
Answering God's Call		69	16%
Other, please specify (50 character maximum)		19	5%
<b>Total</b>		422	100%

20. Do you believe we are all stewards?			
Yes		389	93%
No		31	7%
<b>Total</b>		420	100%

21. From your PERSONAL EXPERIENCE, which of the following best describes your understanding of Catholic Stewardship?			
Encourage parishioners to give back to the parish a portion of their time, talents, and treasures		285	68%
Encourage parishioners to make regular financial contributions to the church		14	3%
Encourage parishioners to become more active in all aspects of the parish		100	24%
Other, please specify (50 character maximum)		22	5%
<b>Total</b>		421	100%

22. Are you interested in learning more about the principles of "Catholic Stewardship As A Way Of Life?"			
Yes		238	57%
No		176	43%
<b>Total</b>		414	100%
33 Responses			

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; continued**

The following questions focus on St. Joseph's LEADERSHIP and ADMINISTRATION programs and services.

23. Please rate your INITIAL REACTION to the importance of each of the following initiatives for DEVELOPING STRONG PARISH LEADERSHIP and EFFECTIVE ADMINISTRATION. (We are not looking for you to rate them in comparison to any of the other listed initiatives. If several sound alike and you wish to rate them the same, that is fine. If, however, you feel much stronger about one initiative than another, then we would like you to reflect that in your ratings as well.)

Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Highest Priority	Important Priority	Medium Priority	Low Priority	Not a Priority
Recruit volunteers from all levels of parish ethnic and socio-economic families	143 34%	156 38%	93 22%	14 3%	10 2%
Ensure new volunteers are welcomed into established lay ministries, apostolates, and committees	177 42%	189 45%	48 11%	5 1%	2 0%
Establish and publish mission statements for each apostolate	54 13%	144 35%	161 39%	36 9%	15 4%
Establish terms and term limits for all lay leadership positions	57 14%	125 31%	134 33%	57 14%	34 8%
Ensure that parish leadership represents a diversity of ethnic, age, gender, educational, and experience backgrounds	113 27%	149 36%	99 24%	42 10%	14 3%
Assure parish volunteers and leaders have access to necessary resources	146 35%	212 51%	47 11%	4 1%	6 1%
Develop a training program for all parish leaders and volunteers	141 34%	171 41%	83 20%	14 3%	6 1%
Develop opportunities to recognize and affirm parish leaders and volunteers	80 19%	168 40%	126 30%	30 7%	11 3%
Develop policies and procedures to ease the administrative burden on our clergy, freeing them to provide Mass and the other sacraments	206 49%	145 35%	57 14%	5 1%	6 1%

24. At an Annual Meeting of the Parish, what subjects would you want to hear about and discuss? (Check all that apply.)

Parish programs and services	283	67%
Parish financial performance for the previous year	143	34%
Parish performance against the previous year's goals and initiatives	216	51%
Parish budget, goals and initiatives for the coming year	263	62%
I am not interested in attending a Parish Annual Meeting	54	13%
What and how the Diocese of Stockton is doing	124	29%
Other, please specify (50 character maximum)	35	8%

25. How often would you like to receive WRITTEN financial and program performance updates from the parish?

Annually	172	40%
Semi-annually	113	26%
Quarterly	83	19%
Don't need written updates	63	15%
<b>Total</b>	<b>431</b>	<b>100%</b>

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

The next series of questions will focus on St. Joseph's COMMUNICATION and PLANNING processes.							
26. What information would you or your family access if it were placed on an enhanced parish website? (Check all that apply.)							
A site map of the parish campus				110		27%	
Staff organizational chart, brief job descriptions including major responsibilities, and contact information				207		50%	
Descriptions, mission statements, and brief bios for the Parish Council, standing committees, and their members				138		33%	
Link to Diocese of Stockton				138		33%	
Upcoming ministry meetings and activities - dates, times, and places				277		67%	
List of apostolates - their missions, chairpersons, when and where they meet, and how to get involved				255		62%	
Copy of current bulletin				277		67%	
Parish Council and standing committee meeting times, places, agendas, and minutes of the prior meeting				165		40%	
Parish Activities & Events calendar				369		89%	
Results of most recent surveys				253		61%	
Towne Hall updates				213		52%	
Other, please specify (50 character maximum)				41		10%	
27. Which one of the following communication methods would you most prefer for important parish notices and announcements -- in addition to bulletin and lector announcements? (Please check 1 only.)							
Email				280		66%	
Phone trees called by fellow parishioners				8		2%	
Pre-recorded message phone calls				11		3%	
US Postal Service mail				104		25%	
Radio public service announcements				5		1%	
Other, please specify (50 character maximum)				14		3%	
<b>Total</b>				<b>422</b>		<b>100%</b>	
28. Please rank (place in order of importance and personal preference) the following survey methods to ensure St. Joseph's leadership receives ongoing feedback from parishioners... 1 being MOST IMPORTANT or PREFERRED.							
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	1	2	3	4	5	6	
Online surveys	212 61%	45 13%	39 11%	20 6%	12 3%	19 5%	
Paper surveys delivered at Mass	37 12%	68 22%	70 23%	52 17%	43 14%	39 13%	
Paper surveys delivered through the US Postal Service mail	42 13%	70 22%	52 17%	40 13%	42 13%	66 21%	
Towne Hall meetings	30 10%	70 23%	77 25%	56 18%	53 17%	24 8%	
Focus groups where volunteers discuss specific issues	30 10%	41 14%	60 20%	55 18%	71 24%	41 14%	
Suggestion box in the church	26 8%	53 16%	54 17%	57 17%	56 17%	81 25%	



**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

29. Specific to online or written surveys, which of the following methods would you most like to see the parish use?				
Larger comprehensive surveys once a year		90	21%	
Smaller surveys on specific topics throughout the year		329	79%	
<b>Total</b>		<b>419</b>	<b>100%</b>	
30. In the future, would you be interested in receiving a voters' guide for Catholics?				
Yes		324	76%	
No		103	24%	
<b>Total</b>		<b>427</b>	<b>100%</b>	
40 Responses				
St. Joseph's Strategic Plan goals will be finalized and prioritized based on information gathered through this research. Your thoughtful input on the following two questions will be greatly appreciated.				
31. Please carefully review each of our parish goals listed below and indicate whether or not you endorse (can support) the vision defined by each goal. Comment boxes are provided following each statement for any additional remarks or suggestions you may wish to make.				
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Strongly Endorse Goal	Endorse Goal	Unsure	Do Not Endorse Goal
Worship - To deepen parishioners' engagement of the Sacred Liturgy and interior prayer life.	285 67%	119 28%	18 4%	2 0%
Education - To deepen our knowledge of Sacred Scripture and Church Doctrine.	265 63%	139 33%	13 3%	2 0%
Family - To strengthen family life (at home and parish) by means of a restoration of Catholic culture practiced in daily life.	270 64%	126 30%	19 5%	5 1%
Charity - To serve others with Christian love, especially the neediest.	273 65%	137 33%	7 2%	2 0%
Stewardship - To develop among our parishioners an understanding and acceptance of Catholic Stewardship.	206 50%	174 42%	30 7%	6 1%
Leadership - To select, train, and develop strong parish leadership.	196 48%	184 45%	26 6%	5 1%
Administration - To steward God's temporal gifts.	184 46%	180 45%	35 9%	5 1%
Communication - To deliver effective, consistent messages about the parish; to foster two-way communication with parishioners.	230 57%	156 38%	21 5%	0 0%
Planning - To determine and deliver strategic plans consistent with the parish mission.	191 48%	171 43%	36 9%	4 1%
22 Responses				

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

32. In building the Church (St. Joseph's community), we have many things we want to accomplish over the next few years, and your input into how we move forward is important to us. Please look at our parish goals one more time and tell us which 4 you think should be focused on first. (Please check 4 only.)			
Worship - To deepen parishioners' engagement of the Sacred Liturgy and interior prayer life.		303	72%
Education - To deepen our knowledge of Sacred Scripture and Church Doctrine.		254	60%
Family - To strengthen family life (at home and parish) by means of a restoration of Catholic culture practiced in daily life.		277	66%
Charity - To serve others with Christian love, especially the neediest.		234	55%
Stewardship - To develop among our parishioners an understanding and acceptance of Catholic Stewardship.		149	35%
Leadership - To select, train, and develop strong parish leadership.		112	27%
Administration - To steward God's temporal gifts.		39	9%
Communication - To deliver effective, consistent messages about the parish; to foster two-way communication with parishioners.		169	40%
Planning - To determine and deliver strategic plans consistent with the parish mission.		99	23%
Almost done! Our last five questions are very important because they give us a better understanding of the viewpoints of our different parish members. Please tell us about yourself.			
33. Are you a registered parishioner at St. Joseph's?			
Yes		426	99%
No		3	1%
<b>Total</b>		<b>429</b>	<b>100%</b>
34. How often do you typically attend Mass at St. Joseph's?			
Daily or 3-4 times per week		64	15%
Sundays plus 1-2 times per week		99	23%
Every Sunday		217	51%
1-2 times per month		29	7%
Less than monthly		13	3%
Christmas and Easter		0	0%
Rarely		4	1%
<b>Total</b>		<b>426</b>	<b>100%</b>
35. Do you currently serve in any of St. Joseph's Lay Ministries or Apostolates (volunteer programs)?			
Yes		219	51%
No		209	49%
<b>Total</b>		<b>428</b>	<b>100%</b>

**EXHIBIT D**  
**PASTORAL PROGRAMS SURVEY; *continued***

36. Please indicate your gender.			
Male		170	40%
Female		258	60%
<b>Total</b>		428	100%
37. Please indicate your age range.			
18-34		42	10%
35-54		192	45%
55-74		164	38%
75+		30	7%
<b>Total</b>		428	100%

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**EXHIBIT E**  
**Facilities Survey Results**



**Survey #1-Facilities 07/31/06**  
**Results Overview**

Date: 11/27/2006 4:10 PM PST  
Responses: Completes  
Filter: No filter applied

1. Is this survey being completed as a(n):			
Household Response	<input type="checkbox"/>	528	60%
Individual Response	<input type="checkbox"/>	354	40%
<b>Total</b>		<b>882</b>	<b>100%</b>
2. Do you think there is an overcrowding issue at St. Joseph's church during weekend Masses?			
Yes	<input type="checkbox"/>	516	60%
No	<input type="checkbox"/>	304	35%
Don't Know	<input type="checkbox"/>	47	5%
<b>Total</b>		<b>867</b>	<b>100%</b>
3. Do you think there is a parking issue at St. Joseph's?			
Yes	<input type="checkbox"/>	657	76%
No	<input type="checkbox"/>	175	20%
Don't Know	<input type="checkbox"/>	28	3%
<b>Total</b>		<b>860</b>	<b>100%</b>
4. Which weekend Mass do you usually attend?			
Saturday at 5:30 p.m.	<input type="checkbox"/>	168	20%
Sunday at 7:30 a.m.	<input type="checkbox"/>	95	11%
Sunday at 9:00 a.m.	<input type="checkbox"/>	129	15%
Sunday at 10:30 a.m.	<input type="checkbox"/>	195	23%
Sunday at 12:00 noon	<input type="checkbox"/>	96	11%
Sunday at 1:30 p.m. (Spanish)	<input type="checkbox"/>	28	3%
Sunday at 5:30 p.m.	<input type="checkbox"/>	94	11%
Sunday at 7:30 p.m.	<input type="checkbox"/>	53	6%
<b>Total</b>		<b>858</b>	<b>100%</b>

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

6. Please rate your satisfaction with each of the following elements of the Mass.					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Very Good	Good	Adequate	Poor	Very Poor
Homily	386 45%	349 41%	99 11%	21 2%	6 1%
Communion distribution	401 46%	325 37%	117 13%	21 2%	4 0%
Music	391 46%	316 37%	109 13%	30 4%	11 1%
Time for meditation and reflection	248 29%	346 40%	171 20%	79 9%	14 2%
Seating	204 24%	313 36%	239 28%	89 10%	14 2%
Environment	288 34%	368 43%	152 18%	31 4%	8 1%
Quality of sound	256 30%	345 41%	179 21%	58 7%	12 1%
Post Mass gathering	227 28%	342 42%	200 24%	37 5%	15 2%
7. Where do you typically sit during the Mass?					
Sit Main Church			815	94%	
Sit Chapel			41	5%	
Standing/Entry			12	1%	
<b>Total</b>			<b>868</b>	<b>100%</b>	
8. In the past year, how often have you...					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Always	Frequently	Sometimes	Infrequently	Rarely
Felt welcomed in this parish?	504 59%	228 26%	97 11%	20 2%	12 1%
Greeted a stranger to the parish?	115 14%	171 21%	269 32%	124 15%	151 18%
Participated in Eucharistic Adoration?	170 21%	132 16%	152 18%	105 13%	265 32%
Invited someone to attend a parish service or activity?	50 6%	129 16%	263 32%	172 21%	214 26%
Spent time in prayer outside of church?	300 36%	250 30%	165 20%	50 6%	69 8%
Spent time learning about your faith?	145 18%	260 32%	259 31%	106 13%	54 7%
Partaken of the Sacraments?	461 56%	221 27%	78 9%	20 2%	47 6%
Given service on behalf of the poor or others in need?	129 16%	198 24%	246 30%	99 12%	151 18%

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

9. Please rate the general condition of existing parish facilities.					
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	Very Good	Good	Adequate	Poor	Very Poor
Church	324 37%	336 39%	172 20%	30 3%	5 1%
Adoration Chapel	291 37%	292 37%	166 21%	35 4%	5 1%
Parish Hall	537 65%	228 28%	53 6%	3 0%	0 0%
Classrooms in Fr. O'Hare Hall	157 22%	292 41%	225 32%	27 4%	8 1%
Meeting Rooms in John Paul II Center	133 18%	315 43%	221 30%	48 7%	8 1%
Parking	62 7%	153 18%	251 30%	296 35%	86 10%
10. What do you see as the parish's TOP THREE most pressing facility needs? (Please check ONLY 3.)					
More church seating			510	60%	
More traditional church design			272	32%	
More parking			624	73%	
More meeting/religious education space			84	10%	
Larger and quieter Adoration Chapel			213	25%	
More outdoor devotional space			68	8%	
Preschool program			179	21%	
Youth center/gymnasium/athletic field			186	22%	
More library space			33	4%	
Other, Please Specify			166	19%	
11. In general, which approach would you favor to address church overcrowding?					
Renovate the existing church			320	37%	
Build a new church on the site of the existing church			171	20%	
Build a new church and renovate the current church for alternate parish use			180	21%	
Leave things as they are			193	22%	
<b>Total</b>			<b>864</b>	<b>100%</b>	

**EXHIBIT E**

**FACILITIES SURVEY; *continued***

12. St. Joseph's architectural consultants have estimated that renovation will save approximately 25% over the cost of building a new church but will limit the parish's ability to address design issues like seating, larger support columns blocking visibility of the altar, and overall sound quality that could be solved with new construction. Given that information, would you favor:				
Renovation			225	26%
New construction			414	48%
Neither... leave things as they are			219	26%
<b>Total</b>			<b>858</b>	<b>100%</b>
13. Would you support a capital campaign to address church overcrowding?				
Yes			450	51%
No			157	18%
Don't Know			275	31%
<b>Total</b>			<b>882</b>	<b>100%</b>
14. Why wouldn't you support a new capital campaign?				
Not convinced of the need			73	46%
Can't afford it			28	18%
Not sure how the last funds raised were used			17	11%
Other, Please Specify			40	25%
<b>Total</b>		157		100%
15. What level of financial commitment would you be willing to make over a 3-year period?				
\$300 per month or more			9	1%
\$200 per month			26	4%
\$100 per month			81	13%
\$75 per month			15	2%
\$50 per month			104	16%
\$25 per month			123	19%
\$10 per month			145	22%
None			27	4%
Other, Please Specify			112	17%
<b>Total</b>			<b>645</b>	<b>100%</b>

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

**16. What information do you think parishioners require when determining the merits of any proposed capital campaign? (Please check UP TO 3.)**

Basis for forecasted growth		395	47%
How last capital campaign money was spent		321	38%
How new money would be spent		559	67%
Commitment to oversight that guarantees money will be spent as proposed		478	57%
Opportunity to participate in the design selection		152	18%
No information would cause me to support building a new church		110	13%
Other, Please Specify		59	7%

**17. Did you contribute to St. Joseph's capital campaign between 2002 and 2005?**

Yes		562	64%
No		320	36%
<b>Total</b>		<b>882</b>	<b>100%</b>

**18. Why didn't you contribute to the previous campaign?**

Couldn't afford it		83	26%
Wasn't directly asked		13	4%
Wasn't part of the parish then		135	43%
Wasn't convinced of the need		40	13%
Other, Please Specify		43	14%
<b>Total</b>		<b>316</b>	<b>100%</b>

**19. Thinking of the parish as a whole, how do you think fellow parishioners will respond to a new capital campaign to expand church seating and available parking?**

Most will support some level of sacrificial giving		200	23%
Two-thirds will support		56	6%
Half will support		164	19%
One-quarter will support		150	17%
Don't know		302	35%
<b>Total</b>		<b>872</b>	<b>100%</b>

**20. Do you feel that you are well informed about issues and events at St. Joseph's?**

Yes		737	86%
No		116	14%
<b>Total</b>		<b>853</b>	<b>100%</b>



**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

21. What is your PRIMARY source of news and information regarding St. Joseph's issues and events? (Please check ONLY ONE.)			
Parish bulletin		732	83%
Website		10	1%
Direct mailings		19	2%
Lector announcements at Mass		60	7%
Plaza tables		2	0%
Word of mouth		17	2%
Newspaper		1	0%
Radio		0	0%
Calls to parish office		1	0%
Other, Please Specify		23	3%
<b>Total</b>		<b>878</b>	<b>100%</b>
22. What THREE types of information would you most like to receive from St. Joseph's on a regular basis? (Please check ONLY 3.)			
Parish finances		266	31%
Pastoral Council discussions		252	29%
Parish long-range plans		319	37%
Upcoming events		594	69%
Diocese information		154	18%
Youth and teen activities		147	17%
Religious education for children and adults		249	29%
Adult offerings like retreats, conferences, Bible studies, etc.		391	46%
Other, Please Specify		40	5%

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

23. What THREE communication formats would be most helpful to you? (Please check ONLY 3.)			
Church bulletins	<input type="checkbox"/>	788	91%
Direct mail of important news	<input type="checkbox"/>	400	46%
Informal neighborhood meetings/gatherings	<input type="checkbox"/>	52	6%
Parish annual reports	<input type="checkbox"/>	129	15%
Parish Towne Hall meetings	<input type="checkbox"/>	163	19%
Parish website	<input type="checkbox"/>	238	27%
Quarterly parish newsletters	<input type="checkbox"/>	286	33%
Talks from the pulpit	<input type="checkbox"/>	348	40%
Parishioner phone tree	<input type="checkbox"/>	18	2%
Other, Please Specify	<input type="checkbox"/>	30	3%
25. Are you aware there is a church library?			
Yes	<input type="checkbox"/>	659	76%
No	<input type="checkbox"/>	212	24%
<b>Total</b>		871	100%
26. Have you ever purchased anything from the church bookstore?			
Yes	<input type="checkbox"/>	566	65%
No	<input type="checkbox"/>	301	35%
<b>Total</b>		867	100%
27. IF NO, why haven't you purchased from the bookstore? (If Yes, please skip to next question.)			
Didn't know we had one	<input type="checkbox"/>	103	45%
Couldn't find what I needed	<input type="checkbox"/>	61	27%
Too expensive	<input type="checkbox"/>	13	6%
Limited selection	<input type="checkbox"/>	52	23%
<b>Total</b>		229	100%
28. Have you attended St. Joseph's Family Life Conference?			
Yes	<input type="checkbox"/>	167	19%
No	<input type="checkbox"/>	699	81%
<b>Total</b>		866	100%

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

29. IF NO, why haven't you attended the Family Life Conference? (If Yes, please skip to next question.)			
Too expensive		34	5%
Don't have a family		142	22%
Not interested in topic		122	19%
Didn't know about it		132	20%
Schedule conflict		218	34%
<b>Total</b>		<b>648</b>	<b>100%</b>
The following information will help us ensure we meet the needs and understand the concerns of our different parish members. Please tell us a little about yourself.			
30. Please indicate your gender.			
Male		276	32%
Female		583	68%
<b>Total</b>		<b>859</b>	<b>100%</b>
31. Please indicate your age range.			
18-34		103	12%
35-54		326	38%
55-74		337	39%
75+		102	12%
<b>Total</b>		<b>868</b>	<b>100%</b>
32. Are you a registered parishioner at St. Joseph's parish?			
Yes		808	93%
No		58	7%
<b>Total</b>		<b>866</b>	<b>100%</b>
33. How long have you been a registered member of St. Joseph's?			
Less than 1 year		45	5%
1-5 years		251	30%
6-10 years		136	16%
11-20 years		180	21%
20+ years		204	24%
Not registered		25	3%
<b>Total</b>		<b>841</b>	<b>100%</b>

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

34. Do you currently serve in any of St. Joseph's ministries or programs?			
Yes		375	43%
No		488	57%
<b>Total</b>		<b>863</b>	<b>100%</b>
35. IF NO, why not? (If Yes, please skip to next question.)			
No time		131	30%
Never asked		61	14%
Not interested		54	12%
No ministry currently serving my main interest		24	5%
Not sure		168	38%
<b>Total</b>		<b>438</b>	<b>100%</b>
36. Did you attend another parish within the Modesto area prior to coming to St. Joseph's?			
Yes		421	48%
No		461	52%
<b>Total</b>		<b>882</b>	<b>100%</b>
37. Which parish did you last attend before coming to St. Joseph's?			
St. Stanislaus (Modesto)		99	24%
Our Lady of Fatima (Modesto)		190	46%
St. Francis of Rome (Riverbank)		26	6%
St. Jude (Ceres)		39	9%
Other, Please Specify		62	15%
<b>Total</b>		<b>417</b>	<b>100%</b>
38. Which statement below BEST describes your reason for transferring from your previous parish to St. Joseph's?			
We moved into St. Joseph's parish boundaries		187	45%
Our children attend St. Joseph's religious education programs		8	2%
We could not attend the Mass of our choice at our previous parish because it was too crowded		15	4%
We like the parish community at St. Joseph's		56	13%
We like the clergy at St. Joseph's		56	13%
We like the programs and activities at St. Joseph's		16	4%
Other, Please Specify		77	18%
<b>Total</b>		<b>417</b>	<b>100%</b>

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

39. What community do you live in?			
Modesto		762	86%
Riverbank		30	3%
Ceres		17	2%
Hughson		0	0%
Oakdale		21	2%
Ripon		6	1%
Turlock		2	0%
Other, Please Specify		45	5%
<b>Total</b>		<b>882</b>	<b>100%</b>
40. What elementary school is closest to you?			
Baptist		12	2%
Beard		7	1%
Boer		0	0%
Bret Harte		2	0%
Burbank		1	0%
C.F. Brown		15	2%
Capistrano		7	1%
Chrysler		2	0%
Dieterich		7	1%
Eisenhut		3	0%
El Vista		23	3%
Empire		4	1%
Enslin		5	1%
Everett		1	0%
Fairview		1	0%
Freedom		55	8%
Freemont		4	1%
Garrison		1	0%
Hart Ransom		2	0%
Hughes		18	3%
Kirschen		0	0%
Lakewood		44	6%
Marshall		0	0%
MJartone		6	1%
Muir		9	1%
Muncy		1	0%
Orchard		55	8%

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

40. What elementary school is closest to you? (Continued)			
Paradise		0	0%
Pearson/Franklin		0	0%
Perkins		2	0%
Robertson Road		1	0%
Rose Avenue		57	8%
Salida		0	0%
Shackelford		1	0%
Sherwood		28	4%
Shiloh		0	0%
Sipherd		25	4%
Sisk		1	0%
Sonoma		25	4%
Standiford		10	1%
Stockard Coffee		49	7%
Stanislaus		4	1%
Stroud		9	1%
Sylvan		42	6%
Tuolumne		3	0%
Wilson		6	1%
Woodrow		14	2%
Wright		0	0%
Don't Know		132	19%
<b>Total</b>		<b>694</b>	<b>100%</b>
41. Are all members of your household Catholic?			
Yes		728	83%
No		154	17%
<b>Total</b>		<b>882</b>	<b>100%</b>
42. Which household member(s) are not Catholic? (Please check all that apply.)			
Father		78	59%
Mother		31	23%
Child(ren)		43	32%
Elderly Parent(s)		7	5%

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

43. How many people reside in your household, INCLUDING YOURSELF?				
1			139	16%
2			312	36%
3			146	17%
4			168	19%
5			62	7%
6			17	2%
7+			19	2%
<b>Total</b>			<b>863</b>	<b>100%</b>
44. How many people in your household, EXCLUDING YOURSELF, are ages...				
Top number is the count of respondents selecting the option. Bottom % is percent of total respondents selecting the option.	1	2	3	4
Age 0-5	72 62%	34 29%	11 9%	0 0%
Age 6-11	87 64%	39 28%	10 7%	1 1%
Age 12-14	82 85%	14 14%	1 1%	0 0%
Age 15-18	96 81%	22 19%	0 0%	0 0%
Age 19-34	167 77%	40 19%	9 4%	0 0%
Age 35-54	265 78%	71 21%	5 1%	0 0%
Age 55-74	231 84%	45 16%	0 0%	0 0%
Age 75+	89 88%	12 12%	0 0%	0 0%
45. What is your primary racial or ethnic identity?				
African American/African			5	1%
Asian American/Asian			19	2%
European American/Anglo			476	55%
Hispanic American/Latino			153	18%
Indian/Native American/Alaska Native			7	1%
Pacific Islander/Filipino			77	9%
Other, Please Specify			96	11%
<b>Total</b>			<b>862</b>	<b>100%</b>

**EXHIBIT E**  
**FACILITIES SURVEY; *continued***

46. What is the PRIMARY language you and your spouse speak in your home?			
English		787	89%
Spanish		42	5%
Other, Please Specify		54	6%
<b>Total</b>		<b>882</b>	<b>100%</b>
47. What is your level of understanding of the SPOKEN English language?			
Fluent		59	65%
Good or Fair Understanding		27	30%
Poor or No Understanding		5	5%
<b>Total</b>		<b>91</b>	<b>100%</b>
48. What is your level of understanding of the WRITTEN English language?			
Fluent		57	63%
Good or Fair Understanding		26	29%
Poor or No Understanding		7	8%
<b>Total</b>		<b>90</b>	<b>100%</b>
49. Do you have access to the Internet?			
Yes		723	82%
No		159	18%
<b>Total</b>		<b>882</b>	<b>100%</b>
50. Is your Internet access at --			
Home		399	56%
Work		25	4%
Both		283	40%
<b>Total</b>		<b>707</b>	<b>100%</b>
51. How often do you typically use the Internet?			
Daily or almost daily		514	72%
2-3 times per week		107	15%
1 time per week		45	6%
2-3 times per month		20	3%
1 time per month		7	1%
Less than 1 time per month		25	3%
<b>Total</b>		<b>718</b>	<b>100%</b>

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**EXHIBIT F**  
**Financial Performance 2002-03 to 2005-06**

	2002-03	2003-04		2004-05		2005-06		3-Year CAGR
	\$	\$	Chg	\$	Chg	\$	Chg	
<b>Ordinary Income</b>								
Sunday Offertory	1,065,789	1,120,653	5%	1,241,913	11%	1,330,302	7%	
Christmas Offertory	49,069	49,285	0%	57,096	16%	64,605	13%	
Easter Offertory	48,782	53,540	10%	56,560	6%	64,780	15%	
All Souls Day	---	---	---	6,796	---	12,571	85%	
Priests Retirement Offertory	9,095	9,095	0%	7,483	-18%	8,755	17%	
<b>Total Ordinary Income</b>	<b>1,172,735</b>	<b>1,233,873</b>	<b>5%</b>	<b>1,369,848</b>	<b>11%</b>	<b>1,481,013</b>	<b>8%</b>	<b>8.1%</b>
<b>Ordinary Expense</b>								
Clergy	81,477	93,237	14%	121,328	30%	125,064	3%	
Rectory	31,068	25,763	-17%	28,299	10%	30,943	9%	
Administration - Operating	284,978	266,658	-6%	307,597	15%	387,783	26%	
Building and Grounds	77,977	79,286	2%	77,813	-2%	103,565	33%	
Landscape	45,937	45,495	-1%	48,329	6%	48,239	---	
Music Ministry	94,060	104,999	12%	96,844	-8%	102,107	5%	
Religious Education	95,813	114,925	20%	185,317	61%	173,888	-6%	
RCIA	14,771	4,637	-69%	---	-100%	---	---	
Youth Ministry	76,169	87,329	15%	62,827	-28%	50,113	-20%	
Sacristy	3,932	4,680	19%	5,426	16%	11,489	112%	
Parish Hall	322	3,209	897%	4,062	27%	13,423	230%	
Church Upkeep	5,212	---	-100%	---	---	---	---	
Outreach Ministries	---	5,938	---	14,144	138%	20,369	44%	
Common Area Costs	94,573	92,330	-2%	91,455	-1%	96,413	5%	
Church Gen. Expenses	36,681	46,102	26%	40,647	-12%	50,452	24%	
Parish Life	9,393	13,251	41%	13,383	1%	20,252	51%	
Stewardship	5,781	15,449	167%	6,026	-61%	10,382	72%	
JP II Center, Net						11,659	---	
BMA	---	34,598	---	53,005	53%	10,070	-81%	
Diocesan Fees	114,458	102,428	-11%	84,341	-18%	90,267	7%	
Book Purchases/Sales	18,965	---	-100%	---	---	---	---	
Toddler Time	1,214	1,100	-9%	1,200	9%	1,200	---	
Parish Tithe	28,328	57,866	104%	71,729	24%	91,700	28%	
% Prior Year Offertory		5%		6%		7%		
<b>Total Ordinary Expense</b>	<b>1,121,109</b>	<b>1,199,280</b>	<b>7%</b>	<b>1,313,772</b>	<b>10%</b>	<b>1,449,378</b>	<b>10%</b>	<b>8.9%</b>
Net Operating Income	51,626	33,293	-36%	56,076	68%	31,635	-44%	
% of Ordinary Income	4%	3%		4%		2%		
<b>Miscellaneous Income</b>								
Bookstore - Net	3,458	3,929	14%	5,721	46%	6,698	17%	
Votive Candles - Net	6,607	8,697	32%	8,076	-7%	7,355	-9%	
Festival - Net	25,268	15,406	-39%	35,522	131%	20,212	-43%	
<b>Total Misc Income</b>	<b>35,333</b>	<b>28,032</b>	<b>-21%</b>	<b>49,319</b>	<b>76%</b>	<b>34,265</b>	<b>-31%</b>	<b>-1.0%</b>
% Total Income	3%	2%		3%		2%		
<b>Capital Expenditures</b>	<b>-</b>	<b>13,807</b>	<b>---</b>	<b>62,506</b>	<b>353%</b>	<b>80,733</b>	<b>29%</b>	<b>141.8%<sup>1</sup></b>
% Prior Year Net Inc.		8%		60%		94%		
<b>Other Income</b>	<b>96,553</b>	<b>56,782</b>	<b>-41%</b>	<b>42,887</b>	<b>-24%</b>	<b>73,364</b>	<b>71%</b>	<b>-8.7%</b>
% Total Income	7%	4%		3%		5%		
<b>Total Income</b>	<b>1,304,621</b>	<b>1,317,387</b>	<b>1%</b>	<b>1,462,054</b>	<b>11%</b>	<b>1,588,642</b>	<b>9%</b>	<b>6.8%</b>
<b>Total Expense</b>	<b>1,121,109</b>	<b>1,213,087</b>	<b>8%</b>	<b>1,376,278</b>	<b>13%</b>	<b>1,530,111</b>	<b>11%</b>	<b>10.9%</b>
% Ordinary Income	86%	92%		94%		96%		
<b>net income</b>	<b>183,512</b>	<b>104,300</b>	<b>-43%</b>	<b>85,776</b>	<b>-18%</b>	<b>58,531</b>		
% Total Income	14%	8%		6%		4%		

<sup>1</sup>2-year Compounded Average Growth Rate .

**EXHIBIT G**  
**Projected Financial Performance 2005-06 to 2025-26**

Projected Fiscal Year Financial Performance										
	2005-06	2006-07	2007-08	2008-09	2009-10	2010-11	2015-16	2020-21	2025-26	
<b>Ordinary Income</b>	Inc 8.7% Exp 11.2%	Income growth @ 8.1%; Expense growth @ 7.1%					Inc 6.0% Exp 5.0%	Inc 5.0% Exp 4.0%	Inc 5.0% Exp 4.0%	
Sunday Offering	1,330,302	1,438,056	1,554,539	1,680,457	1,816,574	1,963,716	2,627,895	3,353,934	4,280,564	
Christmas Offering	64,605	69,838	75,495	81,610	88,220	95,366	127,622	162,881	207,882	
Easter Offering	64,780	70,027	75,699	81,831	88,459	95,625	127,967	163,322	208,445	
All Souls Day	12,571	13,589	14,690	15,880	17,166	18,557	24,833	31,694	40,450	
Priests Retirement	8,755	9,464	10,231	11,059	11,955	12,924	17,295	22,073	28,171	
<b>Total Ordinary Income</b>	<b>1,481,013</b>	<b>1,600,975</b>	<b>1,730,654</b>	<b>1,870,837</b>	<b>2,022,375</b>	<b>2,186,187</b>	<b>2,925,612</b>	<b>3,733,904</b>	<b>4,765,513</b>	
<b>Ordinary Expense</b>										
Clergy	125,064	133,944	143,454	153,639	164,547	176,230	224,919	273,648	332,935	
Rectory	30,943	33,140	35,493	38,013	40,712	43,602	55,649	67,705	82,374	
Administration	387,783	415,316	444,803	476,384	510,207	546,432	697,401	848,495	1,032,324	
Building and Grounds	103,565	110,918	118,793	127,228	136,261	145,935	186,255	226,607	275,702	
Landscape	48,239	51,664	55,332	59,261	63,468	67,974	86,755	105,550	128,418	
Music Ministry	102,107	109,357	117,121	125,437	134,342	143,861	183,632	223,417	271,821	
Religious Education	173,888	186,234	199,457	213,618	228,785	245,029	312,726	380,479	462,910	
Youth/Young Adult Ministry	50,113	53,671	57,482	61,563	65,934	70,615	90,125	109,651	133,407	
Sacristy	11,489	12,305	13,178	14,114	15,116	16,189	20,662	25,139	30,585	
Parish Hall	13,423	14,376	15,397	16,490	17,661	18,915	24,140	29,370	35,734	
Outreach Ministries	20,369	21,815	23,364	25,023	26,800	28,702	36,632	44,569	54,225	
Common Area Costs	96,413	103,258	110,590	118,442	126,851	135,857	173,392	210,958	256,663	
Church Gen. Expenses	50,452	54,034	57,871	61,979	66,380	71,093	90,734	110,392	134,309	
Parish Life	20,252	21,690	23,230	24,879	26,646	28,537	36,422	44,313	53,913	
Stewardship	10,382	11,119	11,909	12,754	13,660	14,629	18,671	22,717	27,638	
JP II Center, Net	11,659	12,487	13,373	14,323	15,340	16,429	20,968	25,511	31,038	
BMA	10,070	---	---	---	---	---	---	---	---	
Diocesan Fees	90,267	101,198	110,455	119,401	129,073	139,528	190,419	257,610	328,782	
Toddler Time	1,200	1,285	1,376	1,474	1,579	1,691	2,158	2,626	3,195	
Parish Tithe	91,700	106,424	122,235	139,909	159,643	181,657	247,915	319,422	407,673	
% Prior Year Net Inc.	7%	8.0%	8.5%	9.0%	9.5%	10.0%	10.0%	10.0%	10.0%	
<b>Total Ordinary Expense</b>	<b>1,449,378</b>	<b>1,554,234</b>	<b>1,674,911</b>	<b>1,803,929</b>	<b>1,943,004</b>	<b>2,092,927</b>	<b>2,699,575</b>	<b>3,328,178</b>	<b>4,083,645</b>	
Net Operating Income	31,635	46,741	55,743	66,908	79,371	93,260	226,037	405,726	681,868	
% of Ordinary Income	2%	3%	3%	4%	4%	4%	8%	11%	14%	
<b>Miscellaneous Income</b>										
Bookstore - Net	6,698	7,241	7,827	8,461	9,146	9,887	13,231	16,887	21,552	
Votive Candles - Net	7,355	7,951	8,595	9,291	10,044	10,857	14,529	18,543	23,666	
Festival - Net	20,212	21,849	23,619	25,532	27,600	29,836	39,927	50,958	65,037	
<b>Total Misc Income</b>	<b>34,265</b>	<b>37,040</b>	<b>40,041</b>	<b>43,284</b>	<b>46,790</b>	<b>50,580</b>	<b>67,688</b>	<b>86,388</b>	<b>110,256</b>	
% Total Income	2%	2%	2%	2%	2%	2%	2%	2%	2%	
<b>Capital Expenditures</b>	<b>80,733</b>	<b>29,266</b>	<b>33,456</b>	<b>37,015</b>	<b>41,463</b>	<b>46,220</b>	<b>80,396</b>	<b>125,500</b>	<b>192,515</b>	
% Prior Year Net Inc	94%	50%	25%	25%	25%	25%	25%	25%	25%	
<b>Other Income</b>	<b>73,364</b>	<b>79,306</b>	<b>85,730</b>	<b>92,674</b>	<b>100,181</b>	<b>108,296</b>	<b>144,924</b>	<b>184,964</b>	<b>236,066</b>	
% Total Income	5%	5%	5%	5%	5%	5%	5%	5%	5%	
<b>Total Income</b>	<b>1,588,642</b>	<b>1,717,322</b>	<b>1,856,425</b>	<b>2,006,796</b>	<b>2,169,346</b>	<b>2,345,063</b>	<b>3,138,223</b>	<b>4,005,256</b>	<b>5,111,835</b>	
<b>Total Expense</b>	<b>1,530,111</b>	<b>1,583,500</b>	<b>1,708,367</b>	<b>1,840,944</b>	<b>1,984,467</b>	<b>2,139,147</b>	<b>2,779,971</b>	<b>3,453,678</b>	<b>4,276,160</b>	
% Income	96%	92%	92%	92%	91%	91%	89%	86%	84%	
<b>net income</b>	<b>58,531</b>	<b>133,822</b>	<b>148,059</b>	<b>165,852</b>	<b>184,879</b>	<b>205,916</b>	<b>358,252</b>	<b>551,578</b>	<b>835,675</b>	
% Total Income	4%	8%	8%	8%	9%	9%	11%	14%	16%	

**EXHIBIT H**

**St. Joseph’s Response to the Diocese of Stockton Synod Decrees – September 22, 2006**

<b>Synod Decree</b>	<b>St. Joseph’s Response</b>
<p><b>1. Foster Effective COMMUNICATION</b></p> <p>We will communicate with all people in a clear, timely and engaging manner, using available methods. We will provide opportunities for response and dialogue to create a strong sense of belonging to the Church.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Communication</b> - We will deliver a consistent message about the parish mission, activities, and leadership opportunities; systematically seek parishioner participation in development of parish goals and strategic initiatives as well as subsequent feedback on implementation and performance.</li> </ul>
<p><b>2. Address the Complexity of CULTURAL DIVERSITY</b></p> <p>We will create a community in which members know and love one another and celebrate the rich diversity of all peoples because as a Church we are one in Christ Jesus.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Leadership</b> - We will recruit, train, and affirm volunteers from all ethnic and socio-economic strata.</li> <li>· <b>Priority Area: Worship</b> - We will a welcoming atmosphere at Mass that instills a sense of family and communal worship</li> <li>· <b>Priority Area: Family</b> - We will participate together in liturgical celebrations: devotions, novenas, feasts, and other celebrations.</li> </ul>
<p><b>3. Encourage Life-Long FAITH DEVELOPMENT</b></p> <p>We will live our Baptism by integrating our faith into our daily lives through purposeful, life-long learning and prayer. This will lead us to deeper engagement with Christ and develop a vibrant, active community of disciples that radiates God’s love, justice, and truth to the world.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Education</b> - We will continually develop our knowledge of Sacred Scripture and Church doctrine, seeking a deeper relationship with God; broaden evangelization efforts to reach all Catholics within parish boundaries; promote the Bible’s importance in parishioners’ daily lives; support and promote Church doctrinal formation.</li> </ul>
<p><b>4. Support FAMILY UNITY</b></p> <p>We will foster, strengthen and support the unity of the family, rooted in the Gospel message of love that reflects Christ’s mission and transforms the world.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Family</b> - We will strengthen family life (at home and parish) by practicing our Catholic faith in daily life; evangelize and support families through an authentic Catholic culture;</li> <li>· <b>Priority Area: Stewardship</b> – We will receive parishioners through hospitality and evangelization.</li> </ul>
<p><b>5. Assure Clear and Transparent FINANCIAL INFORMATION</b></p> <p>In thanksgiving for God’s abundant blessings, we will promote transparent financial accountability through clear, open and timely communication among clergy and laity that leads to a culture of stewardship, fidelity and discipleship.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Administration</b> - We will provide quality management and reporting of parish financial, human, and operational resources; establish policies and procedures that ensure effective management and communicate fiscal accountability.</li> <li>· <b>Priority Area: Planning</b> – Meet annually with Diocesan officials to discuss long range planning and Synod decrees implementation.</li> <li>· <b>Priority Area: Stewardship</b> – We will Develop ongoing educational activities that instruct parishioners in the Church’s teachings of stewardship and encourage them to share their gifts as a faith response.</li> </ul>

Synod Decree	St. Joseph's Response
<p><b>6. Cultivate LEADERSHIP</b></p> <p>We will encourage responsible lay and ordained leadership that models Jesus, the servant leader, that strengthens commitment in the community, and unifies the people of God in proclaiming the Kingdom. We will identify and nurture the gifts and talents of all people and promote ongoing conversion through leadership training and pastoral formation.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Leadership</b> - We will recruit, train, and support strong parish leadership; develop an ongoing training program for all clergy, lay leadership, employees, and volunteers.</li> <li>· <b>Priority Area Worship</b> - We will train clergy and lay leadership to open every parish activity with biblical prayer</li> </ul>
<p><b>7. Inspire Catholics through LITURGY</b></p> <p>We will faithfully participate in the Church's liturgical life as the worship of God. We will celebrate liturgies that inspire, unite and transform us to carry out our baptismal mission to "advance the peace and salvation of all the world," mirroring the zeal, energy and heart of Jesus.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Worship</b> - We will glorify God in our Sunday worship, sacramental life, and personal prayer; actively engage parishioners in Liturgical life through homiletics, music, and ministerial hospitality that is spiritually enriching; make prayer a part of every parish activity</li> <li>· <b>Priority Area: Education</b> – We will maintain a sense of orthodoxy in doctrine and worship.</li> </ul>
<p><b>8. Integrate SOCIAL JUSTICE into Parish Life</b></p> <p>Formed by our ongoing engagement with Scripture, tradition and Catholic social teaching, we will promote the common good by safeguarding and advancing the dignity of every human being and of all God's creation</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Education</b> - We will promote the Catholic doctrine of social justice, emphasizing the consistency of policy and action with respect to the rights of individuals and families in society; discover more about the social teachings of the Church.</li> <li>· <b>Priority Area: Charity</b> - We will serve as resource ambassadors for those in need, directing parishioners and other community members in need to appropriate resources within the parish and wider community.</li> </ul>
<p><b>9. Become a SUPPORTIVE AND WELCOMING CHURCH</b></p> <p>We will develop new ways to invite others to follow Christ with us. We will create an atmosphere of belonging, love and healing in our multicultural Church through our unity and joyful unselfish service to all, in the image of the living Christ.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Family</b> - We will provide a consistent message of welcoming and belonging from parish priests, lay leadership, staff, and volunteers.</li> <li>· <b>Priority Area: Stewardship</b> – We will create an apostolate which will greet and inform visitors at Mass about St. Joseph's.</li> <li>· <b>Priority Area: Charity</b> – We will find ways to identify the specific needs of individuals from within the parish.</li> </ul>
<p><b>10. Strengthen YOUTH MINISTRY</b></p> <p>We will create the structures that support and encourage the participation of young people of all cultures. Through unity, education and spiritual growth young people will be enabled to become passionate and active participants and leaders in our church community, evangelizers and builders of the kingdom of God.</p>	<ul style="list-style-type: none"> <li>· <b>Priority Area: Family</b> – We will support family unity and healthy child/teen development through creation of a comprehensive family and youth ministry.</li> <li>· <b>Priority Area: Education</b> – We will help youth learn how to apply faith to their daily lives; help high school teens stay engaged in their faith after celebrating Confirmation; encourage and support the "Domestic Church" where parents, by their word and example, are the first teachers of the faith to their children</li> </ul>

**EXHIBIT I**  
**Planning Committee of the Parish Pastoral Council**  
**Charter**

The Committee's primary duty is to oversee implementation of the Parish Strategic Plan: to exercise accountability for the Pastor and Parish Administrator (the primary implementers of the plan), to provide support for the parish staff, and to facilitate biennial Strategic Plan updates. The Planning Committee will report to the Parish Council.

**I. SPECIFIC DUTIES:**

1. Develop and publish a clear and attainable long- and short-term implementation schedule of parish priorities and strategic initiatives, including a Master Facilities Plan timetable.
2. Complete a Master Facilities Plan based on pastoral priorities and future growth in northeastern Modesto. Work with the Building Committee to ensure seamless compatibility between the Parish Strategic Plan and the Master Facilities Plan.
3. Conduct an annual parish survey that gauges parish performance to strategic goals and initiatives.
4. Participate in an annual one- or two-day offsite planning session with Parish Staff and parish Council
5. Publish a quarterly implementation document (tracking report) covering progress on strategic initiatives.
6. Develop and provide oversight of the biennial Parish Strategic Plan update process.
7. Work at the bequest of the Parish Council to oversee development and implementation of parish capital campaigns.

**II. MEMBERSHIP**

The Planning Committee Voting Membership shall be comprised of seven (7) parishioners in good standing. Membership is as follows:

1. *One (1) Parish Council member* elected by the Parish Council and will chair the Planning Committee for a two-year term.
2. *One (1) Finance Council representative* annually elected or re-elected by the Finance Council.
3. *One (1) Building Committee representative* annually elected or re-elected by the Building Committee.
4. *Three (3) parishioners-at-large* elected by the Parish Council serving staggered 3-year terms.
5. *The Parish Administrator* who will sit as an ex-officio voting member of the Planning Committee and serve as the primary staff liaison.

Committee members may be removed from membership by the Committee Chairman or the Parish Council Chairman for failure to maintain expected attendance and participation standards, generally considered to be attendance at a minimum of 80% of all regularly scheduled meetings.

**III. DESIRED MEMBERSHIP COMPOSITION**

Desired Expertise on the Committee includes:

1. Planning Professional
2. Finance/Banking/Accounting Professional
3. Operations/Management Professional (especially for Non-Profits)
4. Roman Catholic Liturgical/Canonical
5. Involvement/Leadership in Education or Church Environment

This business plan was developed by Andrus Consulting, Inc. Financial data provided by St. Joseph's Catholic Church was modeled under various planning assumptions to project potential future performance. No warranties are made with regard to actual future financial results.

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