



# Guidelines

*For Developing a Four-Year  
Mission Integration Plan -  
Retreat Ministry*

Marianist Office of Sponsorship  
AUGUST 2023

## Contents

|   |          |
|---|----------|
| <b>The Four-Year Cycle at a Glance .....</b>        | <b>2</b> |
| Year One: Plan Development.....                     | 2        |
| Year Two: Virtual Progress Report .....             | 2        |
| Year Three: On-Site Visit and Review .....          | 2        |
| Year Four: Virtual Evaluation.....                  | 3        |
| <b>The Four-Year Plan: Charting a Course .....</b>  | <b>4</b> |
| The Planning Process .....                          | 4        |
| Where Are We Now? .....                             | 5        |
| Where Do We Want to Be in Four Years and Why? ..... | 5        |
| Identifying Goals.....                              | 5        |
| Articulating Rationales.....                        | 5        |
| How Will We Get There?.....                         | 6        |
| Identifying Desired Outcomes .....                  | 6        |
| Forming Strategies.....                             | 6        |
| A Frequently Asked Question .....                   | 6        |
| <b>The Four-Year Plan: Making It Real .....</b>     | <b>7</b> |
| Measuring Progress and Staying on Target? .....     | 7        |
| Remembering the purpose of this plan .....          | 8        |

# The Four-Year Cycle at a Glance

---

The Mission Integration Planning & Contact Cycle plays a vital role in the Marianist Province's collaborative relationship with its sponsored schools and retreat centers. This process serves as leaven to sustain the sponsored ministry's Catholic and Marianist mission and identity.

The Characteristics of Marianist Retreat Ministry (CMRMs) should be essential to each Marianist-sponsored retreat center's philosophy. The CMRMs can provide a framework for reflection and strategic action for the Marianist vision of retreat center ministry.

The four-year Mission Integration Planning & Contact Cycle builds on itself and helps these ministries achieve their Mission Integration goals.

## **Year One: Plan Development**

The objective of Year 1 is to develop and implement a new Mission Integration Plan. It is a collaborative effort of the sponsored ministry's community and engages the support and feedback of the Office of Sponsorship. This collaboration culminates in a virtual conference with the Office of Sponsorship, the sponsored ministry's leadership, and the Mission Integration Team chair to approve the Mission Integration Plan submitted.

## **Year Two: Virtual Progress Report**

The objective of Year 2 is to review progress in implementing the Mission Integration Plan. The chair of the Mission Integration Team and the executive director of the sponsored ministry meet virtually with a representative of the Office of Sponsorship to demonstrate evidence of progress made with the plan.

## **Year Three: On-Site Visit and Review**

Year 3 includes an on-site visit by a representative of the Office of Sponsorship to monitor the ministry's progress in implementing its Mission Integration Plan. The visitation includes a review of the ministry's ongoing relationship with the Province and a discussion of ways the ministry and the Province can strengthen their collaborative relationship and partnership in mission. This discussion considers the different requirements of the *Sponsorship & Services Agreement*, including the Mission Integration Plan. During this visit, the Office of Sponsorship representative meets with various members of the sponsored ministry's Community to obtain their input. The results of these visits are documented and shared with the ministry's leadership.

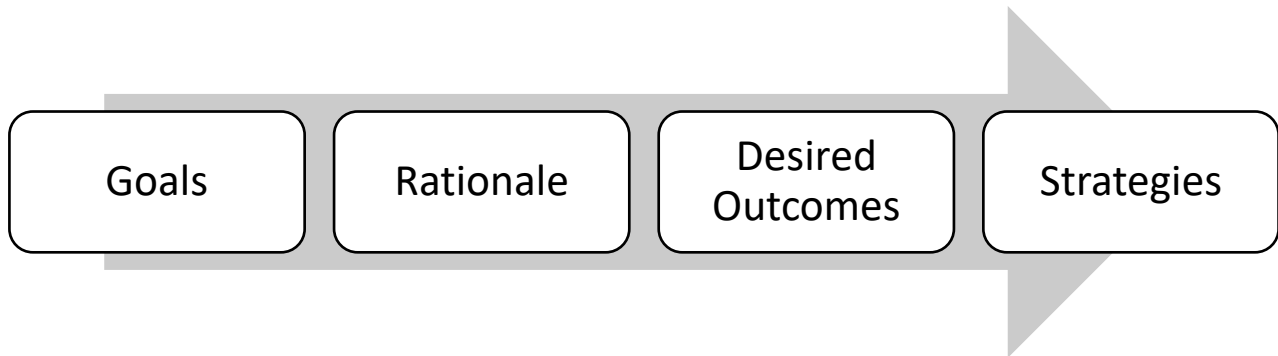
## Year Four: Virtual Evaluation

Year 4 includes an evaluation by the Office of Sponsorship. A representative from the Office of Sponsorship will meet virtually with the Mission Integration Chair and the executive director to evaluate the ministry's success in implementing its four-year plan and give feedback and suggestions on focus areas for the next four-year plan.

| Year 1: Plan Development   | Year 2: Virtual Progress Report  | Year 3: On-Site Visit and Review  | Year 4: Virtual Evaluation   |
|--|--|---|--|
| <ul style="list-style-type: none"><li>•Development of a new four-year Mission Integration Plan</li><li>•Training by the Office of Sponsorship and review of draft plans</li><li>•Approval of final plan</li><li>•Implementation of Year 1 Action Items</li><li>•Development of Year 2 Action Items</li></ul> | <ul style="list-style-type: none"><li>•Implementation of Year 2 Action Items</li><li>•Virtual progress report with representative of the Office of Sponsorship</li><li>•Development of Year 3 Action Items</li></ul> | <ul style="list-style-type: none"><li>•Implementation of Year 3 Action Items</li><li>•On-site visit and review by representative of the Office of Sponsorship</li><li>•Development of Year 4 Action Items</li></ul> | <ul style="list-style-type: none"><li>•Implementation of Year 4 Action Items</li><li>•Virtual evaluation by representative of Office of Sponsorship and fellow retreat center director</li><li>•Feedback and suggestions for next four-year plan</li></ul> |

# The Four-Year Plan: Charting a Course

---



As the MIT of a Marianist-sponsored ministry, you will develop a Four-Year MIP designed to enhance the Marianist character of your retreat center ministry.

The sections in this series outline a planning methodology, borrowing concepts and language from standard planning models and adapting them to our purpose. We begin by addressing the initial big-picture elements of the planning process, posing three critical questions for the planning team.

## The Planning Process

The Marianist Office of Sponsorship supports a four-year planning, implementation, and contact cycle for Marianist-sponsored ministries. In this four-year process, we expect the planning, implementation, and feedback will support a more significant means for the growth of sponsored ministries in their Marianist character. The Four-Year Plan necessitates a more reflective process that asks your ministry to answer three questions:

1. Where are we now?
2. Where do we want to be in four years?
3. How will we get there?

These are not trivial questions. Answering them should not be a mere exercise to complete in a single meeting but rather a process that requires time for reflection, discernment, prayer, assessment, and collaboration if done thoroughly. The product should be a well-articulated plan to move the ministry forward to achieve the Marianist vision of Catholic retreat center ministry.

Developing the Four-Year MIP is the responsibility of your MIT. However, meaningful answers to the above questions will require input from the broader Community. To be effectively realized, the completed Plan will require ownership by that community.

## Where Are We Now?

Effective planning always requires some assessment of the current reality. You know generally where you want to go - **you want your retreat center to be more characteristically Marianist.** You need to know where you are now to plan your route effectively.

As the planning process begins, your MIT addresses these questions within the context of the CMRMs:

- What are the most significant areas of need in making our retreat center more characteristically Marianist over the next four years?
- What are our areas of strength upon which we can build over the next four years?

It is up to your MIT to determine how to address the answers to these questions. The team members can draw on their understanding of the broader Community, consult directly with others, consider what past reports of Mission Integration Visits have suggested, and gather additional data. These and additional methods will likely be necessary to form a reasonably complete picture. It is important to remember that the completed plan will be a plan for your Community, not only for the MIT.

## Where Do We Want to Be in Four Years and Why?

### Identifying Goals

As the needs and strengths of the retreat center community become clear, some **GOALS** should begin to surface. **Goals represent the results desired over the plan term.** At the broadest level, your goal is to enhance the Marianist character of your ministry. However, being more specific in the planning process will be more helpful. Some examples of the kind of language that goals could include:

- To deepen the faith of our Community - Evangelization
- To create a culture of caring and Social Justice
- To share our experience and understanding of Community

### Articulating Rationales

For each GOAL, there should be a RATIONALE. The rationale states why your team needs to accomplish this goal, your motivation and reasoning behind the goal, and how that goal will help to animate the Marianist identity of the retreat center. Often, it is helpful to ask: Why is this goal necessary?

## How Will We Get There?

### Identifying Desired Outcomes

**Desired Outcomes are specific.** They are your statements of what you want this plan to accomplish. **Desired Outcomes are measurable.** These measurements will allow your team to assign accountability and regularly evaluate the plan's effectiveness and meaningful impact.

### Forming Strategies

**Strategies are the** steps you will take to accomplish your desired outcomes and achieve your goals. Strategies include activities, methods you will employ to achieve the goals and desired outcomes, and identifying resources needed to succeed. **Strategies should include accountability** - identifying, as precisely as possible, who is responsible for each strategy's accountability for accomplishing it within identified target dates.

For each of the strategies, you need to identify:

- **WHAT:** What activities will you do? What specific actions are required? What methods will you employ to make this happen?
- **WHO:** Who will steward this responsibility, and who within your ministry will you need to engage as collaborators?
- **WHEN:** When do you hope to initiate and complete each initiative? What are your target dates (over the four years of the plan)?
- Identify what **RESOURCES** you will need. (Like budgeting monies for an initiative or asking for time for a meeting)

## A Frequently Asked Question

How many goals should you have in your Four-Year Mission Integration Plan? - There is no single best answer to this question, no magic number, but 2-5 seems standard. But at a minimum, goals should impact and forward the mission.

Only by beginning with a thoughtful assessment of where you are now as a source of Catholic retreat center ministry in the Marianist tradition can you realistically decide where you want to be in four years. The content and number of goals should reflect your assessment.

# The Four-Year Plan: Making It Real

---

Determining broad goals, articulating the rationale for those goals, identifying the desired outcomes, and planning strategies for meeting the goals and outcomes are essential steps in developing a Four-Year MIP.

In the process of developing a MIP, it is also essential to consider the following so you can track and gauge the impact of your plan:

## Measuring Progress and Staying on Target?

- Be **Specific**
- Make it **Measurable**
- Make it **Meaningful, Realistic, Relevant & Attainable**
- Be **Accountable**
- Be **Timebound** - State expected dates/checkpoints

*(From the SMART criteria standing for Specific, Measurable, Realistic, and Timebound)*

Once your MIT has identified one or more strategic approaches to reaching a goal, it is time to move from abstract and general ideas to concrete and specific ones. What will you do to measure whether you met the goal and desired outcome? How will you know you have been successful? When do you expect to finish? Did it make a difference? Who is responsible? How will you check progress?

Suppose you have chosen a strategy of expanding your retreat program offerings to address your goal of Evangelization. To do this, you could add one or more new retreats, lengthen or intensify existing retreats, or increase attendance, among other possibilities. Your MIT needs to choose from among these or other options.

Suppose your MIT decides to increase attendance at existing retreats. Have you applied SMART criteria? One possible example: Increase the number of attendees for a Young Adult retreat by 10% compared to prior years.

Is it specific (the targeted retreat is named), measurable (you can count the number of attendees), and timed (is there a stated expected date or checkpoint through the time of the plan that will help you stay on track and measure progress)? Are your goals, desired outcomes, and strategies reasonable and attainable? Will it impact your ministry's growth and expression as a Marianist Catholic retreat center ministry?

Suppose your MIT, instead, or in addition, decides to add a new retreat. Is this reasonable and attainable, given the resources and competing priorities? Do those who will need to create the new retreat agree? Can it be achieved within the span of the plan? What does adding a new



retreat mean? Will you consider the desired outcome achieved if the new retreat experience is planned? Or must it also be offered or take place?

Your MIT must judge whether a 10% increase in attendance for this particular retreat (in this example) can reasonably be accomplished within the specified time frame. Your MIT will also reflect and discern these efforts' impact on achieving your goal.

It is up to your MIT to determine how to answer these questions.

## **Remembering the purpose of this plan**

Your plan should **meaningfully enhance the Marianist character of your retreat center ministry**. Blessed William Joseph Chaminade used a fulcrum and a lever as a metaphor for how his followers worked. It is appropriate, then, that your plan has leverage. You may generate many strategies that meet the SMART criteria. With unlimited resources, you could adopt them all. In reality, your MIT must choose those that move you closest to your goal with the resources you have.

In identifying goals and desired outcomes, ask this question: Do they advance your goal of deepening your community's faith and Catholic Marianist identity? Is the effort relevant and meaningful in strengthening the Marianist approach to retreat center ministry? (Perhaps it does, alone or as one of several supporting initiatives.) How can these work together to leverage a more significant impact? Only your MIT, in consultation with your Community, can answer these questions. The important thing is not to become so focused on attaining specific tasks that you lose sight of the overall goal.

One of the advantages of being part of a network of Marianist-sponsored ministries is the opportunity to learn from one another, broaden your perspective, and be exposed to new ideas. There can, however, be a temptation to try to adopt wholesale an idea that has been effective in another ministry simply because it has been effective there. **Make this plan yours**. Using another ministry's successes as inspiration is undoubtedly appropriate. Still, your MIT should choose goals and desired outcomes that meet your retreat center's needs, build on your retreat center's strengths, and support your retreat center's goals.