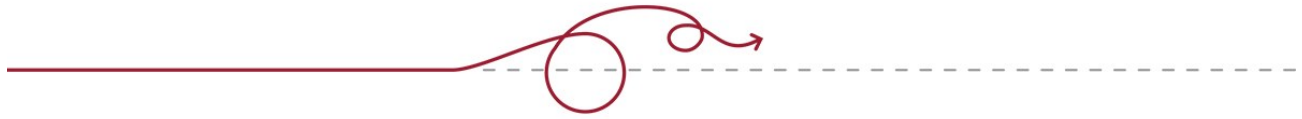


NACPA Strategic Plan



Navigating the Future

FLEXIBILITY RESILIENCY INNOVATION

2022-2025

9/30/2023

Vision Statement

NACPA's members, board and staff will continue to be innovative leaders in providing quality standards of effective human resource practice, education, and service.

We believe that the church should model employment relationships that promote human dignity. We believe that those employed by the church should participate in decisions that affect them and should receive just compensation.

Values

Our values are based on our love of God expressed in the Gospels and the church's teachings and thus encompass respect for all persons, inclusive supportive relationships, ethical conduct, the dignity of work and commitment to excellence.

SERVICES/PROGRAMS

Goal 1

Enhance current services/programs that address church specific topics, including, listserv, convocation, webinars, On-Demand sessions, certificate program, networking, salary surveys, consulting services, job description library, and job board and identify relevant new programs and services to keep NACPA at the forefront of human resources in the church.

Strategy 1.1

Continually assess effectiveness of current services and programs and develop programs and services based on new and evolving legal and workplace requirements. Introduce one new program a year.

- Who will be involved?
Staff, appropriate committees, and research partners
- What are the needed resources?
Survey and evaluation tools, an Evaluation Result Scorecard (chart) that selects only 5-10 key results with due dates and progress tracking that are critical for demonstrating the success of the program, other reporting mechanisms and platforms such as quarterly emails, Website updates, board meetings, annual member meetings and annual reports.
- When will it be accomplished?
It is a continuous process with project plan steps.

- How will we know we are successful?
Success is measured by the annual member survey responses, testimonials to tell stories of the impact and success, and service/program evaluations to assess if goals/outcomes were achieved.
- What is it priority?
High

Strategy 1.2

Design HR educational programs that focus on church specific areas members are least prepared to address for the next 2 years.

- Who will be involved?
Staff and appropriate committee; research partners
- What are the needed resources?
Content experts, program designers, delivery systems and approval of HRCI and SHRM for recertification credits when appropriate
- How will we know we are successful?
Success is measured by responses from members at the annual meetings and testimonials to tell stories of the impact and success, and services program evaluations to assess if goals/outcomes were achieved.

Use annual meeting responses to create agenda for the next year.

- When will it be accomplished?
Beginning in September 2023 and continuing each September.
- What is it priority?
High

Strategy 1.3

Modify the certificate program.

Who will be involved?

Staff, Certificate Program Committee, and content experts

- What are the needed resources?
Program designers, speakers, and delivery systems, recertification credits
- How will we know we are successful?
Success is measured by testimonials to tell stories of the impact and success, and program evaluations to assess if goals/outcomes were achieved by at least 90% of participants.

Presentation scores will be used to inform changes or enhancements.

- When will it be accomplished?

Will be implemented by January 2024 and approved HRCI and SHRM Spring 2023 and Neumann University CEUs.

- What is it priority?
Medium

Strategy 1.4

Create a process to continually identify future trends in HR to ensure that NACPA resources are focused on retaining organizational relevancy to better serve and retain its premier status as an HR resource.

- Who will be involved?
Staff and appropriate committee to define and publish an assessment process with annual updates.
(Suggested by the board- New- ask the expert regional meetings, school track.)
(Should the Planning Committee be reactivated to do this? Or is this an agenda item for board meetings?)
- What are the needed resources?
Make available webinars, workshops and other resources to committees, consultants, and staff.
- How will we know we are successful?
Success is measured by the annual member survey responses, testimonials to tell stories of the impact and success, and service program evaluations to assess if goals/outcomes were achieved.
- When will it be accomplished?
Is a continuous process, with a minimum of annual assessment.
- What is it priority?
High

CULTURE/ORGANIZATIONAL RELEVANCY

Goal 2

Create a culture that ensures organizational relevancy and an environment that attracts entities around the country and retains diverse membership by respecting the unique needs, perspectives, and potential of all members to be innovative leaders in providing quality standards of effective human resource practice, education, and service.

Strategy 2.1

Develop and execute an organizational study with the goal of organizational growth to ensure relevancy, for example, small and large dioceses, religious congregations, small diocese with no HR person, parishes, including unique needs, perspectives of those in these groups to better meet the memberships' needs and other denominations that align with NACPA's core values.

- Who will be involved?
Staff and cross-generational taskforce to assess opportunities to grow, design and implement a culture to grow organizational relevancy.
- What are the needed resources?
Finances and the expertise to create the survey/organizational audit / a membership study to assess needs and define action steps.

Finances to market to diverse groups.

- How will we know we are successful?
Success is acquiring data to confirm or identify cultural and environmental changes to assess if NACPA is providing relevant services to various sizes, regions and staff structures of dioceses and parishes including unique needs, perspectives of those in these groups to better meet the memberships' needs.

Success will be determined by the board's own experiences and reports by the membership on an ongoing basis and reported by the board at its meetings throughout the year.

This will be an annual assessment by the membership through the annual member survey and reported at the annual business meeting.

- When will it be accomplished?
The survey will be developed and disseminated during the 2024 fiscal year.
- What is it priority?
Medium

Strategy 2.2

Develop an HR mentoring program (Marketing Committee identified this as an action step.)
Based on member experience to assist new members and members transitioning from secular to church HR, for example, use the certificate mentor program as a model for mentor program development.

- Who will be involved?
Staff and a new committee to design and implement an HR Mentoring Program that meets the needs of a diverse membership and the various sizes of organizations/institutions, regions of the country, and staff structure and volunteers.
- What are the needed resources?
 - Time and effort to recruit, screen and train mentors.
 - Funding and committee members' and volunteers 'time
 - Develop requirements for mentors.
 - Create a checklist including time frame.
- How will we know we are successful?

Success is determined by participants' surveys, both mentor and mentee and oral feedback. Survey responses will be categorized according to size of entities, regions of the country, and staff structure with 90% of participants reporting a positive experience.

This will be an ongoing assessment by the board at its meetings throughout the year.

This will be an annual assessment by the membership through the annual member survey and reported at the annual business meeting.

- When will it be accomplished?
Be the end of the 2025 fiscal calendar and ongoing.
- What is it priority?
High

MARKETING

Goal 3

Create and implement a robust marketing plan to educate current members of the value of NACPA (Work with the Marketing Committee and Barbara Keebler to do this. This is underway by the Marketing Committee) and to inform prospective members and other relevant constituencies of the association's value for those with HR responsibilities.

Strategy 3.1

Identify relevant trigger points/needs of target audiences by leadership category (Bishop, CFO, vicar general, COO, HR)

- Who will be involved?
Staff, Marketing Committee, and someone to design the survey.
- What are the needed resources?
Survey of current members, appropriate expertise to design strategies to meet identified needs.
- How will we know we are successful?
Increased participation by 5 % on all programming (convocation, webinar, OnDemand, salary survey, website traffic, the certificate program and all offerings.
- When will it be accomplished?
Beginning in 2023 this will be a continuous process with a minimum of an annual assessment.
- What is it priority?
Medium

Strategy 3.2

Develop and implement an outreach and information campaign to attract chancellors and CFOs (priests, deacons, DREs) with HR responsibilities as members and supporters of NACPA that fit with our mission.

- Who will be involved?
Staff and Marketing Committee, board, and bishops to promote the association in particular to our episcopal moderator and Father Donio, Executive Director of CMSM, Conference of Major Superiors of Men.
- What are the needed resources?
Survey of non-members why are you not a member?
Calls from board members seeking membership.
Promotional materials
- How will we know we are successful?
Increase membership by 5%
- When will it be accomplished?
Is a continuous process, with a minimum of annual assessment?
- What is it priority?
Low

Strategy 3.5

Develop and implement services to meet the needs of religious congregations, other Catholic entities, and parishes to become knowledgeable about HR including how to conduct performance reviews.

- Who will be involved?
Staff and taskforce representing a cross section of religious congregations and parishes to design and implement an assessment of needs and define action steps- Use the Archdiocese of Miami pilot project and offered to other arch/dioceses. (This is what will be implemented to do so.)
- What are the needed resources?
Survey religious congregations and parishes
Provide a toolbox of resources on the website for their access.
- How will we know we are successful?
Increased participation and engagement from these groups
Traffic to the toolbox

An increase in membership though that was not indicated in the strategy.

Annual member survey to assess if NACPA is meeting their needs.

The number of new programs and participation in existing programs

- When will it be accomplished?

2024-2025 fiscal year.

- What is it priority?
High

FINANCES

Goal 4

Complete a financial assessment of all programs and services to ensure that the cost structure and pricing are consistent with the competitive marketplace.

Strategy 4.1

Evaluate membership dues considering services included and adjust services and pricing based on a competitive market survey versus key competitors.

- Who will be involved?
Staff, board, and sponsors
- What are the needed resources?
Data and time to collect the data including what the sponsors see as the value of sponsorship.
Create an ROI assessment template.
- How will we know we are successful?
Show a break-even analysis.
90% of sponsors see value in their sponsorship.
Success is measured by NACPA's Financial Statement and Balance Sheet.

Annually evaluate the return on investment/value for the cost of dues, fees, sponsorships, and staffing.

Annually use the ROI formula value for the cost of dues, fees, sponsorships, and staffing. Each evaluation description will be tied into each area to be measured. (Who is our competition? What is the bang for the buck for participants.)

- When will it be accomplished?
Is immediate, with a minimum of an annual assessment.

Conduct a deep dive every three to five years.
- What is it priority?
High

Strategy 4.2

Assess current sponsorship of all programs and exhibitors' fees and adjust based on competitive market conditions and include a level for non-profit vendors. (Work with the Finance Committee on this.)

- Who will be involved?

Staff, Finance Committee, and board

- What are the needed resources?
Data from other comparable associations
- How will we know we are successful?
Success is measured by the NACPA financial statement and balance sheet.
- When will it be accomplished?
Begin in 2023 with a minimum of an annual assessment.
- What is its priority?
High

Strategy 4.3

Identify alternate funding sources and partnerships (Can NACPA find another MOA partner?) to enhance the financial viability of NACPA and its ability to continue as a premier service provider (For example partnerships with Catholic universities to provide training and to institute fees to cover the whole dioceses so more people could be involved.)

- Who will be involved?
Staff and Finance Committee and board.
- What are the needed resources?
A list of possible Catholic Universities that could offer programs and cost calculations/analysis for whole diocese to participate in NACPA offerings.
- How will we know we are successful?
Success is measured by the funding sources acquired and NACPA Financial Statement and Balance Sheet.
- When will it be accomplished?
Begin in 2025 with a minimum of an annual assessment.
- What is its priority?
High

(Identify specific mode(s) of delivering the information, i.e., in-person network board meetings, email, website, SharePoint, phone, formal reports, discussion, planning retreats, social media, etc. d. Identify frequency for providing the information, i.e., ad hoc, monthly, quarterly, in-person only, as requested, etc.)