**TEMPLATE**

**APOSTOLIC PLAN**

**Explanation**

This template is a simplified document to guide you through the elaboration of an apostolic plan. It consists on 6 simple sections.

**Prior considerations – Determining if your unit/organisation needs an apostolic plan or not**

* Creating a fruitful plan requires time, patience, and resources.
* When to do apostolic planning?
  + When there have been significant changes in the external and internal context of the organisation
  + At least once every 5 years
* When not to do apostolic planning?
  + When there is a crisis (external or internal to the institution) → Build stability first
  + When the leader or leadership team has to establish credibility
  + When most of the people in the organisation are new or unfamiliar with the way of proceeding or with each other

**Preparation**

* Decide on process you will follow, the timeline, the resources
* Form a planning team to organize the whole process (Ensure that those with assigned roles will have available time to focus on the planning process)
* Communicate about it and clarify expectations
  + Reasons for apostolic planning
  + Participation, roles, responsibilities
  + Emphasis on spiritual discernment in common

**Guide**

While you go through the process we recommend you follow the - [General Steps for Apostolic Planning](https://docs.wixstatic.com/ugd/a2f086_22ea0ef270354898b6da7ca3a4384421.ppsx?dn=Apostolic%20Planinng%20-%20Process.ppsx) prepared by Christina Kheng PhD. They provide more insights into each step of the planning process and some previous considerations on the importance of “Examen and Conversion” and “Gratitude”.

**1 - MISSION**

*Write your mission statement here*

**2 - VISION**

*Write your vision statement here*

**3 - VALUES**

*Write your organisational values here*

1. *-*
2. *-*
3. *-*
4. *-*
5. *-*

**4 - ANALISIS / RESEARCH**

**External Analysis:**

* What is happening in society? - Use [PESTEL Analysis](https://docs.wixstatic.com/ugd/a2f086_2c8fccd005d74eafbc27cba30189277b.xlsx?dn=Basic%20PESTEL%20Matrix.xlsx) to help you analyse the macro external forces your organisation is facing, this stands for:
  + **P**olitical factors
  + **E**conomic factors
  + **S**ocial factors
  + **T**echnological factors
  + **E**nvironmental factors
  + **L**egal factors
* What is happening in the Church?
* What are the need which are calling out to us?

**Internal Diagnosis:**

* What is the current situation of your institution?
* What are the present lights and shadows?
* What are the Strengths Weaknesses Opportunities Threats to your organisation/unit? Think of them in relation to your mission - Use the [SWOT Analysis](https://docs.wixstatic.com/ugd/a2f086_d13d83926a8846acab0d0c625cc3a58c.xlsx?dn=Basic%20SWOT%20Matrix.xlsx) tool to guide you. Note: if you are stuck in answering the SWOT analysis you can use the PRIMEFACT Checklist developed by David Parrish, this is an acronym for:
  + **P**eople
  + **R**eputation (or brand)
  + **I**ntellectual Property
  + **M**arket research/Information
  + **E**thos (or values or culture)
  + **F**inances
  + **A**gility (or nimbleness or change-ability)
  + **C**ollaborators (Alliences, Partnerships, Networks)
  + **T**alents (Competencies and Skills)

**5 - APOSTOLIC PRIORITIES**

Choose your strategic priorities

1. -
2. -
3. -

**6 - GOALS**

For each Priority choose at least 2 goals

**Priority 1**

* Objective 1:
* Objective 2:

**Priority 2**

* Objective 1:
* Objective 2:

**Priority 3**

* Objective 1:
* Objective 2:

**7 - ACTION PLAN**

*Complete this table for as many goals as you have (you can copypaste the tables shown below if you need more). If you think feel optimistic, for each goal you can choose an indicator that will tell you how you are doing and a target for that indicator.*

|  |  |  |
| --- | --- | --- |
| **Strategic Priority:** | | |
| **Goal:** | | |
| **Actions (What?)**  What needs to be done to complete this goal? | **Responsible (Who?)**  Who is in charge of doing it? | **Timing (When?)**  When should it be done? |
| Action 1:  Action 2:  Action 3:  ... |  |  |

|  |  |  |
| --- | --- | --- |
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| Action 1:  Action 2:  Action 3:  ... |  |  |

**8 – MONITORING AND EVALUATION**

* **When** this will be done, establish timings of when and how often this will happen, for example: twice each week, once each month, etc.
* **Who** will animate and monitor implementation?
  + Appoint an Apostolic Plan Coordinator or make it the responsibility of a steering committee
* **How** can this be done?
  + Regular contact with persons responsible for action
  + Progress reports on the action plans and overall stratigic plan
  + Meetings
* **What** areas are you called to review? What questions are the most relevant ones to determine the fruits of the process? Here are three examples:
  + **Transformation of the apostolic body**: Spiritual situation
  + **Improvement of our faith-justice service**: Apostolic Service
  + **Stronger lay groups and committed citizens**: Collaboration
* **Support** those individuals or departments that face more difficult changes by listening, assisting, providing resources, etc.
* **Be Flexible:**
  + The apostolic plan is a general guide
  + It cannot predict the future
  + Fidelity to the main directions that emerged from the discernment
  + Appropriate response and adaptation to unfolding events
* **Two key elements:**
  + **Examen:** More importantly, spiritual examen (you can get help at [Pray-As-You-Go](https://pray-as-you-go.org/prayer-resources/the-examen/))
  + **Discernment of spirits:** What have been our consolations and desolations? Are we moving in the direction which we have discerned and resolved to take? Are any changes needed?