



*Planning for the Future*

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## WHO WE ARE

### OUR MISSION

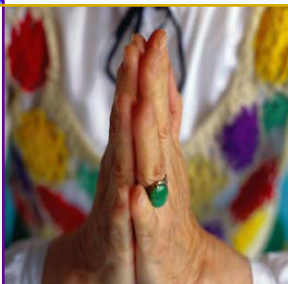
*Meitler Consultants, Inc. is a management consulting firm dedicated to serving Catholic (arch)dioceses, parishes, schools, religious communities and other Church agencies in planning for their future. Meitler Consultants is committed to:*

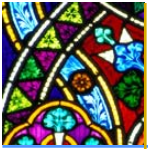
- *Enabling the Church and its agencies to look ahead, achieve their missions and experience vibrant ministry*
- *Understanding our client's total situation within the unique environment in which they operate*
- *Giving direction through reliable data, objective analysis, candid feedback, realistic guidance and specific recommendations*
- *Providing cost-effective services in a professional manner*
- *Furthering the Gospel message of Jesus Christ*

### OUR MINISTRY

Meitler Consultants, Inc. is an empowering organization of consultants that:

- Is dedicated to the Gospel message and the mission of the Church
- Cultivates a vision and provides direction for responsible stewardship and future growth
- Cares about your ministry and planning needs
- Provides experienced and knowledgeable staff
- Brings a proven methodology, specialized skills and a successful track record





## OUR EXPERIENCE

Meitler Consultants has a 40-year history consulting with dioceses, parishes, schools, religious communities and other Church agencies. Over the years the firm has acquired vast experience and a reputation for quality work with substantive results. The work has carried us throughout the United States. In recent years, 99% of our clients have been Roman Catholic.

Our staff brings the skills and planning tools to find successful solutions tested by real world experience. We are uniquely able to customize our approach and adapt to your situation. We have worked in over 110 dioceses throughout the United States. Dioceses where we have worked extensively are:

Arlington	Lafayette, IN
Atlanta	Los Angeles
Austin	Milwaukee
Baltimore	Nashville
Baton Rouge	New Orleans
Boston	Newark
Brownsville	Oakland
Charleston	Peoria
Charlotte	Philadelphia
Chicago	Pittsburgh
Colorado Springs	Portland, ME
Columbus	Providence
Covington	Raleigh
Denver	Sacramento
Detroit	St. Louis
Fort Worth	San Bernardino
Galveston-Houston	San Diego
Grand Rapids	San Francisco
Indianapolis	Scranton
Joliet	Springfield, MA
Kansas City, KS	Syracuse
Kansas City-	Trenton
St. Joseph, MO	Wilmington

- The five senior consultants have over 180 years of combined experience in education and Church consulting.
- Directed large-scale diocesan strategic planning programs in 45 dioceses.
- Coordinated parish restructuring efforts in large and small dioceses.
- Worked in-depth with over 360 individual parishes.
- Played a significant role in over 90 studies or planning programs that led to a capital campaign.
- Directed strategic planning with over 250 high schools and worked with another 270 in related planning.
- Worked closely with 1,400 elementary and middle schools.
- Conducted more than 85 new school studies involving over 120 new elementary schools and 50 new high schools.
- Surveyed over 800,000 households in over 175 different market studies on Church and school issues; often the research was part of a strategic planning process.
- Have a support staff of three full-time people. Various staff members specialize in financial projections, survey management, demographic research and data analysis.





# OUR CORE AREAS OF EXPERTISE

## SERVICES

- Strategic Planning for Dioceses/Regions
- Restructuring Parishes and Schools
- Strategic and Pastoral Planning for Parishes
- Institutional Assessment
- Survey Research
- Demographic Studies
- Pre-campaign Planning
- New School Feasibility Studies
- Strategic Planning for High Schools
- Strategic Planning for Elementary Schools
- Workshops

## RESULTS

- Vision/Mission Development
- Program Plans
- Financial Projections
- Membership and Enrollment Projections
- Staff Projections
- Action Plans
- Governance Structure
- Marketing Programs
- Development Planning
- Facility Utilization Analysis
- Facility Programming
- Collaboration with Architects/Engineers
- Partner with Fundraising Counsel
- Data Trend Analysis
- Consensus Building
- Public Relations Plans

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## STRATEGIC PLANNING FOR DIOCESES/REGIONS

### WHAT MAKES A SUCCESSFUL PLAN?

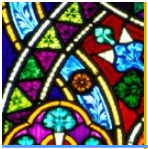
A diocesan-wide or regional strategic plan should be visionary, long-range, comprehensive, realistic and integrated. A good strategic plan articulates a desired future, addresses long-range issues, is based on objective data, results in high ownership and lays a foundation for achieving future goals.

### WHY USE MEITLER CONSULTANTS?

We will design and lead the planning process so you can concentrate on the issues and implementation. Using Meitler Consultants will:

- Bring experienced guidance. Meitler Consultants has prepared 45 comprehensive diocesan-wide strategic plans and 70 regional plans for Catholic schools and parishes.
- Base decisions on a well-researched database
- Provide objective facilitation and expert analysis
- Explore new possibilities for complex situations
- Increase potential to raise capital
- Add professional credibility
- Ensure a professional product
- Provide staff time to do quality planning





# STRATEGIC PLANNING FOR DIOCESES/REGIONS (CONTINUED)

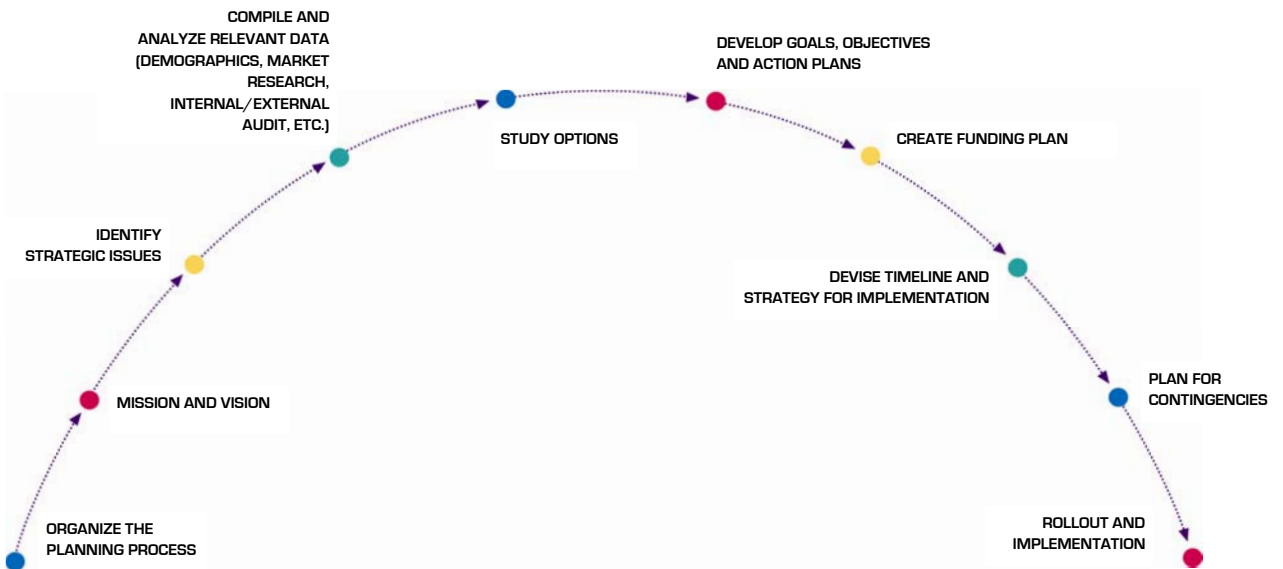
## STEPS TO COMPLETING A PLAN

Our strength is our ability to adapt the consultation process to your situation. Many planning programs include the components shown below.

*“There was ample involvement of Archdiocesan, parish, and school staffs and Meitler Consultants delivered quality reports.”*

*Sister Mary Elizabeth Galt, B.V.M.  
Chancellor  
Archdiocese of Los Angeles*

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# STRATEGIC PLANNING FOR HIGH SCHOOLS

## SUCCESSFUL STRATEGIC PLANNING

High schools that invest in strategic planning experience many benefits. High schools with effective plans raise more money, have a clearer focus on mission, attract more students and supporters, and make wiser decisions.

An effective strategic plan is visionary, long-range, mission focused, comprehensive, realistic and integrated. Using Meitler Consultants to design and direct your planning process will help ensure a successful outcome.

### WHY USE MEITLER CONSULTANTS?

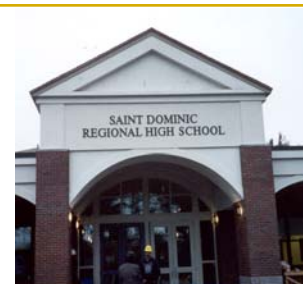
- Nationwide experience in planning. Worked in depth with approximately 520 Catholic and private high schools
- Objectivity in analysis and facilitation
- Challenge traditional thinking and instill new ideas when necessary
- A methodology that is customized to your situation
- Professional data analysis and report writing

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## THE COMPONENTS OF A STRATEGIC PLAN

*The basic parts of a strategic plan are the following:*

- **MISSION AND CATHOLIC IDENTITY**
- **VISION**
- **LONG-RANGE GOALS AND OBJECTIVES**
- **ENROLLMENT PLAN**
- **EDUCATIONAL PLAN**
- **GOVERNANCE PLAN**
- **FACULTY/STAFF PLAN**
- **FACILITIES PLAN**
- **ADVANCEMENT PLAN**
- **FINANCIAL/BUSINESS PLAN**
- **CAPITAL EXPANSION PLAN**





# STRATEGIC PLANNING FOR ELEMENTARY SCHOOLS

## SUCCESSFUL STRATEGIC PLANNING

Effective strategic planning often faces the obstacles of: inadequate time for the planning process, complicated and interrelated issues, personal agendas of those involved and challenges that do not have obvious solutions.

Using Meitler Consultants to design and direct your planning process will help ensure a successful outcome.

Schools that invest in strategic planning experience an abundant return. Schools with effective plans raise more money, have a clearer focus on mission, attract more students and supporters, and make wiser decisions.

## WHY USE MEITLER CONSULTANTS?

- Nationwide experience in planning with approximately 1,400 Catholic and private elementary schools
- Skilled and objective facilitation
- Challenge traditional thinking and instill new ideas when necessary
- A methodology that is customized to your situation
- Data analysis and report writing

## THE COMPONENTS OF A STRATEGIC PLAN

*The basic parts of a strategic plan are the following:*

- **MISSION AND CATHOLIC IDENTITY**
- **VISION**
- **LONG-RANGE GOALS AND OBJECTIVES**
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- **CAPITAL EXPANSION PLAN**

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## PRE-CAMPAIGN PLANNING

### FROM VISION TO REALITY

Every capital campaign grows from a vision for the future. Pre-campaign planning lays the necessary foundation upon which to build realistic goals to transform your vision into reality.

*“Development of the Central Catholic High School Strategic Plan was a great experience for us. We are now positioned to begin planning for a capital campaign to implement an ambitious plan of enrollment growth and facility expansion.”*

*Brother Thomas Long, FMS  
President  
Central Catholic High School  
Archdiocese of Boston*

### WHY CONDUCT PRE-CAMPAIGN PLANNING?

CULTIVATE SUPPORT FOR THE VISION – reliable data, realistic goals and sound action plans provide high levels of trust in your vision for the future.

REACH YOUR POTENTIAL – organizations that put together a compelling case raise more money.

ENCOURAGE STEWARDSHIP – a professional plan articulates realistic and achievable goals, assures potential donors that their support is needed and will be invested wisely.

BUILD OWNERSHIP – involving a broad representation of your community before the campaign cultivates greater ownership and enhances a willingness to support your vision with time and dollars.

AVOID DISAPPOINTMENTS – too often proposed plans are not realistic or the goals are not consistent with the desires of constituents.





## PRE-CAMPAIGN PLANNING (CONTINUED)

### THE BUILDING BLOCKS OF A CAPITAL CAMPAIGN

Before embarking on a major funding campaign, there are essential steps to take to ensure appropriate scope and focus for the campaign. Steps in pre-campaign planning often include many of the following:

- Compile and analyze data from market research, demographics, internal statistics, facility evaluation.
- Envision the future.
- Consider options.
- Set priorities.
- Draw preliminary facility plans based on needs and vision.
- Draw up a projection of costs to implement the vision.
- Analyze sources of funds and create a funding plan.
- Determine if, and how debt should be used.
- Craft a campaign strategy, establish a timeline, select professional counsel.
- Write a case statement that is compelling, persuasive and credible.
- Launch a successful campaign.

### WHY USE MEITLER CONSULTANTS?

- To clearly articulate your vision for ministry and address the issues before a major funding campaign.
- To avoid the mistakes made by others. Rely on 40 years of experience. Meitler Consultants has had a significant role in over 90 studies or planning programs that led to a capital campaign.
- To develop realistic goals and action plans to move your ministry forward.
- To facilitate clarification of long-range facility needs and options.
- To create appropriate financial projections and a sound funding plan to clarify how capital will be used.
- To demonstrate to donors wise stewardship of resources.
- To articulate your vision and plan through a case statement to guide your campaign.
- To build ownership and consensus throughout the planning process.



## MARKET RESEARCH

*Meitler Consultants has conducted market research studies that have surveyed over 800,000 Catholics on various issues. Market research projects include analysis of data, integration of related information, report writing and report presentation.*

*Meitler Consultants has the knowledge and experience to design reliable surveys and interview questions, process large volumes of results, analyze data, write and present professional reports and interpret results in the context of the situation.*

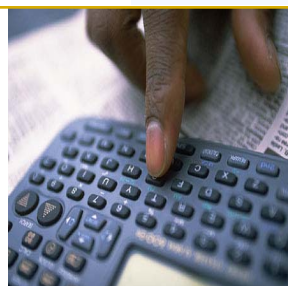
### WHEN SHOULD YOU USE MARKET RESEARCH?

- You need to gather “objective data” or measure support.
- You want to know what constituents think about your school or parish.
- You want constituents to have opportunity to participate in a decision-making process.
- You want to build goodwill among constituents by seeking their advice.

### HOW IS MARKET RESEARCH CONDUCTED?

Market research studies can include any combination of: mail survey research, telephone survey research, focus groups or personal interviews.

Market research may be the sole source of information on an issue. However, it is often advisable to integrate it with a demographic study of the community, statistical profile of the organization’s population, enrollment and membership projections, and so on. Often the combination of data from a variety of sources will aid in objective decision making.





## DEMOGRAPHIC STUDIES

*When you want to know how to better serve your community, demographics are a powerful tool. A thorough demographic study is often needed for planning, feasibility studies, and many strategic decisions.*

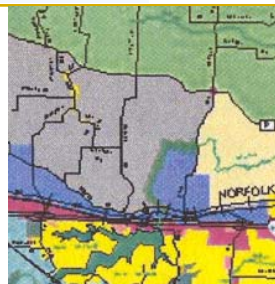
*Demographic information gives decision-makers insight into the environment in which they function. Demographics describe the current population and offer an objective picture of the future.*

### WHY USE THE EXPERTISE OF MEITLER CONSULTANTS?

- Technical knowledge of demographic data sources and interpretation of demographic data.
- Provide the staff time necessary to do the research and compile information.
- Meitler Consultants has compiled data from over 200 communities for schools, parishes and dioceses.

### COMPONENTS OF A DEMOGRAPHIC STUDY

- 1 The type of data needed depends on its intended use. Meitler Consultants first clarifies how the data will be used; then compiles only the relevant information.
- 2 Data is gathered and compiled from many sources including:
  - Large national databases like Claritas, Polk, Map Info and others
  - Interviews with planners at the local, regional and state levels
  - Data from the Internet, public school districts, special studies, etc.
  - U.S. Bureau of the Census
- 3 It is often productive to analyze the internal profile of the parish, school or institution. Meitler Consultants compiles relevant data to show trends, needs and opportunities.
- 4 The data is synthesized and organized into a report and presentation. Meitler Consultants brings experience in translating relevant information to the decisions at hand.





## PROFILES



### THOMAS J. HEDDING

Tom Hedding serves as a senior consultant and President of Meitler Consultants. Tom brings a depth of spiritual background and educational experience. He was Superintendent of Catholic Schools in the Diocese of San Bernardino from 1991 to 1998. Tom was also a Catholic school principal, department chairperson and teacher for 19 years. He served as Accreditation Commissioner with the Western Association of Schools and Colleges and the Western Catholic Educational Association. For 11 years he was a member of the Society of the Divine Word in education as a religious missionary. Tom has a BA from Divine Word College in Iowa and an MA in Education Administration from California State University. He has been a speaker at NCEA in the areas of strategic planning, spiritual development programs for school staff, and crisis management.



### ALAN G. MEITLER

Alan Meitler is a senior consultant and Vice-president of Meitler Consultants with over 20 years experience in the firm. He specializes in regional and diocesan planning for Catholic schools, pastoral planning for parishes and dioceses, new school feasibility studies and marketing research. Many of the projects led to successful capital campaigns, new beginnings for schools and parishes in difficult situations and sometimes restructuring. Alan has had a significant role in 50 diocesan or regional studies and has worked in 57 dioceses around the country. He has directed new school studies in over 20 different cities. He has his MBA from Marquette University and BS degree from Kansas State University in Economics. Alan has been a speaker at NCEA, CACE, and Conference for Pastoral Planners on the topics of strategic planning, new school studies, funding schools, models for schools and market research.



### SR. MARY ANNE HEENAN, CSJ

Sister Mary Anne has 30 years of experience as a high school principal and diocesan leader of Catholic schools. She was Superintendent of Schools for the Diocese of Syracuse from 1989 to 2003. She also served as Provincial Treasurer for the Sisters of St. Joseph of Carondelet Assistant Superintendent, and Principal of Notre Dame High School, Genesee Campus, in Utica, NY. Sister Mary Anne has BA and MA degrees in education and advanced study in educational administration. She is a full-time consultant with Meitler Consultants.



## PROFILES (CONTINUED)



### RICHARD PENDERGAST

Rick Pendergast serves as a senior consultant and brings more than 30 years of experience in Catholic school education as an administrator, business manager, and teacher. Most recently he was Principal of Pius XI Catholic High School in Milwaukee. Rick has been actively involved with a number of educational organizations: North Central Association as an accreditation evaluator, ASCD as an international conference presenter, and a Board Member of The Principal's Center at Cardinal Stritch University. Rick mentors new principals, presents workshops for school faculties and has authored articles for Momentum Magazine, most recently "Saving Money Foolishly" (*Momentum*, April, 2010). He has his M.Ed. in Education Administration and Supervision and his B.A. from Marquette University.

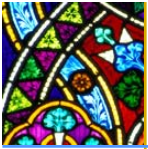


### NEAL D. MEITLER

Neal Meitler founded Meitler Consultants and is currently a senior consultant and Executive Director of the firm. Through the years, Neal consulted almost exclusively in the areas of elementary and secondary education, diocesan and regional planning and church planning. He has directed comprehensive planning programs for over 400 elementary schools, more than 225 high schools and 7 colleges. Neal has worked on over 20 feasibility studies for new schools, involving 50 potential new schools. His experience has taken him into 60 dioceses across the country. Over the years, Neal has worked with dozens of religious communities, many foundations and over 30 public school districts. Neal is the author of two publications by NCEA, the most recent being *Catholic School Growth 1985 to 1999*. Neal has been a speaker at NCEA and CACE on topics including strategic planning, new schools and school finance. Neal has a B.A. and M.A. in Business Administration and Finance.

### MARK C. KEMMETER

Mark Kemmeter serves as a pastoral planning consultant for Meitler Consultants. Mark brings a long background in parish and diocesan planning as well as parish ministerial experience. He currently serves as the Coordinator for Parish Mission in the Archdiocese of Milwaukee, responsible for pastoral planning, council development, and mission implementation. From 2000 to 2008, he served as Coordinator of Staff in the Diocese of New Ulm with the responsibility for planning when that diocese became the first in the United States to partner all parishes. His parish ministry service in Milwaukee includes the positions of pastoral associate, business manager, and DRE. He also lectured as adjunct faculty at Sacred Heart School of Theology and Mount Mary College, both in the Milwaukee area. Mark has a Doctor of Ministry degree from the University of St. Mary of the Lake in Mundelein in pastoral planning and an MTS in theological studies from St. Francis Seminary in Milwaukee.



## PROFILES (CONTINUED)

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### LINDA M. LAPORTE

Linda LaPorte has served as a consultant and project coordinator on over 300 consulting assignments for more than 30 years, working in 65 dioceses. She has coordinated financial analysis and development of financial projections for client projects with over 100 parishes, over 300 elementary schools, more than 200 high schools and 7 colleges. Linda has been with the consulting firm since 1970.



### DIANE L. LEON

Diane Leon has been a staff member of Meitler Consultants for over 20 years. She is presently a full-time project coordinator with responsibilities for client contact, scheduling and logistics, database management, data collection and analysis, financial projections, and report production. Diane has had a significant role in over 100 projects in 50 dioceses around the country. Diane has her BA in Management and Communications from Concordia University, Mequon, Wisconsin.



### ROBERTA R. LOCHER

Robbie Locher is presently a full-time project coordinator with responsibilities for client contact, scheduling and logistics, database management, data collection and analysis, and report production. Robbie has her BA in Mathematics from Grove City College, Grove City, Pennsylvania.