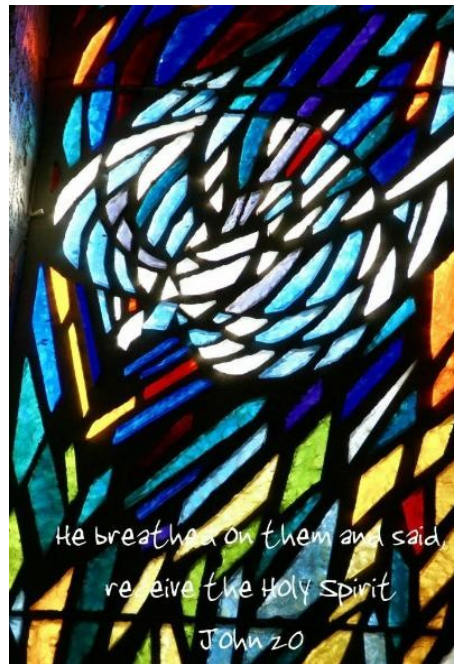


Franciscan Renewal Center Strategy

2009 – 2014

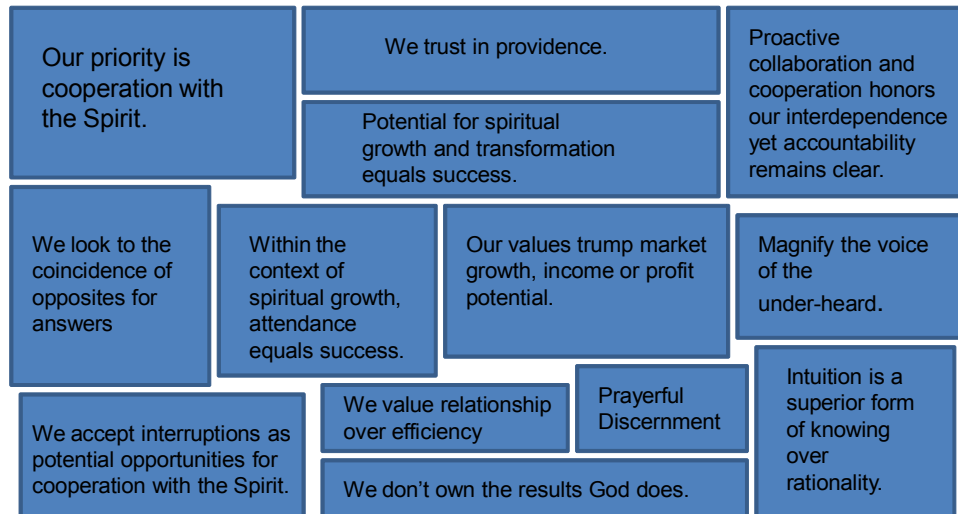


Franciscan Renewal Center Strategy

The FRC Strategy builds on the business model by providing greater detail about our market, value proposition, organizational structure, go-to-market and service delivery principles; and the financial structure and practices we use to ensure our ongoing sustainability.

It is based on the same set of values:

Business Plan Building Blocks **Franciscan Values**



The same Vision & Target Market....

FRC Business Model

Vision

Welcoming Center in the Catholic Franciscan Tradition · Fostering Spiritual Growth, Healing & Transformation · Resulting in Service to Others



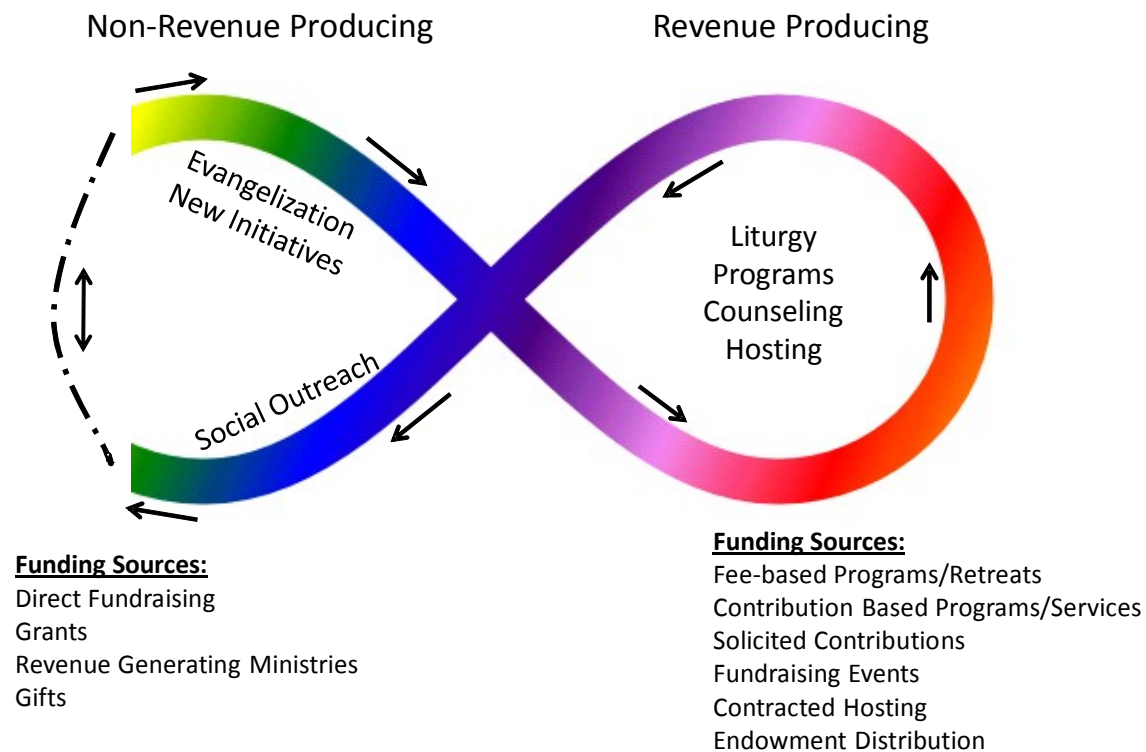
Target Market

Churched & un-churched, Catholics & non-Catholics who are spiritually hungry and seeking spiritual growth. Those in transition or crisis or who feel disconnected from a spiritual home; those in need of healing in a reputable place; who seek to deepen their understanding of the Franciscan charism and way of life (4th Order); and not-for-profits with compatible visions who are attracted to and respectful of our environment and open to the Franciscan way.

...The same Ministries & Funding Sources...

FRC Business Model

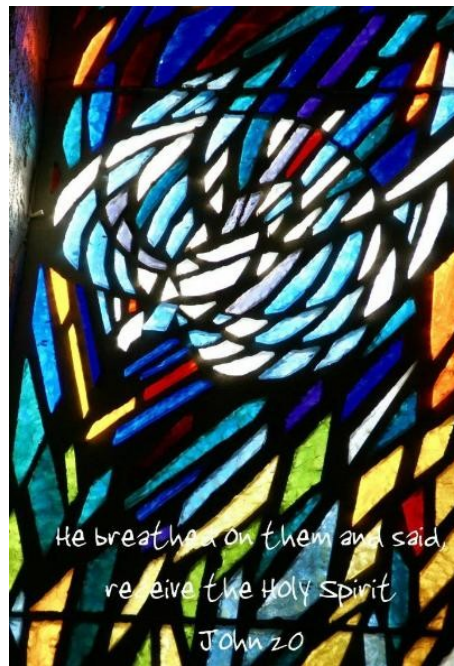
Ministries & Funding Sources




And the addition of some new graphics.....and a more defined
“Franciscan Way”

Franciscan Renewal Center Strategy

2009 – 2014



Franciscan Renewal Center Environmental Strategy



**Open
Sacred
Grounds**

Welcoming Oasis

Reflects Care for All Creation

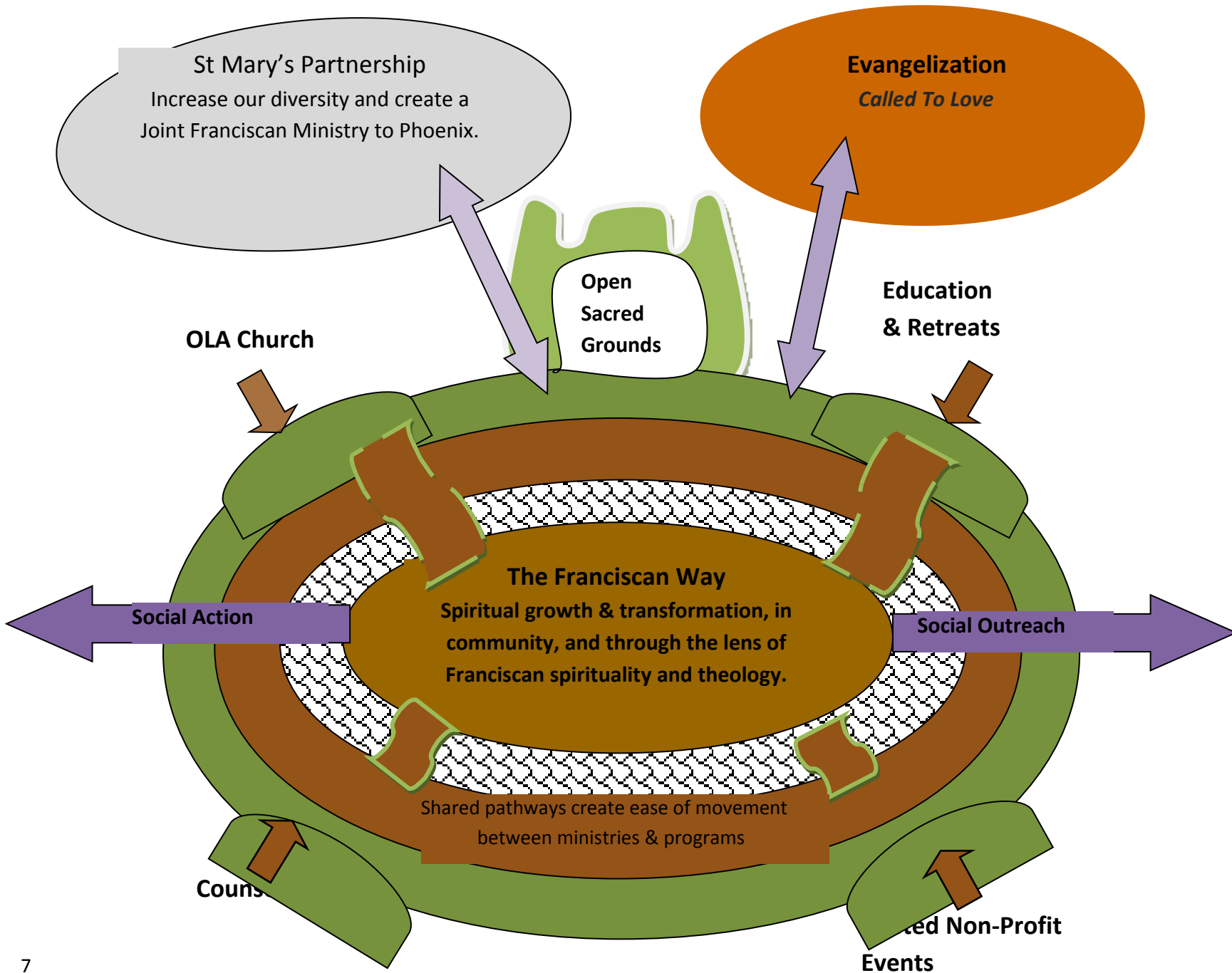
Harmonious

Quiet enough to hear the birds sing

Appetizing yet ordinary food

Simple accommodations, few distractions

FRC's Ministerial Strategy



The Way of St. Francis of Assisi

DRAFT

12/16/08

The life and spirituality of St. Francis of Assisi left a lasting impression on the lives of those who knew him. It was those Franciscans who came after him that gave us the stories and the theology that bring him alive for us today. The following are themes from his life. They are not exhaustive. Rather they serve to inform us about attitudes, beliefs and actions we can take to bring the spirit of St Francis and his followers alive in the world today.

Theme One:

We surrender to God who is fullness of love & all goodness.

St. Bonaventure, OFM

The Franciscan definition of God is always rooted in God whose love is overflowing and who is the Highest Good. As a result, all of our definitions of God proceed from that point of view rather from the point of view of God as Lord, Judge, King, or Master; however, when we do name God as Lord, Judge, King or Master, we believe those images are first grounded in the definition of a loving and good God. For example, after St. Francis received the stigmata, the wounds of Jesus, he wrote *The Praises of God*:

You are strong, You are great, You are the most high. You are the almighty king...King of heaven and earth.

This excerpt gives us an example of how we include different names for God as long as we always consider the true nature of God, who is overflowing love and the Highest Good.

Theme Two:

We live out our lives in relationship because God is relational.

St. Bonaventure, OFM

The Blessed Trinity is the perfect model for a relational God: three persons sharing one nature. In the beginning, before all creation, there was God whose love is overflowing and is the Highest Good. The nature of God, in other words is loving and good. It follows then that it would not be desirable for God to contain his nature, rather it is only natural that it be shared, so he spoke the Word, the Son of God, Jesus Christ. That relationship, between God the Father and God the Son, is also loving and good and personal and we call that relationship the Holy Spirit. Therefore, if the true nature of God is relational and we are created in the image and likeness of God, we are intended to live our lives relating to all of creation which includes ourselves and others.

Theme Three:

We believe that God loves us and seeks us out ‘just as we are’ thus freeing ourselves from the tyranny of self-despair and endless striving to be ‘good enough’.

John Duns Scotus, OFM

Franciscans believe that God, who is love, asks only one thing of us: to love God as we love ourselves and to love our neighbor; we have inherited a human nature and divine call, which urges us to love ourselves and love the good. These calls are not completely integrated and we have a tendency toward sin as well as a tendency toward the good. John Duns Scotus’, OFM, teaching about the human condition is that we experience this tension. It is in this place of tension we have the opportunity to experience discomfort, helplessness, nakedness and vulnerability just as the Child Jesus did when he was born into the world. When we can name our own weakness then we can rely on God’s self-communication which we call grace. It is then when we realize we do not need to be ‘good enough’ to completely depend on God. As we continue to practice dependence on God, we re-enforce our true nature: to be in relationship with God and to reflect God. This dependence is the source of humility in our lives.

Theme Four:

We believe in the Incarnation, which reveals to us the humility of God who chose to make his home among us. This holy event transformed our human beingness. Jesus, born of a woman, lived, suffered and died so that we might be redeemed and would recognize and nurture our capacity to reflect God.

John Duns Scotus, OFM

Franciscans have claimed that the Incarnation was intended before creation. God created in order to provide a home for the Incarnate Word, Jesus Christ. In other words, Jesus did not come into human history only to die for the sins of human beings. Rather in the beginning, God's intention was that Jesus would come as a bridge between creation and the creator. This view of the Incarnation releases us from unhealthy guilt and shame we can hold on to when it comes to the crucifixion and death of Jesus. Jesus would have come even if Adam had never sinned.

Knowing this we can release our old habits of thought that have kept us captive in a theology that bound us to an unhealthy view that it was our sin that caused the incarnation. This Franciscan insight can be found in the writings of John Duns Scotus, OFM. *Scotus for Dummies*

Theme Five:

We recognize that every individual is specifically gifted and called to growth: spiritual, intellectual, emotional and physical.
Franciscan Theology

St. Francis was not kind to his body. In fact he abused it with fasting, sleep deprivation and in his final years bearing the wounds of Jesus in his hands, feet and side. Only when he was near death did he apologize to his body for abusing it and not caring for what God gave him to care for. The idea that the body was a source of evil was more prevalent in the medieval church. Francis was a part of what was called the penitential movement in which people practiced fasting, prayer and denial of the body as good. His apology to his body reminds us that we too can be misled, underestimate or misunderstand the magnificent gift of life we have been gifted with which includes our spiritual, intellectual, emotional and physical self. Let us celebrate our gift with healthy choices for our entire being.

Theme Six:**We maintain a daily practice of prayer: private and communal.**

Jesus showed us the importance of private and communal prayer. It was through the example of Jesus St. Francis discovered, by the reading of the Scriptures, he could listen, speak and see God every moment of his life. He prayed in solitude before the San Damiano crucifix and in community with his brothers. Both ways, personal and communal are an expression of the continuing relationship among God, Jesus and the Holy Spirit. God created us with a desire to pray in order that we may deepen our relationship with Him.

Theme Seven:**We trust that our senses are a natural, sacred and pleasing channel of prayer.**

To see, hear, touch, smell, & taste are extraordinary gifts: ones we cannot buy or earn. Our senses are freely given to us by a God who loves us. For instance, we pray when we gaze at the San Damiano crucifix or an icon of the Blessed Virgin Mary. The sunset or winter snow are also a sacred feast for our eyes. The sound of music or the birds in the trees are an occasion for prayer. Franciscan prayer is rooted in the human gift of the senses. We can imagine touching a baby's skin, a stroke of a fountain pen to fine paper, the smell of honeysuckle in the garden and the taste of good chocolate or maple syrup as prayer. These moments are reminders of the presence of God in all of creation. We realize God's goodness in the gift of our created selves rather than focusing on the body as an occasion for sin. Our prayer then includes using our senses by slowing down and breathing in the beauty of nature and listening to God's voice in the silence of our hearts.

Theme Eight:

Believe all creation is a reflection of God's love and abundance.

John Duns Scotus, OFM

Franciscans recognize that humans are created with a natural capacity to harmonize a love of the good and of self-preservation. These are both good and when they co-exist in harmony, our lives are filled with God's self-communication, which we call grace. When they are out of balance, for instance when control, security or esteem threatens us, we will get out of balance and out of harmony. At those times we are vulnerable to sin, or separation from God. In order to stay in balance we depend on relationship in community, prayer and our knowledge of our religion as a path to "get back on track." Franciscans also cherish the earth, the environment and all that keeps our air and water pure and available for a healthy planet. Francis composed his "Canticle of the Creatures" with images of personal relationships when he sang about Mother, Sister Earth, Brother Sun, Sister Moon, Sister Bodily Death, Sister Water, Brother Wind and every kind of living creature.

We are responsible for the continued care for our planet. In small ways we can decide to make a difference, i.e. picking up trash in our neighborhood, turning off water when we are not using it, switching off lights when we leave a room and planning our errands so we can minimize our time in the automobile.

Theme Nine:

We listen for God's voice and revelation in scripture, the church and within ourselves.

Franciscan Theology

Franciscans recognize that Scripture, the Church and the Self all serve as vehicles of revelation. (What we mean by revelation are the moments when God reveals Himself in our Christian faith story.) It takes all three sources and not just one to confirm a revelation is authentic. Knowing this helps us to trust the traditions and theology of the Catholic Church as authentic and not

just the outcome of one person's "message from God". Depending on all three also helps to appreciate how this process reflects the Triadic nature of God. This insight can serve to help us realize that God does open our eyes and hearts to an inner knowing.

Theme Ten:

Following in the "footprints of Jesus" by observing the Gospel.

St. Clare of Assisi

This requires us to choose to pattern our lives according to the values and teachings of the gospels. For instance, when Francis went to the Church of Blessed Virgin Mother in Assisi, Italy for Mass one day the gospel captured his imagination and he went to talk to the priest after Mass in order that he might understand it better. The words he heard are from the synoptic gospels: Christ's disciples should not "possess gold or silver or money, or carry on their journey a wallet or a sack, nor bread nor a staff, nor to have shoes nor two tunics, but that they should preach the kingdom of God and penance..." Francis immediately exulted in the spirit of God, "This is what I want ... this is what I seek, this is what I desire with all my heart." Francis of Assisi, Early Documents, pg. 202. This reading from Scripture was the primary way St. Francis described for the life of the friars minor. The stories, psalms, and revelations found in Scripture are a continuing source of wisdom, faith and hope in our lives. All we need do is read and listen to God's Word.

Theme Eleven:

We have come to find joy in a life of 'non-attachment.' We have come to understand poverty as non-possession.

There is a continuing conversation about what it means to embrace poverty. Does it mean to sell all and live from day-to-day on the promise that God will provide? Franciscans recognize that each one of us, because we are created as free and unique human beings in the eyes of God, will consider what poverty means for us. The best guideline the Franciscan Way offers is that it is not what we have, rather, it is what we are attached to that indicates how poverty is a part of our spiritual life or not.

Even being attached holds a meaning for each of us that is not shared by others. Asking in prayer for God to reveal how we can relate to poverty is one step toward becoming acquainted with the idea and letting the Holy Spirit inspire the rest of the journey. That is what St. Francis and St. Clare did. They took one step at a time.

Theme Twelve:

We choose to live in the awareness that God gifts us with grace in every moment. Grace, God's self-communication, opens our awareness to a spontaneous joy that springs forth from God's overflowing love.

Angela of Foligno

Fundamental good is in every moment. It is in the goodness Franciscans find joy. We celebrate life and the presence of God's goodness no matter what the situation of our lives. It is found in the midst of Liturgy, family gatherings, graduations, birthdays and paradoxically in the sad times too. Celebrating a Funeral Mass can be a kaleidoscope of emotions: tears, rage, depression, anger, relief, and yes, joy. Franciscans embrace all life which includes Sister Bodily Death. St. Francis sang, "Praise be to you Sister Bodily Death from which no one living can escape." "Praise and bless my Lord and give Him thanks and serve Him with great humility." These excerpts from the Canticle provide us with a way to find meaning in all things. It is when we find meaning that we can find a sense of peace and joy in our daily life. As Angela of Foligno says, "The world is pregnant with the presence of God." The Franciscan Way is to live each day believing in that promise and behaving in ways that reflect God's presence in each moment.

Theme Thirteen

Franciscans form community first and then after community is formed, the brothers discern their ministry to those in need. For example, the poor, the oppressed, the sick and the hungry. It is the life of the community that serves to sustain the ministry itself. This life for the Franciscan friars is called the fraternal life. For lay women and men it can be called by different names: i.e. Secular Order of Franciscans, lay Franciscans, Third Order of Franciscans, community, family, circle, group. There is no one particular word to describe lay participation in the Franciscan way of living.

Theme Fourteen

Evangelization is central to the Franciscan mission. Going out to preach the Gospel to all people throughout the world while keeping minds and hearts open to other religions and different cultures is one of the marks of The Franciscan Way.

Strategy 2009 - 2014

Franciscan Renewal Center

A center for spiritual growth which transforms and moves us beyond ourselves in the service of others

Primary Offering: Place & space for on-going renewal, healing and spiritual growth.

Unique Value Proposition: Invitation into relationship, Franciscan worldview and integration of spirituality with life practices.

Target Market: Churched & un-churched, Catholics & non-Catholics who are spiritually hungry and seeking spiritual growth. Those in transition or crisis or who feel disconnected from a spiritual home; those in need of healing in a reputable place; who seek to deepen their understanding of the Franciscan charism and way of life (4th Order); and not-for-profits with compatible visions who are attracted to and respectful of our environment and open to the Franciscan way.

Current Community Profile: Largely local, white, middle to upper middle-class Christians who have chosen FRC as a spiritual home or oasis because they felt welcome here and attracted to our Franciscan charism; and/or felt that it was more in sync with Christian values than other churches they have access to or because they felt marginalized, pushed to the fringes or pushed out of other churches. Shorter-term or intermittent users and tourists come for hosted events, counseling, programs or holiday and special Masses because they are attracted to our environment or reputation or to the content of our services and programs. At the core, are those who desire spiritual growth or healing and those who are committed to living in a “Franciscan Way.”

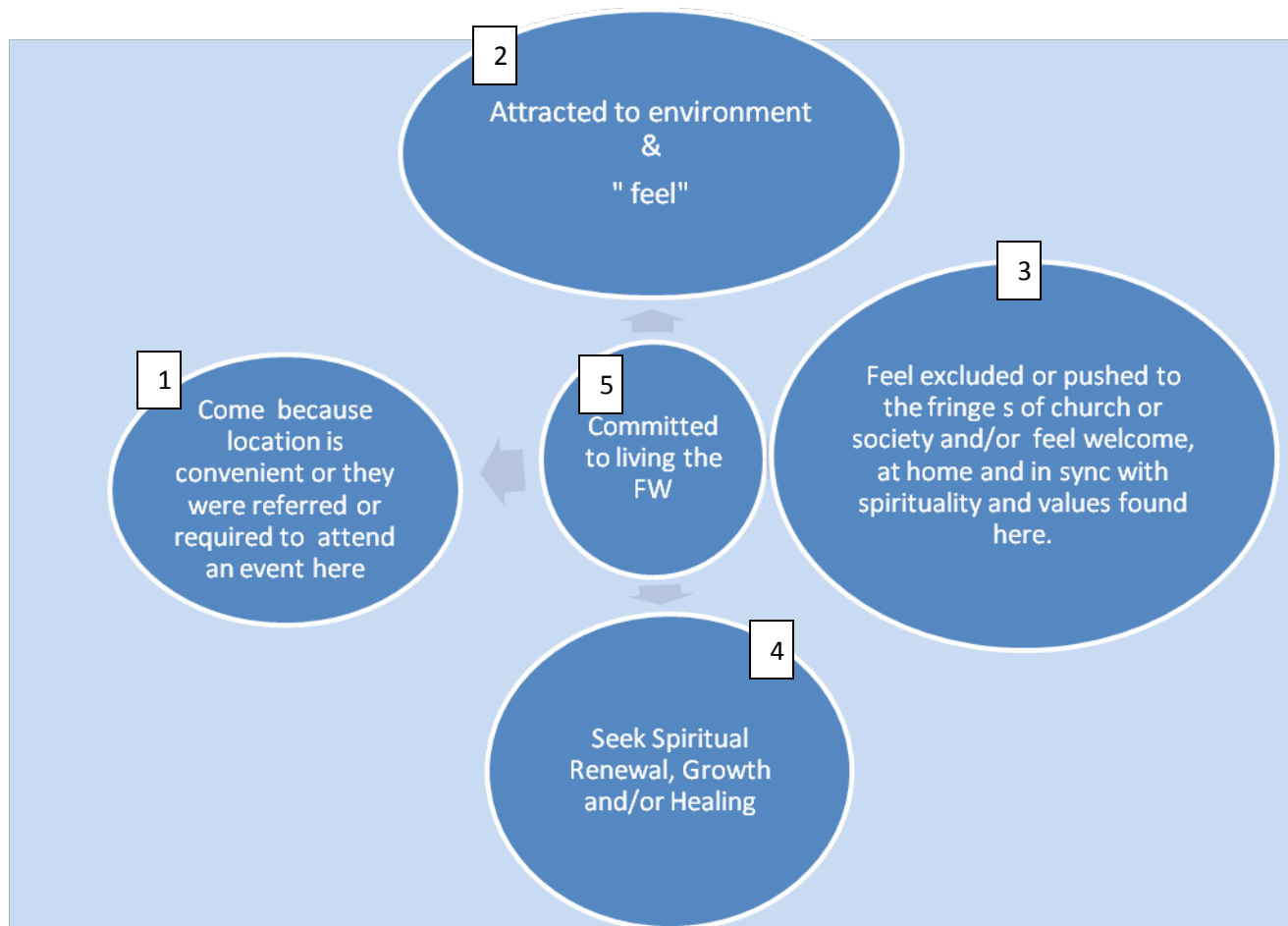
Major Market Trends & Implications

1. **Economic downturn is being realized in unpredictable giving and program participation and a reduction in the value of our endowment at a time when the needs of our community are increasing in proportion to the stresses in the environment. Ageing facilities *require an increase in capital expenditures to retain the value, utility, comfort and safety of our property assets.* Current economic conditions challenge our understanding of divine providence and our resolve to focus on the spiritual needs and growth of our community. In an effort to avoid overreacting while being good stewards we believe we need to develop a comprehensive fund-raising strategy to increase support of our operations, fund capital expenditures and increase our future sustainability.**
2. **More and more families are making OLA their spiritual home.** *This increases the need for sacramental preparation and other family oriented programs and services. Added resources are required to serve the needs of this community segment.*
3. **Week-long retreats and overnight programs remain flat; shorter, commuter oriented retreats and on-going programs are on the rise.** *These trends have motivating us to revamp our program offerings to include shorter and more ongoing opportunities for education and spiritual growth (Scripture from Scratch; Spiritual Spa Days; Retreats for Busy People; 3-4 session programs on spirituality) to meet the changing time requirements of seekers. It has also led us to modify our business model in the sense that we now depend less on retreats and more on hosting to generate housing revenue; maintain and increase occupancy rates and cover the overhead of our facilities and food services.*
4. **A church that is increasingly intolerant and reluctant to enter into robust discussions around the issues that threaten to divide Catholics.** *This creates opportunities for us to be a place of refuge for those who feel excluded, out of sync or pushed to the fringes of other worshiping communities; to expand our Called to Love evangelization initiative and to create a place where dialogue can be had on difficult and divisive issues.*
5. **Increasing demand for quiet space, silent retreats and private retreats.** *We are increasing our focus on this market segment to determine the real demand of this segment and the financial viability of devoting part of our site to these contemplative practices for spiritual growth.*

Market Analysis

Market Segment: Large and growing. **Our Penetration:** Low **Our Growth Strategy:** Attraction

Market Segmentation: We segment the market *by motivation*, or psychographics, not demographics.



Competition decreases and our unique value proposition increases as we move from segment 1 to segment 5.



The Wind Chime as a Metaphor for the relationship between our community segments (and between our ministries):

- Composed of different size tubes that are interrelated and important to the harmonious sound of the whole
- They are held together by what is above them
- All are moved by the same center piece (our Franciscan values and spirituality?) which is set into motion by the wind catcher (Holy Spirit?)
- The vibrating sound energy moves out in concentric circles far beyond our grounds and influences others in ways we will never know
- The transformation of wind energy to sound energy mirrors the transformation we seek within ourselves and our community members

Organizational Strategy:

- Hire skilled and committed staff. Provide mid-market compensation and benefits, flexible schedules and on-going development & opportunity for spiritual growth.
- Organizing in a shared service model assures appropriate focus on both:
 - needs of primary ministry segments within our community
 - consistent feel, efficiency and expense management across ministries
- Foster close collaboration and relationships between staff and friars.
- Foster close collaboration and cooperation among staff
- Volunteers are a key element of the organization. They provide services from hospitality to gardening to helping with the bulletin and mailings. Most ministries could not function at current levels of service without them.

Shared Services Organization

Liturgy & Prayerful Celebration	Retreats & Learning	Counseling	Hosting
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Primary Revenue Generating Ministries.

Typically, P/L responsibility

Strategy focuses on specific needs of that group from attraction thru delivery of services.

Operationally responsible for all functions that are unique to ministry.

Grounds/Maintenance
Food & Beverage
Marketing/Communications
Administration & Finance
Social Action (Discipleship Model)

Functions that primarily serve across ministry lines

Responsible for service and expense mgmt.

Strategy focuses on service levels, unity of message & feel, cross-utilization, community-building and efficiency.

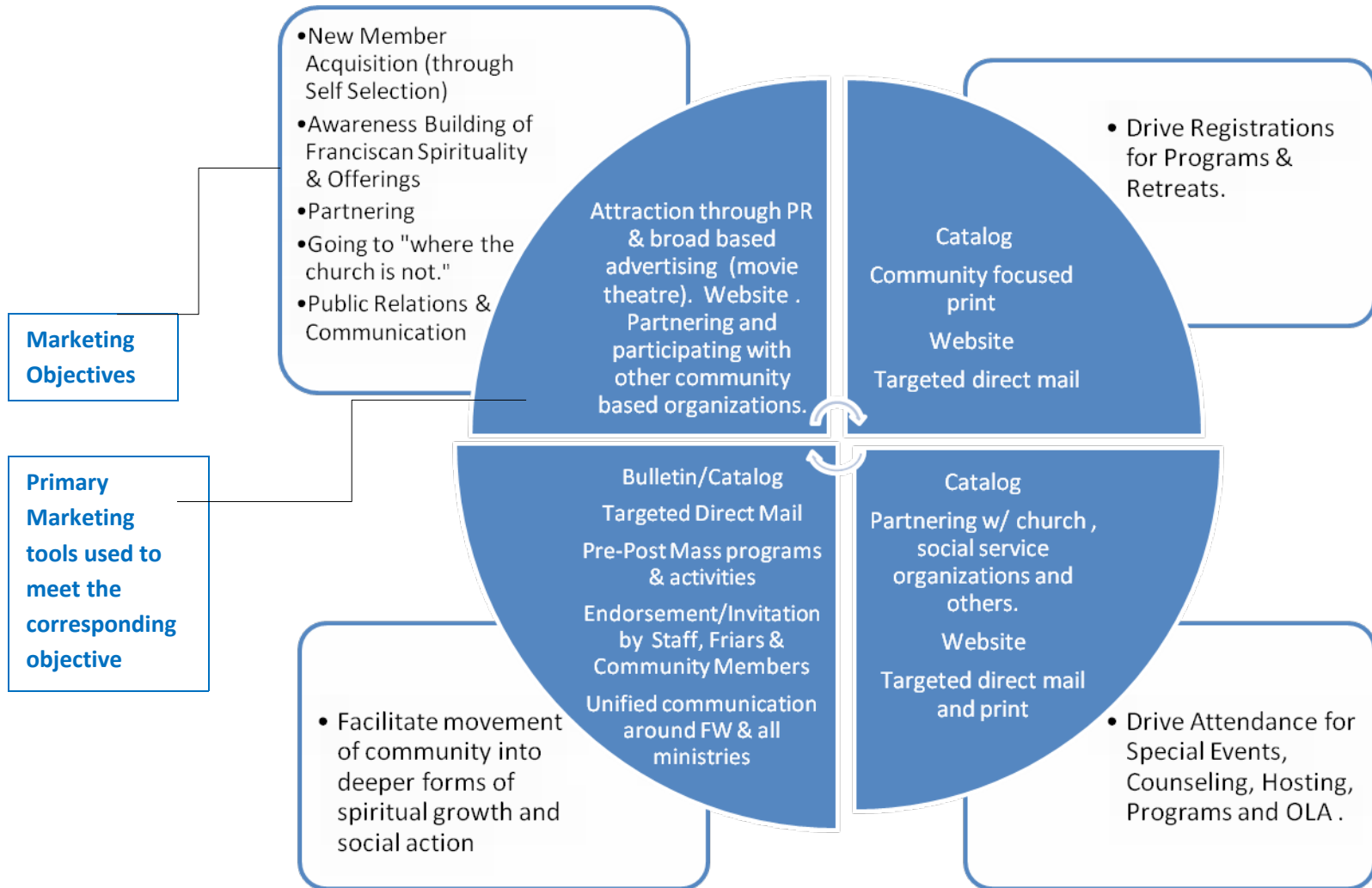
Go-to-Market Strategy:

- Primarily Attraction; some advertising & marketing
- Multiple no-cost to low-cost entry points that provide opportunities for spiritual growth and healing
 - FRC grounds
 - Our Lady of the Angels Church (liturgy, catechesis, sacraments)
 - Education & Retreats (Franciscan Way Programs which is at the heart of all that we try to do; also offer other programs, private retreats, centering prayer and spiritual direction)
 - Counseling – individual & group
 - Hosting services for compatible not-for-profits
- Facilitated movement from entry activities to deepening levels of community, education, healing and spiritual growth enhance potential for on-going transformation and draw community members toward the Franciscan Way
- Evangelization target growing number of alienated Catholic's and families not connected with a parish.
- Social Action serves both as a channel that bring new people into the community and one that prepares community members to leave the FRC to serve the marginalized and work toward social justice.
- Outreach programs increase exposure of Franciscan spirituality and theology to the churched and un-churched.

Marketing Strategy:

Long-term revenue generation

Short-term revenue generation

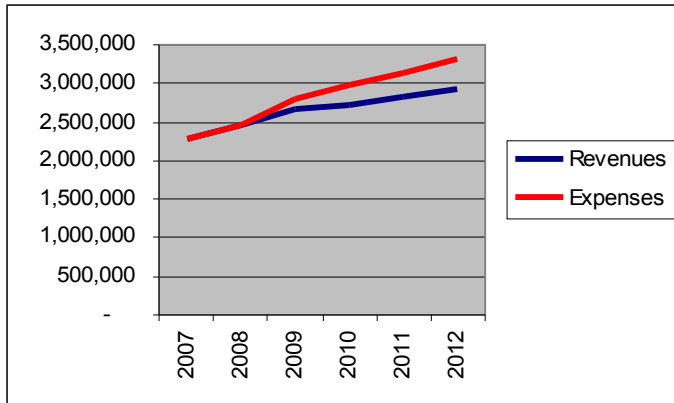


Service Delivery Strategy:

- Multi-use property – with harmonious activities.
- Facilitated movement from entry level activities to deepening levels of community, education, healing and spiritual growth enhance potential for on-going transformation and draw community members toward the Franciscan Way
- Consistent and Pervasive Expression of Franciscan Charism:
 - Preaching and Programs reveal Franciscan theology
 - Grounds express and reflect Franciscan spirituality.
 - All interactions and services from front-desk to food service reflect Franciscan values.
- Utilize volunteers where doing so has a strong potential to strengthen community relationships, provide healing or spiritual growth and reduce cost or increase efficiency or productivity for the FRC staff.

Funding Strategy

- Operations, **including the ongoing support and maintenance of physical and land assets**, are supported by these revenue sources:
 - Fees for services
 - Contributions for services
 - General, on-going fundraising to supplement, subsidize and support ministries and operations
 - Specific fundraising for specific activities (sealing parking lot) or programs (Evangelization)
 - Grants
 - Special one-time fundraising programs for **major** projects that are needed to support the delivery of services or preserve the value of our assets (e.g. new church).
 - Distributions from the endowment
- Current Trends Point to a problem with the level and mix of revenue generation.
All Inclusive...Operations, Fundraising and Endowment Distribution show that by fiscal 2012, there will be a 14% gap between revenue inflow and expense outflow.



- Our strategy is to:
 - Shift from a disjointed approach toward revenue generation and fund-raising to a well coordinated and comprehensive plan to increase our endowment, meet our rising capital needs and provide our ministries with increased resources to respond to the growing spiritual needs of the community.
 - Hold to an **Annual Funding Model** discipline of:
 - Operational Revenue = $\geq 70\%$ of total annual income
 - Fundraising = $\leq 20\%$ (with the exception of dedicated **major** fundraising initiatives)
 - Endowment dist. = $\leq 10\%$ of total annual income*
 - Fill revenue gap by increasing revenue from:
 - Operations by 50% over current trend rate (20% from current offerings; 30% from new services)
 - Fundraising by 50% over current trend rate
 - Endowment Goal: Grow to 12m by 2013

- Some of the “new services” revenue being discussed are:
 - Hosting for-profits mid-week
 - Leasing some of our land

Competitive Strategy/Differentiation

Establish clear differentiation by re-focusing and coordinating our efforts around this set of distinctively Franciscan teachings and activities:

- Share a theology that reveals a humble God who is searching for us
- Provide a removed, harmonious and quiet spiritual oasis
- Offer affordable, programs, services and overnight accommodations for those who are in need of healing or desire to spend time focused on their spiritual growth.
- Maintain a welcoming and inclusive community where the uncomfortable become comfortable and the comfortable become uncomfortable
- Maintain multiple no-cost or low-cost entry points. Facilitate ease of on-boarding, movement between ministries and progression into deeper and deeper levels of healing, spiritual growth and social responsibility.
- Provide practical example, instruction and support for integrating spirituality into daily life

- Reach out and enter into relationship with those who are “where the church is not”
- Serve the “least,” and the “under-served”
- Communicate in a contemporary key
- Resist all that seeks to move us away from Franciscan values and the Franciscan Way.
- Support our activities through a mix of pay for services, contributions for services and fundraising sources. Leverage our property assets through hosting to generate revenue and allow for the acquisition of new community members.

SWOT Analysis

<p>Strengths</p> <p>Committed, caring and qualified Staff of team players. Effective use of limited resources. A property that can support multiple uses</p> <p>Strong Casa ministries. Active & engaged <i>portions</i> of community and board</p> <p>Compelling Mission, Vision, Values. Strong Image</p> <p>Fidelity to Franciscan charism, theology & spirituality attachment to the Order rather than the Diocese.</p> <p>Ability to be a bridge between extremes and a place of dialogue. Our attraction to those on the fringe of society and church.</p>	<p>Weaknesses</p> <p>Financial health and stability of the Casa & Province. Limited financial support from community & unknown capacity.</p> <p>Vague community understanding of Franciscan charism, spirituality or theology.</p> <p>Vague linkage between ministries and lack of coordinated movement of community members toward Franciscan Way.</p> <p>Lack of diversity/disconnected from broader reality</p> <p>Aging facilities/high cost to maintain. Inability to accommodate worship community during peak periods/Multiple space issues.</p> <p>Unrealistic expectations of ministries. Low Friar fraternity/Clergy visibility, involvement and availability beyond Mass.</p>
<p>Opportunities</p> <p>To become a strong(er) community of faith and Franciscan evangelism.</p> <p>Expanded focus on social outreach/action and justice.</p> <p>Develop and execute a comprehensive financial development plan.</p> <p>Reinvigorate Franciscan Way and create a Retreat Ministry Model of leadership for the Province</p> <p>Be a voice for the middle ground in the Church</p>	<p>Threats</p> <p>Financial instability of the Province. Reduction of Friars.</p> <p>Lack of financial investment in our future by the community. Shrinking income of middle class. Aging physical assets and growing operating and maintenance costs</p> <p>Marginalization of Franciscan theology within Catholicism. Growing conservatism, divisiveness and confusion in the larger Church.</p>

Proposed Strategic Initiatives

2009 - 2014

Increase focus and intentionality around Franciscanism as the thing that binds us and allows us to provide the highest value to those we serve.

Develop a 5 year campaign to attract 150 community members to commit to Franciscan Way training and upon completion of that training to accept the responsibility to be spiritual companions to other community members.

Create clearer understanding of how social justice and action fit into Franciscan spirituality and create a stronger platform from which community members can launch outward in service of others.

Facilitate ease of exposure and movement among ministries and toward Franciscan Way.

Establish FRC as model of evangelization in the Southwest.

Continue and expand Called to Love Initiatives to those “where the church is not”

Continue and expand our sacramental preparation and instruction to families

Establish a partnership with St. Mary’s to add to FRC diversity and establish a stronger inner city connection; and to share resources to create a more visible Franciscan ministry for Phoenix.

Develop and execute a comprehensive plan for economic sustainability of the FRC. More clearly define the roles of board and staff in this endeavor.



Ministerial St

