Pastoral Planning: *Communio* in Action
Diocese of Worcester 2

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Patterns for best practice in pastoral planning

1. What is “Pastoral Planning?”
2. Three ways to make decisions
3. A tool for guiding pastoral planning
4. Solid consultation and decision-making process
5. Roadmapping
6. Some Predictable Conditions
7. ‘Change readiness’ versus ‘change management’
Pastoral planning is an intentional relationship

- **What we agree to do**
  - Pastor
  - Parish Leaders
  - Pastoral Council

- **Why we are doing it**
  - Bishop
  - Parish Members

- **Agree on how to go about it**
  - Finance Council

- **Agree to be accountable to each other**
  - National Leadership Roundtable on Church Management
Pastoral and public sector planning

**A DEMOCRACY**
- Democratic Process
- Representation
- Recommendations
- Political: Win/Lose
- Defined and controlled outcomes
- Discussion Concussion, Percussion
- An event

**THE CHURCH**
- Discernment Process
- The Mission of the Church
- Options
- The will of God
- Steps in the journey
- Dialogue, Reflection, Contemplative
- A way of life
Five features of truly pastoral planning

1. Planning breaks open the mission of the Church universal
2. The *communio*, led by their pastor, actively discerns will of God
3. The planning process is itself an experience of evangelization: relationship with Jesus is central
4. The *communio* is outwardly focused by the planning process on *missio*
5. A political frame of reference and rancor are absent, replaced by prayerful experience of the fruits of the Holy Spirit
Three ways to make decisions

1. End Determined
   • We already know WHY we are planning
   • We already know WHAT we are doing
   • We already know HOW we are going to do it

The focus is on implementing well the decisions already decided by the pastor

The purposes of consultation are
   • continuous improvement of delivery/implementation
   • Providing a protocol for feedback and continuous improvement
   • Identifying and mitigating risk
   • Asking for help to implement what the manager has already decided
Three ways to make decisions

2. End Undetermined

“I don’t know, what do you think?”
“I don’t care, what do you want?”
“What ever .... Everything is okay, as long as that’s okay with you”

DO NOT DO THIS ONE

(Unless you are writing a script for a mix of Saturday Night Live, Monty Python and Rocky V)
Three ways to make decisions

3. End in View

• We already know WHY we are doing what we are doing because we all share an understanding of the current reality
• We already know the CONDITIONS we want to create because we all contributed to developing options for what those end conditions might be
• We already know HOW we are NOT going to do it because our leaders set boundaries and direction

The purposes of consultation are

• contribution to shared understanding of reality
• Developing a shared understanding of the desired end state within the boundaries and direction established by our leaders
• To DESIGN how to DELIVER the desired end conditions
• The key leadership tool is a “Guiding Change” document
Reflection and Discussion

1. What has been your experience of making decisions in pastoral settings?
2. What could you do to make pastoral planning in your parish an experience of communio, genuine discernment and evangelization?
Tool for Guiding Change

CONTEXT AND REALITY
- Strategic Roadmap
- Mission
- Vision
- Strategic Directions
- Key Trends and influences

CREATIVE SOLUTIONS
- Configurations
  - Strategies
  - Systems
  - Initiatives
  - Programs
  - Tactics
  - behaviors

RESULTS
- Desired End State
- Conditions
- Services, Programs,
  Fiscal Performance
- Measures,
  Indicators of
  Success

After Dennis Cheesebrow,
TemWorks International
Key pastoral planning questions in sequence

1. What is the end state for your parish that you desire?  
The Vision

2. Why do you want that particular end state?  
The Mission

3. What about the current reality and boundaries influence how you get there?  
The Reality and the Boundaries

4. What are the first three things to do?  
The Priorities

5. How will we get there together?  
The Plan
Solid consultation and decision-making process

- **Shared Reality**
- **Creating Options**
- **Choice Making (Authority)**
- **Implement**
- **Refine**

Shared Understanding
Continuous Improvement

- Input (Representation)
- Design Team (Knowledge)

After Dennis Cheesebrow, TemWorks International

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Examples of context and reality

• Our Catholic school appears to be unsustainable
• We have a new pastor: what does he want?
• We are growing and growing fast: we need to make sense of how we go forward
• Our parishioners are of an age where we are about 10 years from seeing the end of our community
• The costs of maintaining the buildings is very high and rising
• The number of school age children dropped in this region but is now rapidly increasing
• Many families are choosing to attend Masses outside our parish and are not consistently affiliating with another parish community
• The Catholic school has come to be perceived as a service, a private education, and not a mission of the parish
• The average age of parishioners has risen to 78 years old
### Examples of acceptable and unacceptable means

<table>
<thead>
<tr>
<th>Acceptable Means</th>
<th>Unacceptable Means</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Our parish will have competent pastoral leadership</td>
<td>• Do nothing in order to protect the status quo</td>
</tr>
<tr>
<td>• We will maximize access to the Catholic school</td>
<td>• Isolate from other parishes of our region</td>
</tr>
<tr>
<td>• We will operate with a preference for the poor, marginalized and immigrant</td>
<td>• Ignore data</td>
</tr>
<tr>
<td>• Every ministry must evaluate itself according to standardized criteria</td>
<td>• Operate without a 5 year financial plan</td>
</tr>
<tr>
<td>• We will live within our means</td>
<td>• Make the Catholic school into a charter school</td>
</tr>
<tr>
<td>• We will meet long term financial obligations: debt, capital need, maintenance</td>
<td>• Sacrifice core parish ministries for preserving the Catholic school</td>
</tr>
<tr>
<td>of facilities</td>
<td>• Design solutions around particular person(s): subgroup of parishioners, a donor,</td>
</tr>
<tr>
<td>• Keeping a school will not mean the closing of the parish</td>
<td>a bishop, pastor or school principal</td>
</tr>
<tr>
<td>• We will maximizing access to the sacraments</td>
<td>• Make decisions that ignore the reality described by data</td>
</tr>
</tbody>
</table>
Conversation 1

1. What are three key features of the parish you have always dreamed as the one you want to lead?
2. What needs to be changed in your parish in the next five years?
3. What needs to be preserved in your parish for at least the next five years?
4. What are the top three to four priorities for the next three years in your parish?
Strategic roadmapping

• What?
• By When?
• Who?
• Accountable to whom?
• What structures will help these steps happen?
# Template for strategic roadmapping

<table>
<thead>
<tr>
<th>MISSION</th>
<th>VISION</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TIMELINE</strong></td>
<td><strong>PRIORITY 1</strong></td>
</tr>
<tr>
<td>3 MONTHS</td>
<td>Benchmarks and Actions</td>
</tr>
<tr>
<td>6 MONTHS</td>
<td>Benchmarks and Actions</td>
</tr>
<tr>
<td>9 MONTHS</td>
<td>Benchmarks and Actions</td>
</tr>
<tr>
<td>12 MONTHS</td>
<td>Benchmarks and Actions</td>
</tr>
<tr>
<td><strong>2 – 3 years</strong></td>
<td><strong>End state for Priority 1</strong></td>
</tr>
</tbody>
</table>

*National Leadership Roundtable on Church Management*
Solid consultation and decision-making process

Any consultation and decision-making process needs to:
1. Clarify roles, responsibilities and relationships
2. Have people operate within their delegated authorities: no abdication, avoidance or overreach
3. Clearly identified accountability for choice and use of a guiding change document
4. Those who DESIGN are based on knowledge and management responsibility
5. Those who CONSULT are invited based on representation and stakeholder voice
6. Clear process, sequence and time frames
Some predictable conditions

1. A role of staff and parishioners is to responsibly resist change, and some are really good at it

2. The bishop’s responsibility (diocese) is different than pastor responsibility (parish), is different to the role of parishioners

3. Priests are uniquely positioned to lead by influence

4. Priests are the MIDDLES in the organizational structure and manage culture and implement systemic change

5. The dominant Frame of Reference drives the process
Change readiness and change management

• Most parishes and dioceses do NOT assess readiness for change
• Some dimensions of readiness for change
  – Catechesis
  – Systemic Management
  – Standards for Management
  – Leadership
  – Communication of the right information
  – Balance between two dimensions of authority
Some elements of change readiness

- **CATECHESIS**: Mission, right relationships, Local Church, *Communio* and *Missio*
- Parish staff and other resources as service and capacity building
- **Management Standards**
- **Leadership Development**
- **Analytics**
- Parish priorities and roadmap
- School priorities and roadmap

[Image] National Leadership Roundtable on Church Management
Change readiness and change management

Balance between preferences in authority
1. Bishop and Pastors
   – Top down and bottom up
2. Pastors and Parish Leadership
   – Ordained and Lay leaderships
3. Parish Staffs
   – Ownership and Compliance
4. Parishioners
   – Quality or Access
## Smart and Healthy Parishes

<table>
<thead>
<tr>
<th>SMART</th>
<th>HEALTHY</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Strategy</td>
<td>• Minimal Politics</td>
</tr>
<tr>
<td>• Planning</td>
<td>• Minimal Confusion</td>
</tr>
<tr>
<td>• Marketing</td>
<td>• High Morale</td>
</tr>
<tr>
<td>• Finance</td>
<td>• High Productivity</td>
</tr>
<tr>
<td>• Technology</td>
<td>• Low, but enough turnover</td>
</tr>
<tr>
<td>• Efficiency</td>
<td>• Mutual accountability</td>
</tr>
<tr>
<td>• Compliance</td>
<td></td>
</tr>
</tbody>
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After Lencioni, The Advantage, 2012
Reflection and discussion

1. In what ways is your parish ready or less ready for change?
2. How smart and healthy is your parish?
3. How can you as pastoral leader help your parish be ready to change, be smarter and healthier?
Embedding ongoing planning into the parish system

- Scanning (1)
- Evaluating (1)
- Budge (1)
- Pastoral plan (2)
- Pastoral priorities (2)
- Adapting (1)