

NATIONAL LEADERSHIP ROUNDTABLE
ON CHURCH MANAGEMENT

Pastoral Planning:
Communio in Action
Diocese of Worcester 2

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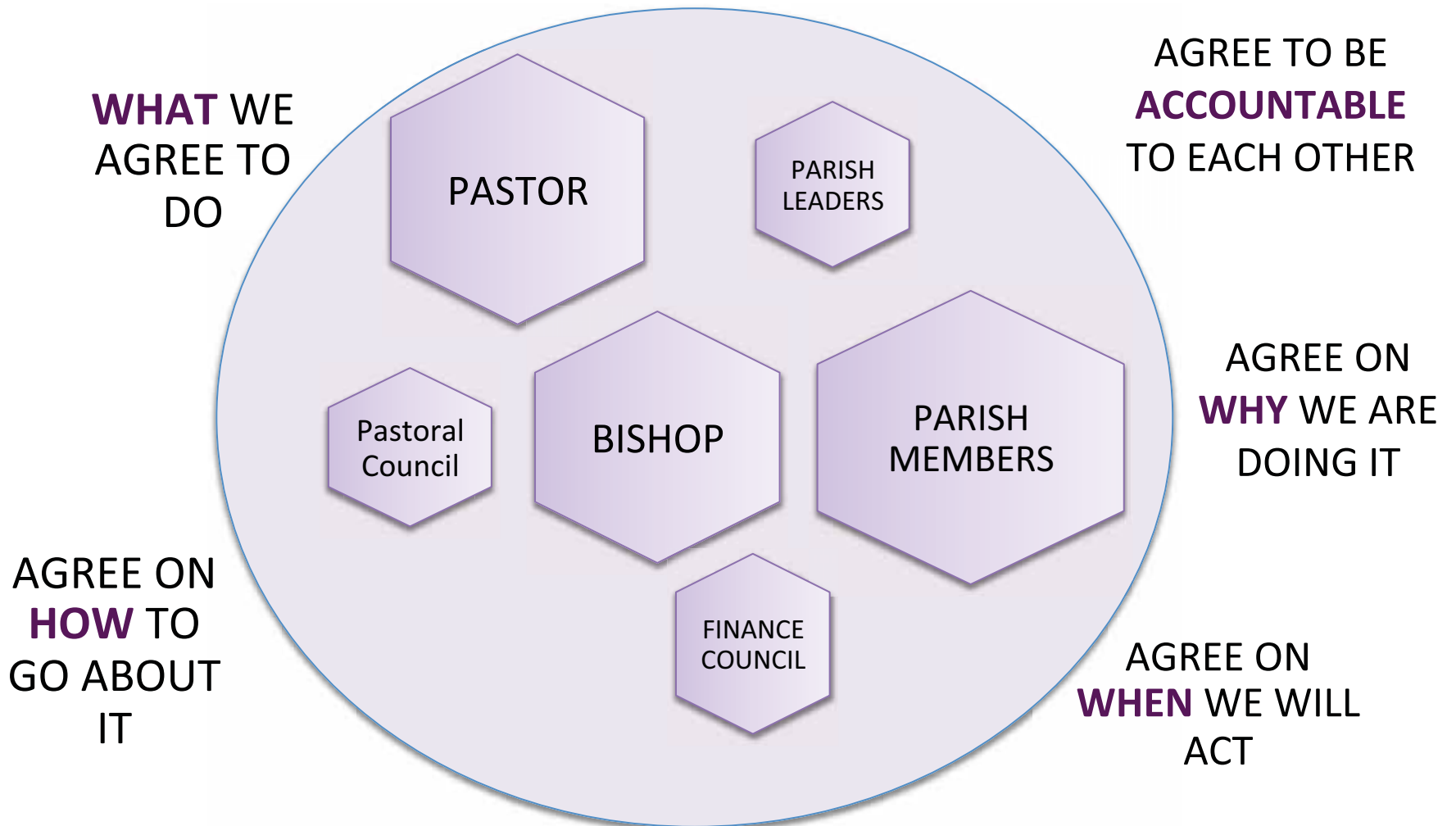
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Patterns for best practice in pastoral planning

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



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?”

“Whatever 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

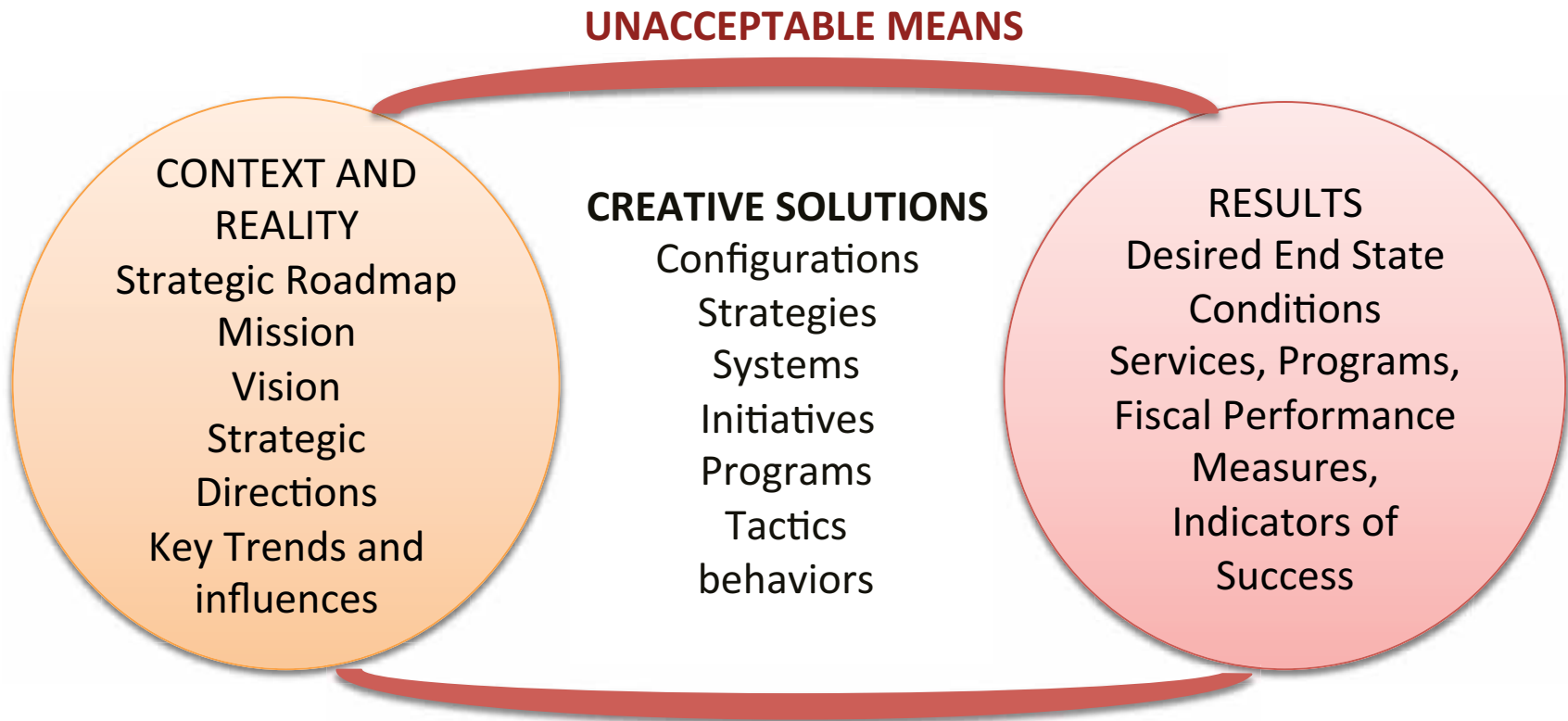
- contribution to shared understanding of reality
- Developing a shared understanding of the desired end state within the boundaries and direction established by our leaders
- To DESIGN how to DELIVER the desired end conditions
- The key leadership tool is a “Guiding Change” document

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 communion, genuine discernment and evangelization?



Tool for Guiding Change



UNACCEPTABLE MEANS

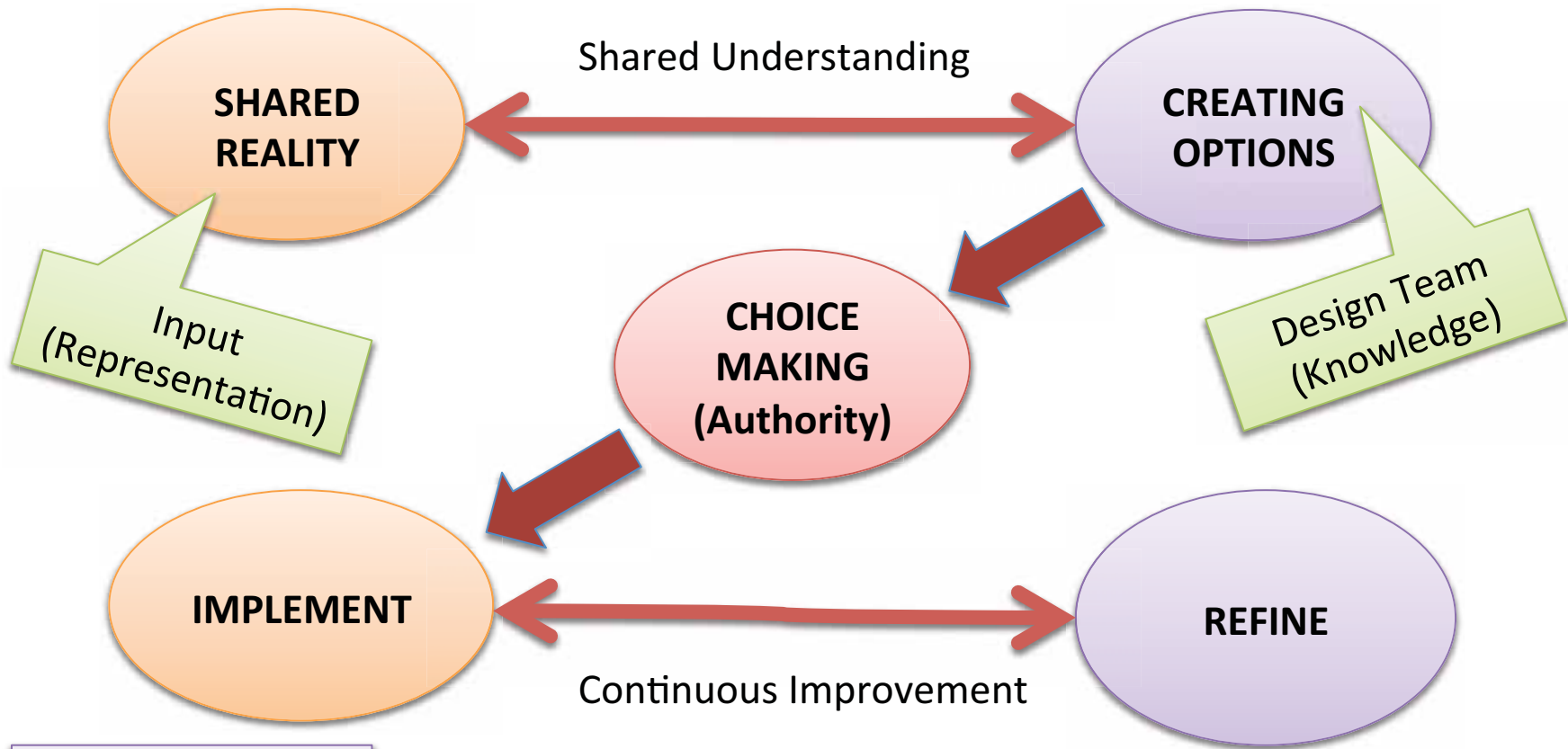
After Dennis Cheesebrow,
TemWorks International



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



After Dennis Cheesebrow,
TemWorks International

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

Acceptable Means

- Our parish will have competent pastoral leadership
- We will maximize access to the Catholic school
- We will operate with a preference for the poor, marginalized and immigrant
- Every ministry must evaluate itself according to standardized criteria
- We will live within our means
- We will meet long term financial obligations: debt, capital need, maintenance of facilities
- Keeping a school will not mean the closing of the parish
- We will maximizing access to the sacraments

Unacceptable Means

- Do nothing in order to protect the status quo
- Isolate from other parishes of our region
- Ignore data
- Operate without a 5 year financial plan
- Make the Catholic school into a charter school
- Sacrifice core parish ministries for preserving the Catholic school
- Design solutions around particular person(s): subgroup of parishioners, a donor, a bishop, pastor or school principal
- Make decisions that ignore the reality described by data



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

MISSION				
VISION				
TIMELINE	PRIORITY 1	PRIORITY 2	PRIORITY 3	PRIORITY 4
3 MONTHS	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions
6 MONTHS	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions
9 MONTHS	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions
12 MONTHS	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions	Benchmarks and Actions
2 – 3 years	End state for Priority 1	End state for Priority 2	End state for Priority 3	End state for Priority 4



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



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

SMART

- Strategy
- Planning
- Marketing
- Finance
- Technology
- Efficiency
- Compliance

HEALTHY

- Minimal Politics
- Minimal Confusion
- High Morale
- High Productivity
- Low, but enough turnover
- Mutual accountability

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

