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Parish Planning

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Planning in a Catholic parish setting is about strengthening *communio* and aligning around a common purpose: *missio*. A parish plan is an agreement within the *communio* about how to go about its *missio*—about reading the signs of the times, deciding what is important at this time, when to do what for how long, and how to know when progress is being made. Most high-level (sometimes called “strategic”) planning is documented. It is mission-driven, data-informed and discernment-derived. In a Catholic parish setting a defined planning process is important, and how planning happens should in itself enhance the experience of *communio* and highlight the focus on *missio*.

Good parish planning is a relational activity. In fact, a pastoral plan for the parish ultimately consists of relationships themselves, not the written document. The written planning document only records for the purpose of future reference the basis for the relationships between the people involved in the planning process. It records why this community called a parish gathers (mission), what it will look like when this group is living in accord with their reason for existence (vision), what this community agreed to do (priorities), how they agreed to go about it (strategies), and who is accountable to whom, for what and by when. How the parish goes about planning is, therefore, far more important than the written plan itself.

It is important to realize from the beginning that planning is not, in itself, rocket science. In fact, keeping it simple and straightforward is essential. This chapter provides a Catholic parish a pragmatic, step-by-step guide through the planning process.

Why Plan?

Planning in a parish helps create mission focus and alignment from the governance level through to the operational level within the parish. A parish planning process has a clearly defined end. It gives the parish a roadmap for the near term and midterm future. It tells the parish leadership and community its priorities for the next two to three years and helps them keep a long-term context in mind. The planning process begins with catechesis that teaches the community about the mission of the church universal and moves from there to clarify the mission of the diocese and the parish. It articulates the vision and near-term priorities of the parish, offering a roadmap of what needs to be done in the next two to three years to bring the parish closer to making its mission and vision a reality. The plan itself gives the pastor, lay leadership, administrative structure, and community of the parish a basis for making decisions about how it organizes its resources. At its best, the planning process is itself an experience of robust *communio* that strengthens the ongoing experience of *communio* and the focus on *missio*.

Adaptive vs. Predictive Planning

After World War II, strategic planning was introduced to businesses and parishes through the experience of those who had been in the military. In the 1960s and 1970s, strategic planning was seen as the “silver bullet” for success. During the 1980s, many were disenchanted with strategic planning in parishes until they realized that much of what had passed for strategic planning erroneously presumed that the conditions under which a plan was created were predictable and largely static, resulting in a document that sat gathering dust on a shelf. It was out of that experience that adaptive planning was born. This approach assumed that both internal and external operating environments for a parish shift continuously and so any useful plan would be one that continuously adapts. Parish planning today, then, has gone beyond the static “five-year plan” model to an adaptive and creative process integrated into parish life. Adaptive planning recognizes that many of the factors influencing parish life such as demographic change, economic conditions in the local and wider community, changes to employment regulations, shifts in the expectations of donors, and expectations about fiscal transparency and

accountability are beyond the control of the parish and are becoming less than predictable. Adaptive planning allows the parish to more effectively live its mission within a changing internal and external environment.

Understanding the Broad Strokes of Parish Planning

The best parish planning processes are mission-driven, data-informed, and discernment-derived. This means that good planning begins with catechesis of parish leadership and those who will have a direct role in the planning process, as well as the wider parish community. The use of the word catechesis here is important. It is a breaking open of the mission given to the church by Jesus using scripture and other documents or literature from the Catholic tradition. In the past this meant just writing a mission statement. What is being suggested here is much deeper.

It begins with formative catechesis about the mission of the church universal. There are many church documents and resources on this, so they need not be rehashed here. What is important is that the dialogue between the pastor and his parish, especially its leadership, begins with the mission of the church universal, moves to the mission of the diocese, and then addresses the mission of the parish. That order is important so that the participants approach planning with a perspective that is larger than just their own parish. Adult catechesis based in deep dialogue, education, and formation about mission in this order often makes the matter of a mission statement a very simple matter. Taking time to catechize and dialogue about the mission at the level of universal church is well worth the effort. The purpose of the catechetical formation and dialogue about mission in the different levels of the church is to bring the parish to a deeper understanding, appreciation, and experience of *communio*. At its best this part of the planning process should be experienced as a shared conversation to Christ and his redemptive purpose. A common understanding of the mission of the parish and this context makes planning both easier and more formative of the community in itself. As an unnamed bishop once said to his planner: "It is more important that people share an understanding of the mission than that they have a mission statement to nail on the wall."

Data-informed planning means that planning is based in reality. Good parish planning requires a shared understanding of the current reality

in which the parish finds itself. There is the story of the parish council that described the parish to its new pastor as a blue-collar, middle-class parish of families whose membership went back many generations. The new pastor drove down the street and saw signs over stores in multiple languages, and at Mass the following Sunday he looked out to a community gathered for Eucharist that represented many races and languages. The picture given by the parish council was not wrong, just incomplete. What the council offered as fact was actually a preference to have the parish remain as it always was. That new pastor asked at the next parish council meeting what was changing in the local community, and they began to tell the pastor in great detail how the area had changed, and that the parish membership had changed. The new pastor then asked the planning office of his diocese for help with some demographic analysis and began asking his parish council to look at the data, discuss what it meant for the future of the parish, and tell stories of "the way things used to be." The best planning includes both data *and* story. Both are necessary for understanding the current reality of a parish.

Over three hundred years ago, St. Ignatius of Loyola articulated discernment as a process that is for anyone who genuinely seeks the will of God. There are plenty of resources available on the discernment process. A great book to help educate parish leadership on the use of spiritual discernment is *Discerning the Will of God: An Ignatian Guide to Christian Decision Making* by Timothy Gallagher.¹ The emphasis for planning purposes here is on the necessity of coming to planning with an open mind and singularity of purpose: the mission of the church. It means setting aside personal agendas and preferences in the same way that, when we pray, we say "your will not mine be done." Approaching planning as a discernment process means that the parish is seeking the will of God. This is very different from any corporate or civic planning process that seeks the efficient path to profit or that reflects the "will of the people." Different purposes lead to different processes. It means that while it is good to gather people who cover a wide cross section of the community, they are not representatives in the "civic representation" sense. A parish council is not a city council, a public school board, any other civic body, or a corporate board. Those who gather to do parish planning have only one purpose: to further the mission of the church. People experience stronger *communio* when they are focused on the mission of the church, prayerfully discern the will of God, and embrace gifts within the parish. Unlike other experiences of planning that

parishioners may have, planning meetings are prayerful, reflective, and even contemplative at times, as well as occasions for lively interaction.

It is common for parish planning groups to say that they use a consensus model for decision-making. This is just fine as long as there is a common understanding of what "consensus" means in a Catholic context. In civic realms it often refers to a group coming to agreement. In our Catholic context it refers to everyone knowing what options are viable and potentially represent the will of God (rather than everyone agreeing on the one recommendation offered to the pastor). In this framework for consensus, political activity is less likely and the open-mindedness required for discerning the will of God—as described by Ignatius—is made possible. Self-will and imposing self-will on others cannot be the center of consensus in the Catholic Church. This implies that members of planning groups are mature enough to move beyond self-will into a focus on mission and have the capacity to keep that mission in mind as they discern practical conclusions for the parish with their pastor.

Who Leads Planning?

The *munera* of the pastor includes governance of the parish. This makes the pastor the leader of parish planning. He does not, however, do that alone. It is common for the parish council to lead the planning process with their pastor. It is also common to engage a special planning task force whose mandate from the pastor is to lead the process. Furthermore, it is common for such a group, usually composed of between seven to twelve members, to report to him through the parish council.

Gathering the right people to lead the process is perhaps the most important decision to make as planning begins. It is crucial to have around the planning table people who are capable of fully participating in *communio* at this time in their lives and who are not carrying a particularly divisive agenda or cause into the process. There are specific competency sets that may be useful: some may be facilitators of open parish meetings, some may help with data collection or data analysis, and some may be creative in developing options. All need to be spiritually mature enough to enter the discernment process with an open heart.

It sometimes happens that a pastor comes to a parish and finds the leadership of the parish underdeveloped and not ready to help him lead planning. In this case it is often very helpful to undertake some

leadership development with his key people: members of the parish and finance councils, lead staff, and himself. One great program can be found described on the website of the National Leadership Roundtable on Church Management under the tab for the *Catholic Leadership 360* program.² It meets the criteria for developing Catholic leaders in that it is researched and long-term impact, it is not time-intensive (your best leaders are usually the busiest people), it is relatively inexpensive, and it is clearly Catholic. This leadership development could be considered a worthwhile "pre-planning" investment.

The Steps of Parish Planning

The canonist Robert Kennedy outlined five steps in an ecclesial decision-making process whenever there are significant decisions to be made.³ They may seem complex at first glance, but in practice they are relatively simple. Kennedy's five steps are:

1. Competent gathering and analyzing the right information
2. Developing and weighing options
3. Asking decision makers to prayerfully consider and choose among the options
4. Implementation of decisions
5. Refining the decisions

These five steps provide a solid basis for a series of steps to guide a process of parish planning along the lines of the adaptive model described above.⁴

1. *Clarity of mission and boundaries.* This is an opportunity for the pastor, perhaps along with an outside resource, to teach his people. What is important is that those directly involved in the planning process, as well as the parish as a whole, have the opportunity to come to a deeper and shared understanding of the mission of the church universal, the diocese, and the parish.

Parish planning operates within some boundaries, usually best set by the pastor before it begins. Some boundaries may come from the teachings of the church, while others may be financial. For example:

- the plan must keep within a balanced budget
- the plan must be consistent with what the bishop has in mind for local parishes
- the plan must include outreach to people not currently served by the parish but who live within its borders

It is also common for a pastor to set boundaries regarding how long the planning process may take.

A common way of setting boundaries is to set out three columns, listing the acceptable means for fulfilling the mission, any unacceptable means, and reasons for why such planning is necessary. Creating consensus on the boundaries of parish planning sets the rules, so to speak, before the process gets into full swing. This necessary step will make a big difference in later planning discussions.

2. *Scan the current reality.* A simple beginning to this can be to ask groups of parishioners to name what is changing in and around the parish in terms of three questions:

- What is emerging now?
- What is peaking right now?
- What is declining or has disappeared from view in recent years?

A subcommittee that focuses on key trends and influences can collect data by:

- Accessing demographic trends within the current parish community and the community within which the parish exists
- Surveying the needs of parish members
- Identifying parish financial, giving, and membership trends

Some other good questions for an analytics subcommittee to address include:

- Who is or is not being served (regardless of intention)?
- What do you regard as the gold standards of high quality or best practice in parish ministry?

- What influences access to high-quality ministry in the parish?
- What would need to leave or be let go of for the good of the parish's mission?
- What stories are told within the parish that tell us who we are, and to what degree are they still true?

Not all data is useful. In fact, too much data can be confusing. An important part of good planning is limiting the data to only what is useful. This step can engage many parishioners through their input. Collecting, assembling, synthesizing, and analyzing data can be a good use of the gifts of parishioners, many of whom may not be on a committee, but would be willing to serve on a special "analytics subcommittee" that does its job with the data and then ceases to exist. Trends are more important than data-points, especially for parish membership, participation in parish liturgies and ministries, and financial performance. Sometimes, especially when a parish is looking at significant demographic or economic changes, professional help with data is needed and may be available from the diocese or consultants. Check with the diocese first because, among other things, they are usually cheaper than external consultants! Some of the best information for planning is an assessment of the current ministries and management. A great tool for this is one based on the "balanced scorecard" model.⁵

One of the basic principles of collecting and analyzing data is that those who participate in its collection need the analysis fed back to them so that they know they were heard and their efforts were useful. When a valid analysis is available, a synthesis of the analysis is often provided to the parish in writing at a meeting to which all are invited. This helps the parish-at-large gain ownership of the process. This is also where the next step begins.

3. *Develop a shared understanding of the current reality of the parish.* This consists of the planning group reducing the amount of information collected and analyzed to seven to twelve key descriptors and putting it into a format that is easy to communicate to the parish community. One useful way of thinking about this is to imagine a car dashboard and its gauges that give limited but valuable information. Often information prepared for the parish at this point is in the form of just a couple of pages of graphics and bullet points. Further details may

be made available upon request. Many parishes distribute this material at a parish meeting led by those who created it, and ask for feedback as to whether it accurately reflects people's experience, surprises anyone, or what particularly grabs one's attention. It is also common to ask if the material changes the image people have of the parish, particularly when a parish has seen significant demographic change. This may lead to further review and changes to the material used by the planning group. What is important is that there is a shared understanding that the information presented is an accurate picture of the current reality.⁶

4. Develop and evaluate viable options for parish priorities over the next two to three years. This is the creative and (dare it be said) fun part of planning. It is where the planning group and the pastor develop a list of potential priorities for the next two to three years, keeping in mind the reality in which the parish finds itself. Many priorities are created, but few can be chosen. All those that are viable must fit the current reality of the parish, including the financial situation. The potential short list of priorities is then taken to the parish community (sometimes in a series of gatherings) for comment about the strengths, weaknesses, opportunities, and challenges within each of the proposed priorities. Sometimes new options for priorities emerge. Some parishes repeat this evaluative process with the parish to make sure that all who want to get engaged and own the outcome.

5. Choose three to seven priorities for the next two to three years. Based on parish feedback the pastor, in consultation with his leadership, prayerfully considers the options and finalizes the priorities for the next two to three years.

6. Create key steps and benchmarks for progress for the next two to three years. This is where the planning group, often with staff assistance, examines the priorities and makes a list under each one of the major means for making them happen (often called "strategies") and benchmarks for progress over the next two to three years, adding a timeframe for achieving getting those benchmarks. In this way the pastor and parish council can measure progress in the plan.

7. Assess resources. The strategies of the plan need resources. This may include human resources, finances, and facilities. The parish finance

council is consulted at this time. If the plan is already aligned with current reality, the basic financial and other resource considerations are most likely already in place. However, sometimes a plan may need to be changed because of resources at this point. This may mean, for example, that a priority or a strategy may need to rest “in the parking lot” for a time (not forgotten—it was important enough to be chosen so it should not be forgotten) until resources can be found for that priority or strategy. A parish budget is basically the pastoral plan of the parish aligned with the resources of the parish. The budget should always be closely aligned with the plan.

8. *Implement the plan.* Itemizing this step may seem superfluous to those not familiar with the planning process, but part of planning is to see that the plan is actually implemented. A plan is not done until it is acted upon. Otherwise, of what use is the plan? This means attaching a “who is taking responsibility for what by when” level of detail—at least to the initial steps of the plan and ensuring that those first steps are in motion. This is where many parish plans fail.⁷

It is also true that the best plan will not be implemented if the context of the plan is poor parish management. The most effective tool for moving toward great management in parishes is the *Catholic Standards for Excellence*, a well-researched and easily adopted set of management standards for Catholic parishes (see the previous chapter by Michael Brough).⁸

9. *Evaluation.* No plan is perfect, and so there is a need for ongoing refinement. This is often done with staff and the parish council in a monitoring role on behalf of and reporting regularly to the pastor. A monthly review by the parish council of “who has done what” is often useful.

Integrating Planning into the Life of the Parish

Planning in the adaptive mode does not occur as an isolated event. It is part of what the pastor and his leadership groups integrate into their annual agenda cycle. The initial planning process is described above. On an annual basis the parish council engages in a scanning process asking the appropriate questions to determine if the conditions under which

the parish is operating have changed significantly enough to warrant adapting the plan to the new circumstances. This is the “adaptive” of adaptive planning. Perhaps a new priority is warranted. Perhaps a particular strategy is not working for one of the priorities. Perhaps there has been a sudden decline or rise in membership, and so the pastor and parish lay leadership ask themselves why this has happened and how this impacts the plan. Perhaps the cultural diversity of the parish has changed and attention needs to be given to that in liturgies. The need for a major planning process is minimized by the ongoing adaptive work of the pastor and his parish leadership. There may eventually come a time when the conditions for the parish change so significantly that an entirely new planning process is warranted, but this is not common if the adaptive work has been ongoing.

How a parish integrates adaptive planning into the life of the parish leadership is described as a seven-meeting cycle spread throughout the year:

- Scan the current reality (1 meeting)
- Develop options for changing priorities and/or strategies for adaptation to new operating conditions and weigh those options (2 meetings)
- Relate the choices that the leadership makes to the budget (1 meeting in close consultation with the parish finance council)
- Adopt the newly adapted plan and its budget (2 meetings)
- Evaluate the mission effectiveness of implementing the plan (1 meeting)

At every parish council meeting time should be set aside for discussing progress toward the plan’s benchmarks and how to keep the parish moving forward in its priorities. Embedding this process into the life of the parish council ensures that the plan remains relevant and implementation is having an impact on the mission focus of the parish.⁹

Documenting a Parish Plan

We began by saying that a parish plan is a set of relationships based on certain well-defined agreements. Remember that the plan is not the

document itself but the shared understandings and agreements within the living relationships that make up the parish. It is also important, however, to document the plan so that it may outlive its creators and be shared and received within the larger context of *communio*. It becomes a reference guide for the parish council through which they measure progress and a resource to focus staff on the mission and to orient new staff. It is used whenever major decisions—financial or otherwise—are made.

When documenting a parish plan the adage “less is more” applies. The first three elements of the plan that form the basis for the relationship we call a plan are Mission, Vision, and Priorities. These may all be documented on one sheet of paper. Each of the three to four priorities should then have its own column on the following page, where the strategies for implementing each priority and dated benchmarks for progress (spaced about every three to six months) are listed. The names of those accountable for each strategy and benchmark are also listed. This makes a valuable reference document for the pastor, parish council, and staff and is small enough to be easily distributed to the parish. The key descriptions of the reality that informed the development of the plan are also documented as a one- or two-page synthesis. Again, such brevity makes it easy to distribute to the community. Some communities also prefer to have a detailed version available as well. Experience shows, however, that a highly detailed plan has limited value and that a document of no more than two or three pages is much more pragmatic.

The Role of the Pastor in Planning

While every pastor is different and has his own preferences for defining his role, there are some common roles that the most successful pastors take in parish planning.

First, the most successful pastors stay faithful to their *munera* by remaining in governance rather than management. In other words, don't abdicate the important role of oversight by spending all your time managing the details. Leave that to the gifted volunteers and staff who want to help you succeed. For example, teach and catechize the faithful on the mission of the universal church and set the boundaries of the process, but then let those who have process management training and expertise do what they are good at. Leverage the strengths around you rather than trying to do it all yourself.

Second, avoid the trap of using a corporate or civic model for planning. Stick to a model that is derived from Catholic teaching and tradition and that plays to your training and strength. In other words, use a model based in prayer and discernment that engages the lay leaders and the parishioners in reading the signs of the times (as the church has done for hundreds of years). Prayerfully discern with the help of the laity (as again the church has always done) the will of God for how to respond in this time and place to the current reality in which the church must fulfill her mission.

Third, be the decision-maker as is your proper role as pastor, but only after you have heard the prayerful and contemplative reflections of the parish leadership. Listen to what God is telling you through their voices with all the humility of one whom God has called to be his servant. Do this and the parish community under your leadership will be doing God's will in a planned and coherent way. And you will be a most effective shepherd of God's people.

A Final Word

Finally, there are two things every pastor who is engaged in pastoral planning should keep in mind. The first is the favorite prayer of almost every pastoral planner I have known: *God grant me the serenity to accept the things that cannot be changed, courage to change the things which should be changed, and the wisdom to distinguish the one from the other.* The second is the words of Jesus himself from scripture: *Not my will, but yours be done.*

Endnotes

1. Timothy Gallagher, *Discerning the Will of God: An Ignatian Guide to Christian Decision Making* (New York: Crossroads, 2009).
2. See *Catholic Leadership 360* (National Leadership Roundtable on Church Management, 2013), www.theleadershiproundtable.org.
3. See Robert Kennedy, "Shared Responsibility in Ecclesial Decision-Making," *Studia Canonica* 14 (1980): 5-23.

4. Dennis Cheesebrow and Jim Lundholm-Eades, "Five Steps for Parish Planning" (working paper, Leadership Roundtable on Church Management, 2005).

5. See National Leadership Roundtable on Church Management, *An Assessment Tool for Parish Leadership Relationships, Parish Ministry and Management* (2008), www.theleadershiproundtable.org/churcheopedia/docs/NLRCMLeadershipRelationshipAssessmentToolv708082008.pdf.

6. Some great insights for this part of the planning process may be found in Dennis Cheesebrow, *Partnership Redefined: Leadership Through the Power of &*. (Centerville, MN: Bogman Publishing, 2012). His framework's diagrams and their explanations deserve particular attention.

7. There are some valuable insights from corporate business literature on implementing a plan. Two of the best that are worth asking parish leadership—certainly a parish council and finance council, as well as ministry staff—to read and discuss are Gino Wickman, *Traction: Get a Grip on Your Business* (Dallas: Benbella Books, 2011) and Larry Bossidy, Ram Charan, and Charles Burck, *Execution: The Discipline of Getting Things Done* (Dallas: Benbella Books, 2002).

8. See National Leadership Roundtable on Church Management *Catholic Standards for Excellence* (2013). Available at www.theleadershiproundtable.org. Also helpful for pastors and parish staff members is Barry Oshrey, *In the Middle* (Boston: Power and Systems, 1994).

9. I have described this kind of cycle in Jim Lundholm-Eades, "The Parish Pastoral Council: *Communio* in Action," www.theleadershiproundtable.org/churcheopedia/docs/ParishPastoralCouncils.doc.