AN APPLICATION OF ACTION RESEARCH

TO ADVANCE PARISH RENEWAL IN

THE ARCHDIOCESE OF PHILADELPHIA

Robert J. Miller,
Editor
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PREFACE

In 1991, Anthony Cardinal Bevilacqua inaugurated an unprecedented period of Renewal in the Archdiocese of Philadelphia. This period was characterized by activities and liturgical celebrations intended to encourage greater participation of all the faithful in the work of the Church. Pastoral planning played a significant role in this process. It intentionally engaged the people of the parishes in expressing the way they would strengthen their own parishes. It also invited people of different parishes to plan and work together to strengthen the ability of the parishes to evangelize their communities. This book is a history of the pastoral planning processes that were undertaken over the next ten years. It also summarizes the preparation and support that was put into place to support the parishes in their efforts and the results of evaluations that were conducted.

The work described here was itself a renewing experience for those directly involved. One of the joys of writing and assembling this material is that it has been a communal practice. The conscientious and dedicated commitment of many, many people of good will were necessary for the work described here to be completed.

I offer His Eminence Anthony Cardinal Bevilacqua my abiding gratitude, not only for his vision and constant support, but for the genuine difference that pastoral planning made in the relationship of the faithful with their priests and with one another. His vision was specifically and consistently implemented by his Vicars for Administration throughout this process, Bishop Edward P. Cullen and Monsignor Joseph R. Cistone. Their assistants and associates, especially Monsignor James E. Molloy, Reverend Michael J. Matz, Monsignor William J. Lynn, Monsignor Michael T. McCulken were most supportive of all this work by insuring that all of the parts of the activities were coordinated and carried one consistent message of renewing the Church. In particular, Sister Linda M. Sariego, O.S.F., provided critical support, collaboration, and writing that were integral in so many of the documents that were developed. A special recognition is needed for the staff of the Office for Renewal especially Monsignor Joseph T. Marino, who led the consultation to develop the Archdiocesan Mission Statement and provided clear and important direction at the start of these activities, and his successors Bishop Joseph F. Martino and Monsignor Charles V. Devlin.

I am grateful for the leadership of the Regional Vicars, the Pastors, and the several thousand parishioners

have been developed. They are responsible for their part in the writing of the different chapters but as editor, I must take responsibility for the production.

To all these and those who are missing because of a lack of space or memory, I owe a real debt, which this preface acknowledges. I have written this as a tribute to all of the work and time that the priests and people of the Archdiocese invested in trying to carry out the work of the Gospel in their time and place. It was a task of love, in communion with others, that hopefully may lead to our ongoing renewal.

Robert J. Miller

October 11, 2002

ESTABLISHING AN ECCLESIOLOGICAL BASIS FOR ACTION RESEARCH IN THE CATHOLIC CHURCH

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Introduction

Action research has been a distinctive form of inquiry since the late 1940s. At that time Kurt Lewin, a pioneer researcher in formalizing the concepts of actionable knowledge, "combined commitments to solving problems and to contributing to basic theory." (Argyris, 1993. 8) In the 60 years that have ensued, action research has taken on a variety of forms and has yielded many new ways of thinking about research that would solve problems and contribute to general scientific inquiry.

In the Roman Catholic Church, an impetus to use action research was the Second Vatican Council held between 1962 and 1965. The council documents call on bishops to encourage institutes and meetings of priests to discuss important social issues and learn new methods of pastoral activity that can be carried back into parish life. It also initiated a change in philosophy or emphasis regarding the role of the lay community. The appropriate role of the lay person in the Church is one that demonstrates knowledge, experience, awareness, freedom and responsibility, and mutuality in relationships.

This book documents an action research project in the Catholic Church. Action research has been employed as an approach to congregational research in a large, complex, Roman Catholic diocese, the Archdiocese of Philadelphia. Leadership in the diocese described a need for large scale, strategically driven changes to further the mission of the Church in an environment of changing demographics, ministerial roles, resources and technology. This book describes all of the steps in these change efforts in terms of the characteristics typical of action research described in the literature. The learning process that has evolved in the diocese will be examined and the evolving role of the research staff in this large scale change will be described. Areas for further education and recommendations to modify the process in future self studies will result. In addition, this entire change process is

being systematically reported to assist other dioceses involved in large scale change. It must be noted that in a Church setting, only behavioral indicators of change are being studied. The desired outcome of a personal change of heart on the part of the parishioners is beyond the ability of this study to assess.

The authors are staff within the office for research and planning in the diocese and provide consulting and research assistance on change strategies, specific interventions undertaken by various parishes, and on the overall strategy for organizational learning.

Action Research

Kurt Lewin and most other researchers have conceived of action research as a cyclical inquiry process that involves diagnosing problems, planning action steps, implementing and evaluating outcomes. Evaluation leads to further diagnosis based on the learning from the previous cycle. A distinctive feature of this process is that the research activity is carried out in collaboration with those who are experiencing a problem defined by them or their representatives. In this way a scientific approach is used to study important organizational problems with the people who experience them. Problems are solved and new generalizable knowledge is produced. (Elden and Chisholm, 124)

Lewin's early action research work contained four core themes. First, he integrated theory and practice by framing social science as the study of problems that were critical for society. The ability to act on the results of a research project was "designed in" at the outset of each research project. Second, he designed research by "framing the whole and then differentiating the parts." Third, he produced constructs that could be used to generalize and to understand the individual case. Fourth, he was concerned that social science play a role in developing a better world. "Responsibility to understand an initiative to act were core features of his sense of stewardship." (Argyris 1993, 8-11)

In more current practice, a review of the literature on social and community action, organizational development, educational organizations and practice, and methodological and theoretical discussion of social science found several shared features. These are: 1. problem focus, 2. action orientation, 3. cyclical process, and 4. collaboration/participation. (Peters and Robinson, 118)   Elden and Chisholm identified two additional characteristics of contemporary forms of action research. Change and learning are made self-generating and self

maintaining processes in the systems in which the action researchers work. The idea of participation is broadened to include co-managing the research process, co-generating problem solutions and creating new knowledge in terms of the system members' own language, based on their sense of their own data, and in relation to their own perceptions and values. Appreciative inquiry has been proposed as an alternative approach to the problem focus of most action research. In appreciative inquiry, research into the social potential of organizational life begins with appreciation and recognizes the organization as an open-ended indeterminate system capable of (a) becoming more than it is at any given moment and (b) learning how to actively take part in guiding its own evolution. (Cooperrider and Srivastva, 1987, 160-161)

Participatory research is another tradition that has emerged more recently from work with oppressed people in the third world. For example, Paolo Freire's work in Latin America uses a dialogic approach to adult education that engages individuals in critical analysis and organized action. Participatory research combines social investigation, educational work, and action. It is distinct from action research because problems originate in the community and it has a goal of fundamental structural transformation and the improvement of the lives of those involved. The community controls the entire process, the term researcher applies to the community as well as those with specialized skill, and research staff are committed participants and learners in the process. (Brown and Tandon, 1993, 279)

The case presented here is action research. Some characteristics of participatory research are apparent. The unique setting of the Church invites consideration of common values held by action researchers and participatory researchers that enrich the experience of both research traditions. At a minimum, five characteristics, consistently identified in well-documented action research such as Emery and Thorsrud (1969, 1976), Pasmore and Friedlander (1982), and Elden and Chisholm (1993), will be used to assist readers in developing an understanding of the cases presented. These are: the purpose and value choice employed, the contextual focus, the use of change based data and interpretation, the nature of participation in the research process, and the method for knowledge diffusion.

Vatican Council II

In the Catholic Church, the Second Vatican Council provided the impetus and the rationale for dramatic changes in the structure of the Church and in the focus of its activities. Bartunek, in reporting on organizational change in a Catholic religious order, describes the structure of the order before the Council as "strongly

mechanistic," in which a few persons at the top of the system "made all major and many minor decisions and passed them downwards, and communications channels were almost exclusively vertical." This arrangement typified all parts of the Catholic Church, including dioceses and parishes.

The central purpose of the Second Vatican Council (1962-1965) was to renew the Church for the sake of the Gospel. In the writings of the Council, a different model of the Church emerges, the Body of Christ. In particular, the Council's statements on the Church, the Bishops' Pastoral Office, and the Laity articulate a set of principles and methods that foster the use of an action research approach in addressing Church problems. Recognizing that the talents of the laity makes them major contributors to the welfare of the entire Church, the bishops explain that the mission of the Church is a common undertaking in which everyone ought to cooperate, using Paul's description of the Body of Christ being tightly joined together (Eph. 4:15-16) as an analogy. (LG, 30) Furthermore, the laity are called by their membership, to share in the governing of the Church. (LG, 31) Dulles points out that the Church's teaching in this document is that the relationship between the laity and the hierarchy is one of mutual support and dependence. (Abbott, p.58: Fn 165) As the bishops put it, "all share a true equality with regard to the dignity and to the activity common to all the faithful for the building up of the Body of Christ." (LG,32)

In considering the roles of the laity on the one hand and the bishops and pastors on the other, as well as their mutual responsibilities, it is appropriate to begin with the laity, who were so often ignored in the past. The very writing of the Decree on the Laity was a radical action. Throughout the history of the Church, no other council had treated the topic. The decision of the bishops of this Council to take up the subject was the result of the recent emergence of the Church's awareness of the issue and its importance. It needed to be written "not merely because, as the result of a shortage of priests, the Church urgently needed the laity to help the bishops in their apostolate, [but] because the laity are the People of God. They are the Church." (Abbott, pp. 487-488) The laity, "As sharers in the role of Christ, . . . have an active part to play in the life and activity of the Church. Their activity is so necessary within church communities that without it the apostolate of the pastors is generally unable to achieve its full effectiveness." (AA,10) Thus, their active collaboration is essential, not merely desirable; it is their right and duty, (CD, 16) "An individual layman, by reason of the knowledge, competence, or outstanding ability which he may

enjoy, is permitted and sometimes even obliged to express his opinion on things which concern the good of the Church." (LG,37)

Bishops and pastors are to oversee this activity. Giving further guidance, the Council continues: "Let sacred pastors recognize and promote the dignity as well as the responsibility of the layman in the Church. Let them willingly make use of his prudent advice . . . Attentively in Christ, let them consider with fatherly love the projects, suggestions, and desires proposed by the laity." (LG, 37) The Decree on the Bishops' Pastoral Office provides several practical recommendations, including the use of social research (16) and conciliar bodies. This is emphasized in the Decree on the Laity: "In dioceses, as far as possible, there should be councils which assist the apostolic work of the Church either in the field of making the gospel known and men holy, or in the charitable, social, or other spheres. To this end, clergy and religious should appropriately cooperate with the laity. While preserving the proper character and autonomy of each organization, these councils will be able to promote the mutual coordination of various lay associations and enterprises. Councils of this type should be established as far as possible also on the parochial, inter-parochial, and inter-diocesan level as well as in the national or international sphere." (AA,26)

The word used in all three documents to describe the continuity, directness, and mutuality of this activity is "dialogue." "A great many benefits are to be hoped for from this familiar dialogue between the laity and their pastors: in the laity, a strengthened sense of personal responsibility, a renewed enthusiasm, a more ready application of their talents to the projects of their pastors. The latter, for their part, aided by the experience of the laity, can more clearly and more suitably come to decisions regarding spiritual and temporal matters." (LG,37; see also CD,13 and AA,25) The nature of this dialogue is also that it avoids narrow parochialism, always reaching beyond the congregation for the sake of the common good. "The laity should accustom themselves to working in the parish in close union with their priests." As they work together, "They should constantly foster a feeling for their own diocese, of which the parish is a kind of cell, and be ever ready at their bishop's invitation to participate in diocesan projects. Indeed, if the needs of cities and rural areas are to be met, laymen should not limit their cooperation to the parish level but expand it beyond that, especially because in modern society, no community can remain closed in upon itself." (AA,10)

One commentator connects the Council's recognition of the need for full lay participation in the Church to the development of participatory management and decision making in business and industry and to efforts in both government and the private sector to work together with those they had previously viewed simply as clients. (Wedel in Abbott, p. 523) The Council sought to foster renewal in the Church at the diocesan and parish levels by expounding values and encouraging processes that reflect the characteristics of action research. The transition, from pre-Vatican II parishes based in the tenets of bureaucratic and classical management theory with an emphasis on authority, direction and control to post Vatican II, characterized by a full response of the lay community to their baptismal call, high levels of consultation, collaboration, shared responsibility and shared ministry, has specifically required the expansion of the participation of the laity in advising, decision making and sharing responsibility.

Archdiocese of Philadelphia

Conceptual Background. In 1991, the Archbishop called for an intensive, Archdiocesan wide, activity for nine years to begin the Renewal of the Archdiocese in preparation for the celebration of the 2,000 year anniversary of the birth of Jesus Christ. The understanding of two concepts is essential to understanding this case: Archdiocesan Renewal and large scale organizational change.

Archdiocesan Renewal. The renewal is a call to each individual Catholic and to each Catholic faith community--whether family, school, parish or other group--to "renew their faith and their expression of that faith in carrying out Jesus' mission of evangelization of the world." According to Catholic theology, the basis of the individual and community call to Jesus' mission is found in baptism. Catholics are being asked to reflect on their "baptismal call" and determine how they might contribute to the work of carrying out the work of God's Kingdom in the family, parish, workplace, and community.

As a part of this renewal effort, structures, such as parish pastoral councils, and planning processes, such as Parish Self-Study were developed to assist parishes. The intent of the renewal of parishes is to: strengthen the sacramental services; align the work of existing parish organizations with the mission; encourage more opportunity for widespread lay involvement, especially in important decision making capacities; and encourage the community to identify and provide needed programs and services. (For a detailed account of the full Renewal Program see Gentili, 1999) As a part of the Archdiocesan renewal, parish pastoral councils were formed in every parish and were encouraged to develop their own mission statements, using the Archdiocesan Mission Statement (appendix 1.1), to

guide their own work. A planning process, developed at the direction of the Archbishop and in consultation with

pastoral leaders, was proposed to parishes by the Archbishop's representative in each vicariate, the Regional Vicar.

The process enables parishes to plan by themselves (Parish Self-study, appendix 1.2) and then to plan with other

parishes in their cluster (cluster pastoral planning, appendix 1.3) on an ongoing basis. The process calls for the plans

to be guided by the mission statement and action research at the parish and cluster (inter-parish) levels. Once

approved and implemented, the plans will be evaluated periodically. Outcomes and the learning derived from the

activity itself will be captured to inform succeeding planning activities projected to be repeated in every parish in

five year cycles.

  Large scale organizational change. The transition from pre- Vatican II parishes, based on the tenets of

bureaucratic and classical management theory with an emphasis on authority, direction, and control, to post-Vatican

II parishes characterized by the full response of the lay community to their baptismal call, high levels of consultation,

collaboration, shared responsibility, and shared ministry represents large scale change. Large scale change has been

described as a change in the character of the organization that significantly alters its performance. (Ledford,

Mohrman, Mohrman & Lawlor, 1989) The assumptions that people hold that are imbedded in organizational design

about authority, control, motivation, and effectiveness are affected. It is pervasive change which extends throughout

the organization and its many subunits. It entails significant change in the behavior of the organization members. It

is accomplished through the establishment of a learning organization that is capable of continuous self diagnosis and

change. (Ledford and Mohrman, 1993, 145)

  Large scale change also requires that the target of change is a large complex organization. In this case the

target is an archdiocese with 1.4 million parishioners registered in parishes ranging in number from 302 to 282

during the period of the project. The change involves multiple nested levels of analysis: individual parishes and

their subsystems, which include parish schools and other parish organizations; clusters of parishes which define large

neighborhoods, whole towns, townships or county areas; the six regional vicariates (one for each of four suburban

counties within the diocese and two for Philadelphia county); and the Archdiocesan Administrative Office Center.

  Interestingly, Beer et al (1990), in discussing such a change in the corporate sector, referred to it as

"corporate renewal". The authors assert that corporate level renewal occurs only to the extent that the individual

organizational units are able to revitalize themselves. In this case, the renewal of the Archdiocese would be dependent on the ability of the parish communities and the individual parishioners to renew themselves. This perspective raises a question of the roles of the archbishop and archdiocesan level leadership and the parish pastors and parish leadership in motivating and enabling the renewal to occur.

Charcteristics of Action Research in the Archdiocese of Philadelphia

Purpose and value choice. Action research solves problems and contributes to general knowledge. In the Archdiocese of Philadelphia, action research is being employed to assist change and to study the process of change in parishes, and among clusters of parishes. Using the mission statement of the Archdiocese and their own study of their parish, pastors and parishioners identify problems in accomplishing the mission and develop ways to address them. Research considered in parish self-study and parish cluster planning includes: a survey of parishioners' perceptions of the activities of the parish with regard to the themes identified in the Archdiocesan Mission Statement; a survey of parish organizations' leadership to identify current and potential mission driven activities; trend analyses and comparisons based on demographic characteristics; and reported religious practices of the Catholic parishioners. At a practical level, parish pastoral councils analyze the information to draw conclusions about actions required to carry out their mission. The intent of the data collection and analysis is to identify relative strengths and weaknesses of the parish, and to permit the establishment of priorities and the identification of required resources.

The research staff has studied the resulting recommendations and the experience of the parish pastoral councils with the process to determine what was evaluated, how decisions were made, how communication was carried out among parishioners, who learned, and what was learned in the process.

This approach is intended to assist parishes to become more effective social entities within their community and more effective communities of Catholic people, faithful to the gospel message. The parish pastoral councils are the groups who work with the research staff to interpret the data and make decisions on recommendations using consensus decision making. The establishment of the parish pastoral council structure, the skills developed by council members in analysis and group decision making, the learning derived from each experience with the process, and the cyclical planning process itself, are intended to enhance the capacity of Catholic people to study the teachings of the Church, their parishes, and propose changes as needed.

Contextual Focus. The Archdiocese of Philadelphia is a tightly organized research setting. It has clear membership boundaries, considerable clarity of purpose and role clarity, and some essential shared values and norms. Formal systems and procedures are present to carry out the mission. The plan of the action research project capitalized on the strengths of this organization.

In preparing for this change activity, a major restructuring of the parish information system was undertaken. Consultation was used to modify survey instruments. Reports back to the information providers and other users of information were enhanced to provide information identified as useful and timely. This two-year process resulted in trend analyses at the Archdiocesan, vicariate, cluster, and parish levels never before available to pastors. It also included data on Sunday Mass attendance and neighboring peer parishes which was new. The resulting picture provided much opportunity to appreciate the large amount of good work which was being done. Overall, the Archdiocese was experiencing modest growth in the number of registered Catholics. Two of the five counties in the diocese were experiencing significant growth in the Catholic population; there was a significant decline in one of the counties and fairly stable population in the remaining two counties. Projections call for two counties to continue rapid growth, modest decline in two counties, and one county to remain unchanged over the next 20 years. The annual study of Mass attendance indicates that a number equal to about 31% of the registered Catholic population attend Mass in the parish churches on weekends.

The process set up in each parish enables the parish pastoral councils to assess information and to address problems, which they define within the context of the teachings of the Roman Catholic Church. The responses to the parishioners' surveys on parish life, the areas of appreciation, the problems and actions identified by the parish pastoral councils, and the consequences of actions taken are the focus of a long term study by the research staff to identify differences based on the council's "framework of understanding."

The involvement of parish pastoral councils, indigenous to the community, in parish self study, provides for tacit knowledge and local theory to be introduced. Representatives from the parish pastoral councils also develop the cluster plan. This grounds the problem definition in the participants' definition of context, and it fosters self sufficiency in learning how to study and change one's own parish. The pastoral leaders of the parishes provide the teachings of the Church, and the practical experience of pastoral adaptation, while the research staff provide general

knowledge of the theory of group process, specific information on the demographic makeup of the area and help to identify additional complementary resources to carry out the mission of the Church in the parish and cluster.

Change Based Data and Interpretation. The action research process has been designed over several years. This included: the development of the Archdiocesan Mission Statement to guide the process; the identification of principles to guide the establishment of parish pastoral councils; identification and collection of data; and, the development and distribution of usable reports based on that data. The research staff, in consultation with parish pastoral leaders, the leadership of Archdiocesan offices and the Regional Vicars, developed processes for parish self-study and for inter-parish cluster planning.

The research is designed to operate at two levels. First, it provides information to the parish pastoral council that they can use to address problems which they define. Second, the "framework of understanding" of the parish pastoral councils, their plans, and the outcomes resulting from the plans, provide the research staff with information to report the experience to other parishes, clusters, Archdiocesan support staff, and other dioceses. This will enhance the effectiveness of the overall activity within the diocese and contribute to the work of the larger Church. It closely parallels the double loop organizational learning proposed by Argyris. (Argyris, 1993)

Participation in the Action Research Process. Early in his tenure, the Archbishop consulted with the priests in the diocese to identify issues that they felt needed to be addressed. Revitalization of the faith of the people was identified by many of the respondents. The specific call for an intense period of Archdiocesan renewal to revitalize the faith of the people came from the Archbishop. The participants in the parish pastoral councils were not involved in sanctioning this effort. The process itself has been largely predetermined with ideas and opinion on the process from some parish leaders. Opportunities for modification of the process are built in as a part of ongoing evaluation. In this regard a precedent was established by evaluating pilot activities and making modifications to processes recommended to the rest of the parishes and clusters.

There was extensive participation in the problem identification, parish research, and interpretation at the parish level. Although this is limited, to some extent, by the information available, the process allows for further inquiry. The parish pastoral councils validate the results of their own research with the parish community through a sharing of the information with the community for their reactions.

Knowledge Diffusion. Organizational learning by the research staff will be validated with the participants but the research staff has been responsible to identify the learning, write the final reports, and determine how it is to be diffused within the scientific community with the approval of the Archbishop.

The Learning Process. Consistent with more contemporary action research, the process in Philadelphia is intended to prompt a wide range of learning practices within the parishes and to promote change and learning as a self-generating, self- maintaining process. A primary mode for learning is to establish opportunities for higher levels of involvement of informed parish pastoral council members, as well as the larger lay community. Archdiocesan staff provide training on methods of election, council members' formation and development, and procedures for operating a parish pastoral council effectively. Prayer, education and discussion are recommended. This has prompted increased self-directed interest in learning resources in the theology of prayer, the teachings of the Church on the theme areas addressed in the Archdiocesan Mission Statement, and group process.

Several parishes were selected to "pilot" early versions of the Parish Self Study process. The process was formally evaluated by the participating parish pastoral councils. Results of those evaluations were employed in the development of the final draft. Similarly, clusters of parishes were selected to "pilot" cluster planning. Research staff conducted extensive interviews with all participants to evaluate the process. That report was provided to the committee developing the cluster planning process.

Formal training programs for priests and parish pastoral councils was provided to every parish as they began the parish self-study process. Clusters of parishes were formed by the Regional Vicars in consultation with the pastors. In almost all cases, pastors are able to request a change in cluster if, in the pastors perception, the parish is inappropriately placed. The clusters create a group of peer parishes located in the same geographic area with, in most cases, similar demographic compositions and ministry needs. Parishes in clusters receive training and engage in self-study at the same time. They are supported by a process resource person assigned to the cluster who provides follow-up training. To assist the group process in the parishes, parish council members also identified group facilitators among parishioners to be trained by the resource persons. Further transfer of information is provided by the inter-parish cluster planning phase of the process.

Parishioners' Survey Results. Parishioners are surveyed as a part of the Parish Self-study. The intent of

the survey is to determine the extent to which parishioners agree with statements describing a parish community engaged in activities consistent with the teachings of the Church as expressed in the Archdiocesan Mission Statement. Details on the content and psychometric properties of the instrument as well as the sampling and surveying procedures are described in chapter three.

Role of the Research Staff

Piloting. The development of "pilot" cluster planning and parish self-study, pilot evaluation, and the dissemination of the results to those charged with developing the formal processes, has been a critical part of the project. Two concerns frequently associated with the pilot experiment model were addressed by the use of pilots in this case. The long wait required to obtain evaluative information on the effectiveness of this approach to change was addressed by selecting "pilot" parishes that required a method to address pressing issues. By involving those parishes in cluster planning pilots, the learning derived from the activity itself was able to be documented while the parishes moved to address their needs. In addition to two parish clusters in this situation, another cluster, without any specific immediate need, was chosen to enable the research staff to validate experiences as typical or exceptional. A deliberate attempt was made to select typical but demographically different parishes and pastors with very different leadership styles to pilot the Parish Self-study. Careful documentation and use of the experience to develop the proposed processes and train new groups was invaluable.

Comparative Case Studies. Because this action research is in a large, multi-unit system, opportunities exist for comparative case studies. A variety of comparative case analyses of different parish renewal initiatives are possible. The cross parish analysis possible in this case was intended to improve the research staff's understanding of the variety of forms the intervention can take, shed light on implementation issues, and increase confidence in the external validity of the findings. (Ledford & Mohrman, 1993)

Ongoing Role of the Research Staff and the Action Researchers. The research staff is a part of the internal staff of the Archdiocese. Additional research staff have collaborated on this project in consulting roles to the Archdiocese. The research staff provide process and expert content assistance at the Archdiocesan and vicariate levels. In addition, the research staff have provided support in the development of parish learning strategies but not in implementing specific changes.

The experience of the action researchers is very similar to that described in other large scale changes.

'In large scale change, action researchers must develop a strategy for learning about loosely-coupled activities that occur in multiple locations. The very nature of large scale change demands energizing a great deal of activity in order to overcome organizational inertia. Change activity can snowball quickly and can far exceed the capacity of the action researchers to respond to it.' (Ledford 1993, 170)

In this case, the action research focus has been on the creation of a learning community that includes a variety of change resources, both internal and external to the Archdiocese. It involves the establishment of both formal and informal structures and processes for learning. The work of the action researchers, in the parishes, clusters and archdiocese, results in the creation of knowledge dependent on positivistic forms such as participant surveys and parish data as well as the ethnographic perspective of the researchers' subjective experience with the change process. In this context, the research staff must facilitate the parishes, either directly or indirectly, in the development of a collective interpretation of the data and a shared vision of the next steps.

The action research values and ideologies employed were consciously chosen. They seem to be consistent with the teachings of the Roman Catholic Church. Action research assumes common interests in solving problems by analyses of individual, group and organizational factors. The ideological stance of action researchers often assumes that enhancing effectiveness and efficiency will improve the situation of all Church members. Consensus is used in decision making. In contrast, participatory researchers assume that societal groups have conflicting interests and that the plight of disadvantaged groups is a critical problem. They believe that enhancing the self reliance of these groups is critical even at the expense of efficiency and growth. They assume that advantaged groups will resist any effort to share power and plan accordingly. (Brown and Tandon, 283)

Action research literature on change projects in organizational settings usually report on single organizational units such as a department. Some authors have argued that change in large, nested, multi-level organizations is qualitatively different. There are few systematic treatments of action research in larger organizational units. (Ledford, 1993) The purpose of this book is to contribute to the extant literature by reporting on the use of action research in a large, multi-level, non-profit, Church setting.

Chapter Two

PREPARATION: PARISH PASTORAL COUNCILS AND MISSION STATEMENTS

Evelyn Brannan Tarpey
Archdiocese of Philadelphia

In 1991, the Archdiocese of Philadelphia began Catholic Faith and Life 2000, a program of pastoral renewal in preparation for the 2000 anniversary of the birth of Jesus Christ. This nine year preparatory period was to be a time of personal and institutional renewal. Individuals would strengthen their relationship with God and parishes would invigorate their communities, both spiritually and temporally, in order to further the mission of Christ. A different aspect of renewal was emphasized each year. The first year was a Year of Prayer, followed by a Year of Listening. One of the important parish activities to assist in community renewal was the development of a method of pastoral planning.

The establishment of Pastoral Councils took place in the *Year of Listening*. In 1992, the Archbishop, after consulting with the Priests Council, accepted the recommendation of the Archdiocesan Advisory Committee on Renewal and asked every parish to establish a parish pastoral council. The council is to be a consultative body which advises and assists the pastor in areas of pastoral concerns. The purpose of the parish pastoral council is to foster full participation of the entire parish in the life and mission of the Church, which shares in the mission of Christ. The parish pastoral council is responsible for developing a parish pastoral plan and participating in ongoing pastoral planning on both a parish and cluster level.

The formation and use of parish pastoral councils is a crucial part of ongoing pastoral renewal.   The Archdiocesan *Rationale, Principles and Guidelines for Parish Pastoral Councils* was published in English and Spanish to assist parishes in this important endeavor. Through the parish pastoral council the entire parish has a visible body commissioned to listen to God and to work with one another to strengthen and renew the parish's unique part in the mission of Christ.

Another significant initiative in the *Year of Listening* was a program of priestly renewal. This extended over three and a half years in five phases. Through Days of Renewal, the priests were invited to pray, listen and be open to God and to come to a deeper understanding of how they share in the priesthood of Christ. They examined

the impact of Holy Orders on their personal spiritual life and on their pastoral activities. The priests were encouraged to support one another in their sacramental ministry and leadership in the parish.

It was hoped that these two initiatives, along with an emphasis on developing and strengthening the prayer life of clergy and laity, would be the pillars to support the renewal efforts that were planned to follow in the Archdiocese.

Identifying Clusters and Waves

In 1988, the Archdiocese was divided into six Vicariates. Philadelphia was divided into a North and South Vicariate and each of the counties surrounding Philadelphia (Bucks, Chester, Delaware, Montgomery) became a Vicariate. Each Vicariate is overseen by a Regional Vicar, a priest who represents the Cardinal to the people in a specific geographic area.

The area of each vicariate was further divided into clusters of parishes. A cluster is a group of contiguous parishes in a certain geographic region. In consultation with the Pastors, the Regional Vicars assigned each parish to a cluster of neighboring parishes with which to plan on a regional level. A cluster was not meant to be a physical reality. The vicariates were set up in the following manner:

Philadelphia North Vicariate:	57 parishes in 6 clusters
Philadelphia South Vicariate:	64 parishes in 8 clusters
Buck County Vicariate:	34 parishes in 6 clusters
Chester County Vicariate:	28 parishes in 6 clusters
Delaware County Vicariate:	45 parishes in 7 clusters
Montgomery County Vicariate:	58 parishes in 8 clusters

The 41 clusters of parishes were assigned to one of four waves of pastoral planning. Waves were developed as a means to deliver information, training and personnel resources in a timely manner to groups of clusters that would be engaged in the same planning tasks at approximately the same time.

Testing the Models: Pastoral Planning Pilots

An important part of the renewal process that took place in the Year of Listening was the work of five pastoral planning pilots - two on the parish level and three on the regional level. Two parishes were asked to undertake the process of parish self-study and to report on their experience of this process. Their feedback was valuable in learning how to prepare parishes for this pastoral planning model as well as to understand the supports and resources that would be required.

In 1991, Regional Planning Committees were formed in the city of Chester, which involved 7 parishes, North Philadelphia , which involved 13 parishes, and Pottstown, which involved 6 parishes. The planning in North Philadelphia was divided into 3 sectors.

Regional Planning came about as a result of the Regional Vicars' parish visitations. As part of these pastoral visits, the pastor had an opportunity to share with the Regional Vicar any concerns that he had for his parish and the surrounding community. In many areas within the Archdiocese, pastors were voicing concerns on rather serious issues. The resolution of these issues seemed beyond the scope of a single parish. In three of these areas, the Regional Vicar called the pastors together as a group to discuss in greater detail the issues with which their parishes and communities were struggling. From these meetings, Regional Planning Groups were established in locations of particularly great need or where it was thought that the pilot planning process could provide important information to guide the cluster planning process.

Each planning group consisted of the pastor and several representatives from each of the parishes, as well as the Regional Vicar, in the role of Chair. The Regional Planning Committees were charged with studying all of the parishes -their sacramental and worship life, evangelization, education and social ministry, and assessing internal and external factors that affected the accomplishment of their mission. The elements of parish life that were a part of the Archdiocesan Mission Statement guided their discussions and reflections concerning the state of the Church and pastoral life in their region. A facilitator assisted the group with their meetings. Participants were advised that these were pilot programs for future inter-parish pastoral planning in which all the parishes of the Archdiocese would eventually be engaged.

A Steering Committee, composed of the members of the Regional Planning Group, helped each of these groups in their work by creating a planning process, determining a time line for the work, and identifying resources. Collaboration among parishes and consultation with the community were core elements of the Regional Planning process. Parishes had an opportunity to work with neighboring parishes to come to a common understanding of the current situation, make assumptions about the future, and develop a plan to address the pastoral needs of the people in the area. Information about the parishes and community was shared with parishioners and members of the community. Parishioners had the opportunity to affirm, question or refute the findings of the Regional Planning Group.

Plans were proposed, accepted and implemented and this planning process was evaluated by an outside consultant (see Appendix 2.1: M.A. Pobicki's Evaluation of Cluster Planning Pilot Groups, January, 1993). The results of the evaluation were shared with the committee developing the parish self-study process and the committee to develop a cluster process.

It was recommended that the parishes involved in Regional Planning be a part of Wave 4 of Pastoral Planning. The parishes involved in Regional Planning would need some time to implement the transformational changes that needed to take place. (The resulting plans called for 17 parishes and 13 parish schools to close and the creation of 3 new parishes and 5 new school communities) In time, when the newly formed parish communities became more unified parish communities, they would develop a Mission Statement and then begin the Parish Self-Study process.

Testing the Model: Consultation with the Participants

Parish Self-Study Process

The Ad Hoc Committee on Parish Self-Study Process was formed in November, 1991 to propose a parish planning process. This Committee recommended that theories of organizational development and group process coupled with theological foundations concerning the mission of the Church and the nature of parish be elements of the new model of pastoral planning being introduced in the Archdiocesan Renewal, Catholic Faith and Life 2000. It was important to test to see if this would be both meaningful and manageable at the parish level. It was essential to

know if the theory would prove relevant in practice and if the parts would be cohesive when utilized by a parish pastoral council. Some pastors had agreed to review the process and to give their reactions to it as a whole. Other pastors agreed to take part in a focus group. The feedback of both of these groups resulted in revisions to the "On the Way to Renewal" workbook. The Ad Hoc Committee on Parish Self-Study Process concluded its work in April, 1993. The list of Committee members can be found in Appendix 2.2.

Cluster Pastoral Planning Process

In the Spring of 1994, the Ad Hoc Committee to Develop a Cluster Pastoral Planning process was formed. This committee was charged with developing a planning process to be used by a cluster of neighboring parishes in order to formulate a five year plan to strengthen the Church in their area of the Archdiocese. This Committee sent a draft of the proposed process to all pastors and invited them to comment on that document. The reactions of the pastors were considered in the revision of the document. A second draft was sent to all pastors in September of 1994. Some pastors sent their personal reactions, others came together as a cluster and sent a letter that addressed the concerns about the process that they would share. In some cases, pastors did both. Three interview sessions took place with groups of pastors, one from each of the forty one clusters. The pastors spoke to the strengths and weaknesses of the proposed process as well as those areas that they believed were not sufficiently addressed. Their comments and the feedback received from other pastors were forwarded to the Committee charged with developing the process. This Committee finished its work in the Fall of 1995.   The list of Committee members can be found in Appendix 2.3.

Laying the Foundation: *The Establishment of Parish Pastoral Councils*

When introducing a new way of accomplishing a mission, it is important to prepare the people who will be a part of the new method. As the Archdiocese of Philadelphia inaugurated this systemic model of pastoral planning, those who would be involved in the process needed to have an understanding of the theological principles supporting their collaboration as well an opportunity to further develop their skills in working with others.

Training for the roles and methods within this new model had to address various needs. It had to include the theological foundation, theories of group process and organizational development, the use of parish information

and the interpretation of data, and an orientation to the tasks involved in pastoral planning. The training developed for this pastoral planning process was designed so that the learning of the participants was coordinated with the timing of tasks and delivery of parish data. The purpose of this design was to provide an opportunity for the participants to apply their new knowledge concerning the pastoral planning process to a specific endeavor.

Parish Pastoral Council Formation

Pastors were asked to appoint a Steering Committee to oversee the formation of a parish pastoral council . It was recommended that this Steering Committee consist of two lay leaders, one staff person and the pastor. Workshops were convened by the Regional Vicars, and presented in each Vicariate concerning the formation of parish pastoral councils. These workshops provided information about the nature and purpose of councils and suggested methods and materials for their establishment. The Steering Committee could adapt these recommendations to meet the specific needs of their parish. 278 of 303 parishes (91.7 %) sent people to these training sessions in 1992.

The Steering Committee was responsible for educating the parishioners about the function of parish pastoral councils, developing and conducting a nomination process, and overseeing the election of parish pastoral council members in their parish.

Orientation and Education of Parish Pastoral Council Members

After the parish pastoral council members were identified, Orientation Sessions were held in each Vicariate to acquaint them with the responsibilities of their new role in their parish. These sessions provided information about the purpose and functioning of councils, as well as an understanding of the specific roles. Parish pastoral council members also learned about assistance and resources available from the Archdiocese. The Regional Vicars convened the orientation sessions. This training program was videotaped and is used to train new Pastoral Council members. 260 of 303 parishes (85.8 %) sent people to these training sessions in 1993.

A Resource Manual was created for the members of parish pastoral councils to supplement the training they received. This contained the following: an overview of the elements of Pastoral Planning, *(The Parish: A People, A Mission, A Structure)*, A Statement of the Committee on the Parish, November, 1980 from the National Conference

of Catholic Bishops, an essay on models of the Church, and articles concerning the nature and work of parish pastoral councils. This resource and some accompanying catechesis were published in English and Spanish.

A core element in the orientation of parish pastoral councils was to have council members come to understand the importance of praying together. In its role as a consultative body to the pastor, the parish pastoral council needs to be a prayerful body. The members of the parish pastoral council were reminded that by praying together at the beginning of each meeting they set the atmosphere for their time together. They are not simply at "yet another meeting" but coming together to continue the mission of Christ. Sharing prayer also helps to remind them that the work they do together is God's work and that they need to remain open to where God is leading their parish community. The members of parish pastoral council were encouraged to grow in their use of shared prayer in their meetings.

Development of Mission Statements

The Archdiocesan Mission Statement is the local specification of the mission of the universal Church. Many of the resolutions expressed come from the New Testament and documents of Vatican II. The Archdiocesan Mission Statement provides the focus for all planning efforts in the Archdiocese of Philadelphia. It is intended to provide a basis for reflection by parishes as they seek to respond more fully to what Jesus is asking them to do.

The theme of the third Renewal Year was *Rekindling our Baptismal Call*. During this year, parishes began to develop mission statements. Each parish, as a "definite community of the Christian faithful" (Canon 515) has a unique mission. The Parish Mission Statement recognizes the parish's particular share in the mission of Christ, in this time and place. It acknowledges the gifts, talents, and needs that are present in the parish community. The mission statement expresses a parish's understanding of its call and how it plans to support the discipleship of its members.

A shared sense of mission is at the heart of parish renewal, therefore the initial task of the parish pastoral council was to write a mission statement. Guidance for this work was provided during the orientation training. (Refer to the *Resource Manual for Parish Pastoral Councils in the Archdiocese of Philadelphia,* February, 1993).

The parish mission statement provides a basis for reflection by the parish pastoral council to consider how

the parish might respond more fully to what Jesus is asking of them. It provides a framework for how a parish community is living out the mission of Christ.

Parish Mission Statements were not collected; however, in a later review of Parish Pastoral Plans it was noted that 237 of the 287 parishes included their Mission Statements with the Pastoral Plans that they submitted. There was a great variety in structure, length and content. Many used the Archdiocesan Mission Statement as a model. Many used the theme areas as a basis for the expression of their mission. Other core issues relating to Catholic life were often included (i.e. family life, respect life, vocations, outreach).

Parish pastoral councils were encouraged to communicate the Mission Statement to the parish community and to make copies of it available. Many parishes include their Mission Statement in their parish bulletin or newsletter. Others display it in their Church or other parish buildings.

Parish Pastoral Planning: **Supports for Parish Self Study**

The preparation phase of any planning activity is critical to its success. During the pre-planning phase of parish self-study three activities were identified as important to the pastoral planning efforts: the training for specific roles within the parish self-study process (pastors, parish pastoral councils, planning steering committee of the pastoral council, parish organizations, parishioners), the gathering of information about the parish and the identification of support personnel (resource people, secretariat liaisons) to assist parishes.

Development of Training

The choice of presenters for the training sessions was made to model the inclusion and collaboration of all the baptized in the life of the Church that was called for by the Second Vatican Council. Presenters representing all states of life were used to train all audiences. A coordinated system of training and the delivery of meaningful information was developed. The planning steering committee of the parish pastoral council was trained after the Pastor and while the survey of parishioners was being done. Having learned of the parish data that the parish pastoral council needed to review for the Parish Self-Study, the planning steering committee could work with the Pastor to assemble this data and deliver it to the members. The planning steering committee trained others on the council concerning the use of the parish based information and prepared them to incorporate the data that they

would soon receive from the parishioners and parish organization surveys.

As the trainees came to further appreciate the collegial nature of the Church, they would also need to have the tools to work together. The theories of the dynamics of groups and organizational development were essential in understanding the human interaction that was integral to this process. See Appendix 2.4 for the list of references consulted in the development of these training programs.

Training for Roles*: Leadership of the Parish Self-Study: Roles and Responsibilities (Pastors and other Priests)*

The prime objective of this consultation session with pastors and priests was to have them understand and appreciate the relationship among the parish self-study process, the parish pastoral council and renewal. The pastors and parochial vicars received orientation concerning the pastoral planning that was a part of the individual and institutional renewal taking place in the Archdiocese.

It was hoped that this session would provide the priests with a better understanding of the self-study process that they would be leading in their parishes and their role in this process. As the leader of the parish, the pastor would be the person to introduce and initiate the self study process into the life of the parish.

Training provided in this session focused on the self study process and proposed time table, the people involved in this process and the roles that they would have, the gathering of parish information and the work involved in the Parishioners' Survey. These tasks were divided into three main categories: communication, personnel and information. The training included general guidelines and directions for each of these preparatory tasks, as well as written material for them to reference as needed during the parish self-study.

The priests were given instructions for conducting the Parishioners' Survey. In the pre-self study phase, this task would involve the longest period of time. Pastors were advised to allow twelve weeks for the selection, distribution, return, follow up and processing of the surveys. The design of the survey, the method of delivery and the follow-up were guided by the Total Design Method created by Don Dillman (See Mail and Telephone Surveys: The Total Design Method, Dillman, Don, Published by John Wiley & Sons, 1978)

A pastor who had participated in a pilot self-study program spoke to the priests about his experience. He affirmed them in their role as parish leaders. The priests were invited to engage in this process with openness and

hope, and to inspire a desire for renewal within their parish. The veteran pastor encouraged them to approach the self-study process with enthusiasm and reminded the priests of how their attitude toward the self study process could influence how their parishioners responded to this and other renewal efforts.

Planning Steering Committee for Parish Self-Study: Roles and Responsibilities

The Planning Steering Committee consisted of the pastor, who would be the chairperson; a parish staff member who is knowledgeable about various aspects of the parish community; one or two members of the parish pastoral council and a facilitator, who is not a member of the parish pastoral council.

This training took place in two sessions. The objectives of this training were: 1) to help the members of the Planning Steering Committee appreciate the relationship between the parish self-study and renewal, 2) to help the members become familiar with the parish data and planning language that would be used in the parish self-study process, and 3) to assist them in better understanding their specific task in terms of training the parish pastoral council for the parish self-study process and guiding them through this pastoral planning process.

The planning steering committee would assist the parish pastoral council by doing the following: 1) determine the specifics of the time-line for self-study, 2) decide the most expeditious yet thorough method of approach considering the particular nature of the parish, 3) assign the particular tasks involved in doing the self-study and 4) oversee the process of self-study to completion.

During these training sessions, the members of the planning steering committee had an opportunity to work with parish information and U.S. Census data. They were able to examine this data and were prompted to consider what this data said about the simulated parish community it represented. The members of the planning steering committee received materials to assist them in training the parish pastoral council for the self-study process. This included sample agendas for the actual training sessions as well as samples for each theme areas of parish self-study, and handouts on shared prayer and group decision making. The members of the planning steering committee were also responsible for educating the parish community about the Parish Self-Study process and for preparing them for their role in this process.

Parish Information System: *Parish Data*

The Report to Pastor, the Parish Pastoral Report, Annual Parish Financial Report, educational reports, as well as information about the parish physical plant (deferred maintenance) were identified as important sources of information for the parish pastoral council to review as they undertook the self-study process. See ***On The Way to Renewal***, *Volume 1, Part 3: Chapter 2* for the list of specific documents recommended for consideration during parish self-study. Volume 3 of ***On the Way to Renewal*** provided a sample of the parish forms and reports that the parish pastoral councils would be referencing during the Parish Self-Study.

Parish Survey

During this preparation phase, it was very important for the Planning Steering Committee to gather accurate information for the parish pastoral council to use during the Parish Self- Study. Using the parish registration information, a survey was sent to parishioners over the age of 18 using a random sample. When the surveys were returned, they were sent to the Human Organization Institute of Villanova University to be processed. Villanova sent each parish a summary of its results. The Office for Research and Planning developed an Interpretation Guide for parish survey results. (See ***On The Way to Renewal***, *Volume 2, Part 2* for the Parishioners' Survey) A complete description of the methodology, general findings and the use parishes made of their individual survey results is covered in chapter 3.

This survey instrument served two purposes in the parish self-study process. One was to collect the opinions and impressions about the parish from a random sample of the list of registered members. The other objective was to frame the essential activities of a parish community and thereby offer another opportunity for education. By asking a respondent to think about the life of the parish within a certain context, a theoretical model is communicated.

Parish Organization Survey

The organizations within the parish were also consulted to learn in what ways they were living out the parish mission. The questions suggested for this consultation had a dual purpose. (See ***On The Way to Renewal***, *Volume 2, Part 3* for the Parish Organization Questionnaire.) The responses of the leaders of the parish organizations

were important information for the parish pastoral council as the self-study was conducted. It was also hoped that the questions would provide a context for relating the programs and services of a parish organization to the parish mission and that this would prompt further reflection by the leaders of the parish organizations on the connection between the activities of the organization and mission of the parish. Finally, it was hoped that this conversation would begin to form the relationship between the leaders of the parish organizations and the parish pastoral council. A summary of this consultation needed to be prepared for the parish pastoral council to review as part of the self-study process.

Developing Support Personnel: *Resource People*

The Office for Research and Planning recruited, hired and trained Resource People to provide support to parishes during their self-study process. Their orientation emphasized the connectedness of pastoral planning and renewal, and an overview of the stages of the pastoral planning process utilized in this Archdiocese. They reviewed the Church teachings in which the renewal efforts are rooted. The Resource People received further training concerning group process and decision making. The Resource People had an opportunity to review the data that the parishes would be considering during their self-study and learned how to help others in their use of this information.

Resource People were assigned to a cluster of parishes and remained available to those parishes throughout their self study. Resource People were to be a support for the Pastor, a trainer of the Planning Steering Committee and the parish facilitator, and a liaison between the parish and the Archdiocese.

The Resource People receive ongoing training to enhance and improve their ability to offer support to parishes. At these training sessions, the resource people also are able to share their experiences with the pastoral planning process and learn from one another. As a result of their time together at training, they have developed an informal support system through which they help one another to better meet the needs of parishes.

Secretariat Liaisons

Employees of the Archdiocese of Philadelphia acted as a point of contact for needs that might be identified during parish self-study and cluster pastoral planning. Their purpose was to facilitate the delivery of specific information to the planning committee in a timely manner.

Communication: *In Preparation for Parish Self-Study*

The importance of communication at every level cannot be underestimated during the introduction of a new model of pastoral planning. This fact was recognized by the Ad Hoc Committee to Implement Parish Self-Study, Subcommittee on Training early in the development of the process and was made a part of each training session. At the training session for priests, the presenter spoke about what everyone in the parish needed to know as the pastoral planning process began. This was: that their parish would be involved in a Self-Study process, that a random sample of parishioners would be surveyed and that the parish pastoral council would be using this data along with other parish documents to develop a pastoral plan for the parish. The priest received samples of communications that could be used in their parish bulletin or could be supplements to their bulletins. The priest presenter strongly encouraged the priests to communicate from the pulpit concerning this renewal effort in the parish. This verbal communication would be a chance to highlight the connectedness between what is happening in the parish and what was happening throughout the Catholic Church in preparation for the Jubilee Year. In the training that they received the members of the Planning Steering Committee were told that part of their responsibility is to assist the pastor in informing the parish about the Parish self-study.

Through his communication with all of the faithful during the years leading to the Jubilee Year, the Archbishop provided a strong model for getting the message to those who need to hear it. He used many types of media to communicate renewal efforts to the People of God in Philadelphia - personal meeting with priests, direct mailing to homes, inserts in parish bulletin and articles in *The Catholic Standard and Times*, the Archdiocesan newspaper.

Communication: *In the Midst of Parish Self-Study*

In order to foster ownership of the Parish Self Study process and the resulting Parish Pastoral Plan, the parish pastoral council was encouraged to be in communication with the parish community throughout the self-study process. It was recommended that the parish pastoral council share with the parish community its commendations and recommendations as it completes each of the seven themes of parish life. These periodic communications would help to keep all that is being done for the renewal of the parish in the minds of the parishioners. Inviting the

parishioners to provide feedback to the parish pastoral council was a vital part of this communication.

Communication: *At the end of Parish Self-Study*

It was recommended that the parish pastoral council communicate the Parish Pastoral Plan with the parish community and that many different methods be used, wherever possible. A summary of the Parish Pastoral Plan should be published and a copy of the Parish Pastoral Plan should be available for parishioners who wish to read the entire document. Parishes were encouraged to plan a prayer service or Mass of Thanksgiving to celebrate the blessings received during this phase of pastoral planning and to ask God's grace upon the parish's efforts to make their Pastoral Plan a reality.

Supports for Cluster Pastoral Planning

The Cluster Pastoral Planning process is a part of Parish Pastoral Planning. In the Parish Self-Study the parish identified areas in which collaboration with neighboring parishes might add vitality to a program or service. It was hoped that through a process of cluster pastoral planning parishes would discover ways in which they could work together to further renew their geographic area of the Archdiocese of Philadelphia and to strengthen and support each other.

Training for Roles: *Orientation of the Cluster Pastoral Planning Committee*

The cluster pastoral planning committee consisted of the pastor and two representatives of each parish in the cluster and the Regional Vicar, as the Chair. The parish representatives were also members of their parish pastoral council, thereby putting in place a direct line of communication. It was essential to have liaisons between these two pastoral planning bodies, since the cluster pastoral plan complements the parish pastoral plans and provides another set of resources to address that portion of the parish mission that it cannot accomplish its own.

The members of the cluster pastoral planning committee attended an orientation session on a weekday evening. The evening began with an opportunity to get to know one another and socialize a bit, to meet the facilitator who would be working with them through this process, to pray together and then to share a meal. After dinner, there was a presentation on the theological and theoretical foundations of this model for regional pastoral planning. In many of the waves of cluster pastoral planning, two clusters in the vicariate would be formulating plans.

When this was the case, they attended the orientation sessions together, but worked within their own committee.

The second part of the orientation session was a full day meeting on a Saturday. The main purposes of this training session were to help the members of the committee continue their formation into a working group and to familiarize them with the elements of the cluster pastoral planning model. This training session simulated the four stages of the process.

Subcommittee for Agenda

Each cluster pastoral planning committee had a subcommittee for agenda, which consisted of members of this committee, who had specific roles. These were the Regional Vicar, the Priest Coordinator, the Secretary, Communication Liaison, and the Facilitator. The goal of this Training session was to have the members of the Subcommittee for Agenda have a clear understanding of the responsibilities that they shared (to prepare the agenda for the next meeting and to review communiques about the work of the cluster pastoral planning committee) and to better understand the responsibilities of their specific role.

These training sessions included a presentation by the staff of the Communications Office of the Archdiocese. This presentation emphasized the importance of communication throughout the cluster pastoral planning process and provided an overview of the network of who, what and how that was involved in keeping the community informed.

Revision of Training

At the completion of Wave 1 of cluster pastoral planning, a group of participants with different roles within the cluster pastoral planning process were gathered to provide feedback on their experience of the process. They were asked to reflect on the training they received and the resources provided to support this pastoral planning process. They recommended ways to revise the orientation and training sessions so that these addressed the issues that were emerging as a part of the cluster pastoral planning process. These recommendations included: keep the planning language simple and give examples, recognize the need to build trust among the committee members, increase the understanding of the participants concerning the importance of the flow of information and communication between the parish pastoral council and the cluster pastoral planning committee and the need to

coordinate the meeting calendars in order to incorporate information and feedback at critical stages of the cluster pastoral planning process.

Information System for Clusters*: Cluster Data Reports*

Using information from the Annual Pastoral Reports, the Annual Parish Financial Reports and the most current U.S. Census (1990) the Office for Research and Planning prepared a summary of the data for the cluster as a whole. The individual parishes would provide information specific to their parish. At the first meeting of the cluster pastoral planning committee each parish shared a summary of its parish pastoral plan and its facilities report. Each member of the cluster pastoral planning committee received this information for their consideration as they developed the cluster pastoral plan.

The data from the Annual Pastoral Reports included the registered population and registered households and the number of priest assigned to the cluster of parishes. These numbers were used to determine another figure that was part of the Cluster Report, the ratio of priests to registered population and registered household.   The Cluster Report also included information about infant baptisms, funerals, marriages, weekly attendance of Mass (by actual count and by percentage of the parish community), adult catechumens, adult candidates and enrollment in programs of parish religious education and the parish school. This data was presented by year. Information was kept for each category since 1990. Some information was available from 1980. The projection of priests available for parish ministry in the cluster through the year 2000 was also a part of the Cluster Report.

The U.S. Census Data included the total population as well as a breakdown by race, median income, education and occupation. These figures were shown by census tract within the cluster of parishes. A map of the cluster was also provided. This map displayed the parishes and parish boundaries, parochial schools and Archdiocesan high schools within the boundaries of the cluster.

Developing Support Personnel: *Facilitators*

The facilitators used in the first two waves of cluster pastoral planning were identified as a result of their work as Resource People. To prepare for this new role, the facilitators attended four training sessions. They received additional training in group process, the dynamics of working groups and facilitation skills. The feedback

that was received from the facilitators in Wave 1 and 2 helped the Office for Research and Planning to refine the training and recruitment of facilitators. In Wave 3 and 4 of cluster pastoral planning, additional facilitators, who had not been Resource People in Parish Self-Study, were added. Many were professionals who had training and skills in working with groups. These facilitators required education in the theological and philosophical basis for parish renewal and pastoral planning.

The facilitators served the cluster pastoral planning committee in two ways: by facilitating the meetings of the committee and by being a member of the Sub-committee for Agenda. The staff of the Office for Research and Planning supported the facilitators in their work. A staff member checked in regularly with the facilitators to help them process the dynamics of the meetings and to get feedback in order to learn if the process was serving the work of the committee. The facilitators received on-going training for their role and pastoral planning. As part of an ongoing effort to evaluate the effectiveness of facilitators, the Regional Vicars who served as chair of the cluster pastoral planning committees and worked closely with the facilitators were asked to evaluate them after each cluster planning process was completed. The reports of the evaluation are attached (Appendix 2.5).

Communication: *In Preparation for Cluster Pastoral Planning*

The communication of accurate and meaningful information was seen as crucial to the success of the cluster pastoral planning process throughout the Archdiocese of Philadelphia. The Office for Communications for the Archdiocese was actively involved in the preparation of material and the presentation of information throughout the four waves of cluster pastoral planning (1996-2000).

A tri-fold mailer entitled "Guided by Faith" was sent to every registered household in the Archdiocese. This explained the cluster pastoral planning process and provided statistical information concerning the Catholic population, the number of parishes, and the number of priests in parish ministry. This data was presented by Vicariate. The mailer was published in English and Spanish (see Appendix 2.6 for English).

A tri-fold pamphlet (Appendix 2.7) was developed to educate the parish staff and parish pastoral councils about the cluster pastoral planning process and how their work was connected to this. This pamphlet addressed ways the parish staff and parish pastoral councils could support the work of the cluster pastoral planning committee and

the importance of honest, open and factual information through-out the entire process. In their briefing sessions, the pastors and priests of the Archdiocese were given this pamphlet and asked to distribute it at their meetings with parish staff and the parish pastoral council.

The pastors and priests also received announcements for their parish bulletins (Appendix 2.8) explaining cluster pastoral planning. They were also given tips for speaking with the media (Appendix 2.9) and answering reporters' questions. It was hoped that these prepared materials would help pastors to educate the people of their parishes about this new phase of pastoral planning. These were meant to support the communication already taking place in the parishes.

One member of each cluster pastoral planning committee was chosen to be the communication liaison. This individual was responsible for preparing a communique at the end of each of the stages of cluster pastoral planning. These communiques were reviewed by the Regional Vicar and then sent to the parishes, the Archdiocesan Office for Communications, and the local newspapers. The Communication Liaison received training for this role during the training session for the Agenda Sub-Committee.

Briefings Sessions:

Pastors and Parochial Vicars

Information sessions for Pastors took place prior to the beginning of cluster pastoral planning. The parochial vicars were also invited to attend these session**.** An overview of the theological foundations of pastoral planning, its purpose on a regional level and the particulars of the wave of planning in which the parish would be involved was given. This information would be helpful to the pastor in preparing the parishioners, the parish staff and the parish pastoral council for cluster pastoral planning.   At a later date, the pastors would receive training for the cluster pastoral planning process with all of the members of the cluster pastoral planning committee.

Regional Vicars' Secretaries

The Regional Vicar was the chair of the cluster pastoral planning committee. In the majority of cases, in each wave of planning each vicariate would have two cluster pastoral planning committees meeting to develop plans. The Regional Vicar was responsible for overseeing communication to the parishes and community concerning the

work of these committees. As a result, it was important for his secretary to understand the cluster pastoral planning process and to have an idea of the work that would flow to and from the committee from the Regional Vicar's office.

The Communications Office of the Archdiocese prepared a flowchart for communication during cluster pastoral planning. This provided a visual understanding of the network of communication that would be taking place. In many instances the chart also identified the nature of the communication. The Regional Vicar was at the center of the communication matrix.   The Regional Vicars' secretaries would also be invited to attend the training session for the members of the Subcommittee for Agenda.

Major Superiors of Religious Orders

Many priests, religious brothers and sisters of religious orders are involved in parish ministry or work in institutions that serve the people of the Archdiocese of Philadelphia. It was important that the Major Superiors of these religious orders be a part of the discussions about the renewal efforts taking place in this Archdiocese. This briefing session was intended to inform the Major Superiors about the cluster pastoral planning process and to address some ways in which they could support the cluster pastoral planning process.   The Major Superiors were asked to provide information, communication and consultation to the Office of the Vicar for Religious and the Regional Vicars**.**

The Major Superiors were asked to provide to the Regional Vicar any appropriate information about their Order's presence or apostolate in the Archdiocese, that would be helpful to the cluster pastoral planning committee as it was developing its plan. The Major Superiors were encouraged to contact the Regional Vicar in writing with any observations they might have during this phase of the renewal process. It was also recommended that they encourage the members of their Order who were involved in ministry in parishes or institutions, to keep them informed about developments within the clusters.

Priests in Other Ministries and Employees at the Archdiocesan Office Center

These two group**s** each received separate but similar briefings concerning the cluster pastoral planning process. The goal of these sessions was to have participants be aware of what was taking place in the parishes of the Archdiocese and how they might be of service to this process. They were also encouraged to think of how their

ministry/work might be affected by the pastoral plans that resulted in this phase of the renewal process.

Communication: *In the Midst of Cluster Pastoral Planning*

Archdiocesan support

As cluster pastoral planning began, a hotline was established. People were encouraged to call with any questions they might have concerning the cluster pastoral planning that was taking place. The purpose of the hotline was to make accurate information available to anyone who wanted it. It was hoped that this would alleviate some of the rumors that were circulating as each wave of cluster pastoral planning began.

Activity at the Cluster Level

Since the Parish Pastoral Plan identified the issues for consideration in the cluster pastoral planning process, it was essential that the parish pastoral council have an opportunity to review and consider the recommendations being made by the cluster pastoral planning committee. The parish pastoral councils also needed an opportunity to provide feedback to the cluster pastoral planning committee. A sample agenda for meetings dealing with recommendations of the cluster pastoral planning committee was included. As the cluster pastoral planning committee completed its work in one stage of the planning process, the Communication Liaison prepared a communique. The Communication Liaison often received assistance from the Agenda Sub-committee in writing the communique. This needed to be a succinct report of the deliberations of the cluster pastoral planning committee. The communique was published in the parish bulletins for each of the parishes in the cluster. The parishes agreed to publish the communique on the same weekend, in order to present a collaborative working model. By running the communiques simultaneously, parishioners in each parish of the cluster received the information at the same time, thus reducing the tension of being the "last to know" something that affected all parishes in the cluster. The communique invited feedback from all parishioners. That feedback was channeled to the parish pastoral council for their consideration.

Communication: *At the conclusion of each Cluster's planning*

The Catholic Standard and Times, the newspaper of the Archdiocese of Philadelphia, published the acceptance of each cluster pastoral plan by the Cardinal. This was accompanied by an article which gave details of

the cluster pastoral plan, the Cardinal's comments on how the goals of this cluster pastoral plan would strengthen the parishes of that cluster, and testimonies from members of the cluster pastoral planning committee about the issues that they believed were the priorities of that cluster of parishes and their hopes for the implementation of this plan. A summary of each cluster pastoral plan was posted on the Archdiocesan website.

A summary of the cluster pastoral plan was published in the parish bulletins of parishes of the cluster on the same weekend. In many of the clusters, a worship service was held to give thanks for the blessing received as a result of cluster pastoral planning and to commission those who would be responsible for overseeing the implementation of the cluster pastoral plan. The members of all of the parishes in the cluster were invited to attend this public celebration of the completion of this phase of pastoral planning.

Chapter Three

PARISH EXPERIENCE WITH THE PARISHIONERS' SURVEY
AND PARISH SELF STUDY

Robert J. Miller
Archdiocese of Philadelphia

This chapter reviews the implementation of parishioner surveys by parishes in the Archdiocese as a means for bringing parishioners' perceptions and desires to decision makers as they develop recommendations for their parish pastoral plans. The chapter describes the purpose and methods of developing the parishioners' survey, the procedures used to train parishioners and parish staffs to conduct the survey, and the actual practice observed in 287 parishes and as reported by a sample of the pastors of those parishes. The specific roles of the Archdiocesan research staff and the parishioner researchers are described, and the results of the participants' experience with the survey process is examined.

The author's analysis of the use of action research as a methodology for integrating parishioners and pastors into the research process and into the democratization of the decision making process (at the parish level) proceeds through an evaluation of the research methodology and practice of local level action researchers (i.e., pastors and parish councils). The author employs a multi-methodological design to come to an understanding of the research practice of the pastors and councils, their successes and failures, the response of the parishioners (in this case the respondents of the Parishioner Survey) and the role of the bureaucratic body that guided the larger research project (the Archdiocesan Office for Research and Planning). (Brewer and Hunter, 1989:17). Specifically, the author uses a summary of the parish experience with results of the Parishioners' Survey process; the results of the Post-Parish Self Study Pastors Survey; and a review of the parish plans that were produced. This blend of data (both quantitative and qualitative) provides insight into the perceptions and practice of the action researchers in this non-traditional, non-research environment.

One of the first planning tools for parish pastoral councils was the Parish Self Study. In Philadelphia, the research approach was not simply problem focused. It was an appreciative inquiry that recognizes that the social potential of the parish begins with an appreciation that the parish is an open-ended indeterminate system capable of becoming more than it is at any given point in time and with parishioners capable of learning how to actively take

part in guiding their own evolution (renewal). (Cooperrider and Scrivasva, 1987, 160-161)

The Parish Self Study has been a "systematic method" for pastoral planning intended to foster the participation of all the members of the parish in a process in which the parish,

> "characterizes itself as a particular community of faith by developing its own
>
> Mission Statement; assessing its strengths/resources, limitations/needs; making
>
> recommendations to the pastor concerning establishment of priorities and goals
>
> and devising ways to accomplish its mission. Parish pastoral planning helps to
>
> answer the questions: Who are we as a parish? What are we called to do? How
>
> are we best going to do it?" (Archdiocese of Philadelphia, 1993, 11)

In the Parish Self Study, the members of the parish pastoral council were asked to gather information, evaluate how the parish is carrying out its mission, and recommend actions which will strengthen and renew the parish community. As a part of the self study, the parish pastoral council members were asked to become familiar with the teachings of the Church and the work of the parish in seven areas: worship, community, teaching, evangelization, service, leadership and stewardship. In addition, the pastors and members were trained to carry out a survey of parishioners and parish organizations within their parish and to train the other members to evaluate the data collected. The process was intended not only to generate useful information upon which decisions can be made but also to form the members by helping them develop an identity as a group, develop communication skills, enhance their ability to conduct research within their own parish, and train other parishioners.

Parishioners' Survey Training

As a part of the preparation for Parish Self Study, Pastors, selected parish staff, and parishioner members from the parish pastoral council were trained to conduct surveys and to evaluate the data that was obtained. They participated as action researchers to identify the strengths and weaknesses internal to the parish and the opportunities and threats present in the external environment (SWOT analysis) in order to identify the most appropriate course of action to accomplish the parish mission that they themselves had previously formed.

The training program was conducted by the staff of the Archdiocesan Office for Research and Planning. It consisted of three sessions devoted to information gathering, communication, the roles of the participants, evaluation

of the information, decision making, group process skills, and training others. All leaders in the parish planning activities were expected to attend the training. Of the 287 parishes that were offered training, all but 7 attended.

The first training session described the role of the parishioners as the primary investigators and evaluators of the data. The method and procedures for the parishioners' survey was described. The research setting was identified as the parish, and the population, sample, and sampling method were described. (Dillman, 1978) Copies of the instrumentation proposed to be used were made available and scoring was characterized. Questions on instrument validity and reliability were addressed. The proposed method for data collection and analysis of the data was presented. Concerns, suggestions and modifications particular to individual parishes were also addressed. These included adding questions to be processed and analyzed separately for parishes with particular needs, the provision for stratified sampling and the adaptation of the report when necessary, and the interpretation and use of the results of other parish surveys that had been administered by specific parishes in the recent past. Trainees were provided with a package of written materials that included step by step procedures and samples of follow-up letters and other communications between the pastor/parish pastoral council and the parishioner respondents. The second and third sessions introduced the kinds of information available to council members, methods of analysis of data, group process, decision making, and techniques to organize to carry out the work of the self study.

Parishioners' Survey

All of the data collected in the parishioners' survey were reported to the research staff. The archdiocesan research office uses the data to identify responses to questions of strategic importance to the diocese. An example of such a question is: "If you attend Mass once a month or less, why don't you attend Mass more frequently?" The results of this question were compiled at the Archdiocesan level for the purpose of informing archdiocesan evangelization efforts.

Methods and Procedures. The survey of registered parishioners was an integral part of the self study process. The purpose of this survey was to determine to what extent parishioners agree with item statements describing the parish that they most frequently attend. Respondents were also asked to provide demographic information about themselves and to respond to a small number of questions concerning their religious practices. The survey was carried out by the parish leaders as one part of a Parish Self Study process. It was intended to obtain

the respondents' perceptions of the behaviors exhibited by the priests and other parishioners in the parish that they attend most frequently and the respondents' self report of their own religious practice.

Research Settings. The 287 parishes of the Archdiocese of Philadelphia are located in the five Pennsylvania counties of Bucks, Chester, Delaware, Montgomery and Philadelphia. Over 1.24 million Catholics are registered in the parishes that range in size from a registered population of 45 to 16,335. Although all parishes share in the common mission of the Catholic Church and the Archdiocese, parishes differ in the particular way they carry out the mission.

Most parishes (86%) are "territorial" and particularize their mission to the diverse populations who live in the geographic area of the diocese located within the boundaries of the parish. The remaining parishes are "personal" and have a mission particular to serving some national, cultural or ethnic group regardless of where the parishioners reside. All parishes have a pastor or an administrator appointed by the Archbishop who has ultimate responsibility for carrying out the mission of the parish in conformance with the teachings and the regulations of the Catholic Church.

Population, Sample and Sampling Method. The population for each parish's parishioners' survey is all Catholic parishioners over the age of 18 who are registered (appear on the official list held within a parish) at the time the parish conducts its survey. The survey was administered by parishes over the period January 1994 until March 1996. The priest/parishioner researchers are asked to select a systematic random sample of 200. The sample size takes into consideration confidence ranges for variability of a unique sampling frame (i.e., the over 18 registered Catholic parishioner in a specific parish). Using the theoretical assumption that our sample group is controlled for certain characteristics (i.e., religion and region); we note that a sample size of over 200 will not gain enough confidence in precision to justify larger sample sizes (Fowler, 1984). In twenty-nine instances, where the registered population was small (under 2000), parishes selected fewer than 200 for their sample and the sample selected comprised 10% of the population.

This sampling methodology allowed researchers to devote more time, energy, and resources into the design and follow-up procedures of the sampling methodology (which are equally important) (Fowler, 1984). The mail survey employed a comprehensively designed model using parishioners and parish staff, research and planning staff

and a printing and mailing company to carry out Dillman's procedures to increase survey return rates. A summary of the parish populations, sample sizes and response rates is attached (Appendix 3.1).

Instrumentation. The research instrument was developed by a panel of persons (priests, religious, laity) familiar with the teachings of the Catholic Church regarding the purpose for the parish. (Appendix 3.2) They were asked to validate items on a draft with their parishioners and other members of their staff. Finally, two pilot studies were conducted with different parishes during the winter of 1993 to elicit general comment on the instrument, to test the data collection procedures and to test instrument reliability.

The instrument, Parish Self-Study Parishioner Questionnaire (Appendix 3.3) was comprised of sixty three items, organized in seven general areas, intended to measure the degree of agreement the respondents have with statements describing an ideal parish. Perceptions of the respondents were requested for parish worship, attempts to build Christian community, evangelization efforts, teaching the gospel message, services provided, parish leadership and stewardship. The preference of the respondent for a place of worship, the respondent's Mass attendance, annual financial contribution and demographic characteristics were also collected.

Scoring. The instrument employed a Likert scale to measure the level of respondent agreement with 46 statements in seven categories describing the parish the respondent most frequently attends. This type of item was selected because this scale is simple to understand and able to measure more general constructs of the type that are associated with parishes that give apparent evidence of being in conformity with the teachings of the Second Vatican Council. (Alreck and Settle, 1985) Respondents were instructed to circle one number under each statement that best describes their feeling of agreement from 1 = strongly agree to 5 = strongly disagree. A mean score and standard deviation was computed for each of these items.

In addition, respondents were asked why they attend another church, if they attend it more frequently than the parish in which they are registered. They were asked why they did not attend more frequently if they report attendance less than monthly. They were asked to comment in open ended items in each of the seven areas. They were asked to identify the three most important activities the parish should be doing. Finally, they were asked to provide some demographic information about themselves.

Instrument Validity. The involvement of Church leaders and experienced pastors in the development and

approval of the instrument contributed greatly to the face validity of this instrument for the purpose for which it was used. The development committee agreed that instrument items appeared to be statements describing a parish that was carrying out activities in conformity with the teachings of the Catholic Church. For each area in the instrument, scripture and Church documents were identified to guide the wording of the instrument item. Many revisions took place throughout the development process to insure clarity of understanding and consistency with Church teaching.

Pilot Studies. Pilot studies were conducted among parishioners in two parishes with different socioeconomic characteristics (parish fa 2705 and fa 2420) during the period January-June 1993. Pastors from these two parishes were well versed in the purpose and the background of the Parishioners' Survey because they sat on the committee that developed the survey instrument. They observed the procedures used by their parish pastoral council members to establish meaning for the survey items. In addition to the procedures that were incorporated into the training of the survey process, (Dillman, 1978), pilot parishes included one additional follow-up with respondents to identify if there was any instruction or item that they did not understand. As a result of the pilot studies, minor wording changes were made to the instrument.

Data Collection. The instrument has been prepared to conform with the recommended size and layout, and distributed in accordance with the Total Design Method. (Dillman) In almost all cases the Questionnaire was mailed[1] to a systematic random sample of 200 parishioners from each of the Archdiocese's 287 parishes. The questionnaire gives each parish information about their particular parish; it was not designed to provide information about the perceptions of the Archdiocese or the Catholic Church as a whole.

Language. The instrument was published and made available in English and Spanish. Parishes were encouraged to provide translating support for persons identified in their sample who spoke other languages. In at least two cases, with the Korean and Polish communities, this was done frequently.

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[1] Mail surveys were chosen on the basis of low cost, low labor, anonymity, no interviewer bias, and to effectively target our population (i.e., those on a parish roll). We note the disadvantages as well: slow data intake, long process, inability to get extensive information on particular topics, little control over the procedure and implementation, and no validity feedback on meaning prescribed to questions.

Roles of Parish, Research & Planning, Human Organization Research Institute

This survey was conducted through a relationship among the parishioners, the Archdiocesan Office for Research and Planning, and the Human Organization Science Institute of Villanova University (HOSI). The Office for Research and Planning provided the overall process, the recommended research procedures, training in research methods and interpretation to local pastors and parish council members, and ongoing technical support. The local parish (under the direction of the pastor) choose the sample and mailed the questionnaires, conducted follow-ups, decided the cut off point for returns, mailed the returned surveys to HOSI, received the report and interpreted the data in light of other information available to the parishioners.   HOSI reviewed and cleaned the data prior to data entry, systematically checked the data entry, cleaned and coded the data after it was entered and produced a written report to the parish and the Office for Research and Planning. The Office for Research and Planning received a copy of the written report and the data disc in order to perform additional analyses.

Parish Experience with Parish Self Study

The Office for Research and Planning conducted ongoing research among the participants to determine their perceptions of the processes being used and the extent to which useful information and actions was being developed. This provided the research staff with the means to carry out one of their major roles in this activity: assisting the Archdiocesan and parish leadership in the development of a collective interpretation of the experience and a shared vision of the next steps in the Archdiocesan Renewal.

Results of a Survey of Priests' and Parishioners' Perceptions of Parish Self Study Training.

Priests and parishioners trained to be action researchers in the self-study process were surveyed upon completion of their training to determine their overall impression of the training meetings. The perception of Parish Self Study changed as pastors and parishioners have engaged the research process.

Among the participants in this first wave of parishes to participate in training, there were heightened levels of suspicion and fear. Still, 88% of the pastors and 79% of the parishioners found training helpful. While only 2% of pastors and 2% of parishioners felt the training was not helpful. Both pastors and parishioners of the fourth wave were more pleased than those of the first wave.

First wave pastors and parishioners were often unhappy about and suspicious of the self study, as

demonstrated by some of the more common themes expressed in their comments on training and parish self study.

"There needs to be a reassurance that there is no hidden agenda behind the self-

evaluation."

"Sometimes I feel as if the Church is becoming a business, although I know they have

problems that must be addressed."

"I am not convinced that this is for the good of my parish. Somehow I get a sense that we

will spend a lot of time spinning wheels to get what someone else wants."

"There is a need to clarify the overall goal of the process. The renewal is under great

suspicion because of misinformation and conflicting signals (example: closing schools

and parishes)."

By the fourth wave, many of the parishes in the previous waves had positive experiences. The overall perception of

parish self study was more enthusiastic.

"The meetings have been very informative and very well presented. The ideas and

suggestions (of Parish Self Study) have cleaned up many questions."

"With these meetings I now feel more closer to my parish than ever before."

"The Parish Council has to become more involved."

In the first wave 79% of parishioners found the training helpful, by the fourth wave 86% of the parishioners found

the training helpful. While in the first wave 88% of pastors found the training helpful, by the fourth wave 92% of the

pastors found the training helpful. The reasons for the difference are not known. Some possible explanation could

be improved training plans and trainer performance, and less apprehensiveness and more realistic expectations on

the part of participants who observed others who had gone before them.

Parish Experience with the Parishioner Survey. To begin to address the question of how well the

pastors and the parish pastoral councils engaged the research process, their research experience with the parishioner

survey implementation was evaluated. Ninety-three per cent of the parishes (269 of 287) completed their parishioner

survey and had the results processed by Villanova University which sent a report to the Research and Planning

office. Nine other parishes ordered the survey and may have completed and processed it themselves leaving no

record of the results to be reported here. Nine parishes never ordered the survey but in at least two cases another survey instrument recently employed by the parish was used to provide information to the parish pastoral council.

The Office for Research and Planning received a report and data on 269 parishes. The return rates for individual parishes ranged from 13% to 100%. Overall, the mean average number of surveys mailed from a parish was 195, while the mean number returned was 100. Seventy-one parishes (26% of the returns received in the Research and Planning Office) had a rate of return of 60% or higher. One hundred and fifty nine parishes (59% of the reports) had a return greater than 50%. Another 63 parishes had a return of between 40% and 49%. Forty-six parishes (17%) had a rate of return less than 40%.

Those parishes with an individual return rate of less than 50%, were surveyed in an attempt to clarify the reason for a lower return. Reasons for the lower return rates included historically bad mail delivery (notably in those parishes that are located in the inner city), bad registered parishioner lists, special circumstances where 200 surveys were not sent out (rather some percentage of the population), and improper procedure and research practices. Often lower response rates were the result of novice researchers not using Dillman's procedures (i.e., not properly creating their own cover letter, not sending follow up letters, or not conducting the sample appropriately) prescribed in the training. Also, there is some evidence to suggest that return rate was influenced by the Mass attendance practices of the recipients[2].

After adjusting for population size, 66% of the parishes (178 of 269) had a high degree of confidence (95% of the time) that they could generalize their survey findings to the whole parish population within plus or minus 10%. (See Appendix 3.1, Response Rates and Confidence Intervals for Parish Self Study Parishioners Survey)

The total number of surveys obtained from the 287 parishes participating in the planning process was 26,072. Invalid responses were due mainly to respondents indicating more than one response to a question, or not responding to a question. Using these valid responses, a preliminary statistical report was created that allowed for a general analysis of the Archdiocese (see Appendix 3.4 Parish Survey: Preliminary Statistical Report Combining All parishes)

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[2] It is possible to theorize that those who attend Mass frequently are more likely to return surveys mailed by the Catholic Church, as they have a more pronounced interest in the contents of the survey. Still, it should be noted that there was a distinct presence of surveys returned by non-regular Church goers.

Results of the Post-Parish Self Study Pastors Survey. A survey of pastors whose parish pastoral councils completed the parish self study was conducted over the months of April to September, 1995. It represented a random sample of pastors from the first wave of parishes involved in Parish Self Study (85 parishes from differing socioeconomic settings and every county in the Archdiocese). This qualitative study was done through phone interviews conducted with priests. The attached survey (Appendix 3.5) represents the base questions that were asked of each pastor. The survey allowed for an analysis of the overall experiences of the action researchers (i.e., Pastors, councils, and resource persons) from training through the parishioner survey, to the final draft of their analysis of the data (The Parish Self Study Report). In this survey, pastors continually expressed that though apprehensive at first the overall experience was positive.

Typical answers included:

"Our people were suspicious of the process at first. When we finished they were

less suspicious."

"Interaction was good."

"Enlightening."

In answer to the question *"Looking back on the whole thing what do you think was the most important part?"* pastors made reference to the participative and democratic characteristics of the process:

"Communication to the parishioners."

"Gave pastor and council greater awareness of the parish."

"Discovered there was more of a common vision."

"Communication to the parishioners. . . . Surveying and creation of parish

notes." (Newsletter)

". . . gathering people together. Honest sharing of what you think the parish

should be."

"Interaction of the people."

"Survey of the people. Analysis of it. Communication to larger parish by

response of the people. Everyone ended up with a voice."

The Parish Self Study and Parishioners Survey, as seen through the pastor's eyes, represented a year of cumulative work in which the parishioners were asked to become part of the decision making process.

Review of Parish Pastoral Plans.

The most definitive measures of the impact of the Parish Self Studies are the planned actions to be taken by parishioners, the commitment of the parishioners to undertake the actions, and the results of the actions. The parish researchers were trained to develop a report that draws on their own research and their analysis of parish data to identify their parish's strengths and weaknesses in accomplishing the mission that they themselves identified. Parish plans also identified goals and objectives.

Two hundred and eighty-seven plans were reviewed by the authors. They were the work of the parish researchers who wrote them and differ substantially in overall appearance and presentation. Each of the plans was reviewed to determine if:

1)   it contained the mission of the parish

2)   the themes developed in the self study process were actually used[3]

3)   parish planners cited strengths, weaknesses, commendations and recommendations

4)   parish goals were clearly identified and prioritized for the next three to five years.

Three plans were not complete enough to be a part of this review. There were 237 of 287 (82%) plans that made a connection between their mission and the plan that was developed. Most of the parishes addressed all of the themes recommended by the planning process. This ranged from a high of 245 parishes (85%) making recommendations in the area of evangelization to a low of 228 parishes (79%) making recommendations in the area of leadership.

Strengths and limitations, and commendations and recommendations were cited in at least 65% of the parish plans for each of the seven theme areas. Goals for the next three to five years are cited in 170 (59%) of the plans. Strategies for implementing the goals are cited specifically in 102 (35%) of the plans. About the same number (103-117 parish plans or 35-40%) identified resources or needs that must be provided by the parish, the cluster of parishes

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[3]The themes identified in the Parish Self Study are worship, community, evangelization, teaching, service, leadership and stewardship. They were developed by Archdiocesan leaders in consultation with parishioners.

or the Archdiocese in order to accomplish the plan. (See appendix 3.6   Parish Plan category frequencies of Strengths Limitations and Goals)

A review of the written plans, conducted early in the process before all the plans had been submitted, revealed a considerable amount of creativity among parish planners to mitigate their limitations and capitalize on their strengths to accomplish the goals that they identified. Each plan was also reviewed to determine if there was an internal, logical, consistency among the parish's own mission statement, the parish researchers' identification of strengths and limitations and the goal setting they conducted.

Chapters 4 through 10 summarize the specific recommendations contained in the parish pastoral plans for each of the seven theme areas.   There are several things to keep in mind when reviewing the pastoral plans and this analysis. It is important to observe that language plays a role in understanding the final assessment of frequencies across parishes. Common use of similar names for ideas within the particular categories, as described above, may explain high percentages of certain concepts. Lower percentages may indicate that parishes use a variety of terms to indicate similar concepts. In this case there may be a wider distribution of ideas as a function of the terms chosen by the planners.

The categories for parish pastoral planning were prompted by the Archdiocesan Mission Statement. Several of the words used in the Archdiocesan Mission Statement have the potential for producing overlapping recommendations. Thus the recommendations under a particular heading may not represent a discrete understanding of that area. Several of the seven content areas outlined in the parish self-study overlap. Therefore, recommendations found under one content area may directly relate to another content area. For example, several recommendations regarding evangelization and teaching were made in the area of worship due to the intimate relationship between these areas. A future synthesis of recommendations made for each of the seven themes may reveal further information.

The parish planning process outlined in *On the Way to Renewal*, as well as the parish surveys also played a significant role in shaping the parish plans. Each section of the document *On the Way to Renewal*, offered seven statements inviting the parish pastoral council members to indicate their level of agreement (these questions were different from the Parishioners' survey questions). The language of these statements may have also prompted some

of the specific areas of concern that are reflected in the parish plans.

The parishes of the Archdiocese, in conducting their self-study process, surveyed registered parishioners. The parishioner surveys also included several questions under each of the theme areas. These questions were oriented primarily around the role of the laity in understanding and acting on the goals of the parish. These ideas seem to eventually find their way into the parish plans. The levels of agreement to the questions among those surveyed also may have influenced the frequency with which these ideas were included in the plans.

Thus, the language of the plans probably has some relationship to the mission statement, workbook, and to the surveys. Such influences cannot be overlooked when analyzing the plans. It is logical that parishes would attempt to design some goals in this area. These goals may only reflect a level of aspiration as a pastoral response to the published mission of the Catholic Church in this Archdiocese rather than any particular attempt to implement concrete action in the near future. In almost every parish, the council members who formed the plan were recently elected to new parish pastoral councils. They were planning for their parishes for the first time. It is better to read the words of the plan with some caution since the true meaning and intent remains with the writers. Similar recommendations by several parishes may have different meanings as well as priorities. However, with these cautions in mind, it is still possible to draw some general conclusions regarding the recommendations of almost all of the parishes in the Archdiocese in each of the seven theme areas.

Chapter Four

PARISH RECOMMENDATIONS TO ENHANCE THE WORSHIP LIFE OF PARISHES

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This chapter summarizes an overall picture of all worship recommendations, mostly desired actions, across the Archdiocese using frequencies as the measure of common agreement around worship needs and common perceptions in the area of worship.

Parish Survey Results

The total number of valid responses obtained for questions relating to worship ranged from 23,623 to 25,179. The statistical report of the parishioner survey results revealed that 88% of parishioners surveyed in the Archdiocese affirmed that the readings from the Sunday Liturgy assisted them in some way, and 90% of parishioners stated that the prayers used during Mass assisted them. In regard to the survey item pertaining to preaching during the liturgy, 81% of those surveyed declared that it assisted them. A total of 76% indicated that their parish's music ministry enhanced the liturgy. The church environment was cited as helping to foster participation by 78% of the respondents and 74% stated that their parish fosters a sense of community. One interesting finding was that 78% of the respondents affirmed that there are many opportunities for worship within the parish and that the worship life of the parish is of assistance to them, yet only 52% indicated that they attend other forms of worship aside from the Sunday Liturgy. Nearly 35% of those surveyed indicated that they did not attend additional forms of worship at all, and an additional 14% were undecided. (See Appendix 3.4)

Content Analysis of Worship Recommendations from Pastoral Plans

Of the 284 plans that were able to be analyzed, 245 plans (86%) specified 1071 recommendations in the area of worship. Table 4.1 provides a complete summary table of worship recommendations from the parish pastoral plans.

Of the 1071 recommendations made by the 245 parishes, a total of 136 parishes (55%) made 224 recommendations (22%) focused upon various liturgical ministries, including an area pertaining to the training of liturgical ministers. Five ministries were identified in the recommendations. They include altar servers, Eucharistic ministers, ushers or greeters, those involved in the music ministry of the parish, and those involved in the proclamation of the Word, which includes both lectors and clergy. The largest number of recommendations made regarding liturgical ministries pertained to music with a total of 80 parishes (33%) making 100 recommendations. The majority of these recommendations focused upon expanding the current music program of the parish.

A majority of the recommendations made across the five liturgical ministries identified focused upon increasing the number of those involved in the ministry. Recommendations concerning the need for clarification of ministerial roles were also evident in each of the five ministries with the role of the greeter and usher receiving the largest number of recommendations for clarification. In regard to the 28 recommendations made on the proclamation of the Word, the majority of recommendations focused upon improving the quality and content of the homilies. Recommendations that focused upon the training of liturgical ministers called for an increase of in-service, seminars, and workshop opportunities for liturgical ministers.

Eighty-one of the 245 parishes (33%) made 111 recommendations regarding education. Recommendations focused upon increasing knowledge, understanding, and awareness of Catholic liturgical practices and fostering an appreciation for the liturgy. It was also recommended by many parishes that opportunities for faith sharing and bible study be made available to the parish community, and that attempts be made to encourage a deeper sense of reverence during times of worship.

TABLE 4.1

PARISH PLAN REVIEW

Worship - Recommendations

Responses		Parishes		Code	Description
73	(7%)	58	(20%)	AP	Active Participation
42	(4%)	35	(12%)	CC	Fostering Christian Community
111	(10%)	81	(29%)	CE	Catechesis & Education
17	(2%)	15	(5%)	EF	Evaluations & Feedback
37	(3%)	30	(11%)	EV	Evangelization & Increased Attendance
19	(2%)	17	(6%)	EW	Environmental Worship
34	(3%)	26	(9%)	EWS	Environmental Worship - Structure
39	(4%)	34	(12%)	IC	Improve Communications
16	(1%)	14	(5%)	IN	Inclusivity
72	(7%)	65	(23%)	LC	Liturgy Committee
15	(1%)	12	(4%)	LMA	Altar Servers
12	(1%)	11	(4%)	LME	Eucharisitic Ministers
23	(2%)	22	(8%)	LMG	Ushers/Greeters
100	(9%)	80	(28%)	LMM	Music Ministry
28	(3%)	27	(10%)	LMP	Proclamation of the Word
46	(4%)	43	(15%)	LMT	Training Liturgical Ministers
64	(6%)	59	(21%)	LY	Liturgy & Youth
23	(2%)	16	(6%)	MC	Multicultural Issues
60	(6%)	48	(17%)	OTH	Other
14	(1%)	12	(4%)	PL	Pastoral Leadership
24	(2%)	22	(8%)	PW	Prayer & Worship
53	(5%)	42	(15%)	RD	Religiosity/Devotions
18	(2%)	17	(6%)	RE	Retreats, Revivals, & Missions
28	(3%)	26	(9%)	SAC	Sacraments
22	(2%)	19	(7%)	SCH	Mass Schedules
46	(4%)	41	(14%)	SL	Specialized Liturgies
35	(3%)	27	(10%)	SM	Sunday Mass
1071	100+%)	284	100+%)	(May add to more than 100% due to multiple responses)	

The apparent need for parishes to organize their efforts pertaining to worship may be reflected in their desire to establish a liturgy committee. A total of 65 parishes (27%) made 72 recommendations to either establish a liturgy committee or improve the functioning of the liturgy committee already in place. Some recommendations made an effort to define the role and responsibilities of the liturgy committee.

The role of youth in the worship life of the parish also received significant attention with 59 parishes (24%) making 64 recommendations. These recommendations not only called for an increase in the general involvement of youth in the worship life of the parish, but also for an increase in their participation in the liturgical ministries of the parish. In a similar fashion 24% of the parishes (n = 58) made 73 recommendations on the active participation of the general assembly gathered for worship, and fostering parishioner involvement in the liturgical ministries of the parish. Several parishes made recommendations to address the impediments that prevent fuller participation by those gathered for worship.

Other recommendations pertaining to worship included those focused on fostering Christian community (n = 42). These recommendations centered around creating a welcoming atmosphere in the Church community, outreach to new parishioners, and the establishment of hospitality committees. The need for evangelization was also reflected in the worship recommendations (n = 37). The majority of these recommendations were concerned with increasing attendance and reaching out to inactive members of the parish community.

In regard to the actual worship life of the parish, 24 general recommendations were made on improving or increasing prayer and worship within the parish. Fifty-three recommendations were made concerning religiosity and devotions, which included increasing novenas and adoration, and 18 recommendations were made regarding retreats. In regard to sacraments, 28 recommendations were made with a majority of them focusing upon increasing the frequency in which parishioners received the sacraments, especially the sacrament of Reconciliation. Other areas of recommendation included pastoral leadership (n = 14), and inclusivity (n = 16).

The environment for worship was the subject of several recommendations (n = 53). These recommendations were generally concerned with modifying the Church building in order to foster a more prayerful and spiritual environment. In order to accomplish this goal, several parishes made recommendations for building improvements that would bring the interior of the Church up to date with the structural changes recommended by

Vatican II.

Forty-six recommendations were made regarding specialized liturgies and 35 recommendations were made on the Sunday Mass. Sunday Mass recommendations often dealt with practical concerns, such as scheduling those who would participate in the presentation of the gifts at Mass, and addressing the best time to make announcements during the Mass. A related area that was identified in the recommendations dealt with the Sunday Mass schedule. Nineteen parishes made 22 recommendations concerning the need to modify the current Sunday Mass schedule in place.

Multi-cultural issues received a modest amount of attention by several parishes. A total of 16 parishes made 23 recommendations in the area of multi-culturalism. The majority of the recommendations were concerned with satisfactorily addressing the needs of various ethnic groups in the parish so that a greater sense of community could be fostered.

Three miscellaneous areas were developed from this analysis, the first dealt with the area of communication. Thirty-nine recommendations were made to improve current methods of communication between parish organizations and the parishioners. The second area was an area designated as evaluation and feedback (n = 17). Several parishes were concerned with obtaining feedback from parishioners regarding ongoing worship efforts and some went as far as considering ways for parishioners to evaluate the parish's progress in the area of worship. The final area was designated as "Other." This area contained 60 items that were too general or lacked specification to permit the reviewer to identify what the parish pastoral councils had in mind at the time they were written. They included recommendations like "van" and "small numbers." Other items contained in this category were very specific, but appeared to be unrelated to content areas in this analysis. They included recommendations like "challenge Bryn Mawr Hospital to hire certified Hospital chaplains."

Conclusions and Recommendations

The recommendations demonstrate an increasing awareness on the part of the laity that worship encompasses more than Sunday Mass, and that the celebrant is not the only active participant in the Liturgy. Pope John Paul II in his Apostolic Letter, ***Dies Domini***, defined the importance of the Eucharistic assembly in the celebration of the Liturgy. "Those who have received the grace of baptism are not saved as individuals alone, but as

members of the Mystical Body, having become part of the People of God. It is important therefore that they come together to express fully the very identity of the Church, the ekklesia, the assembly called together by the Risen Lord" (1998). This full expression of ekklesia requires the active participation of the assembly during the Liturgy. It is encouraging to see so many parishes desiring to foster a sense of ekklesia within the parish Church. This is evident in their desire to increase the active participation of those assembled for worship. Parishioners are beginning to recognize that they are not passive observers of the Liturgy, but rather intimate participants in the liturgical celebration who set out to "relive with particular intensity the experience of the Apostles on the evening of Easter when the Risen Lord appeared to them as they gathered together" (John Paul II, 1998).

Improving the music ministry, encouraging the laity to take an active role in liturgical ministries, and actively seeking to create a welcoming community are ways in which to foster the increased participation of the Eucharistic assembly. Many parishes throughout the Archdiocese of Philadelphia are calling for this in their pastoral plans. This may be taken as a positive sign that indicates that the vision of the Second Vatican Council is being embraced by the clergy and laity of the Archdiocese of Philadelphia.

The USCC Bishop's Committee on the Liturgy has defined the preeminent importance of music to be "among the many signs and symbols used by the Church to celebrate its faith" (USCC, 1972). Furthermore, the Committee stated that "faith grows when it is expressed in celebration. *Good celebrations foster and nourish faith. Poor celebrations weaken and destroy faith"* (USCC, 1972). Music therefore serves as a viable bridge to faith. The large percentage of parishes recommending that their current music ministry be expanded and improved is an encouraging sign that parishes are recognizing the vital role that music plays in enhancing the liturgical and faith experience of the community. This effort could be supported through the continuing formation of those involved in parish music ministry and parish liturgical planning.

The role of the laity in the activities of the parish has been increasing over the last ten years. Numerous parishes recognize a need to further increase the involvement of the laity in the various liturgical ministries of the parish. Special effort should be made to provide appropriate liturgical ministers with proper training and ongoing formation so that their participation in the liturgical life of the parish will continue to enhance the celebration.

Of particular interest is the role of the usher or greeter. There appears to be a great deal of ambiguity in the

recommendations regarding the role of the usher or greeter as is evident in parishes' use of the word usher in conjunction with greeter. Parishes appear to be struggling with this particular function. The role of the usher or greeter is not defined in Canon Law, nor is it clearly defined in any official Church documents. If the role of the usher is shifting to that of a greeter, then some orientation may be required to assist parishes in defining the role of the greeter. Such an action could be essential if the role of greeter was seen as vital in helping to foster a welcoming environment in the Eucharistic assembly.

A properly trained and formed Liturgy Committee should be able to provide parishioners with a general understanding of worship and provide training for particular liturgical ministries within the parish. Training and formation of Liturgy Committees appears to be a requirement in order to equip parishes with competent individuals who will be able to plan effective liturgical celebrations.

The Second Vatican Council stated that the Liturgy of the Word is intimately tied to the Liturgy of the Eucharist, so much so that they form a single act of worship (Constitution on the Sacred Liturgy, Sacrosanctum Concilium, 1964). Therefore, the effective proclamation of God's Word is vitally important to the entire Liturgy. Several parishes made recommendations regarding the need for their clergy to improve their homilies. In light of such recommendations a yearly workshop in homiletics offered to priests may assist parishes in addressing this need.

Another area of concern is the parishes' ability to meet the needs of the increasing ethnic population of Catholics in the Archdiocese. While the current self-study shows only a modest number of parishes (n = 16) realizing a need to address multi-cultural issues in their pastoral plans, it is anticipated that future self-studies will demonstrate an increase in concern for multi-cultural issues given the continued rapid change in demographics throughout various regions in the Archdiocese. Developing programs and workshops that address multi-cultural issues now will equip parishes with the resources necessary to meet the changing demographics of their parishioners. Delaying action until the percentage of parishes requesting such assistance is higher may result in parishes becoming overwhelmed by the complexity of multi-cultural issues and ethnic parishioners feeling alienated from the parish community.

The role of youth in the liturgy is of significant importance to parish communities. Twenty-four percent of parishes identified recommendations to involve youth in the liturgical life of the Church. Appropriate models for

engaging parish youth in effective and meaningful ways in the liturgy need to be recognized as necessary and provided for in parishes in order to meet this need.

Finally, there appears to be a definite need to provide catechesis in worship. The recommendations indicate that parishioners who have a limited understanding of Liturgical practices are easily confused by the variations in Liturgical Rites. Such confusion can often inspire inquiry, but it can also breed misunderstanding, frustration, and even anger as parishioners attempt to understand why their own parish does not engage in a certain Liturgical practice. These variations can be as basic as allowing girls to assume the role of altar servers to performing Liturgical Dance during a Liturgy. The need to address a catechesis on worship would be best accomplished within the individual parishes given the various needs among parishes throughout the Archdiocese. This could be accomplished through adult education programs. Parishes who are incapable of developing adult catechesis programs due to a lack of resources should be encouraged to work with a neighboring parish by sharing the resources that are available. This issue could also be addressed within the various clusters of parishes in the form of a workshop or seminar.

The recommendations presented here are not all inclusive and other ways of addressing the concerns and needs of the parish may be warranted. Regardless of the action taken with this report, it is essential that some attempt be made to address the issues and concerns brought forth in the self-study process and pastoral plans in order to assist parishes in their effort for continuing the ongoing process of renewal.

Chapter Five

PARISH RECOMMENDATIONS FOR BUILDING VITAL COMMUNITIES

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As a part of the parish self study process, parish pastoral councils were asked to generate recommendations "to create and nourish community in the domestic Church of the family in the life of every parish and in society as a whole." (Mission Statement, Archdiocese of Philadelphia). This chapter is intended to summarize the results of these parish research activities that resulted in recommendations to build community identified by parish pastoral councils.

Of the 284 parish plans that were reviewed, all of them submitted recommendations to build community numbering a total of 1,076 recommendations in this area. This was the largest number of recommendations for any single area addressed in the self study. All percentages identified in Table 5.1 are calculated as part of the total number of parishes engaged in parish self study at that time (286).

As a Christian Community, a parish is united by the common bond of baptism into the life and mission of Jesus Christ. The need to build up the community is an essential part of the life of parish. Within the parish self study process the parish pastoral councils made the greatest number of recommendations (1077) concerning the Christian Community.   Because this building up of community frequently involves other elements of parish life such as worship, evangelization and service, parish recommendations in this area have multiple foci but, since the planners chose to place these recommendations under the general heading of community, they are summarized in this chapter.

A. Common Recommendations

Six major categories of recommendations (providing an atmosphere of welcome, engaging groups perceived to be marginalized in the parish, improving communication within the parish, outreach to the communities in which the parish exists, recognizing worship and prayer as times to build community and creating opportunities to gather and socialize) seem to provide the foundation in which the other aspects of parish life can take root and be expressed. Taken together, these recommendations seem to appreciate the human need to feel valued, wanted and welcomed. It would appear that with these elemental needs satisfied, the planners then made recommendations that satisfied the needs of the next developmental level - to move beyond self, to be of service to others and to care for the future.

Table 5.1 Parish Plan Review: Christian Community Recommendations

TABLE 5.1						
Parish Plan Review - Frequencies (Code Order - Code 1 Only)						
(06) Christian Community - Recommendations						
Responses		Parishes			Code1 Description	
Provide and Atmosphere of Welcome						
173	16.1%	115	40.5%		Foster community by providing a welcoming atmosphere	
6	0.6%	5	1.8%		Foster community though small faith communities	
179						
Engage Groups Perceived to be Marginalized in the Parish						
11	1.0%	10	3.5%		Strengthen community through sensitivity to diversity	
39	3.6%	23	8.1%		Groups to engage more fully in parish - by marital status	
84	7.8%	67	23.6%		Groups to engage more fully in parish - by age	
20	1.9%	18	6.3%		Groups to engage more fully in parish - by	
19	1.8%	18	6.3%		Groups to engage more fully in parish - by physical condition	
173						
Improve Communication in the Parish						
124	11.5%	82	28.9%		Fostering community, through communications	
124						
Reach Out to the Communities in Which the Parish Exists						
13	1.2%	13	4.6%		Outreach - to parishioners	
54	5.0%	42	14.8%		Outreach - to the community	
12	1.1%	11	3.9%		Outreach - in order to evangelize	
79						
Recognize Worship and Prayer as Times to Build Community						
63	5.9%	46	16.2%		Foster community by providing opportunities to worship/pray	
63						
Create Opportunities to Gather and Socialize						
57	5.3%	50	17.6%		Fostering community by providing opportunities to gather	
57						
Other Recommendations to Build Community						
Recommendation to Be of Service						
22	2.0%	22	7.7%		Foster community by providing support services - bereavement	
16	1.5%	16	5.6%		Foster community by providing support services - support groups	
4	0.4%	4	1.4%		Foster community by providing support services - material assist	
12	1.1%	7	2.5%		Foster community by providing support services - general	
54						
Importance of Family						
15	1.4%	15	5.3%		Issues of family life - single parenthood	
4	0.4%	2	0.7%		Issues of family life - challenges	
20	1.9%	19	6.7%		Issues of family life - support	
39						
Structures to Support Community						
28	2.6%	27	9.5%		Structures within the parish - need for participation/involvement	
35	3.3%	29	10.2%		Structures within the parish - organizations	
10	0.9%	9	3.2%		Structures within the parish - leadership	
6	0.6%	5	1.8%		Talent resources within the parish	
79						
Non Specific Recommendations						
93	8.6%	75	26.4%		Fostering community (in general)	
Particular Recommendations Unique to a Few Parishes						
Education						
33	3.1%	27	9.5%		Foster community by providing education	
Physical Plant						
27	2.5%	19	6.7%		Foster community by efficient use of physical plant	
10	0.9%	10	3.5%		Foster community by efficient use of physical plant - access issues	
37						
Accurate Data						
21	2.0%	21	7.4%		Fostering community, by use of accurate data	
Changing Environment						
12	1.1%	9	3.2%		Foster community by responding to changing environment	
Other						
8	0.7%	7	2.5%		Foster community by utilization of parish staff	
9	0.8%	9	3.2%		Foster community by networking	
16	1.5%	13	4.6%		Not a recommendation	
1076	100.0%	284	100.0%			

Provide an Atmosphere of Welcome

The largest number of recommendations within the area of Christian Community (179) concerned the need to provide a welcoming environment within the parish. The parishes identified four major ways to meet this need. These were by establishing Welcoming Committees (69),using greeters at Mass (46),establishing Hospitality Committees (24) and hosting Sunday socials (21). They also noted attention to the atmosphere of the parish (6) and personal contact by pastor and priests (3). The Welcoming Committees were seen as organizations whose members visited new parishioners to bring them information about the parish and extend a personal invitation to become active members of the parish community. The parish pastoral councils most often defined the greeters as those whose duty it is to welcome all as they come into Church. The hospitality committees were more broadly defined. Some of the duties assigned to them were to provide refreshments after Masses and other parish functions, serve as ushers, to be a welcoming presence at parish functions, or to be escorts to and from parish activities. Sunday socials were presented as opportunities to come together after Mass to share fellowship. These were also thought to be times when organizations could highlight their work in the parish community and personally invite parish members to become involved.

Engage Groups Perceived to be Marginalized in the Parish

Sixteen percent of the recommendations (173 recommendations) were to engage parishioners within the parish which they perceived as having circumstances that might preclude their full engagement in the life of the parish. These groups included those that might be less a part of the community because of their age (84 recommendations from 67 parishes). Both young and old were identified as needing special attention. Marital status (39 recommendations from 23 parishes) was seen as a possible barrier to full community. Single, separated, divorced and widowed were all cited. Finally, persons with illnesses or disabilities (19 recommendations from 18 parishes) were recognized as having barriers to full participation in the community. Most of the recommendations made about these groups of people emphasized the importance of putting programs in place or enhancing present programs for them within the parish. A smaller number of the recommendations addressed the need to include these groups in the spiritual and social activities of the parish. An even smaller number spoke to the importance of involving these groups in the mission and ministries of the parish community.

Eleven recommendations were made by 10 parishes concerning efforts for unity and integration of the diverse cultures present in a parish and surrounding community.   It is not known if this issue was addressed by a small number of parishes because parishes are already sensitive to the diversity present in their community or because they do not see diversity as an issue with which their parish needs to be concerned.

Improve Communication Within the Parish

The issue of communication within and around the parish community was addressed in 124 recommendations from 82 parishes. The parish planners seemed to acknowledge that many good works are taking place and believe that they need to take action to make certain that the parish community and others are aware of what is happening. Fifty of these recommendations focused on the need to publish information in many forms (newsletters, parish directories, pamphlets, parish event calendars). Nineteen recommendations were made to improve communication within the parish community, but were not specific in terms of the way this should be accomplished ("to increase awareness of our parishioners and the community at large of parish programs and activities").   There were 10 recommendations concerning the need for better communication among the many organizations within a parish ("ensure that all parish organizations communicate and support one another" and "tolerance and more communication among organizations. Joint meetings which will be informational"), and nine others recommended the formation of communication committees to facilitate the sharing of information.

Reach Out to the Communities in Which the Parish Exists

Outreach to the community was the focus of 79 recommendations. This was delineated as outreach within the parish community (13), outreach to the surrounding community (54) , and outreach with the expressed purpose of evangelization (12). Recommendations concerning outreach within the parish community spoke of the importance of personal contact and expressions of care and concern for fellow parishioners. The recommendations about outreach to the proximate community highlighted two main reasons: for civic involvement and to raise awareness of the good works taking place within the parish community. Three reasons were noted for engagement in civic affairs: to witness by action to the mission of Christ, to improve the communities around the parish and to influence public policy. Although reasons for engagement are given, few directives are given concerning who should be engaged and the manner in which they should be involved.   Five recommendations stressed the importance of

cooperating with other faith communities to strengthen the community of which the parish is a part. Over half of the recommendations concerning outreach for the purpose of evangelization specifically mentioned the need to reach out to inactive and alienated Catholics.

Recognize Worship and Prayer as Times to Build Community

There were 63 recommendations made by 46 parishes which noted worship and prayer as ways to foster Christian community. Ten recommendations addressed how what takes place at Mass - the atmosphere, the homilies and the music - strengthens the sense of community. The parish pastoral councils also mentioned how opportunities to grow together in the understanding of their faith would also nurture their sense of Christian community. Parish missions and retreats were mentioned as ways to do this. They also cited small group experiences such as Bible study, neighborhood/block prayer, small prayer groups, mens' prayer group and faith sharing groups as ways to provide for this need.

Create Opportunities to Gather and Socialize

The pastoral planners also saw opportunities to gather as ways to strengthen the sense of Christian community and made 57 recommendations concerning the need to socialize together. Fourteen recommendations made general statements concerning the importance of social gatherings to the parish community. Thirteen additional recommendations called for "Parish Days" when all parish organizations would be present to highlight their activities and recruit members. These were perceived as opportunities to socialize as well as to share information. Other recommendations included: parish picnics, the creation of social committees, parish service days, shared meals, and days to celebrate ethnic traditions.

B. Other Recommendations to Build Community

The remaining recommendations made up a little over one third (37.3%)of the total were dominated by recommendations to provide support service for various groups (54), support families (39)and develop structures within the parish(79) in order to carry out community building. Taken together these three categories made up 16% of the recommendations.

Recommendations to Be of Service

A small group of parish planners identified opportunities to be of service as a means to strengthen

community. Support services provided to the parish and surrounding community were included in 54

recommendations. These were delineated by three main services: assistance for those who are grieving, support

groups of various types, and material and referral assistance for those in need

Importance of Family within the Christian Community

The planners made 39 recommendations concerning family life within the Christian Community. Their

recommendations expressed their concern for families in general, single parents and families in crises.   These

recommendations stated a desire to strengthen family life, provide a supportive community for families and involve

families more fully in the life of the parish. Concern for family life was also noted earlier in this analysis in

recommendations concerning worship ("...ongoing prayer specifically for family life") and ("have a family Mass for

all parish families"), and opportunities to gather and socialize ("establish some family and social events").

The concern of the planners for strengthening Christian Community through the support of the families

within the parish reflects that expressed in *The Parish: A People, A Mission, A Structure* a Statement of the

Committee on the Parish, November, 1980 of the NCCB - "*.....the parish finds the ways it can nourish the love and*

trust, intimacy and responsibility within families. This same concern for the roots of faith and love directs the

parish to the special needs of single parents and of those without the support of family life. Parish programs

support families and individuals of all ages, animating their own faith and ministry".

Recommendations for Structure to Support Community

Seventy nine recommendations focused on structures that the planners felt needed to be in place for the

parish to carry out community building. There needs to be parish organizations, parishioners actively involved in

these, the talents and resources of these parishioners, and leaders. "Active" involvement in the organizations of the

parish is seen as a means to enhance the parish community, provide services needed and foster growth within the

parish. The importance of involvement of parishioners in parish organizations is addressed in 28 recommendations.

Thirty five of these recommendations spoke to the aggregate of parish organizations and their common

needs. The planners expressed that it was essential for the organizations of a parish to understand their own mission,

be able to communicate this mission, and to cooperate and collaborate with other organizations within the parish

community. Within other categories of recommendations, the planners called for the creation of new organizations

to undertake the work seen as necessary to strengthen Christian community, i.e. communications committees, welcoming and hospitality committees, youth ministry boards, social committees and committees to study needs within a parish.

Leadership is addressed in 10 recommendations. The planners speak to the need for formation and training of parish leaders. Stewardship is mentioned specifically in 5 of these recommendations.

Incomplete Recommendations

There were also seventy five parishes who expressed a general need to foster community in 93 recommendations. There was great similarity of intent, but not of means. The planners appear to have an understanding of what needs to be in place to nurture the Christian Community within a parish, but do not offer specific direction on how to do this.

C. Particular Recommendations to Build Community

In addition to the categories of recommendations already reviewed, some particular topics addressed in a small number of recommendations, may provide other insights that the planners had regarding ways to strengthen their own communities.

Physical Plant

The physical plant of a parish was noted as a factor in strengthening Christian community in 37 recommendations. Twenty-seven recommendations suggested ways in which the space of the parish could be utilized for meetings, gatherings, athletic activities and the larger community. Ten of these recommendations dealt with making the church and parish facilities more accessible to those with physical limitations. This recognition of the need to be more mindful of the physical barriers to involvement in the life of the parish complements recommendations identified earlier to further engage those with disabilities in the activities of the parish.

Education

The parish planners made 33 recommendations which listed education as a means of strengthening Christian Community. These concerned the need for education in order to better understand the meaning and mission of a Christian community and suggested education as a way to raise awareness of specialized issues (i.e. respect life, family life, community needs). Other recommendations specifically addressed the importance of life long faith formation and the need to enhance the parish school.

Accurate Data

Twenty one recommendations perceived accurate data as another means to strengthen Christian community. The parish plans call for the use of data in order to increase awareness of the needs of the parishioners (9), to provide an understanding of who comprises the parish community (6), by making data available in a database (3) and by gathering data in surveys (2). This appreciation for the uses of data by parish communities is noteworthy. Although cause and effect would be hard to determine, it is important to note that the members of the parish pastoral councils reviewed a great deal of data about their parish during this self-study process. Some members were seeing this data about their parish for the first time. The planners are now aware of the information that is available within a parish community and have witnessed the utilization of this data when addressing the pastoral and temporal concerns of a parish.

Changing Environment

There were 12 recommendations made by nine parishes concerning the changes in the environment surrounding the parish. Among these were proposed programs to respond to changes in lifestyles, families, and neighborhood such as employment and after school programs.

Conclusions

In their introduction to the document "Communities of Salt and Light", the National Council of Catholic Bishops present a description of a parish: *"The parish is where the Church lives. Parishes are communities of faith, of action and of hope. They are where the gospel is proclaimed and celebrated, where believers are formed and sent to renew the earth. Parishes are the home of the Christian community: they are the heart of our Church."*

The majority of the 1,077 recommendations are concerned with providing an atmosphere of welcome and acceptance. They also expressed a desire to engage those who may be feeling that they are not fully a part of the parish community. There was an appreciation on the part of the planners of the individual's need to have a sense of belonging within a community of faith. As important as this sense of membership is to the individual, it is also essential to the structures within a parish that help the parish to carry out its mission.

These 1077 recommendations prescribe an agenda for strengthening community for the next five years. They express an awareness of the many groups present within the parish and the variety of needs within the

community.   However, many of the recommendations do not have the 3 elements of an effective plan of action - a means (program), an audience (those who will receive a program) and providers. This may lead to some frustration as efforts are made to implement these plans. Implementers may need to seek out those who envisioned or wrote the plan in order to learn of their intent.

In light of the recommendations for the parish to be engaged in the surrounding community, this chapter may be of particular interest to Archdiocesan office staff involved with pastoral or civic outreach, or evangelization. The offices for youth ministry and persons with disabilities may wish to work collaboratively with persons identified in the parishes as implementers of these recommendations to help them not only to develop programs to address the needs of these groups, but also to engage youth and persons with disabilities in services and ministries to their parish. Other offices that provide program for families or offer support services may wish to review these recommendations to have a better understanding of the services that parishes believe that they need.   The fact that all of the other aspects of parish life addressed by the self study (worship, teaching, evangelization, service, stewardship and leadership) were present in the community recommendations seems to indicate that the parish planners recognize that strengthening community enriches the foundation in which these other aspects of parish life can be rooted and nurtured.

"Whatever the form, a parish seeks to become evermore fully a people of God, sharing the mission of Christ , and developing the structure necessary for supporting its community life and carrying out its mission." (The Parish: A People, A Mission, A Structure, p5)

Chapter Six

PARISH RECOMMENDATIONS TO CARRY OUT THEIR WORK OF EVANGELIZATION

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In this chapter, we report the results of parishes using the parish self study process to develop recommendations to carry out their work of evangelization. Of the 284 plans reviewed, 249parishes developed 1.027 recommendations in the area of evangelization. At the time this chapter was developed, only 270 parishes had submitted their plans. This review includes only those 270 parish plans.

Of the 270 plans submitted, 235 plans (87%) specified 980 recommendations in the area of evangelization. The expressed need for evangelization was primarily rooted in data that parish pastoral planners, including the pastors, were considering for the first time. Data available to the parish pastoral councils included an annual count of Sunday Mass attendance since 1990, and their parishioners' responses to items pertaining to evangelization in a survey conducted as part of their parish self study. Observed Mass attendance averaged around 33% of the registered Catholic population and there was a large percentage of undecided response to the survey items on evangelization.

Summaries of <u>Evangelization in the Modern World (Evangelii Nuntiandi)</u> and <u>Go and Make Disciples: The National Plan and Strategy for Evangelization in the United States</u> were provided to each of the parish pastoral councils as they began the work on parish self study. These two documents are used by the authors to provide a framework against which the recommendations of the Parish Pastoral Plans may be compared.

Parish Plan Recommendations Aligned with Evangelization in the Modern World

All of the parish recommendations were coded for any mention of three foci identified in the Apostolic Exhortation of Paul VI, <u>Evangelization in the Modern World</u>(EN): **beneficiaries, methods,** and **workers**. In the 980 recommendations, a total of 1,358 mentions were coded. There were more recommendations naming **methods** of evangelizing (630) than either those identifying particular **beneficiaries** of evangelization (440) or those

identifying **workers** for evangelization. (288).   Only three of the recommendations could not be coded with any of these three categories. These categories were further divided into 25 particular beneficiary groups, 35 particular methods and 27 particular kinds of workers.

Beneficiaries of Evangelization

The beneficiaries of evangelization named in EN were: everyone, people in the faith, those who are far off, those who never heard the Good News, non-Christian religions, those who seek a deeper faith, those not in full communion with the Church, non-believers, non-practicing, the multitudes, and communities who see themselves as inspired by the Gospel but are not connected to any structure or system. Because of the similarity in definition of some of these named as beneficiaries, the authors developed three discrete sets of categories:

1) **Believers** include "everyone, people in the faith, those who seek a deeper faith";

2) those who are outside the membership which would include **"non-practicing"** alienated, fallen away, non-participating, not attending regularly

3) the **multitudes** and those who may be **non-believers** encompassing, those who are not in full communion with the church, those who have never heard the Good News, those of "non-Christian religions." or those described by the planners as "the neighborhood."

One category not named in the parish plans but named in EN was "those who see themselves as inspired by the Gospel but **not connected** to any structure or system." Another category named in EN was **"those who are far off"** which indicates the missionary work of the Church. The pastoral plans never directly address this role of the parishioners. Some beneficiary was named in 32% of the recommendations. Believers were named as the primary beneficiaries in 16% of the cases. Another 9% of the recommendations were directed at non practicing Catholics. Only 8% of the recommendations named non believers and the multitudes as primary beneficiaries.   While EN declares that "The Church is deeply aware of her duty to preach salvation to all…knowing the Gospel message is not reserved to a small group of the initiated, the privileged or the elect but is destined for everyone" (EN, 57), the parish plans reveal that the plans for evangelization efforts are primarily focused on the faithful or those just beyond that circle.

Table 6.1 Evangelii Nuntiandi - Coding Scheme (Beneficiaries)
<u>1) **Believers**</u>   N=215

The core group of Catholics (**Active parishioners**) who appear to be active in the parish, need support to

TABLE 6.1						
	Evangelii Nuntiandi - Coding Scheme					
	(Beneficiaries)					
Code 3		Description	Responses	Share of	Share of	
				Beneficiarie	All Recommendations	
		Believers	**215**	**49%**	**16%**	
030		Active parishioners	68	15%	5%	
410		Youth	39	9%	3%	
080		New parishioners	27	6%	2%	
440		Parish groups	20	5%	1%	
020		Adults	19	4%	1%	
340/350		Religious Education for Sacraments	11	3%	1%	
160		Children	10	2%	1%	
330		Parents	9	2%	1%	
170		CCD	5	1%	0%	
200		Handicapped/Homeless/Aged	4	1%	0%	
370		Senior Citizens	2	0%	0%	
180		Divorced/Separated/Grieving	1	0%	0%	
		Non-Practicing	**121**	**28%**	**9%**	
060		Inactive parishioners	79	18%	6%	
050		Alienated parishioners	13	3%	1%	
110		Catholics who do not attend church re	12	3%	1%	
290		Fallen away	11	3%	1%	
090		Non-participating parishioners	6	1%	0%	
		Multitudes and Non-Believers				
			104	**24%**	**8%**	
190		Ecumenical/interreligious	48	11%	4%	
310		Neighborhood/community	27	6%	2%	
120		Unchurched	12	3%	1%	
320		Non-catholics	9	2%	1%	
400		Visitors	3	1%	0%	
420		Invite a friend to church	2	0%	0%	
130		African-American community	2	0%	0%	
240		Interreligious Dialog	1	0%	0%	
		Total Beneficiaries	**440**		**32%**	

become involved in evangelization methods. The "need to present parishioners with the opportunities to strengthen

their knowledge and understanding of the scriptures and our Catholic faith," to bring active members to "a deeper

faith in bringing the message of Christ to alienated Catholics," and to their role to "reunite inactive members of the parish" reveals some recognition of the role of those already committed to the faith to exercise "apostolic initiative."

Planners seemed particularly concerned with the **youth** in the community. They want to engage the youth in parish activities to "rejuvenate young parishioners in their faith." A "youth ministry program," seems to offer some structured approach to drawing youth into the parish community. Planners use expressions such as "enhance teen outreach and inclusiveness," "provide a fellowship program for youth," "participate in diocesan youth and young adult activities."

Parish groups and organizations on the whole were named as beneficiaries who would be open to deepening their faith. Phrases such as "**adult** education programs," "adult formation experiences," and "adult sessions for discussion," seem to imply that planners believe adults need updating in some knowledge of the Church. One recommendation recognized that to implement any adult education program would require further exploration of the learning needs of those to be addressed: "invite the various parishioners mentioned and invite them to express their needs."

Twenty-seven recommendations identified a need to "evangelize" those designated as "**new parishioners**." There was also some recognition of a need for children to be active in their parish. "Involving children in the activities of the parish" is identified as a place for bonding in the membership. **Candidates for sacraments** already seeking fuller participation in the parish community and their formation were identified as prime audiences.

The need for "encouragement and support" for **parents** sees these persons as "target groups" ready to pass on the heritage of the faith but perhaps in need of some community assistance in sustaining initial incorporation of their children into the membership. Other categories named included **Handicapped/Homeless/Aged** and **Senior Citizens**. One of the initiatives aimed to reach across generations to link the old with young: "Children should adopt a grandparent from among parish senior citizens." **Divorced/separated/grieving** were identified as in "need of support."

2) **Non practicing** N=121

Because of their access to the annual count of Mass attendance, members of parish pastoral councils know that approximately one third of the registered members in their parishes attend weekly Mass. One hundred and

twenty-one recommendations directed evangelization efforts toward the other two-thirds: "former Catholics," "non-active Catholics," "those not active in their faith," "marginal" but in most instances simply **"inactive**." The expressions "fallen away" or "lapsed Catholics" were also used.

The term **"alienated,"** while never defined, was often used in conjunction with other terms that seem to open up the intent of the writer: "Reach out to alienated and unchurched," "Those who feel alienated, or who have fallen away from the Church." In contrast to the former or inactive Catholics, the term "alienated brothers and sisters" would suggest that these members of the parish family are missing as a result of some circumstance that the parish may be able to address.

Catholics who do not attend Church regularly and **non participating** were classified as "not attending weekly liturgies," and "parishioners not regularly attending" and "non-practicing" or "non-participants." There was the intent expressed to "find out why and try to do something about it." "Lax relatives and friends" were named as persons who would be accessible to the more active members.

3) **The "multitudes" and non-believers** (N=104)

The number of recommendations directed toward **ecumenical** activities "uniting efforts with other church groups" to bring people to a greater awareness of the Gospel and in particular to the Catholic faith, indicates a wide interest in "dialogue and interaction with other religious congregations." The need to establish "interfaith" activities ranging from "sharing pulpits" to "community prayer services" and "neighborhood dialogues" and "forming alliances with the ministerium and rabbinate associations in the area" reveals an openness to influence and be influenced. None of the recommendations are stated with a clear intent to "convert" to Catholicism.

Unchurched persons were sometimes named in conjunction with "alienated" Catholics. Some recommendations were more specific describing these persons as "people who do not belong to any church" and "persons with no church affiliation." Also included were "occasional worshipers" and "un-baptized people in our parish area." The initiatives that focused specifically on **"non-Catholics"** described distinct behaviors on the part of the planners, "to leave ourselves open to non-Catholics" and to "invite non-Catholics to join our faith."

Neighborhood/Community encompasses a nebulous group of people who may or may not have knowledge of Catholicism or interest. The proximity of these persons to Catholics in the parish may be the only reason they are

named. The initiative to "promote social justice consciousness in the community" and to develop "a neighborhood ministry structure" reflects the urging of the Church to proclaim the Gospel message to the multitudes.   One parish indicated the potential for "more opportunities for dialogue with the **African-American community. "**

Workers for Evangelization

Twenty-one percent of the recommendations identified workers for evangelization. These were divided into three groups: unspecified roles, and role specific workers within the parish community and outside the parish community. Thirteen percent of the recommendations identified workers with specific roles within the parish community; 7% were unspecified roles, and only 1% of the recommendations identified workers with roles outside the parish.

Unspecified roles   N=101

The categories of Parishioners, We/all parishioners, Active members and Volunteers (a total of 83) are the least role specific among the evangelization workers identified. We could assume that **"parishioners"** indicate all who are working in the parish in some capacity, or those to be asked. The **we/all parishioners** could mean that evangelization is everyone's job; **active members** might point to a particularly faithful and generous sub-set; and **volunteers** covers everyone asked and willing. The vagueness of these designations may be consistent with a general sense that something has to be done about evangelizing and someone has to do it.

Table 6.2 Evangelii Nuntiandi - Coding Scheme (Workers)

Code 3	Description	Responses	Share of Workers	Share of All Recommendations	
	TABLE 6.2				
	Evangelii Nuntiandi - Coding Scheme (Workers)				
	Unspecified roles	**101**	**35%**	**7%**	
440	Parishioners	62	22%	5%	
650	We/All parishioners (unspec.)	28	10%	2%	
020	Active members	6	2%	0%	
640	Volunteers	5	2%	0%	
	Role specific workers within parish community	**174**	**60%**	**13%**	
130	Evangelization committee	72	25%	5%	
550	RCIA team	14	5%	1%	
430	Parish groups/organizations	13	5%	1%	
570	Faith-sharing groups	13	5%	1%	
070	Clergy	11	4%	1%	
140	Evangelization coordinator	8	3%	1%	
660	Greeters/Welcoming committee	7	2%	1%	
150	Hospitality/welcoming committee	5	2%	0%	
630	Visitation committee	5	2%	0%	
520	Public Relations committee	5	2%	0%	
180	Existing ministries	5	2%	0%	
670	Youth minister	3	1%	0%	
410	Parish Pastoral Council	3	1%	0%	
420	Parish leadership	3	1%	0%	
200	Legion of Mary	2	1%	0%	
230	Inter-parish cooperation	1	0%	0%	
340	Businessperson's group	1	0%	0%	
460	Calling chain/committee	1	0%	0%	
480	Pre-catechumenate team	1	0%	0%	
100	Diaconate	1	0%	0%	
	Role specific workers outside parish community	**13**	**5%**	**1%**	
400	Guest speakers	10	3%	1%	
620	Teachers	2	1%	0%	
010	Archdiocesan representatives	1	0%	0%	
	Total Workers	**288**		**21%**	

The more role specific designations express confidence in the ability and willingness of persons named to see the work they do as evangelizing work.

Actions directed toward **parishioners** as workers express a need for "encouragement," "education," "development," "confidence," and "awareness of responsibility." This may indicate that the planners recognized a need for preparation of parishioners for the specific role of evangelizing. Whenever a parish council wrote the plan

in the first person **(We/All parishioners)**, they did not seem to specify if they were speaking on behalf of the whole parish community or for themselves as a group. In some instances, words leave little room for evading the basic responsibility of active members in bringing others into the community. "Catholics must be convinced that reaching out to the inactive, alienated and unchurched is the duty and the privilege of everyone who claims to be a follower of Jesus." Recommendations for "Recruiting of volunteers," seem to recognize that evangelization would be an added parish task not to be placed on already burdened volunteers.

Role specific workers within the parish community   N=174

Perhaps the easiest way to get something started is to assign it to a committee. This would seem to be the case in the volume of recommendations that looked for the assistance of an **Evangelization Committee/Team** to carry out the critical work of spreading the Gospel. Structured organizations have traditionally served parishes well and confidence in their ability to "get things done" may have influenced the planners. The word "team" is sometimes used in place of "committee" but the concept remained stable: "Structure an evangelization committee to meet the needs of the parish while adhering to the Archdiocesan guidelines," "Guidelines should be written for the Evangelization team, including each member's job description." "Begin a parish group whose task will be to dialogue with alienated Catholics at the parish or cluster level," "Formulate a vision and plan: form and train a team; establish a time line and accountability," "Get a nucleus of 50 evangelists then bring in Paulist program to develop their skills."

Along with the establishment of a committee or team, some parishes see the need for an **Evangelization coordinator**. This person is seen as a "committee leader" and is given responsibility "to oversee a persistent program of evangelization." The permanent role of a designated coordinator is also seen as part of an "evangelizing ministry."

Committees/Organizations are those that provide structure for community building and service. Again, the presence of a committee seemed essential to insure that evangelizing would happen. As an example the welcoming process could be made the job of a committee to support its success and parish committees working together would also increase their strength. Confidence seemed to exist in parish groups and organizations, already made up of volunteers from the active group of parishioners. "Encourage the expansion of good core groups,"

"more awareness of the role of parish organizations in evangelization." New groups were called for, including visitation committees not yet established and a "business person's group." The task of a (public relations) "**PR committee** would be to improve communications both internal and external." While this is a rather specialized skill, no recommendation was clear whether to hire professional assistance or rely on the good will of select parishioners.

Existing ministries give service to the sacramental life of the parish. Ministries that are included are Eucharistic Ministers, RCIA teams, and pre-catechumenate teams in whom the parish places trust to "offer support to those seeking to be a part of the faith," "educate parish leaders of the ways to evangelize, their role to evangelize, and the full meaning of evangelization." Another suggestion was to "utilize our Eucharist ministers to provide the Sacrament for the sick, elderly or handicapped."

The work among youth was seen as critical among "beneficiaries" thus this desire for developing the role of **youth minister** seems consistent with the general planning to re-engage youth in the life of the church. In some cases, the **Parish pastoral council** assigned the task of evangelization to itself or other lay leaders. **Faith sharing groups**, parishioners who gather in their homes or churches to pray together and to offer one another spiritual support, are named. The recommendations for formation of these small communities seemed to assume that they would, in and of themselves, bear witness to the faith and, "create faith sharing groups.".

Planners looked to their **clergy** but not with the frequency that might be expected given the history of the pivotal role of the priest in parish activities. Priests hold a central role in a sacramental church and yet were identified as active evangelizers few times. Recommendations such as "parish clergy will welcome and seek to reunite inactive and alienated members through parish visitation and availability, " "Continue programs of visitations by priests and correspondence programs to invite inactive and alienated Catholics back to Church," indicate the perceived importance planners gave to the presence of a priest in the lives of the inactive and alienated. The role of the **deacon** in parish life did not appear to most planners as appropriate for evangelizing work even though it is likely that these men would have opportunities to engage others in conversations or activities focused on spreading the Gospel. Clarity around the role may be needed or a greater familiarity with their functions.

Religious sisters and brothers were identified as having a very specific role in evangelization in EN. But religious sisters and brothers were never specifically named by parish planners as evangelizers who could work in

the parishes.

Specific roles outside the parish community   N=13

A few parishes identified other persons outside the parish who would serve in specific roles as ministers of evangelization. Some identified **teachers and speakers** who would address issues of concern to evangelizers. Some **Archdiocesan personnel** are trained evangelization workers; however, only one parish directly identified these workers.

Methods of Evangelization

Methods of evangelization were named in 46% of the recommendations. The proposed methods reflected the diversity of the 270 reporting parish congregations. Eighty-five percent of these were able to be associated with one of the eight areas identified in Evangelization in the Modern World(EN) as having "fundamental importance" to communicating the Gospel. (EN, 40)   These methods are witness of life, preaching, liturgy of the word, catechetics, use of mass media, personal contacts, the sacraments, and popular piety.   Fifteen percent of the recommendations proposed methods of planning, surveying, or other activities that may have been quite significant to the parish councils who proposed them but for which there is no comparable method identified in EN.

Education **(Catechetics)** was the most common method identified. Education was identified in 12% of all the recommendations. Recognizing a lack of experience and, in some cases, a discomfort with the term, the recommendations identified the need to provide a "Catholic" definition of evangelization. "Define evangelization in a post-conciliar church." "Teach parishioners the broad meaning of evangelization along with ways to share their faith with those around them." "Teach the meaning of evangelization to allay fears and misconception." "Teach the broader meaning of Evangelization."

Table 6.3 Evangelii Nuntiandi - Coding Scheme (Methods)

General education, and in particular, adult education was the focus of the largest number of recommendations with

TABLE 6.3						
		Evangelii Nuntiandi - Coding Scheme				
		(Methods)				
Code 3		Description	Responses	Share of Methods	Share of All Recommendations	
		Catechetics	**164**	**26%**	**12%**	
780		Develop, promote RCIA	40	6%	3%	
700		Education	33	5%	2%	
730		Adult education	33	5%	2%	
760		Train evangelizers	27	4%	2%	
740		Define evangelization	15	2%	1%	
770		Paulist program/Landings	8	1%	1%	
710		Outside speakers	4	1%	0%	
720		Catechism study	4	1%	0%	
		Mass Media	**88**	**14%**	**6%**	
400		Advertising	51	8%	4%	
300		Direct mail	20	3%	1%	
350		Newsletter	17	3%	1%	
		Personal Contact	**90**	**14%**	**7%**	
521		Parish visitation	24	4%	2%	
520		Personal contact - active	23	4%	2%	
217		Faith sharing groups	15	2%	1%	
222		Small church communities	12	2%	1%	
510		Personal contact - passive	9	1%	1%	
530		Personal contact - systemic	7	1%	1%	
		Life Witness	**79**	**13%**	**6%**	
110		Welcome new people	25	4%	2%	
140		Atmosphere of welcome	22	4%	2%	
120		Welcome less active	21	3%	2%	
130		Welcome visitors	11	2%	1%	
		Popular Piety	**48**	**8%**	**4%**	
210		Prayer	16	3%	1%	
230		Parish renewal activities	12	2%	1%	
231		Missions	11	2%	1%	
232		Retreats	6	1%	0%	
216		Prayer groups	3	0%	0%	
		Sacraments	**38**	**6%**	**3%**	
640		Sunday Liturgy/Mass	24	4%	2%	
620		Other Liturgy/Sacraments	14	2%	1%	
		Liturgy of the Word	**18**	**3%**	**1%**	
221		Bible study groups	16	3%	1%	
220		Reference scripture	2	0%	0%	
		Preaching	**7**	**1%**	**1%**	
610		Homilies/preaching	7	1%	1%	
		Other	**96**	**15%**	**7%**	
900		Other	55	9%	4%	
850		Planning	26	4%	2%	
851		Surveying	11	2%	1%	
800		Family	4	1%	0%	
		Total Methods	**628**		**46%**	

the suggestions varying widely.   "..teach the Gospel message of love and thereby to draw new members to the body

of Christ." "Establish parish video/audio/book library of Catholic material." "Provide for continued faith

development through proper experience and training programs to enhance spiritual growth." "Use the parish bulletin

as a way to build consciousness in evangelization." "Improve communications between the organizations, the people and the pastor." "Encourage parishioners to read."   Requests in adult education were made for outside speakers, catechism study, and the Paulist Fathers/Landings program.

Development and promotion of the RCIA program were cited in three different ways: 1) to create opportunity for active parishioners to learn more about their faith as participants; 2) to provide roles for laity to play in this evangelization activity, and 3) to create opportunity for others to learn more about the Catholic Church. Development involved a range of activity depending on the local situation from "taking another look at RCIA..", to beginning a program in a parish where one did not exist, to recruiting more people to take an active role in an existing program, to more actively promoting an existing activity to the general public.   There were additional recommendations to train active parishioners specifically for an evangelizing role (27) without making reference to RCIA.

The need for better communication within parishes, between the parish and the local community, and the use of **mass media** was addressed by 6% of the parish recommendations. The most common recommendation in media was **direct mail** and the development of a **newsletter** "to help parishioners in learning more about their faith." There was recognition that parishes needed to use direct mail to communicate with parishioners on a frequent basis. "Periodically mail church bulletins to non attendees." "Send literature to the homes of parishioners." "Implement computer program to send out pastoral letter to registered parishioners.. Send to all quarterly." "Send direct mailing to parishioners inviting them to special devotions." "Prepare a booklet for all parishioners listing all pertinent information which would be updated and distributed yearly."

Media besides direct mail were also identified including, advertising in local newspapers, message boards at church, radio, signs in store windows, and flyers. "Investigate the prospects of preparation and maintenance of (parish) Homepage on the Internet."

Personal Contact took the form of proposals to form faith sharing groups and the development of small church communities. "Develop a plan for more faith sharing in small groups and within family" "Create short programs for faith sharing with other parishioners with sacramental closure." ".. create smaller groupings in parish neighborhoods where the Gospel can be shared and experienced; where needs of parishioners can be surfaced and

addressed." "Create parish cells in which parishioners discuss their faith and how to bring their faith to the workplace, family, neighborhood." "By bringing the church to the parish blocks, the non practicing Catholic can be invited to come and see what the Church has to offer." "Break down the parish into small units as a means of enhancing communication, encourage enthusiastic response to parish programs, and the spreading of the faith."

Other **personal contact** was proposed in a number of ways. Passive contact included things like coffee after , talking sessions and publishing phone numbers. "Put the shrine daily message phone number in the bulletin so parish people may make use of it" "Talk to us sessions held in the rectory or in parishioners' homes." "Organize a 'ministerial fair' to showcase our parish organizations." Recommendations for active personal contact generally took the form of invitations to parish events, home visits or follow-up to home visits. "Invite people to join our activities" "Knock on doors" "Conduct home visits to all registered parishioners just to say hello and see and hear how things are going." "Initiate a home visitation program through the Evangelization Team who will work with the Comboni Sisters." "Create visitation program for people to people in the summer" "Follow up absences from parish visitation program-call-reach out." In some instances a systematic approach was proposed. "Create a sacramental follow-up program" "A phone chain inviting all parishioners to the liturgy" "Develop a program to systematically contact members who discontinue or do not attend Mass regularly."

In parish recommendations, **life witness** seemed to take the form of creating a more welcoming parish life environment. Several parishes wanted to create "an atmosphere of welcome." Welcome was actually thought about in three ways. Welcome of new people moving into the parish was identified most frequently. These suggestions included welcome receptions, packets, letters, announcements, welcome wagons, hospitality ministry and "buddy" systems. Welcome to alienated Catholics, those less active, or those who were more active at some other time in their lives was the second largest group. Welcome home Masses and programs were cited. Finally, welcome to visitors, strangers, those not associated with the Catholic Church made up the smallest number of welcome recommendations. These included providing guest books and welcoming visitors in the liturgy.

Popular piety appeared to take the form of calls for prayer and prayer activities, prayer groups, missions, retreats and other parish-based activities. "All evangelization must start with prayer, especially asking for the grace to listen and for the Holy Spirit to open the hearts of the people." "prioritize prayer in organizations.." "Add Hail

Mary after every Mass for evangelization" "Add an intention to the prayer of the faithful" "Pray with intercession at every " "Offer prayer socials" "Implement prayer warriors" "establish ministry of evangelization that would promote small group prayer in homes..." "Use of revival to bring souls to Christ" "..the centering of Santo Nino devotions from the home to the Church" "...yearly weekend retreat that would initially focus on renewal of representatives form many parish organizations..." "'Witness' testimony..." "...develop a 'contract' to live by faith commitment..." "...go through once again the RENEW program..." "Hold a parish renewal period"

"Cursillo Movement was mentioned as a possible tool for evangelization..." "Plan a parish mission or retreat," "Mission day," "program of outreach, including missions," "encourage more men of the parish to participate in our parish's annual Malvern Retreat," "Conduct whole family retreats / gathering for educational sharing," "Utilize retreat promoters to speak at ." are examples of statements made in this area.

The **Sacrament** of the Eucharist, (specifically the Sunday Mass), was most often seen as the sacrament where evangelizing activities could be increased. Improvements to Sunday liturgies included calls for a change in the manner in which the liturgy is conducted. "..emphasis must be put on joyful celebration.." "renew spirit sense of joy" "...facial expression-spirit of joy."   Particular recommendations were "Better proclamation of the word.." "Utilize more children in Sunday service" "Expand music program for vigil.." "Obtain cantors for every Mass." "Ensure participation, especially in the selection and use of music." "Have visiting homilists" "Have lectors announce important news and events." Additions to the Sunday liturgies were also proposed. "A Mass for all organizations..", "Re establish a Sunday Mass for children and their parents" "Need for African American liturgical...expression" "a running commentary Mass "

Other liturgical initiatives were proposed. "Identify and introduce additional liturgical activities (i.e., sacramental classes, parish wide processions, etc.)" "More directive penance service," "Implement Perpetual Adoration," "Home Masses," "Use special liturgies (for example Baptism, confirmation, weddings and funerals) as opportunities to evangelize," "Sunday family event," "(be)Creative as a community, special liturgies, healing Mass, ecumenical services."

There were several recommendations to develop **Bible study groups**, to reference **scripture** in other activities, and to enhance Sunday Mass by strengthening the proclamation of the word.   There were only seven

recommendations to enhance preaching as a means to evangelize. The reason for a lack of attention in this area is not clear and needs to be investigated further.

Examples of recommendations that were coded into these **other** categories (n=96) include: "Ask every parish organization to self assess regarding their role in evangelization" "Appoint a full time coordinator of evangelization" "Require each parish organization to develop a mission statement" and "Physically double or triple the size of our church vestibule to allow for greeting and conversation."

Conclusion of the Review of the Parish Pastoral Plans with Reference to Evangelization in the Modern World

Of the 980 recommendations coded, about 33% included "beneficiaries and methods," "beneficiaries and workers," or "methods and workers."   But in only 3% of the cases were all three named. Most often, (63% of the time) only one focus was named. Very few recommendations allotted specific resources for supporting the evangelization efforts. In most case the method for evangelization would come about because of the efforts of workers (clergy, deacons, religious, lay staff) already in place or through the gift of time and talent of volunteers. Much of this allocation of tasks to others assumes a degree of interest by the people named and a degree of good will by the people who would receive the benefit of the work.

The methods themselves reflect the traditions of many other religious groups who have a message to communicate. However, results of methods remain untested. The authors are not aware of any research which can demonstrate a direct correlation between the methods of evangelization and the receiving.

Go and Make Disciples: Alignment of Parish Recommendations to the National Plan

The goals of <u>Go and Make Disciples</u> focus on three dimensions: **personal enthusiasm** for the faith, the **active invitation** by believers to all persons to hear the message of salvation, and the **transformation of society** through the power of Gospel teachings.   908 (93%) of the 980 responses were coded into 30 major response areas that corresponded to areas of initiatives associated with the three major goal areas in the national plan. In addition, there were 49 recommendations calling for further planning (code 4.1), staffing or structure changes (code 4.2) to carry out evangelization. Twenty-three (2%) of the recommendations were not able to be associated with any goals of the national plan.

In the national plan, the parish is identified as the most fitting place for evangelization to be carried out.

"The goals assume that an evangelizing spirit will touch every dimension of Catholic *parish* life. Everywhere Americans see Catholics and Catholic institutions and in all of these they should sense the spirit of evangelization" (Go and Make Disciples, p.52). Thus, the message to evangelize is broad, general and ongoing. The plan itself contains three broad goals involving interior change on the part of the faithful, active invitation to others to hear the Gospel, and the fostering of gospel values in society in general. (For the sake of clarity and ease these were dubbed by the authors as inside, outside and all around the town) Each of these particular strategies contained a description of means for reaching the goals.

Table 6.4 Content Analysis Summary Table: Parish Plan Recommendations Aligned to the National Plan for Evangelization, "Go and Make Disciples"

TABLE 6.4			
Content Analysis Summary Table: Parish Plan Recommendations Aligned to the National Plan			
			Total Parish
National Plan and Strategy for Catholic Evangelization in the U.S.	**Code**	**Recommend.**	
Goal 1. Increase the enthusiasm of Catholics for their faith in Jesus that they want to share their faith with others.			188
Foster:			
an experience of conversion in every believer	1.1	74	
make evangelizing of Sunday Eucharist more explicit	1.3	27	
an appreciation of God's word	1.2	19	
an experience of conversion in every parish	1.11	17	
a deeper sense of prayer among our people	1.4	16	
a sense of discipleship among adults and children	1.6	15	
an appreciation of presence of Christ in sacraments	1.31	9	
renewed understanding of faith	1.5	5	
shared faith experiences (small groups)	1.41	2	
foster a sense of church in households	1.7	2	
promote and develop spirituality in workplace	1.8	1	
greater appreciation of cultural and ethnic spirituality	1.9	1	
Goal 2 Invite every person in the U.S. to come to know Jesus in the fullness of the Catholic faith.			704
to invite effectively people to our Church	2.3	182	
to equip and empower Catholics to exercise their baptismal call	2.7	116	
programs of outreach for those ceased being active in the Church	2.4	101	
to cultivate an active core of the baptized to evangelization in their parishes,	2.9	79	
to deepen ecumenical involvement	2.11	58	
to make every Catholic parish, more welcoming	2.1	53	
to use special times in parish and family life to invite people	2.8	53	
to help every Catholic feel comfortable about sharing his/her faith and inviting people to discover Christ	2.2	31	
programs that reachout to those who do not participate in a church	2.5	20	
to develop capacity to share the Gospel within families and households	2.6	10	
to foster cultural diversity within the unity of the church	2.91	1	
Goal 3: "To foster gospel values in our society, the importance of family, and the common good of our society so that our nation may continue to be transformed by the saving power of Jesus Christ."			16
1) involve parishes and local service groups in the needs of the neighborhood	3.1	16	
2) to foster the importance of family	3.2	0	
3) to develop group to explore issue of workplace and lay spirituality	3.3	0	
4) to encourage Catholic witness in the arts and American intellectual community	3.4	0	
5) Involve every catholic in areas of public policy	3.5	0	
6) involve the catholic church in every level in the media	3.6	0	
7) Involve Catholics, at every level, in economic systems questions saving power of	3.7	0	
Structures for Implementation, p. 21			49
"Parishes, as part of their regular planning process, need to examine their activities in light of this plan.."			
Planning	4.1	41	
Structures	4.2	8	
Other	4.3	23	23
		980	**980**

"..Invite All people in the United States.."

Perhaps reflecting the current understanding of evangelization on the part of parish leadership, 72% (704 of 980) of all the recommendations on evangelization involved going "outside" of the current active participating parishioners with an invitation to others to hear the Gospel. In the words of goal two of the national plan, "To invite all people in the United States, whatever their social or cultural background, to hear the message of salvation in Jesus Christ so they may come to join us in the fullness of the Catholic faith." Most of the recommendations were intended to more effectively invite people to the Church (code 2.3), to equip and empower Catholics to exercise their baptismal call (code 2.7), and to provide programs of outreach to those who ceased being active in the Church (code 2.4).

Effectively Invite (code 2.3)

In many instances the particular methods to effectively invite people were not specified. "Keep parishioners informed of activities in the Church" "New ways of communicating" "Publish what we are doing--make it open" "Media blitz on activities" "improve communications" "Monthly welcoming."

In other instances there were particular suggestions. "Establish a program of household visitation by clergy and lay parishioners" "Draw up a parish directory that would list the various organizations and committees in both the parish and school as a welcome booklet for new members and to represent to parishioners during parish visitation" "Three groups of home visitors: information sharers, liaison for follow-up (baptism, marriage, death, etc.), and to invite the inactive to return and discover and deal with their problems with church and God," "More communication of ecumenical opportunities with our neighboring churches" "Transportation to be provided to Mass for those who otherwise would not be able to attend" "Develop a program to systematically contact members who discontinue or do not attend Mass regularly" "Mail bulletins newsletters etc. to college bound parishioners to keep them informed of activities."

Empower Catholics to Exercise their Baptismal Call (code 2.7)

Recommendations to empower the Catholic people to exercise their baptismal call to evangelize most often took the form of recommendations for education. "Inform people that evangelization is not a protestant term - it is the way we live our lives - it is how we witness to each other" "Provide an Adult Education program" "Short

program for lay speakers" "Provide education about evangelization to parishioners in the form of open houses, bulletin notices, workshops, speakers, scripture and liturgy classes."

Frequently the recommendations were centered on the Rite of Christian Initiation for Adults (RCIA) programs. "Make parishioners more aware of RCIA programs and their part in the process" "Need to restructure RCIA in parish with eye toward cluster-based program" "Ongoing work with those who have been a part of RCIA process and Baptism (Pre-Jordan) program."

Particular active roles in evangelization were identified for select groups of parishioners. "Educate parish leaders of the ways to evangelize, their role in evangelization, and the full meaning of evangelization" "We will have interested members formally trained to reach out to alienated Catholics" "Train teams of parishioners to go out in pairs to visit non-practicing or new members."

Programs of Outreach (code 2.4)

The programs of outreach coded in this section were programs "for those who have ceased being active in the Church." In the parish recommendations, these Catholic people were identified as alienated, fallen away, inactive, lapsed, non-practicing, marginal, non-participant, former members.

Frequently the calls for outreach programs were not clearly identified: "To develop a program to reach out to inactive and alienated members" "Develop an approach to reach out to alienated and new parishioners" "Find a systematic and compassionate way to reach out to non-participating parishioners." In some instances particular groups were identified. "Reach out to those Catholics not attending weekly liturgies." "Need for support groups for divorced, separated and grieving."

There were only a small number of instances where particular methods were proposed: "Letters, Welcome back you are missed, sent to all inactive members inviting them to a meeting with our priest and pastoral minister..." "Have a weekend seminar for alienated Catholics to air their concerns and problems. Provide support group." "At Easter and Christmas have a card in the pew for 'yearly' parishioners to give their reason why they only come once a year to Mass." "There should be a reevaluation of the parish questionnaire on spiritual life and an effort should be made to implement those religious activities most requested."

Other Recommendations to "..Invite All people in the United States.."

Additional areas of recommendations for goal two of the national plan included recommendations to help Catholics feel comfortable about sharing their faith (code 2.2) such as "Develop more small faith sharing communities," and to make parishes more welcoming (code 2.1) such as "Establish a committee to provide transportation to the needy, visit the homebound, welcome new parishioners, contact new residents in our community." "Form welcome committee for Masses." Other recommendations in this area included "welcome wagons" "welcome signs" "space for welcome" "monthly socials" and "Build community among parishioners before reaching out to others"

Several parish pastoral councils recommended ecumenical activities. There was a particularly notable interest (n=58) in deepening ecumenical involvement with other congregations in the area (code 2.11). "Initiate interreligious dialog" "Increase ecumenical activities" "Provide information to the parishioners about ecumenical services" "Ecumenical prayer service" "Invitations to the choirs of neighboring churches" "Invite other religious representation to our International Buffet" "Invite other faiths to see our CCD program" are characteristic of statements coded in this area. A range of other ecumenical gatherings, ministries, activities, groups, inter-faith services, committees, and dialogs were proposed.

As a means to carry out all these activities, active cores of people were identified to carry out the work of evangelization (code 2.9). Establishment or restructuring of an evangelization committee or team was frequently recommended. "Rejuvenate the evangelization committee, define mission and encourage participation" "Recruit members for an evangelization committee and offer training, evaluation and planning" "Priests identify people who might feel more comfortable talking to a lay person about their disenchantment with the church" "Get a nucleus of 50 evangelists then bring in Paulist program to develop their skills"and "Recruitment of volunteers for the RCIA team needs to be made" were typical of recommendations that were coded into this area.

"..Bring about in all Catholics..an enthusiasm for their faith..."

Much less supported than going "outside" were "inside" recommendations involving interior change on the part of the faithful. Only 188 parish recommendations (19%) recommended action "To bring about in all Catholics such an enthusiasm for their faith that, in living their faith in Jesus, they freely share it with others." The greatest

interest in this area was to foster an experience of conversion in believers through a change in attitude and through encouragement of parishioners to participate in missions and retreats and/or for the parishes to sponsor them. (code 1.1) Enhancement of Sunday Masses, in particular, was also recommended (code 1.3).

Many of the recommendations addressed a need for inner conversion but did not specify a role for the parish, "To eliminate indifference". Others identified a general role for the parish community, "Strive to instill Christian values through preaching, teaching and living." Frequently, there were specific recommendations particular to the parish characterized by statements such as "Recommendation that we go through once again the RENEW program," "Special theme night should be dedicated during the St. Joseph Triduum for inactive and alienated members," "A mission day for the parish," "Moving the centering of the Santo Nino devotions from the home to the Church," "The Cursillo movement was mentioned as a possible tool for evangelization within the parish," "Witness testimony in appropriate settings wherein persons can genuinely explain their own journey of spiritual renewal and ongoing conversion."

Several recommendations focused on improvement of Sunday Mass. "Obtain cantors for Mass," "Expand the music program for vigil," "At Mass renew spirit sense of joy," "Have visiting homilists," and "Address the issue of evangelization in the homilies" were typical of recommendations coded in these areas.

Special initiatives at Sunday liturgies were also proposed. These included: "A Mass for all organizations" "Organize a 'bring a friend to Mass Sunday' on a monthly basis" and "Welcome Home Mass."

"Foster gospel values in our society..."

The final major goal of the national plan, to foster gospel values in society in general, was almost completely overlooked by parish planners. This third goal states "To foster gospel values in our society, promoting the dignity of the human person, the importance of the family, and the common good of our society so that our nation may continue to be transformed by the saving power of Jesus Christ." Only 15 recommendations, all of which were calls for greater participation in the local civic community, were coded in this area. Parish planners did not recommend developing groups to explore issues of workplace and lay spirituality, giving witness in the Arts and the intellectual community, areas of public policy, the media or the economy.

The call of the national plan "To foster gospel values in our society, promoting the dignity of the human

person, the importance of family, and the common good of our society so that our nation may continue to be transformed by the saving power of Jesus Christ," was not addressed by the majority of these parish plans with these few exceptions. Statements that were coded in this area included: "Implement new ministries to help those in need." "Broaden parish-sponsored activities to include groups/people within our local community" "Allow community groups to meet on Church property" and "Encourage participation in township functions, e.g., St. Patrick's Day Parade"

In addition to recommendations that could be identified with goals of the national plan, there were 49 recommendations (5%) calling for the development of planning and structures in the parishes to carry out evangelization. (codes 4.1 and 4.2) These recommendations are consistent with the national plan. "Parishes, as part of their regular planning process, need to examine their activities in light of this plan. They should consider how to give their present ministry a clearer evangelizing focus and how new ministries might be formed to achieve the goals of this plan. We ask parish leadership, especially pastors who have a critical leadership role, to understand their ministry in terms of this plan." (Go and Make Disciples, 21-22)

Twenty-six (3%) of the recommendations were not able to be categorized.(code 4.3). Statements that were coded into this area included, "None at this time" "Continue to do what we have been doing" "Practice good stewardship" and "Build a facility to support our evangelization activities."

The Planning Process as an Evangelizing Activity

Consistent with more contemporary action research, the Parish Self Study process is intended to prompt a wide range of learning practices within the parishes that are self-generating, self-maintaining. A primary mode for learning is to establish opportunities for higher levels of involvement of informed parish pastoral council members, as well as the larger lay community. There is evidence of these learning practices from the employment of the process itself and from the use of the parishioners' survey instrument as a part of the process. The identification of recommendations in the area of evangelization by 86% of the parishes who submitted plans provides additional evidence of the recognition on the part of the clergy and laity of their evangelizing role with one another in the process itself to "deepen, consolidate, nourish, and make more mature the faith of those who are already called the faithful.."(EN, 54) and to carry the Gospel message to others.

Conclusion

In this chapter we have attempted to characterize recommendations for goal directed activities in individual parishes consistent with the Mission of the Archdiocese and the teachings of the Church. The chapter describes parish recommendations in the area of evangelization consistent with the Apostolic Exhortation on Evangelization: On Evangelization in the Modern World; and the National Plan and Strategy for Catholic Evangelization in the United States. Looked at through these lenses, some general conclusions can be made.

Recommendations in parish plans are heavily weighted in favor of methods. Much less emphasis was given to naming those to whom the efforts were to be directed, or to identifying their needs. If the parish efforts at evangelization are to succeed, the precise definition of who the various beneficiaries are, needs to be developed. The evangelizers (workers) are also less frequently defined than the methods even though, implicit in every method named, are those who are carrying out the work of evangelization. Worker's preparation and support have not been specified. Substantial evidence that the parish planners are aware of the need for the further education and development of the lay faithful are found in the recommendations but specific initiatives for training are infrequent.

The goals of the national plan are also addressed unevenly. The internal change of heart that is integral to the Catholic meaning of evangelization was not given as much attention as the goal to effectively invite others. Very few recommendations were proposed to address the needs of evangelizing society as a whole. The parish's ability to be effective in inviting others to more active participation may be limited by less attention given to providing for strengthening of the faith commitment of the active faithful. The long range effects of bringing the inactive "back" is uncertain. If the methods proposed for those not currently active or unchurched succeed, what are they coming home to? Although specific methods for return and welcome are recommended, the supportive faith life and parish community to which the person is to be brought is not clearly described. Without evangelizing efforts for the clergy's and the active parishioners' own renewal, success may be difficult to sustain.

PARISH RECOMMENDATIONS TO TEACH

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TEACHING: APOSTOLIC TRADITION OF THE CHURCH

The General Directory for Catechesis, USCC 1999 (GDC) describes the Church as "the true subject of catechesis, continuing the mission of Jesus the Master and, therefore animated by the Holy Spirit, is sent to be the teacher of the faith. The Church imitates the Mother of the Lord in treasuring the Gospel in her heart. She proclaims it, celebrates it, lives it, and she transmits it in catechesis to all those who have decided to follow Jesus Christ." **GDC# 78** *"In transmitting the faith and new life, the Church acts as a mother for mankind who begets children conceived by the power of the Holy Spirit and born of God."* **GDC #79.** The purpose of this chapter is to summarize parish recommendations that were formed in action research processes known as parish self studies to act on their role to teach.

In **Called and Gifted for the Third Millennium**, NCCB/USCC, 1995 the United States Bishops urge "*that theological education and formation be extended to more lay persons…innovative ways must be found to bring the best of the Catholic intellectual and spiritual tradition to more laity.*" Finding these ways is the challenge that the parishes of the Archdiocese put before themselves. One parish plan states its perception of this challenge: "*... we seek a deeper appreciation and understanding of Christ's teaching and His Church.*"

From the Holy Father, to the Bishops, to the Archdiocese, to the individual parish there is recognition that teaching has been, and always will be, vital to the future of the Church. What is perhaps less apparent, especially for individual members of parishes, is the vital role each person in the church has in fulfilling this mission and the increased responsibility of the laity for parish renewal.

Evangelii Nuntiandi (1976) identified "*catechesis as an essentially ecclesial act.*" Thus it seems that the teaching ministry of the Church has been and always will be critical to the continuing growth of the Church.

CHURCH DOCUMENTS AS CONTEXT

The parish recommendations were frequently aligned with current Church teaching and demonstrate common support for the pastoral concerns of the United States Bishops. Overall, the teaching recommendations provide frequent references to: persons to be catechized, named catechists, and proposed programs. The recommendations do not make explicit the content or strategies for teaching with the same frequency.

The use of the word *catechesis* is not always used in the parish plans in its ecclesial definition: "the definitive aim of catechesis is to put people not only in touch, but also in communion and intimacy, with Jesus Christ." **Catechesi Tradendae, John Paul II, Apostolic Exhortation** *October 1979*. However, the intent of the teaching goals seems congruent with the purpose of catechesis as expressed in the Apostolic Exhortation.

In addition to the Catechism and the GDC the following documents were also used to create a context for analysis:

> **Called and Gifted for the Third Millennium,** USCC 1995
>
> **Christifideles Laici,** Apostolic Exhortation December 1988
>
> **Evangelii Nuntiandi,** Apostolic Exhortation December 1975
>
> **Gravissimum Educationis,** Second Vatican Council October 1965
>
> **Lumen Gentium,** Second Vatican Council October 1965
>
> **Gaudium et Spes,** Second Vatican Council October 1965

Of the 284 plans reviewed, 237 parishes (83%) submitted a total of 892 recommendations about teaching. Overall 1,281 individual ideas were cited concerning teaching. All percentages identified in Table 7.1 are calculated as part of the total number of parishes (287). The teaching recommendations and their multiple variables were assessed comparing their content with recent Ecclesia documents that addressed the teaching function, as the catechetical mission of the Church, expressed clearly in the mandate of Christ: "Go into the whole world and proclaim the gospel to every creature." (Mark 16:15)

DATA COLLECTION: FREQUENCIES ACROSS PARISHES

In this summary, frequencies of recommendations named, are grouped within the categories of catechetical/teaching activities provided by the **GDC:**

Teaching Audiences: who should be catechized

Teachers Catechists: who should serve as catechists

Place of Catechesis: locus of teaching

Content of Catechesis: faith, doctrine, morals, etc.

Organization of Catechesis: deliver of catechesis and pedagogy

While the analysis of the recommendations demonstrated some variations among parishes, similar categories remained high in frequency of citation across the Archdiocese.

Table 7.1

1. TEACHING AUDIENCES: The GDC lists a wide range of persons who would be recipients of catechesis. The teaching recommendations identified persons as recipients in the following order:					
CATEGORY	# of recommendations	% of recommendations	# of parishes	% of parishes	CODE
Adults	155	17.4%	117	40.8%	0512
Youth	79	8.9%	67	23.3%	0511
Children	49	5.5%	41	14.3%	0510
Disabled	16	1.8%	16	5.6%	0514
Elderly	5	0.6%	5	1.7%	0513
Marginalized	4	0.4%	4	1.4%	0515
Diverse Cultures	3	0.3%	3	1.0%	0516
Unbaptized	1	0.1%	1	0.3%	0517
Ecumenical	0	0.0%	0	0.0%	0518
2. TEACHERS/CATECHISTS: The GDC listed a wide range of persons who could serve as catechists. The teaching recommendations identified the following as having the potential for a catechetical role.					
CATEGORY	# of recommendations	% of recommendations	# of parishes	% of parishes	CODE
Parents	52	5.8%	43	15.0%	0525
Laity	27	3.0%	24	8.4%	0527
Family	24	2.7%	21	7.3%	0542
DRE	14	1.6%	13	4.5%	0520.1
Youth Minister	14	1.6%	12	4.2%	0520.2
Guest Speakers	12	1.3%	12	4.2%	0527.1
Pastors	7	0.8%	5	1.7%	0524
Religious	6	0.7%	5	1.7%	0526
Priests	5	0.6%	5	1.7%	0523
Eucharistic Min	5	0.6%	5	1.7%	0527.3
Lectors	2	0.2%	2	0.7%	0527.2
Adult Rel. Ed Dir	2	0.2%	2	0.7%	0520.3
Parish Com.	2	0.2%	2	0.7%	0521
Bishops	0	0.0%	0	0.0%	0523

3. PLACE OF CATECHESIS: The GDC lists a variety of places where catechesis can take place. The teaching recommendations identified the following:

CATEGORY	# of recommendations	% of recommendations	# of parishes	% of parishes	CODE
School	87	9.8%	57	19.9%	0544
CCD	57	6.4%	50	17.4%	0543.1
Family	24	2.7%	21	7.3%	0542
Parish Com.	23	2.6%	22	7.7%	0543
Committees	20	2.2%	19	6.6%	0546
Organizations	8	0.9%	6	2.1%	0648
Small Faith Groups	6	0.7%	6	2.1%	0545
Local colleges	2	0.2%	2	0.7%	0547

4. CONTENT OF CATECHESIS: The GDC listed specific content areas for catechesis. The teaching recommendations identified the following:

CATEGORY	#of recommendations	% of recommendations	# of parishes	% of parishes	CODE
Scripture	34	3.8%	29	10.1%	0313
Faith/Doctrine	26	2.9%	22	7.7%	0310
Liturgical Life	23	2.6%	18	6.3%	0340
Spirituality	19	2.1%	17	5.9%	0314
New Cath.Catechism	13	1.5%	12	4.2%	0311
Contemporary issues	9	1.0%	8	2.8%	0352
Leadership	3	0.3%	3	1.0%	0351
Faith in the Trinity	2	0.2%	2	2.7%	0330
Union with Christ	1	0.1%	1	0.3%	0320
Moral Life	1	0.1%	1	0.3%	0350
Local Catechism	0	0.0%	0	0.0%	0312

5. ORGANIZATION: The GDC describes a variety ways to organize the catechetical activity of a parish. The teaching recommendations identified the following:

CATEGORY	# of recommendations	% of recommendations	# of parishes	% of parishes	CODE
Parish Programs	110	12.3%	83	28.9%	0557
Formation of catechists	48	5.4%	46	16.0%	0530
Cluster programs	22	2.5%	19	6.6%	0553
Archdiocesan survey	14	1.6%	13	4.5%	0556
Parish survey	13	1.5%	12	4.2%	0557.2
Archdiocesan program	13	1.5%	13	4.5%	0551
Pre-Sacramental program	11	1.2%	11	3.8%	0557.1
Evangelization program	6	0.8%	6	2.1%	0559

Looking at each category: *who should be catechized, who should catechize, how should catechesis take place, the content and organization of catechesis,* the overall common recommendations indicate that: ***adults,*** are first on the list of those in need of teaching; ***parents,*** first on the list as the primary religion teachers; ***parish schools*** as the primary place of catechesis, ***scripture*** as the primary content area in need of explication, and ***parish programs,*** as the primary means for carrying out the recommendations.

Proposed ideas for **who** should be taught and **how** it should be done are mentioned more frequently than the specifics of **who** would teach, **what should be taught** and **what** supportive organization and structures would carry out the recommendations.

Parishes named specific strategies for implementing goals. Seventy-two (25%) parishes urged the use of the media to promote teaching programs as important to the delivery of catechesis. A smaller number, 22 parishes (8%), recognized the need for increased funding to support their teaching goals. Both of these types of recommendations point to a recognition of the direct requirements that increased programming would place on communication and resources.

A summary of frequencies across Vicariates for concepts that were mentioned by 15% or more of all the parishes, offers a perspective of how parish recommendations in the area of teaching vary by location. (Appendix 7.1)

The parishes of the Archdiocese in conducting their self-study process surveyed registered parishioners. The results of the survey answers are summarized in Appendix 3.4. The parishioner surveys also included seven questions regarding teaching. All of these questions also pointed to areas of catechesis that seemed to eventually find their way into the parish plans. The levels of agreement to the teaching questions among those surveyed also may have influenced the frequency with which each item was included in the plans. Thus as had been previously mentioned, the language of the plans probably has some relationship to the mission statement (Appendix 1.1), self study workbook (Appendix 1.2), and to the parishioners' survey (Appendix 3.3).

DESCRIPTIONS OF CATEGORIES

In addition to the five general categories taken from the GDC, the following section of this paper provides examples under each category of the wording of the actual parish recommendations and compares them with the recommendations found in the GDC. This analysis will provide some indication if parishes have captured, in their expression of teaching recommendations, the intent of the Church to implement the new Catechism directives in parish life.

RECOMMENDATIONS FOR TEACHING: A SUMMARY

A. TEACHING AUDIENCES:

The **GDC** lists a wide range of **persons** who would be the object of catechesis. These were identified in parish plans:

Category	# of recommendations	% of all recommendations	% of parishes	code
Adults	155	17.4%	40.8%	0512
Youth	79	8.8%	23.3%	0511
Children	49	5.5%	14.3%	0510
Disabled	16	1.8%	5.6%	0514
Elderly	5	0.6%	1.7%	0513
Marginalized	4	0.4%	1.4%	0515
Diverse Cultures	3	0.3%	1.0%	0516
Unbaptized	1	0.1%	0.0%	0517
Ecumenical	0	0.0%	0.0%	0518

From this table it is evident that parishes saw teaching needs within similar populations. What was missing, or cited fewer times, were those who live on the margin of the Church, those of diverse cultures, the unbaptized, and those in other faith denominations.

However, such groups were designated as the audience for evangelization in many of the evangelization recommendations. In all, 40% of all evangelization recommendations addressed non- practicing Catholics and non-believers. (Parish Recommendations for Evangelization, Archdiocese of Philadelphia, Office for Research and Planning, November 1998). Since catechesis and evangelization are often perceived as similar activities this may account for the lower numbers in these categories among the teaching recommendations. It may also imply that teaching is seen as necessary for the practicing Catholics while evangelization is directed toward those who are not.

1. Adults (N=155)

Of all age groups, adults are mentioned with the greatest frequency in the parish pastoral plans as recipients

of teaching. If we included "family" and "parent" groups in this category (who are identified as primary teachers and would need to be supported with sound doctrinal knowledge) we would expand the sub-set even further. These audiences are described as in need of "faith development" along with "education" which may indicate a desire on the part of the laity to be prepared to teach the truths of the faith and to live out their on-going spiritual formation. Parish plans expressed these ideas in words such as: "*To promote the continuing education of parishioners in all areas of Catholic faith and belief.*"; "*To implement programs to meet adult needs, making the parish, as a whole, more alive and demonstrative of our Catholic faith.*"; "*Identify and encourage parishioners for on-going formation through courses in theology, scripture, catechetics, liturgy and family life issues.*"

These aspirations are consistent with the guidelines for catechesis. "*Adult catechesis concerns persons who have a right and a duty to bring to maturity the seed of faith sown in them by God. It is addressed to individuals who are charged to fulfill social responsibilities of various types and to those who are also prey to all kinds of changes and crises, sometimes profound. The faith of adults, therefore, must be continually enlightened, developed, and protected so that it may acquire that Christian wisdom which gives sense, unity and hope to the many experiences of personal, social and spiritual life.*" **GDC # 173.**

Parish councils appear to be aware of the challenges that face the adult members of their parish communities. From the very number of recommendations addressing adult education, it may be that councils judge spiritual formation and theological up-dating as critical to the ability of the community to revitalize itself. Members may also want very practical skills in managing the affairs of a parish.

2. Youth (N=79)

The frequent reference to **youth** in the parish plans parallels much of what was proposed regarding the education of children and adults. As the numbers indicate, this group was referenced even more frequently than children. As the recipients of religious education, youth are seen as that group ripe for living out the faith. Many recommendations offered simple yet global statements: "*Create teen and young adult programs for formation, education, and service*"; "*...develop programs for young adults*"; "*...develop a means to reach out to the inactive teens and young adults in the parish.*" In most cases the recommendations did not designate the particular age of "young adults" nor did the plan specify the nature and scope of the programs.

The GDC addresses the particular characteristic of the needs of youth. "*The diversity of the religious situation should be kept in mind: there are young people who are not even baptized, others have not completed Christian initiation, others are in grave crises of faith, others are moving towards making a decision with regard to faith, others have already made such a decision and call for assistance*." **GDC # 184**.

The implementation of these recommendations would probably benefit from a wider dialogue among the young persons themselves. The direction of activities would also benefit from sociological research which addresses the developmental stages experienced across the wide span of persons often included in the term "youth" as used in the parish plans. "*Catechesis should be integrated with certain procedures, such as analysis of situations, attention to human sciences and education, the cooperation of the laity and of the young people themselves*." **GDC #184.**

3. Children (N=49)

Each time schools or CCD settings were mentioned children were most likely implied as the recipients of catecheses. Children in this definition would include pre-school to adolescents in need of basic catechesis and sacramental preparation.

The parochial school, attached to the parish, has traditionally been one of the activities used to address the religious education needs of children and continues to be perceived as a means for creating a culture for Christian learning: "*...to fulfill the responsibility of our parish school and to foster a Christian community, worship and witness in ways that are recognized and understood by parishioners*." The added dimensions frequently named are the extension of religious education to pre-schoolers "*...investigate the possibility of kindergarten and pre-K classrooms*" and the emphasis on parents, operating in the family context, as the *primary religious educators*: "*...encourage and involve parents in the faith life of their children and the church*"; "*greater emphasis must be placed on educating parents so that they may carry out their educational roles*."

Most of the CCD recommendations saw the religious education program as comprehensive covering pre-school through high school. The number of parishes recommending high school CCD programs seem to indicate that, at present, CCD programs are either not being offered at this level in some parishes or the programs are not attracting young Catholics. Some creative suggestions were made "*Form a high school board and develop a combined topic oriented approach"; "...organize pizza/soda night for youth to discuss parish life*"; "*[Produce a]*

newsletter to young adults." There seems to be support for youth programs which have already had some success. "*Continue to establish a Life-Teen program to fill the void of a religious education for youth*."

One parish expressed the purpose of CCD as a means to "...*find ways to keep children/young adults connected by a combination of activities and prayer*." This carries religious education to the level of integration and internalization essential to Christian transformation as described in the GDC "*To develop all the dimensions of faith through which it conveys faith which is known, celebrated, lived and prayed*." **GDC 144.**

4. Other Groups: Disabled (N=16); Elderly (N=5); Marginalized (N=4); Diverse Cultures (N=3); Unbaptized (N=1); Ecumenical (N=0).

With less frequency certain groups of people were named such as the elderly, the disabled, the marginalized. Those of diverse cultural backgrounds and those either not baptized or in other faith communities were cited by fewer than 5% of all the parishes. They do not appear, in this study, to have any particular status in parishes. The Directory, however, exhorts that "*The kingdom of God is for all, beginning with the most disadvantaged. [Jesus] was interested in the needs of every person, body and soul*." **GDC # 163.**

B. TEACHERS/ CATECHISTS:

The GDC lists a wide range of persons who could serve as catechists which were named in parish recommendations. These include:

Category	# of recommendations	%of all recommendations	% of parishes	code
Parents	52	5.8%	15.0%	0525
Laity	27	3.0%	8.4%	0527
Family	24	2.7%	7.3%	0542
DRE	14	1.6%	4.5%	0520.1
Youth Minister	14	1.6%	4.2%	0520.2
Guest Speakers	12	1.3%	4.2%	0527.1
Pastors	7	0.8%	0.7%	0524
Religious	6	0.7%	1.7%	0526
Priests	5	0.6%	1.7%	0523
Eucharistic Minister	5	0.6%	1.7%	0527.3
Director: Adult Rel. Ed.	2	0.2%	0.7%	0520.3
Parish Community	2	0.2%	0.7%	0521
Lectors	2	0.2%	0.7%	0527.2
Bishop	0	0.0%	0.0%	0522

> "*The catechist is essentially a mediator. He facilitates communication between the people and the mystery of God, between subjects among themselves, as well as with the community. [The catechist] always draws support from faith in the Holy Spirit and from prayer. Finally the personal relationship of the catechist with the subject is of crucial importance.*" **(GDC #156)**

Catechizing, while usually addressed under the concept of teaching, was accepted in the parish plans primarily as the responsibility of the members of the parish community, e.g., laity, parents, families. The General Directory for Catechesis sees teaching as the primary domain of Bishops, pastors, priests, and religious. The infrequent naming of these persons may indicate a focus of the writers on *who else* (in addition to priests and religious) could fulfill this role rather than implying a preference for laity. It could also indicate that the planning process directed attention to those within the parish community as ones who would take responsibility for implementation.

In particular ways the parish plans identified a wide range of persons who could be entrusted with the work of teaching, communicating the faith and engaging with those catechized in religious experiences. Some very

specific roles were identified, e.g., *DRE's, Directors of RCIA programs, Youth Ministers*, while others among the clergy and laity were also seen as mediators of the faith capable of fulfilling the duties of a catechist.

1. Parents (N=52)

"*Parents receive in the sacrament of Matrimony 'the grace and the ministry of the Christian education for their children* (John Paul II: *Christifideles Laici,* 62, Dec.1988) *to whom they transmit and bear witness to human and religious values*." The Directory continues to say that "*the Gospel is transmitted and radiated through family life and thus [family life] is transformed into a journey of faith and the school of Christian life*". (**GDC #227)** The focus on parents as teachers and the family setting as the primary locus of catechesis is a clear and general direction in at least 18% of the parish plans.

In the recommendations the role of parents is frequently placed in the broader recommendations for the formation of catechists: "*Greater emphasis should be placed on parents as the primary educators in the faith; therefore we must provide them with adequate tools to exercise this role.*" They are cited as essential to continue as teachers beyond the stage of sacramental initiation: "*That parents would stay with their children in their faith journey especially after their children have received their sacraments*"; "*provide parents with religious education programs regarding contemporary family issues*"; "*reach out to families who are receiving no religious education.*"

2. Laity (N=27)

"*By sharing the same form of life as those whom they catechize, lay catechists have a special sensitivity for incarnating the Gospel in the concrete life of men and women. Catechumens and those receiving catechesis can find in them a Christian model for their future as believers.*" **GDC #230.**

In most plans the recommendations for lay activity are very general and do not give concrete direction but they do point to a need to involve a greater number of parish members in catechetical activities. "*To include more people in our teaching of God's Word*"; "*Give encouragement and invite all to come forward to teach*"; "*to develop the gifts of the laity through ministry training, and in-service to existing organizations.*"

While the number of recommendations citing laity as catechists, which use the word "laity" is only 2% of all recommendations, all citations that do not mention the ordained clergy and religious, could imply that laity take this role. These total 164 or 62% of all catechist citations. This seems to place significant confidence in the role of

the laity to undertake the teaching functions of the parish or it may simply recognize a need for calling on the parish members to take active roles in catechizing.

3. Families (N=24)

Parish planners saw an obvious connection between the family and the whole process of Christian formation: "*The family is the focal point and prime agent for Christian formation. The parish does not and cannot supplant the family but can and does support, complement, and supplement the family's efforts in these all important endeavors*"; "*promotion of more family oriented activities to exemplify our faith*"; "*teaching at a home base level*"; "*need to look toward building effective family-based religious education*." These statements in the parish plans are consistent with the position held in the General Directory "*Nothing replaces family catechesis, especially for its positive and receptive environment, for the example of adults, and for its first explicit experience and practice of the faith*." **GDC # 178.**

4. DRE/ Director of Adult Religious Education (N=16)

"*Hire a DRE to coordinate all religious education programs*"; "*need a Director of Religious Ed*"; "*hire a full time Director of Religious Education to develop and coordinate religious education programs for adults and children*"; "*that the parish have a Director of Adult Education*." The number of DREs already in place in parishes: 138 parishes or 48.1% (Archdiocesan Office of Religious Education, June 1999) may provide a population who can support further development of educational programs and mentor new persons in this position. The fact that the role is acknowledged as a legitimate catechetical one in the Archdiocese is consistent with the GDC: "*The importance of the ministry of catechesis, however, would suggest that there should be in a Diocese a certain number of religious and laity publicly recognized and permanently dedicated to catechesis who, in communion with the priests and Bishop, give to this diocesan service that ecclesial form which is proper to it*." **GDC #231.**

5. Youth Minister (N=14)

"*Hire a paid Youth Minister*"; "*there is a need for a parish Youth Minister or someone to run a youth group*"; "*need for a youth minister*"; "*Establish a youth ministry board*". As was noted earlier the role and function of a Youth Minister is not detailed in most of the recommendations. What is also not clear is the age, experience or

education this position would require. The Directory suggests that "...young people cannot be considered only objects of catechesis but also active subjects and protagonists of evangelization and artisans of social renewal.".

GDC 183. Development of the role of a Youth Minister may be seen in the parish plans as a function of each individual parish according to its goals and means, however, the 1997 NCCB/USCC Pastoral Plan for Ministry with Young Adults suggest that a "core team" of young adults be formed within the local church who will work to assess parish needs, initiate young adult activities and "*keep the vision of young adult ministry in the forefront*". **Sons and Daughters of the Light**, NCCB/USCC, 1997. The pastoral also suggests that Diocesan wide activities be promoted to assist individual parishes in this important work. The work with young adults is cited as *"key to regenerating and renewing church members and providing for leadership development in the future.*" **Sons and Daughters of the Light**, NCCB/USCC, 1997.

6. Guest Speakers (N=12)

In addition to roles already in place, parishes recognize the benefit of guest speakers. At the same time this recommendation was minimal by comparison with recommendations for *programs* suggesting that education would not be an incidental event but an intrinsic part of parish life. Such programs predominate those recommendations that address the means for catechizing or teaching goals found in the parish plans. These will be addressed in the next section of this paper.

7. Clergy: (N=12) Bishops, Priests, Pastors

The **GDC** reiterates John Paul II's words in (*Catechesi Tradendae, 63b Oct. 1979)* placing the responsibility for catechesis as the principal duty of Bishops: "*[Bishops] are beyond all others the ones primarily responsible for catechesis and catechists par excellence*". The parish recommendations never make specific reference to the Bishop.

The GDC reminds parish priests that their catechetical task is to "...*foster a sense of common responsibility for catechesis in the Christian community, a task which involves all, and a recognition and appreciation for catechists and their mission*". The GDC further reminds the clergy that: "...*catechesis in a community depends very largely on the presence and activity of the priest*". **(GDC #225).**

Since the pastors and priests were, in most situations present for the writing of the parish pastoral plan, their

leadership in encouraging recommendations for a community wide responsibility for catechesis, or teaching, could be the genesis of some of the proposed actions. Their support of these plans could also imply a willingness, and perhaps a recognized need to share the transmission of faith with qualified laity. The references to priests and pastors explicitly in the recommendations seem to place them as the catalysts and not necessarily as the teachers.

8. Parish Ministers (N=7)

Recognition of other lay ministry positions, e.g., lectors, cantors, and Eucharistic Ministers, as functioning in a catechist role is minimal.

9. Religious (N=6)

The Directory gives clear parameters for the role of religious in catechesis. "*In a special way the Church calls those in consecrated life to catechetical activity and wishes that religious communities dedicate as much as possible of what ability and means they have to the specific work of catechesis*." (John Paul II *Catechesi Tradendae, #65. Oct. 1979) "Although evangelical values must be lived by every Christian, those in consecrated life incarnate the Church in her desire to abandon herself to the radicalism of the beatitudes" (Evangelii Nuntiandi, #69, Dec. 1975). "The witness of religious united to the witness of the laity shows forth the one face of the Church which is a sign of the Kingdom of God*". (Catechism of the Catholic Church, p. 932. Oct.1992) **GDC #228.** However, there only six references made about religious in the total Archdiocesan recommendations concerning teaching.   The word *religious* ordinarily used as synonymous for *sisters, brothers* or *vowed clergy* are not referred to particularly as catechists. Two references to religious are written as invitations to include religious in the experience of teaching: "*Parishioners feel we should have more religious sisters*"; "*encourage religious women to visit our school and CCD programs so vocations to the religious life might be fostered*".

C. PLACE OF CATECHESIS:

The GDC suggests a number of places where transmission of the faith can take place.

Category	# of recommendations	% of all recommendations	% of parishes	code
School	87	9.8%	19.9%	0544
CCD	57	6.4%	17.4%	0543
Family	24	2.6%	8.3%	0542
Community/Parish	23	2.6%	7.7%	0541
Committees	20	2.2%	6.6%	0546
Organizations	8	0.8%	2.1%	0548
Small Faith Com.	6	0.6%	2.1%	0545
Local colleges	2	0.2%	0.7%	0547

1. Parish School: (N=87)

The significant role of the parish school in providing Christian education is seen as a pivotal means for "*Continuing Christian formation and education of all our members*". A number of parishes made note of the need to "*Keep tuition low and increase enrollment in the parish school*". Frequently recommendations called for improvement of facilities and the need to search out new sources of revenue to do this: "[Build] *new school and religious education building*". One parish proposed that there should be "*A cluster-area Catholic elementary school for which the cluster parishes share responsibility and have input into the religious education program*"; "*seek assistance in the development area to find and apply for financial grants*"; " *we must increase our resources and commitment to teaching the faith*"; "*establish scholarships for financial needy families*"; "*Develop a program that will encourage more financial support for our school and religious education program*". This last recommendation, as did many others, sees the close connection between the parochial school and the CCD program.

2. Confraternity of Christian Doctrine (CCD): (N=57)

Many parishes see the school and CCD as interdependent parts of the whole concept of the parish "*...religious education program*". Emphasis, in some recommendations, placed high value on communication and cooperation between the parish school and the CCD programs: "*Build harmony between school and CCD programs*"; "*need to build up CCD program for public school children- connected with our parish school children, e.g., Sunday Mass*".

One parish proposed that "*CCD is to be made one of the top priority activities of the parish in personnel, promotion, and budget*". As others said: "*Continue to commit financial and physical resources to the total Religious Education program of the parish*". Another concern that surfaced frequently was the apparent attrition in CCD attendance after the reception of the sacraments. "*Curtail the drop in enrollment in grade school and CCD programs*

after the sacrament grades"; "*initiate a religious formation program for parishioners between 12-18 years of age*".

What is observable is that these parish councils appear to have a larger picture of religious education than simply what is taught in the elementary school.

3. Family Settings: (N=24)

As mentioned earlier the family was frequently referenced as the primary **catechist**. The family home was also acknowledged as a **place** for catechesis. When parish surveys were returned throughout the Archdiocese there were over 26,000 valid surveys with 25,490 responses to the item: "*Parents have responsibility*" [for the teaching of the faith]. Of these responses 59% (14,917) **strongly agreed** with the statement. Another 39% (9887) **agreed** to the statement which left only 3% undecided or disagreeing with the role that parents play in the teaching of the faith. The instrument used by council members for survey analysis: *On the Way to Renewal* (p. 36 #5) also prompted the idea of parents "as the primary religious educators of their children" which gave language to the planning process.

4. Parish Communities (N=23)

The parish as a place for fostering religious teaching is cited in a variety of ways each pointing to some general use of the parish space or personnel as a means for teaching: "*Need to find ways to utilize the parish center to help children*"; "*teach the value of our parish to the larger community*"; "*foster parishioners ownership of the parish's future*"; "*organize and schedule a parish renewal or retreat in the near future*"; "*[develop] an adult theological library*"; "*could use a parish newsletter for teaching*". Reference to programs, CCD, RCIA, Pre-Sacramental preparation etc. already in existence in the parish, seem to support the idea that the parishes function well with structured systems for catechesis.

Improvement of parish facilities, funding for parish programs and reference to the provision of child care in the parish reflect some of the minor themes incorporated into parish support for teaching.

5. Committees and Organizations: (N=28)

Recommendations which acknowledge the power of the parish committee or parish organization to contribute to the collaboration of laity in the tasks of the parish are reflected in the reference to establishing new committees or accessing ones already in existence to carry out the teaching role of the parish. "*Formation of an adult education committee*"; "*assist the parents and guardians in meeting their spiritual obligations for their children by a Family Support Program made up of leaders from the Home and School Committee*"; "*form a high school board*

and develop a combined (9/10 and 11/12 grades) topic oriented approach".

6. Small Groups Within the Parish Communities: (N=6)

Only six recommendations made reference to the effectiveness of small groups of parish members meeting for the purpose of teaching scripture, doctrine, and prayer. "*Seek opportunities for more personal and active teaching such as: Bible study in home meetings and apartment building*"; "*Pursue the development of small Christian communities of prayer, faith sharing and service*"; "*have neighborhood prayer and education groups on scripture*"; "*educate the parish about the adult discussion groups available to them*".

The General Directory for Catechesis calls attention to the vitality of "*basic ecclesial communities*". From them an enriched community experience can result. In Redemptoris Missio, December 1990, John Paul II notes that small communities are "*a true expression of communion and a means for the construction of a more profound communion*" but also reminds the faithful that "*every community must live in union with the particular and universal Church*". **GDC # 263.**

7. Local Colleges: (N=2)

Only two parishes made reference to the resource of a local college as a means for carrying out the teaching tasks for adults, youth or children. Within the Archdiocese there are 11 Catholic Colleges, with at least one in each Vicariate. "*Present more forcefully learning opportunities for theology, scripture, etc. at the Seminary and local universities*." The recommendation is general and lacks concrete action.

D. CONTENT OF CATECHESIS:

The GDC suggests a range of topics for catechesis especially for youth and adults.

Category	# of recommendations	% of all recommendations	% of parishes	code
Scripture	34	3.8%	10.1%	0313
Faith/Doctrine	26	2.9%	7.7%	0310
Liturgical Life	23	2.6%	6.3%	0340
Spirituality	19	2.1%	5.9%	0314
Contemporary Issues	9	1.5%	4.2%	0352
Leadership	3	1.0%	2.8%	0351
New Catholic Catechism	3	0.3%	1.0%	0311
Faith in the Trinity	2	0.2%	2.6%	0330
Union with Christ	1	0.1%	0.3%	0320
Moral Life	1	0.1%	0.3%	0350
Local catechism	0	0.0%	0.0%	0312

In the General Catechetical Directory a number of content areas are identified for the presentation of the faith. The Catechism of the Catholic Faith is described as acting. "*In service to the word of God as the official presentation of the deposit of Christian doctrine*." **GDC #125.** The "*local catechisms present the synthesis of the faith with reference to the particular culture in which catechumens and those to be catechized are immersed*". **GDC #133.** "*Sacred Scripture also holds a pre-eminent position since it resounds with the voice of the Holy Spirit*." **GDC #127.**

Only 13.5% (121 recommendations) made reference to the particular content of catechesis. But the planning instrument *On the Way to Renewal* also did not prompt the councils to designate teaching content in particular. The General Directory for Catechesis suggests that scripture, spirituality and the understanding of faith and doctrine are intricately one: "*The celebration of the word in sacred liturgy assists the Christian in interiorizing the comprehensive message and vision found in the Gospel*". **GDC #97**. "*Through proper catechesis genuine religious and moral values which as seeds of the word, are sown in human society and diverse cultures*." **GDC #96.**
 These seem to be areas that the parish pastoral council members also have experienced as the content and context of their own education.

1. Scripture/Liturgy: (N=34)

General references to scripture as a source of faith development were more frequent than any others. "*Begin Bible study and prayer groups for adults*"; "*to include more people in our teaching of God's word*"; "*promote Bible study*"; "*cooperate with other parishes in Bible study*"; "*some of these were described in the context of Liturgy*"; "*organizations could promote religious education for adults, and especially the youth by holding workshops, bible study and special liturgies*"; "*identify and encourage parishioners for ongoing formation through course in theology, scripture, catechetics, liturgy and family issues*"; "*consider a Family Mass as a teaching tool.*" Overall the recommendations seem to describe the content of teaching in ways that were already familiar to the writers.

2. Faith and Doctrine: (N=26)

"*Promoting the knowledge of the faith*" is listed in the Catechetical Directory as the first of six major tasks of catechesis. "*By deepening the knowledge of the faith, catechesis nourishes not only the life of faith but equips it to explain itself to the world*". **GDC #85.**

The parishes reference *faith and doctrine* in a variety of ways but usually in the context of general information: "*To provide relevant and informational material on Catholic/faith belief in bulletin and/or monthly newsletter*"; "*to promote the continuing education of parishioners in all areas of Catholic faith and belief*"; "*[hold] classes to deepen our faith*"; "*emphasize faith as a life commitment*"; "*the study of Catholic documents as well as on-going Lenten and Advent programs are necessary*"; "*promote awareness of faith through adult education so that our adults can better understand their Catholic faith*".

3. Spirituality: (N=19)

The term spirituality is never really defined in the GDC though the word is referenced in the thematic index. In the same way the word *spirituality* is used in recommendations without any particular explanation. "*Develop opportunities for growth in spirituality and leadership for women in the parish*"; "*Develop a spiritual outreach toward the large group of inactive and partially active teens*"; "*Have more spiritual programs on a regular basis*"; "*begin programs for the spiritual development of our young adults*".

Perhaps spirituality, which seems to apply to the integration of knowledge and practice, has as many definitions as there are Christians who name it. To implement these recommendations there could be a rich

conversation to build a common understanding of what it means to grow *spiritually*.

4. New Catechism of the Catholic Church (N=13)

In the General Directory it is recommended that the GDC be used as a basic guide, to The Catechism of the Catholic Church. The National Advisory Committee in Adult Religious Education offers "*Serving Life and Faith*" (1986) or *The Living Light,* a quarterly journal of the USCC Department of Education to provide an inter-disciplinary review of Catholic Religious Education, Catechesis and Pastoral Ministry to all adult laity. NACARE can be easily accessed. (http://www.nccbuscc.org/education/catechetics/nacare.htm).

A limited number of recommendations were cited which proposed the use of the new Catechism: "*Consideration of an adult education program based on the new catechism*"; "*to have an ongoing, open ended adult education program exploring the New Catechism*"; "*to arrange an informative presentation of the New Catechism*".

5. Contemporary Issues (N=9)Leadership (N=3)

Beyond the more common topics the parish plans did not become too specific in the area of content for catechesis and while the GDC alludes to a wide range of topics the writers of the plans seemed to hold to the more traditional themes e.g., scripture, liturgy.

It should be noted here that, in the parish plan recommendations under the title of Service, 7.1% of the (58) recommendations focused on the need for education about service. In the recommendations concerning Worship 10% (111) of the recommendations make reference to the need to have instruction in this area. These would, therefore also describe the content areas for education. The infrequency with which leadership was named as an area for instruction is difficult to interpret. The desire for formal structures for catechesis especially in the administration of programs, however, implies an on-going need for leadership abilities. There were also 775 parish plan recommendations in the area of leadership but the analysis of these had not yet been completed as this report was prepared. This analysis may further clarify education requirements in the area of leadership**.**

E. ORGANIZATION OF CATECHESIS:

The GDC suggests a variety of ways that the process of catechesis can be accomplished and beginning with the formation of catechists.

Category	# of recommendations	% of all recommendations	% of parishes	code
Parish program	110	12.3%	28.9%	0557
Formation of catechists	48	5.4%	16.0%	0530
Cluster programs	22	2.5%	6.6%	0553
Archdiocesan survey	14	1.6%	4.5%	0556
Parish survey	13	1.5%	4.2%	0557.2
Archdiocesan program	13	1.5%	4.5%	0551
Pre-sacramental program	11	1.2%	3.8%	0557.1
Evangelization	8	0.8%	2.1%	0559

1. Parish Programs/Evangelization Efforts: (N=118)

One third of all the parish plans suggest that the teaching and learning activities of the parish would require the development of, and/or expansion of current, programs, e.g., RCIA, Evangelization programs etc. As stated in the executive summary this concept of "program" if aligned with those already in place seems to imply something that is stable, systematic and somewhat permanent as a part of the life of the parish.

2. Formation of Catechists (N=48)

In addressing the formation of catechists, 16% of the parish plans proposed that efforts to recruit and train catechists is essential to the teaching function of the parish. This aligns with the emphasis given in the GDC concerning the need to have adequately trained persons in the role of catechist.

"*Catechesis is a responsibility of the entire Christian community*." **GDC# 220**. "*Together with the primordial mission which parents have in relation to their children, the Church confers the delicate task of organically transmitting the faith with the community on particular, specifically called members of the people of God*". **GDC # 221**. "*The formation of catechists cannot ignore the specific character of the laity in the Church and cannot be regarded as merely a synthesis of the mission received by priests and religious. Rather, their apostolic training acquires a special character precisely for the secular nature of the lay state and from its particular type of spirituality*". (Catechesi Tradendae October 1979. p.22) **GDC #237**.

The parish plans used these words: "*Encourage more lay persons to become catechists with proper training*"; "*Make funds available for parish sponsored on-going education for Catechists*"; "*More training for catechists* (in-service workshops)"; "*more trained teachers and ministers to expand the work beyond the priests*"; "*provide additional education programs for CCD teachers*"; "*to train adequately additional catechists for the respective CCD and RCIA programs*". Each of these proposals suggests the importance of the role of the trained catechist in continuing the teaching mission of the Church.

Frequently the catechists in a parish are members of religious communities or current and past Catholic teachers. These have had some level of training. However, only 55% of Archdiocesan catechists have participated in the Archdiocesan catechist training program as of this year. (Reported in June 1999, Director of Parish Religious Education, Office of Religious Education.)

While catechist formation is mandatory for parish school teachers, it is only strongly recommended for CCD teachers. In the first case the teachers are paid staff. In the second case teachers are, for the most part, all volunteers. If the ideal is to place only well trained catechist in all catechetical programs, there is probably a need for a more systematic attempt to prepare catechists prior to recruitment and assignment.

3. Cluster Programs: (N=22)

Another small percent of the parish plans described the possibility of being linked with other parishes in the organization of its catechetical responsibilities. "*That the parish partner with the surrounding Cluster 18 parishes to provide evening religious curriculum for adults*." "*We will seek to co-operate regionally/clusterally in religious adult education programs*." "*Establish a cluster-area Catholic elementary school for which the cluster parishes share responsibility and have input into the religious education program*." These recommendations pre-dated any cluster planning. Such collaboration has the support of the General Directory. "*The coordination of catechesis is not merely a strategic factor, aimed at more effective evangelization, but has a profound theological meaning. Evangelizing activity must be well coordinated because it touches on the unity of faith which sustains all the Church's actions*." **GDC # 272**. Coordinating with other parishes may also serve as a means for gathering catechists into a group of well trained educators who see themselves in a ministry role of the Church as well as a volunteers.

4. Surveys: Parish and Archdiocesan: (N=20)

Before any organization undertakes a new initiative it is likely that the members of the group will decide to

survey the constituents to determine what they would want, support and use. In the case of the parish pastoral plans the use of parish or Archdiocesan surveys was mentioned by fewer than 5% of the 287 parishes. It would probably be in the best interest of the parishes to look over their own parish surveys, taken prior to the parish self-study, to determine individual needs. At this time it seems as if the proposed actions for initiating programs to enhance the parish teaching capability has sufficient information, e.g, this Archdiocesan wide summary, to support immediate and future action. The parish surveys as well as the workbook *On the Way to Renewal* seemed to offer parish council members some legitimate language for their planning. As councils implement their plans and continue to plan in the future these initial recommendations may expand in meaning and significance.

5. Archdiocesan Programs: (N=13)

Only ten percent of the parish plans made reference to Archdiocesan programs as the source for building up the teaching functions of the parish. "*The parish needs to utilize diocesan training programs*"; "*require certification/education to catechists to set higher standards*"; "*examine and re-vitalize physical, financial and educational resources (including University and Archdiocesan resources) of the parish as they impact religious education*"; "*the continuing and updating of our teachers in all programs through the attendance at various classes and workshops offered by the diocese and other agencies*". This may be attributed to a limited experience of such Archdiocesan programs for catechist training or it may be the desire to build a strong educational program within the parish.

6. Pre-Sacramental Program (N=11)

Apparently the introduction of pre-sacramental programs for Baptism, First Penance, First Communion and Confirmation are viewed as a means for teaching the recipients but it may also be seen as teaching moments for the parents involved.

PART IV: CONCLUSIONS

In viewing all of the recommendations certain patterns emerged that seemed to indicate common perceptions among parishes and places of special emphasis. The reader of this document may discover further points of significance to add to the following suggestions.

A. "PROGRAMS" AS TEACHING STRATEGIES

1. ***Parish based programs***. As mentioned in the parish plans, the word *programs* probably suggest multiple

meanings, each particular to the intent and assumptions of the writers' ideas. In general programs appeared in such contexts as "*Establish adult education program*"; "*development of a program that addresses the spirituality of parenting*"; "*to research what adult continuing religious education programs are desired by parishioners and commit parish resources to these programs*"; "*a structured program aimed at parental awareness of their primary role as teachers of the faith and as vital partners in the entire educational enterprise*"; "*establish high school and adult CCD programs*"; "*a program for video screenings of Christian oriented films followed by discussions.*".
In most parishes, there is a precedent for program type teaching activities, e.g., CCD and RCIA, Pre-Jordan, Pre-Cana, which could serve as models for other teaching type programs, however, the lack of specificity will place some considerable work on the implementers who are yet to be named.

2. ***Program delivery*** It seems critical that the delivery of these programs have some probability for success, otherwise the proposed plans could remain undeveloped and, at some later date, be written off as impossible.
The overwhelming perception that *parish based programs* are necessary, stops short of designating when the parishes should be ready to undertake them. Offering religious education to adults requires removing every possible barrier to participation, since the rewards for participation are, for the most part, intrinsic rather than extrinsic. Adult education programs usually include a plan of procedures, schedules, and systems within which action can be taken toward a desired goal. Teaching programs usually entail a plan determining the offerings of the specific educational curriculum; a plan of study for the student over a given period of time; a catalogue of projected proceedings, prospectus, or syllabus including the scope and sequence of learning. Educational institutions, serving the need of adults, also recognize the importance of the convenience the adult looks for in the scheduling, the attractiveness of the setting, and the added value that the adult will accrue as a result of the class.

The recommendations citing *programs* as the generic strategy for catechesis open up a wide scope for parish activity but it also places demands on the time, the resources and the people of the parish community who ultimately have to manage the programs or engage competent educators to assist them in this **major undertaking**. Adult education program designers in the academic field take great care in targeting specific markets necessary to engage the right audience. All of this happens prior to the offering of the program, as does the search for competent faculty, adequate funding, and available space. Easy access would also be key to sustain any commitment to a structured or systematic program. Use of home based study, use of cable TV, Internet, etc. might need to be

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explored.

Within the Archdiocese, the Catholic Institute for Evangelization demonstrates a systematic preparation of the laity for fulfilling evangelizing activities and would probably offer significant learning about what works and what doesn't which may be helpful to parishes interested in reaching large numbers of adult laity.

3. _**Youth Ministry and Program Model**_ Key ideas kept coming to the surface that described consistent concerns of parishes across Vicariates. While adult religious education programs, stood above all others in the area of _**who should be catechized**_, (17.4% or 155 recommendations) which represents 40.8 % of the parishes (117 parishes), the next area of concern (8.9% or 79 recommendations) representing 23.3% (67 parishes) are concerned with the needs of youth.

Several parishes, 4.2% (12 parishes) expressed the idea of hiring a Youth Minister but these recommendations did not define the role and function of this position. This would probably vary from parish to parish. The Archdiocesan Office for Youth and Young Adults communicates with individual parishes and to date lists 266 parishes as having "someone" designated to work with youth. (Archdiocesan OYYA, September 1999). The role may be evolving but the attention to this age group seems common to most parishes.

A recently published program from the USCC/NCCB office: **Renewing the Vision: A Framework for Catholic Youth Ministry**, 1997 underscores the Church's concern for youth as a particular group in need of catechesis stating: "_[this document] takes up the Holy Father's challenge by focusing on three essential goals: empowering young people to live as disciples of Jesus Christ in our world today, drawing young people to responsible participation in the life, mission and work for the faith community and fostering the personal and spiritual growth of each young person_." A Pastoral Plan for Ministry with Young Adults entitled **Sons and Daughters of Light** (1997) is available from the USCC/NCCB.

B. FORMATION OF CATECHISTS

What is equally remarkable is the number of recommendations which have no designation of who would carry out the program or activity. Planners are either assuming that current staff or parish volunteers, or augmented staff and volunteers will take on these tasks. In the absence of these assumptions, the assigning of responsibilities for action steps to individuals was never written in the plan. There are almost twice as many citations naming who should be catechized and where this should be done than there are citations about who should assume the role of

catechist.

Formation of catechists was only recognized as a current need by 16% of all parishes. This is not consistent with the exhortation of the Council Fathers: "*In discharging her educative function, the church is preoccupied with all appropriate means which are proper to herself, of which catechetical training is foremost.*" (*Gravissimum Educationis* #4, Documents of Vatican II 1965). The formation of catechists, both in defining their role and preparing them for service, will become a critical challenge to every parish community.

C. COMMUNICATION, MARKETING, PUBLIC RELATIONS AND THE USE OF THE MEDIA

Seventy-two parishes (25%) identified a need for greater attention to the use of a variety of means for communicating the parish message about itself, its educational programs, and its role as teacher in 101 different citations. The planners saw the need to get their message out using the most modern and effective means possible. Again, few specific persons were named as the doers but there seems to be an implied sense that the proposed action would have to be assigned to someone with communication competence.

This recognition of the power of communication, as both a teaching and an evangelization medium, seems to keep pace with the times when multiple media avenues are open to the general public. The GDC encourages the use of social communication as a means of teaching and evangelizing: "*...in addition to the numerous traditional means in use, the media has become essential for evangelization and catechesis all of the media offer a particular service and everybody will have his own specific use for them. It is therefore necessary to appreciate their importance and to respect their demands.* **GDC #160**.

The recommendations proposing a better use of public relations and the media in getting the Christian message taught also reflects the words of the Council Fathers: "…*the Church seeks to penetrate and ennoble with her own spirit those means which contribute mightily to the refinement of spirit and the molding of men. Among these are the media of social communication…*" (*Gravissimum Educationis* #4 Documents of Vatican II 1965).

D. FUNDING

The recognition that very little could be done to support teaching efforts without cultivating personal and financial resources demonstrates a practicality about the plan recommendations. This realization of the need for broader staffing, and additional facilities for program support is common to many parishes within this Archdiocese, as it is across the nation.

The increase in parish staffing since 1970 is a national trend. The need for professionally trained (presumably salaried) staff is implied in the research presented by Joseph Claude Harris (*Supply and Demand and Parish Staffing.* America, Vol. 180 No. 12 April 10, 1999. pp.16-20). He cites that "*fewer priests represents only a partial view of changes affecting religious staffing in the U.S. Catholic Church. Between 1960 and 1995 the number of religious and ordained staff per registered Catholics dropped from 5.6% to 2.6%. This change represents a decline of 54%. The estimated Catholic population in the United States by 2010 will total 68.8 million*".

The author quotes from another researcher who proposes that " *…if the Catholic Church managers and parish councils choose to maintain a professional staffing level of 5.5% per 1,000 Catholics (which is the present ratio) then parishes will need to hire 378,000 professional employees by 2010*". (Schoenherr & Young, 1993 in *Full Pews and Empty Altars*).

While the General Directory for Catechesis reiterates the central role of the clergy in the teaching responsibility of the Church, only 2% of all parish recommendations reported in this study saw the priest as the designated teacher. While it could be erroneous to draw quick conclusions from this statistic it does seem that a general awareness exists which assumes that priests will be less available for such roles in the future as compared with what may have been true in the past. As the parishioners in this Archdiocese already know the availability of clergy in Philadelphia is decreasing by approximately 2 % each year. (Archdiocese of Philadelphia Diocesan Priests' Personnel Projections). The range of tasks of the priests such as the sacramental life of the parish will remain a priority. While other activities in support of the spiritual life of the parishioners, such as education might have to fall to other trained personnel.

The reorganization of parishes within clusters, the implementation of cluster initiatives, and the overall management of parish life will necessitate some creative thinking when implementing media and public relations activities and in hiring professional staff and developing funding programs.

E. PARADIGM FOR PARISH RELIGIOUS EDUCATION

In all, the concepts imbedded in the teaching recommendations offer a rich paradigm for building a blueprint for a long range teaching plan for parish religious education. The recommendations themselves suggest that this paradigm needs to be comprehensive and integrated and might be fragmented if each category of learner or program were to discretely address its own concerns.

The recommendations exhibit a strong desire on the part of the planners to support all ages of the parish membership with the full knowledge of the faith from birth to death. The recommendations suggest multiple needs. The recommendations provide a broad scope of religious educational efforts that would be required to engage the faithful, of all ages, in the full life of the church and to ready them as witnesses to and proclaimers of the Gospel.

The plans describe teaching and learning as critical to evangelization and leadership in the Church particularly for the laity who bear the responsibility in family and in the workplace for manifesting confidence in knowing their faith and courage in promoting fidelity to Christ and membership in His Church.

To reach desired goals, action plans need to be developed that include responsibility, resources and deadlines. The pastor and pastoral council members remain the critical links in bringing about the desired goals. An orientation to the plans for new council members would be essential to moving them into action. The acceleration of social changes, growing parish needs and increased pastoral demands does not permit prolonged lags between the plans and the implementation. Building a strong foundation for parish religious education is a complex task and will take time and detailed work but the rewards seem to be apparent to the writers of the plans. To continue the cycle of action research (and there is no linear end) the process needs to move ahead in a timely way.

Pastoral leadership will bring direction, expertise and accountability to these recommendations. The next generation waits in the wings and will need to know, as did those who came before, how to continue to respond to the basic Christian challenge, ever old, and ever new: "Go into all the world and preach the Gospel to the whole creation." Mark 16:15.

Chapter Eight

PARISH RECOMMENDATIONS TO PROVIDE SERVICE

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This chapter summarizes all the service recommendations, written as goals or desired action statements, of the parish pastoral councils. Of the 284 plans included in the analysis, 235 plans (82%) specified 810 recommendations in the area of service. Using frequencies as the measure of common agreement around parish needs and common perceptions in the area of service, this chapter proposes certain patterns of ideas common to the 284 parish plans included in the study. Due to the varieties of service programs and initiatives throughout the Archdiocese it was necessary to involve several divisions (Appendix 8.1) from Catholic Human Services in the development of this chapter.

PRINCIPLES, PROPHECY AND PASTORAL RESPONSE

One of the resources provided to parish pastoral councils, ***Principles, Prophecy and a Pastoral Response***, (Campaign for Human Development. USCC. 1991), found in Volume 3 of the parish self study materials offered areas of service that were applicable to parish communities. Based upon the principles of Catholic social teaching, this document defined the following domains for parish service: *Life and Dignity of the Human Person; Call to Family, Community, and Participation; Human Rights and Responsibilities; Option for the Poor and Vulnerable; The Dignity of Work and the Rights of Workers; Solidarity; Care for God's Creation.* The recommendations summarized in this report offer similar areas for service in the language of the parish planners.

PARISHIONERS SURVEY

A review of items 35-40 of the *Preliminary Statistical Report Combining All Parishes* revealed that 76% of parishioners surveyed in the Archdiocese agreed or strongly agreed that their parish offered some form of service to

the poor and 85% affirmed that their parish assisted the poor in the Archdiocese. The report went on to show that 75% of parishioners believe that their parish helps parishioners who are in need with 60% indicating that their parish helps non parishioners in need. In regard to survey items pertaining to discussion of justice and equality within the parish, and the parish having groups for justice, the number of affirmative responses dropped to 38% and 36% respectively with nearly an additional 50% of respondents indicating that they were undecided for both items. The survey responses appear to be consistent with a national sense of parishioners' response to the needy. Recent research observes that 65% of American Catholics, born post-Vatican II, and 58% of American Catholics, born pre-Vatican II, feel a duty to help close the gap between the rich and the poor (Davidson, Lasmanna, Stenftenagel, Weiglet, Whalen & Wittberg, 1997). Fewer responses showed agreement with the issues of justice as content for parish discussion.

Table 8.1   Parish Plan Review, Service Recommendations

Responses		Parishes		Code	Description
SERVICE PROGRAMS					
16	(2%)	16	(7%)	P1	Bereavement
13	(2%)	13	(6%)	P2	St. Vincent de Paul Society
7	(1%)	5	(2%)	P3	Special Needs Populations
7	(1%)	7	(3%)	P4	Hospitality/Parish Welcoming
8	(1%)	6	(3%)	P5	Meal/Food Programs
24	(3%)	19	(8%)	P6	Shut-ins/Elderly Ministry
5	(1%)	5	(2%)	P6a	Hospital/Sick Ministry
31	(4%)	29	(12%)	P7	Committees on Social Justice
5	(1%)	5	(2%)	P9a	H.O.P.E. Programs
35	(4%)	31	(13%)	P9b	Other General
37	(5%)	29	(12%)	P9c	Other Specific
4	(0%)	3	(1%)	P9d	Employment
192	(24%)				
VOLUNTEER ISSUES					
12	(1%)	10	(4%)	V1	Recognition/Appreciation
9	(1%)	9	(4%)	V2	Training/Support
66	(8%)	56	(24%)	V3	Recruitment
51	(6%)	37	(16%)	V4	Recruitment Methods
138	(17%)				
EDUCATION					
14	(2%)	13	(6%)	E1	Education using Speakers
20	(2%)	20	(9%)	E2	Awareness of Social Issues
44	(5%)	43	(18%)	E3	Catechesis & Education
27	(3%)	25	(11%)	E4	Awareness of Parish Services
105	(13%)				
RESOURCES FOR GENERATING AWARENESS					
18	(2%)	17	(7%)	R1	Publicize
12	(1%)	11	(5%)	R2	Utilizing Church Bulletin
17	(2%)	16	(7%)	R3	Newsletter/Directories
12	(1%)	11	(5%)	R4	Utilizing Liturgy
17	(2%)	15	(6%)	R5	Other
76	(9%)				
MINOR THEMES					
26	(3%)	25	(11%)	IC	Communications
23	(3%)	23	(10%)	CN	Cluster/Networking
16	(2%)	12	(5%)	F	Christian Call to Service Faith Issues
20	(2%)	16	(7%)	G	Civic/Community Involvement
25	(3%)	23	(10%)	N1	Areas of Need
14	(2%)	14	(6%)	N2	People in Need
21	(3%)	19	(8%)	S	Staffing
30	(4%)	26	(11%)	Y	Youth/Young Adult Involvement
175	(22%)				
124	(15%)	85	(36%)	W	Other uncoded
810	(100%)	**235**	**(82%)**		Unduplicated parishes and recommendations

SERVICE RECOMMENDATIONS: A SUMMARY

The Gospel call to Christian service was recognized by 12 parishes making 16 recommendations

specifically stated in these terms, but overall the desire to express internal values with external deeds seems apparent in the service recommendations. The largest number of parish recommendations for service was in the area of programs, followed by volunteer issues, education, and resources required for generating awareness of social justice issues. These four areas accounted for 63% of the recommendations (n = 511). Eight additional "minor theme" areas accounted for the remaining 22% of recommendations (n=175). These recommendations suggest the organization of service actions, staff to develop service programs, specific groups to target for service involvement, and as is true for most organizations the recognition of communication was cited as essential to success.

Some recommendations (n=124), because of their nature, could not be easily categorized but describe the general desire of parishes to increase their efforts to reach out to those in need in response to the Gospel call to Christian service. Table 8.1 summarizes the coding scheme for service recommendations from the parish pastoral plans.

1. Service Programs

The majority of recommendations made by parishes focused upon actual service programs. A total of 112 parishes (43%) made 192 recommendations concerning the improvement of current outreach programs, reviving former programs, and initiating new programs that cater to parishioners and non parishioners in need. Some of the more prominent program themes focused upon establishing committees for social justice (n=31), a bereavement ministry (n = 16), ministering to the elderly and shut-ins (n = 24), and establishing a St. Vincent de Paul Society (n = 13).

2. **Volunteers**

The issue of volunteerism within the parish is an interesting one in that the issue itself, as it pertains to service, was not addressed in the parish surveys nor in the pages of the Parish Self-Study workbook dealing with service. In spite of this fact, it was the second most frequently addressed issue by the parish pastoral councils. One hundred and thirty-eight recommendations were made by 97 parishes (41%) concerning volunteer issues. The majority of these recommendations (n = 117) focused upon the need for increasing the number of volunteers within the parish and the development of effective recruitment methods within the parish. The remaining recommendations (n = 21) addressed issues concerning the need to recognize volunteers for the work that they do in the parish

community and the need to provide training and support to volunteers in their respective ministries.

3. Education

        Eighty-eight parishes (37%) made 105 recommendations regarding education. Tools for educating parishioners consisted of inviting guest speakers to the parish (n=14), expanding or using the parish's existing religious education program to foster knowledge and awareness of social teaching (n=44). Recommendations regarding education not only focused upon the need to increase the knowledge, understanding, and awareness of Catholic social teaching within the parish community, but also the need to educate the parish community on the services and outreach programs provided by the parish. It was evident from the plans that in the perception of the plan writers, while the parishes were providing numerous services, a great number of the parishioners were unaware of the programs the parish provided. If the council members' perceptions are accurate, this lack of awareness may adversely affect volunteerism within the parishes.

4. Generating Awareness

        In their effort to address the perceived lack of awareness on the part of parishioners, parish pastoral councils recognized a need to use various resources to generate awareness of parish service programs, Catholic social teaching, and other social justice issues. Fifty-eight (20.3%) parishes made 102 recommendations dealing directly with this need for building awareness. Forty-seven of these recommendations suggested using printed resources to inform, invite and motivate parishioners. These printed resources include the church bulletin, parish and organization newsletters, parish directories, and making literature on social justice issues and programs available to parishioners. In addition, eleven parishes recommended the Sunday Liturgy as a formal setting for generating awareness of service issues.

        Other areas of recommendation consisted of networking within the cluster to address service issues (n = 23), involving the parish community in the civic community and increasing parishioners' political involvement for the benefit of social justice (n = 20), and improving current methods for identifying areas and people of need within and around the parish community (n = 39).

        Nineteen parishes recognized a need to hire additional staff members for the purpose of addressing the service needs of the parish (n = 21). This usually involved the hiring of a social worker or coordinator to oversee the

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parish's social justice programs and outreach.

The area of youth and service also received modest attention. Thirty recommendations were made by 26 parishes calling for increasing the involvement of youth in the social ministry of the parish. Finally, twenty-six recommendations were made to improve current methods of communication between parish service organizations and the parishioners.

Certain general topics were categorized as "other." This area contained 124 items that lacked specification to permit the reviewer to identify what the parish councils had in mind at the time they were written. They include recommendations like "choose a direction/focus," "empower people," and "we will continue to keep doing what we are doing." Other items contained in this category were very specific, but appeared to be unrelated to content areas identified in this analysis. They include recommendations like "see that more members of our parish attend the Catholic Institute for Evangelization," and "give information in Sunday bulletins relating to weddings, baptisms that take place."

RECOMMENDATIONS

It would appear given the nature of the results obtained from the content analysis that a large number of parish pastoral councils associated the idea of service with the notion of a program. This is evident in the fact that 43% of the parishes made recommendations that pertain to specific service programs to be offered by the parishes. The perceived need to educate parishioners regarding parish services and develop resources to generate awareness of parish service programs is consistent with a national phenomenon. More than 90% of parishioners throughout the United States indicate "that helping the needy is an important part of their own religious beliefs" (Davidson, et al., 1997).

Volunteers

The area of volunteerism is an issue that deserves closer attention. Current trends in the United States indicate that "an average of 208 parishioners provide an average of 810 hours of service to their parishes each month" and that volunteers from the parish are being called upon to fulfill more leadership positions in parish ministries than paid staff members (Murnion & DeLambo, 1999). Judging from the recommendations made in the pastoral plans, it would appear that parishes are struggling with the issue of volunteerism. In general, parishes are having difficulty with volunteer recruitment and maintaining a sufficient volunteer base to accomplish their goals for the service life of the parish.

Given the nature of the Church to rely heavily upon volunteers to carry out its mission within the parish, it would not be surprising to find this issue surfacing in the other six themes of the parish self study. Providing parish pastoral staffs with formal training in effective volunteer recruitment and management techniques may be warranted in light of the expressed need of many parishes to identify ways of increasing involvement and the number of volunteers within the parish.

Workshops could be developed that focus on specific volunteer issues within a particular cluster of parishes or provide clusters with important general information regarding parish recruitment and protocol. Training could also be provided on a vicariate level. It may be possible to draw on the experience and resources available from the Office for Volunteer and Community Relations Services withing the Secretariat for Catholic Human Services in an effort to address training issues and development.

Parishes may need to become more keenly aware that, "Being clear with volunteers, for example, regarding the role they are expected to play (a form of job description), the length of their commitment, and other practices regarding staff positions is good for the parish and the parishioners who volunteer" (Murnion & DeLambo, 1999). Equipping parishes with the necessary resources to develop application, interview and screening processes for parish volunteers may greatly reduce the potential liability resulting from improper screening procedures within the parishes. Enabling parishes to engage in effective volunteer recruitment and management may increase the potential capability for parishes to implement more parish programs and works by increasing the size and quality of the pool of parish volunteers.

Stewardship

The relationship of service to stewardship needs to be promoted further within the parishes. The concept of "stewardship" provides a sound theological basis for the active involvement of parishioners in their communities and may provide an ideal opportunity for addressing the issue of volunteerism. In their research of parish lay ministers Murnion and DeLambo found that stewardship provides an effective "framework for increasing commitment of 'time and talent' to the community of the parish" (Murnion & DeLambo, 1999). An increasing number of parishes throughout the United States are promoting stewardship in their effort to engage parishioners' active involvement in the life of the parish.

Education/awareness

As mentioned in the introduction, ***Principles, Prophecy, and a Pastoral Response*** was distributed to all of the parishes participating in the self-study process in Volume 3 of their parish self-study resource material. However, based upon this content analysis, it is evident that very few parish pastoral councils made recommendations based upon the content areas identified in the document. The lack of reference to the article may reinforce the need for continuing education and awareness of Catholic social teaching. There appears to be a general need to identify ways of increasing the parishioners' familiarity with Catholic social teaching throughout the Archdiocese. Parishes' recognition of the need for increased education supports this assumption.

The issue of education regarding Catholic social teaching might vary from parish to parish and might need to be addressed within the individual parishes. However, there would also be benefit in encouraging parishioners to attend Archdiocesan sponsored events, such a the Parish Life Congress and Catechetical Forum. The planners of these Archdiocesan educational activities need to incorporate the recommendations of the parishes into their program planning in order to assist parishioners to stay current with Catholic social teaching. Such efforts could serve as a springboard for stimulating education on Catholic social teaching within parishes as participants return to their parishes. Catechesis around Catholic social teaching could also be provided as part of a cluster's effort to address shared concerns and issues among parishes within the cluster.

PARISH RECOMMENDATIONS TO ENSURE LEADERSHIP

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This chapter considers the results of the parish pastoral planning process that addressed the area of *leadership.* Parish pastoral council members incorporated the parish self study survey results with their own experience, current data on the parish particular to their setting, and reflection questions found in the parish self study guide, to construct perceptions about the effectiveness of parish leadership in forming, communicating, and acting to accomplish the goals of the parish and to generate recommendations to improve leadership in the future.

CHURCH DOCUMENTS AS CONTEXT

Since 1965, the role of the laity as co-partners with the clergy has been addressed by the Holy Father and local bishops in clear and unequivocal descriptions of the Church as the people of God. In particular, the Council's statements on the Church, the Bishops' pastoral office, and the laity articulate a set of principles and methods that foster more participative and consultative models of leadership for the bishops, pastors, other clergy, and laity. Recognizing that the talents of the laity make them major contributors to the welfare of the entire Church, the bishops explain that the mission of the Church is a common undertaking in which everyone ought to cooperate, using Paul's description of the Body of Christ being tightly joined together (Eph. 4:15-16) as an analogy. (Lumen Gentium, LG 30) Furthermore, the laity are called by their membership, to share in the governing of the Church. (LG, 31) The laity, *"As sharers in the role of Christ, . . . have an active part to play in the life and activity of the Church. Their activity is so necessary within church communities that without it the apostolate of the pastors is generally unable to achieve its full effectiveness."* (*Apostolicam Actuositatem,* AA,10) Thus, their active collaboration is essential, not merely desirable; it is their right and duty for, *"An individual layman, by reason of the knowledge, competence, or outstanding ability which he may enjoy, is permitted and sometimes even obliged to express his opinion on things which concern the good of the Church." (LG,37)*

One commentator connects the Council's recognition of the need for full lay participation in the Church to

the development of participatory management and decision making in business and industry and to efforts in both government and the private sector to work together with those they had previously viewed simply as clients. (Wedel in Abbott, p. 523)

The topic of discussion at the regular Synod of Bishops in 1987 was "The Vocation and the Mission of the Lay Faithful in the Church and in the World." The three Council documents are all cited frequently in the work of the Synod and in Pope John Paul II's consequent letter *Cristifideles Laici (CL).* The pope draws on the Council's Decree on the Laity: *"It is now necessary to look more closely at the communion and participation of the lay faithful in parish life. In this regard all lay men and women are called to give greater attention to a particularly meaningful, stirring and incisive passage from the Council: 'Their activity within Church communities is so necessary that without it the apostolate of the Pastors is generally unable to achieve its full effectiveness'(100)."* (CL, 27)

The participation of the laity in a manner which is consistent with their vocation also requires education and formation. *"The fundamental objective of the formation of the lay faithful is an ever-clearer discovery of one's vocation and the ever-greater willingness to live it so as to fulfill one's mission." (CL 57-58)*

The appropriate role of the laity in providing for the work of the parish is further specified in the *Catechism of the Catholic Church, 1994 (CCC)* and the *Directory for the Life and Ministry of Priests.(DMLP). "The Laity can also feel called, or be in fact called, to cooperate with their pastors in the service of the ecclesial community, for the sake of its growth and life. This can be done through the exercise of different kinds of ministries according to the grace and charisms which the Lord has been pleased to bestow on them.' In the church, 'lay members of the Christian faithful can cooperate in the exercise of this power (of governance) in accord with the norm of law.' And so the church provides for their presence at particular councils, diocesan synods, pastoral councils; the exercise in solidum of the pastoral care of a parish, collaboration in finance committees, and participation in ecclesiastical tribunals, etc." (CCC, 910-911).*

Parish leadership requires the full and appropriate participation of clergy and laity. *The Directory for the Life and Ministry of Priests* (1994) states*, "In carrying out their mission, priests must know how to transfer these demands (the correct study of theology and reflection on social cultural and scientific data) into a constant and*

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sincere attitude of being in tune with the Church, and thus will always work within a bond of communion with the

Pope, Bishops, other brothers in the priesthood, as well as with the faithful consecrated through the profession of

evangelical counsels and with the lay faithful. They moreover will not fail to request, in legitimate ways, and taking

into account the capacity of each one, the cooperation of the consecrated faithful, and the lay faithful in exercising

their mission." (DMLP, 55)

In **Called and Gifted for the Third Millennium**, NCCB/USCC, 1995 the United States Bishops state

"Lay participation in church life at all levels is a gift of the Holy Spirit, given for the common good. Laity can and

should exercise responsible participation both individually and in groups, not only at the invitation of church

leadership but by their own initiative" Integrating these responsibilities to develop the full leadership parishes

require and the implications of this integration for the roles of pastors, other clergy, parish staff, and parishioners is

the challenge that the parishes of the Archdiocese put before themselves.

ORGANIZATION LITERATURE ON LEADERSHIP AS CONTEXT

Parish planners are also directly and indirectly exposed to a wide range of ideas on leadership in schools

and colleges, in their places of work, and in the popular secular press. An understanding of these ideas is necessary

to grasp what might be implied in the recommendations. The range of definitions for leadership as it has been

defined in organization studies, is vast. Three elements seem to be common to most definitions of leadership. First,

it is a process of influence where the leader effects the behavior of others (followers). Second, that influence process

takes place in a group. Third, the leader effects the behavior of the group in the direction of goals with which the

group is faced.

The theory and research in leadership has progressed from a focus exclusively on the person in the

designated role of the leader (traits or styles of the leader), to a consideration of the situation that the leaders find

themselves in (particular work, environments and people involved). More recent leadership theory emphasizes that

the leader is able to create(or at least influence) an interaction with followers characterized by 1) charisma-

developing vision engendering pride, respect and trust; 2) inspiration - motivating by creating high expectations and

modeling appropriate behavior; 3) individualized consideration - giving personal attention, respect and responsibility

to followers; and 4) intellectual stimulation - continually challenging followers with new ideas and approaches.

Currently, the area of leadership has been focused on the idea of dispersed leadership, a perspective that emphasizes the importance of recognizing the need for leadership to be viewed as a widely dispersed activity not specific to formally designated leaders. This approach makes a clear distinction between the formally designated leader and leadership roles that everyone can perform. One key feature of this idea is that leadership requires 'leading others to lead themselves' so that followers are stimulated to become leaders. Dispersed leadership recognizes that leadership processes and skills do not reside exclusively with designated leadership positions and that organizing activities and motivating can be carried out by knowledgeable people throughout the organization. (Bryman, 275-292) In the Church, dispersed leadership complements and is an extension of the unique role of the Pastor as servant leader, that is one who enables others. It is in the vein of these more recent approaches to the study of leadership that leadership theory begins to converge with Gospel teaching.

Then an argument broke out among them about which of them should be regarded as the greatest. He said to them, "The kings of the Gentiles lord it over them and those in authority over them are addressed as benefactors; but among you it shall not be so. Rather let the greatest among you be as the youngest, and the leader as the servant. For who is greater: the one seated at table or the one who serves? I am among you as the one who serves. Luke 22:24-27

DATE COLLECTION: FREQUENCIES ACROSS PARISHES

Of the 284 plans included in this analysis, 228 parishes (79% of the total) submitted a total of 775 recommendations about leadership. All percentages identified in Table 9.1 are calculated as part of the total number of parishes in the archdiocese (286) at the time this chapter was developed.

In this summary, frequencies of recommendations named, are grouped within the categories of persons identified to be supported in their leadership roles in the parishes as identified in the parish plan: pastors and other ordained clergy, members of religious communities, paid parish staff, and other laity.

Recommendations for lay leadership were further classified into the four areas identified in *Called and Gifted for the Third Millennium: Reflections of the U.S. Catholic Bishops on the Decree on the Apostolate of the Laity,* the call to holiness, call to community, call to mission and ministry, and the call to Christian maturity.

While the analysis of the recommendations demonstrated some variations among parishes, similar

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categories remained high in frequency of citation across the Archdiocese. Parish planners were clearly interested in identifying ways to call **laity** into leadership positions. Among the categories of persons identified in Church documents to be supported in their leadership roles in the parishes, (pastors and other ordained clergy, members of religious communities, paid parish staff, and other laity), the largest share of recommendations (43.2%) involve the leadership role of the laity.

The leadership roles of the Pastor, other priests, and parish staff was not the primary focus of the parish planners. Only 13% of the recommendations dealt with these roles. The particular role of members of religious communities was not mentioned. This may be the result of the planners seeing the religious present in the parish as part of the staff and included in staff recommendations or it may be that the religious are not distinctly part of the conscious perceptions of the parishioner planners.

Parish planners also named specific strategies for implementing goals. One hundred and twenty three (43%) parishes urged the use of better communication to promote the opportunities for leadership in the parish. Twenty six percent of the parishes identified a specific need to train people in their responsibility to assume leadership positions and to provide them with leadership skills. A smaller number recognized the need for the development of systematic approaches to plan, develop roles, and/or evaluate leadership positions (69 parishes; 24.1%). Different or enhanced structures such as volunteer lists, coordinating groups, and special meetings were strategies recommended by 19.9% (1 in 5) of all the parishes. All of these types of recommendations point to a recognition of the direct requirements that an increased awareness of the role leadership in parishes places on communication and other resources.

TABLE 9.1   **SUMMARY TABLE OF LEADERSHIP RECOMMENDATIONS**

CATEGORY	# of recommendations	% of leadership recommendations	# of parishes	% of all parishes	code
Pastors/Priests		**6.0%**			
Priest/Deacon leadership	38	5.1%	34	11.9%	LP
Vocations	7	0.9%	5	1.7%	LV
Staff		**7.1%**			
Staff/human resources	53	7.1%	45	15.7%	LF
Laity		**43.2%**			
Call to Holiness	30	4.0%	25	8.7%	LH
Call to Community	15	2.0%	15	5.2%	LU
Call to Mission and Ministry	244	32.5%	152	53.1%	LM
Call to Christian Maturity	35	4.7%	30	10.5%	LT
Particular Methods		**61.7%**			
Communicate	205	27.3%	123	43.0%	LC
Provide Training	94	12.5%	76	26.6%	T
Plan/Evaluate	91	12.1%	69	24.1%	LR
Change or enhance structure	73	9.7%	57	19.9%	LS
Characteristics of Leaders		**8.4%**			
Parish Pastoral Council Members	26	3.5%	23	8.0%	B
Men	1	0.1%	1	0.3%	M
Elderly	3	0.4%	3	1.0%	O
Youth	33	4.4%	30	10.5%	Y
Other	26	3.5%	20	7.0%	LO
Not a recommendation	4	0.5%	3	1.0%	LN

775 unduplicated responses   228 unduplicated parishes

DESCRIPTIONS OF CATEGORIES

In addition to the five general sections of categories of persons identified to be supported in their leadership roles in the parishes, (pastors and other ordained clergy, members of religious communities, parish staff, and laity), this paper provides examples under each category of the wording of the actual parish recommendations and compares them with the recommendations found in the *Directories on the Pastoral Ministry of Bishops and Priests*, *Called and Gifted for the Third Millennium,* and organizational studies dealing with leadership. This analysis will provide some indication if parishes have captured, in their expression of leadership recommendations, the intent of the Church regarding the distribution of leadership roles among the clergy and the laity. It will also highlight the parish recommendations in the context of existing research on effective organization leadership.

PART III: RECOMMENDATIONS FOR LEADERSHIP: A SUMMARY

A. Persons Who Should Lead:

The Directories on the Pastoral Ministries of Bishops and Priests, and *Called and Gifted for the Third Millennium* (CGTM)all identify persons with leadership roles in parishes. These are identified in parish plans:

Category	# of recommendations	% of recommendations	% of parishes	code
Priests/deacons	38	5.1%	11.9%	LP
Vocations	7	0.9%	1.7%	LV
Parish staff	53	7.1%	15.7%	LF
Laity				
lay call to holiness	30	4.0%	8.7%	LH
lay call to community	15	2.0%	5.2%	LU
lay call to mission	244	32.5%	53.1%	LM
lay call to maturity	35	4.7%	10.5%	LT

From this table it is evident that parish planners focused on the leadership role of the laity in parishes. Since the pastoral leadership in parishes is well established with the ordained pastor, it raises a question why the role of the pastor and other ordained clergy is not addressed very often when parishes are making recommendations on how to strengthen leadership. More than 52% of the parishes have priests assigned to parish ministry in addition to the pastor. But almost completely absent from the recommendations is any reference to the role of other priests or deacons present in the parish.

The focus of the self study questions was balanced among the roles of the newly formed parish councils, the roles of pastors, and parish staff. The particular data available to pastoral councils at the time of parish planning did not include projections for the availability of priests but reasonably observant intuitive planners could guess that the availability of priests would be less in the future. Whether the implications of fewer priests in the parish was overlooked by planners or biased them in the direction of looking at the role of laity is not clear. Regardless of the reason, the number of recommendations directed to the pastors and other ordained clergy is not great.

1. Pastors and Other Clergy - Priests/Deacons (N=38) Vocations (N= 7)

Recommendations coded Priests/Deacons seem to fall into two areas: strategies to obtain additional ordained staff for the parish, or direction for the pastor/leader. Recommendations coded as vocations are long term suggestions to create an atmosphere of support for priest vocations.

In the first instance, recommendations include *"appointment of... retired priests,"* to *"request a commitment from the Oblates of St Francis de Sales to provide continuity of clergy,"* and to *"acquire an assistant priest/ lay deacon."* In line with these suggestions are specific recommendations to foster vocations including special prayer and programs in the parish specifically intended to foster vocations such as the involvement of eighth grade students in the liturgy.

The directions to the pastoral leadership provide more opportunity for action on the part of the pastor and staff. Specific direction to the pastors include *"meeting with small groups of parishioners, directly asking people to assume leadership roles, reinstating clergy visits to parishioner homes, having the pastoral staff 'comprised of priest, pastoral assistant, principal, DRE meet as one staff' and sharing responsibility."* Implied in some of these recommendations is a developing role for others in the parish, *"Free the priest from business aspects"* and

recognition for the work of the pastor, *"have a priest appreciation dinner."*

These aspirations are consistent with the guidelines from the *Directory for the Life and Ministry of Priests*, *"In the awareness of the profound communion which binds him to the lay faithful and to the religious, the priest will make every effort 'to awaken and deepen co-responsibility in the common mission of salvation, with a prompt and heartfelt esteem for all the charisms and tasks which the Spirit gives believers for the building up of the Church'" (* DLMP*, 30)*

2. Parish Professional Lay Staff (N = 53)

The infrequent naming of pastors and priests may indicate a focus of the writers on *who else* (in addition to priests) could fulfill leadership roles in the parish.   In particular ways, the parish plans identify a wide range of persons who could be entrusted with co responsibility for the leadership of the parish. The recommendations in the area of parish staff tend to fall into two broad categories: recommendations to hire or identify staff, and recommendations to develop existing staff. In both instances, the pastor does receive some direction and support to build staff.

Staffing some very specific roles is identified as one approach to providing leadership in the parishes. These roles include DRE's(3); Youth ministers (11); Social ministers (3); Music ministers (3); and Volunteer coordinators (3) who would *"... serve as a facilitator between those who feel called to serve and the various service organizations and opportunities in our parish and community."* There are single recommendations for a public relations person; a development person; a parish service coordinator; a consultant in business, and a consultant in communications.

Development of existing staff is the other major approach proposed. *"Develop staff as leaders particularly in light of turnover of persons*." In addition to general staff development, (named 7 times), more coordination of staff, use of staff to carry out better communication, the scheduling of regular staff meetings, continuing staff education, more delegation <u>by</u> staff members to parishioners and the need to *"Establish a more responsive rectory organization"* are mentioned.

In a manner similar to the parish recommendations in teaching, the need is identified in a general statement

that more staff is needed, but the source of qualified staff and the resources to the support them are not identified. The source and preparation of the existing and new staff, beyond "qualified" and "professional," are identified in only one instance. *"Augment parish personnel by soliciting retired business people with management skills."* There are no other references to the specific qualifications of persons to assume these positions. For example, members of religious communities are not identified as a particular source of staff.

3. Laity

In more than half of the plans there are leadership recommendations involving lay parishioners. In an effort to find common themes around which to organize this large group of recommendations, the author chose the four callings of the laity identified in *Called and Gifted for the Third Millennium.* This does not imply that the calls of the laity all include leadership. However, each legitimate recommendation on lay leadership should involve one or more of the appropriate calls of the lay vocation.

Using this organizing structure, the number of recommendations involving the laity's call to mission and ministry is substantial(n = 244). Less frequently mentioned recommendations that involve the call of the laity to holiness(n = 30), community (n = 15), and Christian maturity (n = 35) might have been better placed with parish recommendations to evangelize, to build community, and to educate. But the parish plans include these in the area of leadership.

Lay call to mission (N = 244)

The call to ministry involves laity's witness and service within the family, workplace and community, but it also involves the appropriate role of laity in carrying out the work of the Church and the parish. In this regard, it involves identifying the resources to prepare people for work within the Church, to involve people of different backgrounds and to ensure the Church is a good and just steward of human resources.

Recommendations in this area focus on identifying and supporting more and different lay leaders to carry out the work of the parish. Often this takes the form of a general expression of need. *"Get new and different people to volunteer, seek out and invite those not involved." "We need to call more people to exercise leadership and to free others from the often all consuming fiscal preoccupations so that as a parish we might experience their full gifts for leadership." "Invite all parishioners to participate in some leadership activity." "Find ways to reach reluctant leaders."*

Frequently parish planners suggest that the techniques to recruit people into parish work are insufficient and need to be addressed. This includes recommendations for active identification and recruitment of parishioners into parish volunteer work and leadership positions.   Among the many particular recommendations on how to engage more people in the work of the parish are, Parish Ministry Sunday, Career Day for students, Annual Leader's Campaign, one-on-one recruitment, one hour of volunteer service a month, inviting students from the local university to become involved, time and talent fairs, and tuition incentives.

It is not clear whether planners making recommendations to increase the numbers of active parishioners are satisfied that enough meaningful work exists in the parish, or whether this is simply not considered. Some parish councils express concern that there may not be an appropriate amount or type of opportunity to work in the parish. These recommendations include; *"Develop opportunities for service and leadership" "We need to create more opportunities for parishioners to develop leadership skills."*

The large numbers of recommendations (94) calling for training implicitly suggest that there is a perception that parishioners may not recognize parish work as their responsibility, feel adequately prepared to do the work, or be prepared to take on appropriate leadership roles. A more detailed discussion of the training recommendations is a part of particular methods to enable leadership in section B.2 of this paper.

Some recommendations proposed to address the issue of involving more parishioners in their call to ministry in more systematic ways. *"Spend one year educating the parish to focus everyone on their responsibility to their parish."* Develop a parish program to prompt reflection by all parishioners on *"what active role they can play to make a contribution to the parish that will benefit them individually and the parish as a community."* Develop programs to train replacements for leaders and ensure a continual turnover of leadership positions in key ministries.

Lay call to holiness (N =30)

Some recommendations call the parish to *"Spiritualize the efforts of volunteers"* by providing opportunities for a day of recollection or *"retreats for pastoral councils and other parish leaders"*, a *"focus more toward Christian ideals,"* periodic *"evenings of reflection or mini retreats for leaders,"* prayer days, a spiritual event for parish leaders or a *"spiritual growth program for lay leaders,"* speakers to raise the awareness of the leaders and

would be leaders, taking action on a corporal work of mercy such as *"Bring food to the needy,"* or simply to "increase" and "intensify" prayer activity.

Parish planners making recommendations in these areas seem to recognize that those who provide leadership in the parish are in need of support to be open to God's gift of grace in their lives. They, in turn, might be better prepared to support others. *"Support the clergy , religious and lay leaders of the parish enabling them to help parishioners grow in Christ." "An initial step is to evangelize first our leaders then all parishioners. This recognizes the universal need for individual evangelization so each of us can develop our faith and religious practice."*

Lay call to community(N =15)

The call to community is a call to pastors and laity to develop and sustain supports for the family and Christian communities based on "gifts and wisdom" acquired through family and work. The small number of recommendations coded in this area are frequently proposing methods of strengthening the leadership in the family or in small faith communities. *"Parishioners should take on leadership roles by inviting others to participate." "Strengthen the leadership roles of parents." "Encourage more lay leaders to ....visit the homes of our people." "Develop a structure of faith sharing in the homes."Develop a friendly atmosphere..." "Start monthly parish socials hosted by families."* The particular families and individuals who may carry out these activities, the preparation they need to do it, and the particular targets of their efforts are not addressed.

Lay call to Christian maturity (N = 35)

The call to Christian maturity is a call to all the laity to become actively involved in bringing the Catholic tradition to new generations. It also involves the ongoing personal development, adult religious education and active responsible participation in Church life. Motivation, inspiration, encouragement, empowerment, sharing, and collaboration are terms used frequently by the parish planners in this group of recommendations but the recommendations are not very specific about who will take these actions, and who is the target of them. There are some exceptions to this general pattern. Targets of recommendations include subgroups within the parish. *"Continue to discern, identify, nurture, and support leadership among the various ethnic groups for the good and growth of those groups and the parish in general." "Finance council needs to assume greater responsibility and*

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develop opportunities for fund raising as well as become more a part of the decision making."

There are also some direct and indirect suggestions to the pastors. *"Recommend that all those parishioners who have volunteered for and been assigned special duties by the pastor be permitted to perform their tasks in accordance with their recognized expertise and without undue interference or unreasonable demands by the pastor." "The quality of our leadership needs to improve by becoming more clear, more direct, and more forceful"*

The methods to encourage the ongoing maturation of the faithful include encouragement of *"inclusive celebrations"* by all parish groups, developing *"models of collaboration among parish leaders"*, remaining open to *"new ideas"* and participating in development programs. *"We must encourage parish leaders to participate in Archdiocesan and regional events."*

4. Particular Characteristics of Persons to be Involved

In most of the recommendations, who is to be called to a leadership position is specified as everyone, and the caller is implied. *"Invite all parishioners to participate in some leadership activity."* Since there are existing parish staff and parish organization leaders, the reader could assume that the "inviters" should be the pastor and existing parish leadership though this is not often clearly stated.

CATEGORY	# of recommendations	% of leadership recommendations	# of parishes	% of all parishes	code
Characteristics of Leaders		8.4%			
Youth	33	4.4%	30	10.5%	**Y**
Parish Pastoral Council Members	26	3.5%	23	8.0%	**B**
Men	1	0.1%	1	0.3%	**M**
Elderly	3	0.4%	3	1.0%	**O**

In addition to the frequently implied role for the pastor, parish pastoral council members are singled out in 26 different recommendations to be informed and share information with the pastor and parishioners, to foster more effective communication among parish organizations and among the parishioners, to host ministry leaders at the council meetings, to report to the parish regularly about the council's activities including goals, to become visible and known in the parish and, in general, to promote the idea of lay leadership in the parish.

In addition to "all parishioners," young parishioners as the future leaders of the parish are identified by thirty parishes (33 recommendations) for special consideration. *"Make a report informing the parishioners of all the needs of the parish made known to us through the parish self study and give everyone, especially the younger parishioners, an opportunity to volunteer their services."* The age of those that the parish planners have in mind is known only to them but appears to vary substantially from one parish to another. *"We need to allow our teens/young adults to take on responsibilities in the parish." "Develop future leaders among our youth". "Develop youth leaders." "Young adults need to be recruited and educated for leadership roles." "Try to draw in younger parishioners and acquaint them with activities"*

The elderly(3), men(1), and "full time church goers"(1) are also recognized as groups who should be especially sought out for leadership positions. The motives for naming these groups are not specified in the plans. The elderly may have been named because of presumed expertise and availability; men because they are absent; and church goers because of their apparent interest but the real intent here is known only to the planners.

B. STRATEGIES TO IMPLEMENT LEADERSHIP IN PARISHES

CATEGORY	# of recommendations	% of leadership recommendations	# of parishes	% of all parishes	code
Particular Methods		61.7%			
Communicate	205	27.3%	123	43.0%	LC
Provide Training	94	12.5%	76	26.6%	T
Plan/Evaluate	91	12.1%	69	24.1%	LR
Change or enhance structure	73	9.7%	57	19.9%	LS

1. Communicate: (N=205)

One hundred and twenty three parish plans (43% of all the parishes) identified improved communications as instrumental in the development of parish leadership. Communication recommendations include opportunities for two-way communication in meetings and electronically, and one-way verbal communication and in written and posted media. The content of the desired communication is also addressed. The recommendations to generally improve communication, make it more frequent and full, and involve additional groups left the writer with the

impression that effective and efficient communication is seen as a significant need by a number of parish planners.

One way written communications proposed to strengthen leadership in the parish included the following:

> annual calendar of all groups
>
> booklet identifying parish organization for new parishioners
>
> copies of the mission statement to all new parishioners
>
> copies of Mission statement mailed with envelopes
>
> directory of parish organizations and services
>
> master list of committees
>
> meeting minutes to other staff groups
>
> newsletter to college students away at college
>
> news briefs from all organizations in bulletin
>
> ongoing news release to the local newspaper
>
> parish brochure
>
> parish directory of activities
>
> parish directory listing organizations and leaders
>
> parish information book
>
> periodic bulletin inserts
>
> publish lists of lectors, EM's, council members
>
> publish a list of needs asking people to help
>
> quarterly newsletter
>
> summary minutes of the parish council and finance committee
>
> suggestion boxes
>
> 'Voice of the Parish Council' in the Bulletin

One-way posted communications proposed to strengthen leadership in the parish included the following:

> leader pictures and organizations

parish council bulletin board in Church

parish mission statement (artistic rendering)

pictures of council members and those involved in key ministries

volunteer list with special interests

One-way spoken communication proposed to strengthen leadership in the parish included the following:

coordinate homilies with current events

homilies on peoples' gifts

Two- way spoken communication proposed to strengthen leadership in the parish included the following:

council speak regularly to parish to exhibit unity of purpose

establish a parish forum

establish staff liaison for each group/organization

hold social Sundays to introduce parish organizations

inquiry night about parish group meetings

invite ministry leaders to attend parish council meetings

leadership come together during summer to plan the year's activities

meetings of parishioners and parish council

monthly open parish meetings

monthly reporting session among leaders of all parish groups

more frequent meetings of council to foster communication with organizations

networking process among parish organizations

open parish council and finance committee meetings

periodic meetings among parish groups

regular parish meetings with pastor and council for feedback

schedule sharing session

semi annual meeting of organization heads

staff needs to communicate more clearly with parish groups

staff table with person from various organizations after Mass to answer questions

survey talents and interests

tables for monthly after Mass social

Two-way electronic communications proposed to strengthen leadership in the parish included the following:

develop parish web site

Among the **communication content areas** proposed to strengthen leadership in the parish were the following:(if not already mentioned)

annual state of the parish

commend all those who volunteer (leaders and members)

commend parish staff

existing service opportunities.

opportunities for parishioners to fill leadership positions

parish organization goals

2. Provide Training (N=94)

The need for training for leadership and, to a lesser extent, the content of this training is well documented in 25% of the parish plans. The particular identity of the providers, the trainees, and the source of resources needed to provide the training are generally not. This section summarizes parish leadership recommendations calling for education, formation and training. Who is to be trained, the content of the training, the delivery systems and the providers identified in the recommendations are reviewed.

Who is to be trained.

The 1998 Annual Pastoral reports filed by every pastor in the Archdiocese reported that there are 1,756 persons in parish leadership positions outside of the schools. This includes 1,042 full and part time clergy and 831 full and part time lay staff and volunteers. The laity are reported to be occupying leadership positions as parish services directors (90), business managers (184), directors of religious education (213), social workers (107), and

other (youth music, liturgy, etc.) directors (120). See appendix 9.1 and 9.2. (Miller, November 1999)

Most parish recommendations to train staff do not single out any particular staff positions such as parish business manager. *"Establish a program of ongoing education of our staff and yearly evaluation of staff."* We can only assume that this recommendation is generally applicable. None of the leadership recommendations single out the pastor or other priests and deacons for ongoing leadership training, but the role of the pastor in providing training and, in some instances, participating in training is implied in the recommendations.

Training Content

The training content identified by the parishes includes training to carry out the parishioners' call to mission and ministry. The largest content group named is leadership training and related ideas such as empowerment, practical leadership, and communication skills seminars, time management, Christian leadership, train the trainer activities, programs in active listening, how to run meetings, and mentoring.

Specifically mentioned are the role of laity, lay formation programs, and training for laity as extraordinary Eucharistic ministers, CCD teachers and other educators, training to conduct parish visitation, and training for prayer leaders. Recommendations also call for geographic access for parishioners to existing Archdiocesan programs in lay ministry, the permanent diaconate, and youth ministry.

Training Delivery Systems

The large majority of the recommendations are for parish based training. Within the parish, mentoring, providing *"on the job"* opportunities, and *"shadow volunteer programs"* are mentioned. But the majority of recommendations are proposing *"programs"* or *"workshops"* in the parish. Recommendations for training outside the parish include the Martin de Porres Foundation's training with an emphasis on leadership, general reference to Archdiocesan programs such as the Parish Congress, Seminary Courses, and Lay Ministry programs, and the Philadelphia Interfaith Action.

Teachers

The persons to conduct the training are generally not identified. The implications of the delivery systems proposed and some general statements about program delivery such as off-site and on-site, cluster and locally delivered seminary programs, video programs, the use of professional trainers and motivational speakers seem to

suggest a need for a fairly flexible and sophisticated adult learning activity conducted by knowledgeable and experienced educators.

The emphasis on parish programs is consistent with parish recommendations in the area of teaching where," The parish as a place for fostering religious teaching is cited in a variety of ways, each pointing to some general use of the parish space or personnel as a means for teaching."(Baker, Miller and Parfet,1999 p21)   This raises some issues that have already been identified in the review of parish recommendations for education. The identification of appropriate program content, qualified learning facilitators, and the choice of appropriate learning technologies and schedules that are attractive and appropriate for the intended audience, is a significant undertaking that is beyond the resources of the typical parish. The implications for staffing, improvement of parish facilities, and funding for such parish programs reflect some emerging themes of parish support for leadership that need to be addressed.

3. Plan and evaluate: (N=91)

Another 24.1% of the parish plans developed a particularly rich set of recommendations that are coded under the heading ongoing planning and evaluation of actions. These are more specific, understandable, and measurable recommendations for parish actions than those in other categories. Examples include, *reexamine the parish mission statement, formulate an organization chart, formulate job descriptions, update parish census, survey parishioners, set up a database of talents, create focus groups of uninvolved parishioners, evaluate existing organizations, encourage organizations to set goals, each organization should submit an annual report to the pastor, develop a more systematic evaluation of leaders, and define leadership for this parish community.*   In only a few cases is the responsibility to carry out the action established.

4. Change or enhance structures (N=73)

Establishing new committees or accessing or modifying committees already in existence to provide for the leadership requirements of the parish is also recommended. In some instances, these recommendations seem to be intended to address a perceived inadequacy in communication as well.   *"Establish more completely the various committees needed to fulfill the objectives of the parish Mission Statement." "Restructure parish assembly." "Plan a coordinating group for better communication among various parish groups." "...Heads of Parish Committee...." "Staff meetings to develop policy, programs, goals, and to improve communication."*

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C. RELATIONSHIP TO ORGANIZATION STUDIES LITERATURE

The study of organizational leadership can be divided into four types: trait theory, style theory, contingency theory and the new leadership approach. Trait theory investigates the physical traits, abilities and personality characteristics that distinguish leaders in organizations. In its current form, the characteristics being investigated are those prompting an inference on the part of others that a person is a leader. These include being strongly driven, having a strong desire to lead and exercise power, exhibiting honesty and integrity, and high self confidence (Locke et al, 1991, 34).

In the parish recommendations, the planners' mental image of priest and deacon seems to be used to characterize a leader trait but the particular traits that the planners have in mind are not spelled out. Beyond specifying a priest or a deacon, very little is expressed about the qualities of the persons who would lead. Neither is it assumed that all are equally gifted. There is some evidence that there are mental models at work in the minds of the planners when they recommend, *young* parishioners, the *right* full time youth minister, *qualified* professional staff and *responsive* rectory organization, but the specific characteristics of the leaders being sought are not named.

Style theory focuses on the leader's behavior. Two commonly investigated components of leadership behavior are consideration of others and initiating structure. The former denotes a leadership style in which leaders are concerned about the people, are trusted, are responsive to them and promote camaraderie. Initiating structure refers to a style in which the leader closely defines what the members are supposed to do, how to do it, and actively schedules work.

Once again, in the parish recommendations, we can only infer what may be in the mind of the planners since there is very little direct language about the desirable style of the leader.

Language such as *"invite," "encourage." "direct personal appeal*," and *"share responsibility"* seem to associate with a considerate style. But recommendations to *"define areas to be pursued then approach people to develop these ideas"* and *"clear forceful direction to organizations*" appear to be exhortations to initiate structure.

A contingency approach to leadership considers the situation that leaders find themselves in (the particular work, environment and people involved) as central and identifies the leader's behavior as one situational variable.

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The characteristics of the situation that have been studied include the leader-member relationships, whether the work is vaguely defined or very clearly spelled out (task structure), and the position power held by the leader relative to the members.

The relationship of the proposed parish leaders to other parishioners and parish staff, the nature of the different kinds of work to be done (task structure: well defined or undefined), and the influence (position power) of different positions held in the parish, are not directly addressed in the parish recommendations. The language used in the plans does leave some clue that these notions are not completely out of the minds of the planners. *"Staff persons must concede control to chairperson–sometimes staff ideas overshadow committee head." "Educate laity to take expanded roles in parish life; e.g. serve as leaders in prayer services, funeral services and serve as educators." "Have pastoral personnel assigned to support leaders of various ministries within the parish."*

The "new leadership approach" actually includes a number of approaches known as transformational, charismatic and visionary. These approaches characterize leaders as managers of meaning much more than direct influencers of behavior. The numerous parish recommendations to enhance communication may have their source in this conception of leadership. Reflecting not only the current organizational thinking but also Gospel teaching, much of the language of the parish recommendations is implicitly based in the idea of dispersed leadership, a perspective that emphasizes the importance of recognizing the need for leadership to be viewed as a widely shared activity. In this view, leadership is the product of a relationship between the leader and members based on mutual needs and interests in a specific relationship.

It is not surprising that the implicit assumption that all can be leaders is present in the parish recommendations, but the lack of specification in the language leaves a question about what the planners are really recommending. Are these recommendations simply aspirations for more and better prepared volunteers? Are they calling for more professional management behavior? Or do they constitute a call for a kind of dispersed leadership? Parish planners use the term 'leadership' to represent 1. a willingness to participate actively in the work of the parish, 2. effective management of the parish, 3. the assumption of leadership roles in the parish, and 4. actual leadership positions. Only the planners themselves know their full true intent.

CONCLUSIONS

In viewing all of the recommendations certain patterns emerge that seemed to indicate common perceptions among parishes and places of special emphasis. The reader of this chapter may discover further points of significance to add to the following suggestions.

A. Leadership Roles of Clergy and Laity: Confusion Among Volunteering, Managing and Leading

The Church's mission of salvation in the world is realized not only by the ministers in virtue of the Sacrament of Orders but also by all the lay faithful; indeed, because of their Baptismal state and their specific vocation, in the measure proper to each person, the lay faithful participate in the priestly, prophetic and kingly mission of Christ.

The Pastors, therefore, ought to acknowledge and foster the ministries, the offices and roles of the lay faithful that find their foundation in the Sacraments of Baptism and Confirmation, indeed, for a good many of them, in the Sacrament of Matrimony.(CL, 23)

In developing recommendations for leadership within the parishes, the planners seem to intuitively appreciate the value of the laity in more active roles in parishes, but the particular character of those roles and their relationship to the leadership roles of the clergy are left unexplained. Even the term 'leadership' is ambiguous and may involve anything from recruiting more people to work to formation of the current group of parish leaders. 'Leadership' as it is used in the plans, includes volunteers to do menial tasks as well as full time, professionally educated, paid, personnel (lay and clergy) to assume a part of the pastoral ministry of the parish. It involves activities ranging from holding meetings to promote communication (basic management), to providing professional development opportunities for existing parish leaders to learn how to identify, inspire, and empower others to assume leadership positions.

The range of possible recommendations under the general area of leadership suggests the need for clearer, more detailed identification of issues pertaining to volunteer development, organization management, and leadership. Guidelines rooted in *Christifideles Laici* and the *Instruction on Certain Questions Regarding the Collaboration of the Non Ordained Faithful in the Sacred Ministry of Priests* appear to be needed by parish planners. In the absence of these guidelines, the range of work characterized as leadership in parishes may be too

broad for current parish leaders to address.

It is not clear that parish planners have made the connections between the **goals** of the parish pastoral plans, the **work necessary** to accomplish the goals, and the **people necessary** to accomplish the work. By recommending recruitment of persons (volunteers) to more active roles within the parish before clearly defining who is needed (both in number and quality of preparation), parish planners risk not being able to effectively communicate their need for parish workers and not being able to gainfully engage parishioners who do come forward. Meaningful work requirements, and the characteristics of individuals needed to accomplish the work, need to be in place before effective recruiting can take place.

B. Education for Leadership-- Leadership Development

In general, parish programs are identified as the means to develop leadership in parishes. The term 'parish program' probably has multiple meanings, each particular to the intent and assumptions of the writers. The difficulty with this is that recommendations for parish based programs stop short of designating when the parishes should be ready to undertake them. Adult education programs have identified the need to remove every possible barrier to participation on the part of people who are fully engaged in life activities. Adult education programs usually include a plan of procedures, schedules, and systems within which action can be taken toward a desired goal. Teaching programs usually entail a plan determining the offerings of the specific educational curriculum; a plan of study for the student over a given period of time; a catalogue of projected proceedings, prospectus, or syllabus including the scope and sequence of learning. Educational institutions, serving the need of adults, also recognize the importance of the convenience the adult looks for in the scheduling, the attractiveness of the setting, and the added value that the adult will accrue as a result of the learning experience.

When dealing with leadership, clergy as well as laity must be attracted to participate in leadership education programs. As the Pope has stated in Christifideles Laici; *"The lay faithful ought to be ever more convinced of the special meaning that their commitment to the apostolate takes on in their parish. Once again the Council authoritatively places it in relief: 'The parish offers an outstanding example of the apostolate on the community level, inasmuch as it brings together the many human differences found within its boundaries and draws them into the universality of the Church. The lay faithful should accustom themselves to working in the parish in*

close union with their priests, bringing to the Church community their own and the world's problems as well as questions concerning human salvation, all of which need to be examined together and solved through general discussion. As far as possible the lay faithful ought to collaborate in every apostolic and missionary undertaking sponsored by their own ecclesial family'(101)."(CL,27) Convincing the laity of the importance of their commitment to the apostolate, and helping them to become accustomed to working in close union with their priests would seem to require the involvement of priests and laity together in at least some leadership development activities.

Leadership programs can be seen as part of the larger agenda to provide ongoing adult religious education to all Catholic people. Like other programs in this group, it is critical that program delivery have some probability for success, otherwise the proposed plans could remain undeveloped and, at some later date, be written off as impossible. These recommendations place demands on the time, the resources, and the people of the parish community who ultimately have to manage the programs or engage competent educators to assist them in this major undertaking. Adult education program designers in the academic field take great care in targeting specific markets necessary to engage the right audience. All of this happens prior to the offering of the program, as does the search for competent faculty, adequate funding, and available space. Easy access would also be key to sustain any commitment to a structured or systematic program. Use of home based study, cable TV, the Internet, etc. needs to be explored.

C. Communication

The frequent reference to the need for more effective communication and training suggests that the planners do not perceive the current efforts to communicate about the needs of the parish, or the responsibility and opportunity for people to participate in carrying out the work of the parish, to be adequate. The planners do recognize that training needs to be part of any effort in this area. The recognition of the power of communication, as a teaching and an evangelization medium, is also recognized in the parish plan recommendations for teaching. In all of these efforts the use of appropriate communication (usually two way), and training methods (based in adult learning theory) is essential.

D. Resources

Implicit in the call for additional laity to take on leadership roles is the need to develop appropriate roles for

laity and to properly prepare them to assume those roles. To develop these positions and train people to perform in them, parishes need to identify human and financial resources to reorganize the work of the parish, restructure the positions necessary to accomplish the work, and prepare and deliver the training. The range of tasks of the priests such as the sacramental life of the parish will remain a priority. Other activities in support of the spiritual life of the parishioners, such as education, might have to fall to other trained personnel.

The grouping of parishes within clusters, the implementation of cluster initiatives, and the overall management of parish life, will necessitate some creative thinking when hiring professional staff and developing funding programs to support these efforts.

E. Roles

In all, the concepts imbedded in the leadership recommendations begin to open the discussion of the staff and volunteer needs to carry out the work of the parishes. The options that may exist to address these needs have not been fully investigated. The particular roles that could be developed for parishioners to assume and the particular preparation required for the roles, are generally not addressed in the parish plans. Indeed , the content and method of formation and training that needs to be made available to interested clergy, parish staff, and laity may be an issue best addressed at the Archdiocesan level.

To reach desired goals, action plans need to be developed that include responsibility, resources and deadlines. The pastor and council remain the critical links in bringing about the desired goals. An orientation to the plans for new council members would be essential to moving them into action. The acceleration of social changes, growing parish needs and increased pastoral demands does not permit prolonged lags between the plans and the implementation. Developing appropriate parish roles (volunteer and paid) that contribute to accomplishing some of the mission of the parish, and identifying, preparing and matching interested people with those roles is a complex task and will take time and detailed work. But the need for this effort seems to be apparent to the writers of the plans. To continue the cycle of action research (and there is no linear end) the process needs to move ahead in a timely way.

The challenge for pastoral leadership is to create environments where other well prepared, responsible, leaders can emerge into appropriate roles in the parish that complement the ongoing role of the pastor.

For as in one body we have many parts, and all the parts do not have the same function. So we, though many, are one body in Christ and individually parts of one another. Since we have gifts that differ according to the grace given to us, let us exercise them: if prophecy, in proportion to one's faith; if ministry, in ministering; if one is a teacher, in teaching; if one exhorts, in exhortation; if one contributes, in generosity; if one is over others, in diligence; if one does acts of mercy, with cheerfulness." (Romans 12:5-8)

PARISH RECOMMENDATIONS ON STEWARDSHIP

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This chapter summarizes an overall picture of all stewardship recommendations across the Archdiocese using frequencies as the measure of common agreement around parish needs and common perceptions in the area of stewardship. Of the 284 plans included in this review, 239 specified at least one of the 812 different recommendations in the area of stewardship.

The expressed need for initiatives in the area of stewardship was primarily rooted in data that parish pastoral planners, including the pastors, were considering for the first time. Data available to the parish pastoral councils included the median family income for 1990, parish income and expenses for the previous five years, an annual count of Sunday Mass attendance since 1990, their parishioners' self reported household giving and their responses to items pertaining to stewardship in a survey conducted as part of their parish self study.

Observed Mass attendance averaged around 33% of the registered Catholic population. The share of responses to the parishioners' survey items dealing with adequacy of resources and appropriateness of the budget that were in disagreement or undecided was at about 50%. Parish pastoral councils also had the report of survey responses from their own parishioners on self reported income and parish contributions. (See appendix 3.4 Parish Survey: Preliminary Statistical Report Combining All Parishes).

As part of the parish self study process, each of the Parish Pastoral Councils received copies of To Be a Christian Steward: A Summary of the Bishops' Letter on Stewardship (USCC pub No. 568-2) in volume 3 of their parish self study resource material. This document has been used by the author to provide a framework against which the recommendations of the Parish Pastoral Plans may be compared.

Stewardship: A Disciples Response

For the purpose of this summary, recommendations were named and grouped within categories in a manner consistent with the National Conference of Catholic Bishops' Pastoral Letter on Stewardship entitled Stewardship: A

Disciples Response, USCC 1993, (SDR). This pastoral letter identifies stewardship as part of the Christian vocation to be a disciple of Jesus. It involves a call to discipleship, and a mature response to that call. This response includes a commitment to the stewardship of creation, to protect and preserve the environment, to respect human life and to develop the world through human effort. Stewardship also involves stewardship of vocation, to understand our particular role and to respond generously to this call from God. Finally, stewardship involves collaborating and cooperating in the continuing redemptive work of Jesus Christ, which is the Church's essential mission. (NCCB Pastoral Letter on Stewardship, 45-47) The parish pastoral plan recommendations on stewardship were organized around these three areas: stewardship of creation, stewardship of vocation and stewardship of the Church.

The parish pastoral councils also seemed to be very conscious of their need, and that of the parishioners, to be further educated about the Church's teachings on stewardship. There was also a general recognition in the plans of the need to organize and provide structure for the parish's stewardship efforts. As a consequence, the stewardship recommendations were also coded for references to education for stewardship, planning to carry out stewardship activities and structures to facilitate the parish's stewardship response.

Overall Results

The 812 recommendations each received at least one code identifying the primary aspect of stewardship with which it was concerned. Because some recommendations dealt with several aspects of stewardship simultaneously, these recommendations received multiple codes. An additional 66 codes were employed bringing th total number of different codes to 878. (Table 10.1) All percentages in this analysis expresses the number of parishes as a share of all the parishes in the Archdiocese at the time (284) and the recommendations as a share of the number of codes (878).

Three large areas accounted for 74% of the recommendation codes: education about stewardship, parish structures to carry out stewardship activities, and financial support of the parish.

The largest number of recommendation were in the area of education. Almost all of the parishes (87%) included calls for parishioners to receive more complete and timely parish financial information, for stewardship education programs, for homilies, bulletin announcements, newsletters and brochures to inform and educate. The

need to inform parishioners of their obligation to support the parish/school and to create opportunities for personal invitation or contact were also identified. The largest single education recommendation was to provide more parish financial information to parishioners (n = 112).   30% of the parishes (84/287) identified recommendations of this type.

TABLE 10.1

Recommendations		Parishes		Description	Code
Education about Stewardship					
112	13%	84	30%	Information (parish financial)	4.3
98	11%	82	29%	Time, talent, treasure	4
29	3%	29	10%	Stewardship Program	4.1
25	3%	18	6%	Homilies and bulletin announcements	4.4
21	2%	16	6%	Newsletter, brochure or event on stewardship	4.5
12	1%	11	4%	Personal invitation/contact	4.6
10	1%	8	3%	Obligation to support parish/school	4.2
Area Total					
307	35%	248	87%		

Parish Structures to Carry Out Stewardship

97	11%	69	24%	Financial or other committee (strengthen or establish	7.1
69	8%	48	17%	Space/physical plant recommendations	7.3
22	3%	18	6%	Business mgr. or other staff (strengthen or establish)	7.2
16	2%	15	5%	Establish operating budget or other instrument for planning or accountability	7.4
Area Total					
204	23%	150	53%		

Financial Support of the Parish

49	6%	40	14%	Increased giving	3.33
31	4%	27	10%	Fund raising activity	3.32
21	2%	19	7%	Tithing	3.31
17	2%	14	5%	Other financial	3.35
16	2%	13	5%	Cut/control costs	3.4
5	1%	4	1%	Bequests	3.34
Area Total					
139	16%	117	41%		

59	7%	50	18%	Stewards of the Church - Talent	3.2
23	3%	20	7%	Stewards of the Church - Time	3.1
2	0%	2	1%	Stewards of creation - Social Justice	1.1
1	0%	1	0%	Stewards of vocation	2
42	5%	34	12%	Plan for stewardship/information gathering	6
31	4%	24	8%	Evangelize	9
70	8%	48	17%	Other	8
TOTAL 878	100%+	284	100%+	(May add to more than 100% due to multiple responses)	

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The creation of structures to carry out the stewardship activities of the parish was the second largest area of recommendations. Twenty four percent of the recommendations (n = 204) were in this general area. These included the strengthening or the establishment of finance committees, other working groups, the office of parish business manager, or other staff. The establishment of operating budgets, capital budgets, or other instruments for planning or accountability were recommended. Finally, specific recommendations for changes in the use of space and facilities was included in this area.

Perhaps reflecting the general understanding of stewardship, operationalized in the parish self study section on stewardship (Appendix 1.2), the third largest group of recommendations were in the area of stewardship of the Church through financial support.

Sixteen percent of the recommendations (n = 139) involved tithing or other increased giving program, fund raising activities, bequests or other activities to enhance the financial resources of the parish. Thirteen parishes offered recommendations to cut or control costs.

Additional recommendations included those involving stewardship of creation, vocation, time and talent (n= 85, 10% of the recommendations). Stewardship as an evangelizing activity was identified by 24 parishes (4% of the recommendations). Recommendations to gather further information and plan for stewardship were named by 34 parishes (5% of the recommendations). In addition, there were 70 other recommendations that fell outside of the general coding system classified as "other".

Education for Stewardship (307 recommendations)

Recommendations for education in the area of stewardship comprised the largest of the three general areas of parish recommendations on stewardship. In most cases, the parish councils did not separate the parishioners into specific audiences for education (e.g. children). They were more specific on the content and the manner of delivery of education and information.

Time, talent, and treasure (98 recommendations, 82 different parishes)

A large group of parish councils (29%) recognized a need to educate parishioners to the ideas that stewardship involves more than financial support. "Increase awareness, encourage, provide education and

opportunities, educate, challenge, help parishioners understand , instill in the faithful a full appreciation," are some of the ways that parishes are calling themselves to the responsibility of placing an "equal emphasis on the three components of stewardship: time, talent and treasure."

Stewardship programs (29 recommendations, 29 different parishes)

In related recommendations, parishes called for the use of "Archdiocesan Stewardship Programs which deal with time, talent and treasure. The parishes' reference to "program" seems to imply something more than simply education to include motivation and behavior change. "We will seek help from the Archdiocesan Office for development in implementing a stewardship program." "We recommend that the Archdiocesan program for Stewardship be implemented in our parish ..." "Implement the Archdiocesan Stewardship Program by educating parishioners on the meaning of stewardship and by developing a structure which enables parishioners to accept the responsibility for the continuing existence of the parish and its ministries".

Information (112 recommendations, 84 different parishes)

Within the general area of education, the largest coded area involved a need to provide more or better financial information to parishioners. This was identified in 30% of the parish plans. Issues of the amount of information, its clarity and timeliness, and the manner and frequency of informing parishioners were all identified. "Send out a report interpreting financial information several time a year." "Financial information needs to be repeated often." " Emphasize to parishioners where the money comes from and where money goes." "Ask finance committee to present financial situation to parishioners."

Statements such as "..share more financial information...publish a financial report more frequently than once a year...report monthly collections and expenses... Distribute the financial report...publish the annual financial report...expand regular reporting of financial information... Provide an opportunity for parishioners to react...." characterize the recommendations in this area.

Homilies, bulletin announcements, newsletters, brochures and events (46 recommendations)

Related to the general call for more information were specific suggestions on the means to stay in communication with parishioners. The parish bulletin was identified as the means to disseminate information about

the parish finances and to educate parishioners about the Church's teachings on stewardship and tithing. Parishioner talks and reflections, homilies, addresses by members of the finance committee, and announcements from the altar were also recommended as methods to stay in communication with parishioners.

Comprehensive communication strategies were also suggested. These involved "parish newsletter..calendar and bulletin to carry specific reports from the pastor and the finance committee." or "Newsletter on stewardship, witness talk, brochure to new parishioners" or "..monthly flyer to the Catholic community about parish activities, needs, invitations" or "Newsletter articles and outside speakers (to) share information about parishes and dioceses in different parts of the country and in other countries to broaden parishioners' concept of Church"

Obligation and personal invitation (22 recommendations)

Two variations on the general approach to educate parishioners with regard to stewardship were found in recommendations of 8 parishes that emphasized either the **obligation** of stewardship or the need, identified by 11 parishes, for a **personal contact.** "Be more strict about the obligation to support the parish." "Educate why we have a responsibility to the school." "Personally ask people to get involved." "Acknowledge contributions personally." "Personal witness at Sunday Mass." and "Publish volunteer testimonials."are characteristic of statements in this area.

Financial Support of the Parish (139 recommendations)

Parish pastoral plans were very concerned with the stewardship of the financial resources of the parish. About one-third of all the parishes made recommendations in this area. The concern over financial support was expressed in calls for increased giving, tithing programs, fund raising activities, bequests, and in recommendations to cut or control costs.

Within the general area of stewardship of financial resources of the parish, the most frequent recommendation was **increased giving** programs. This was identified by 14% of the parishes (40). Specific approaches included increased offertory programs, changing or improving the Sunday envelop system, setting individual goals for special collections, distribution of commitment cards at Mass, and general encouragement to increase giving. The Pastor is most frequently mentioned as the person to take these actions. "Pastor should

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consider writing to the parishioners who are registered members but who have not contributed anything financially in the past 12 months inviting them to contribute." Others identified to take action in these areas are the Parish Pastoral Council and the finance committee. In most recommendations, the person who should initiate the action is not specified.

Fund raising was identified by 27 parishes. These included several recommendations for a monthly lottery and 10 week club, "overhaul our Bingo and 50-50 fund raisers to make them more effective." Major capital fund raising campaigns were proposed in two parishes.

A **tithing program** was identified by 19 parishes. In this area recommendations seemed to be divided between those intended to encourage continued and expanded participation in the parish tithing program already in place, and those calling for a new program. "Consider having a tithing program."

Recommendations dealing with **bequests** were identified by four parishes. "Conduct a wills seminar." "Encourage parishioners to mention the parish in their wills."

Cutting costs and increasing controls on costs were proposed by 13 parishes. Recommendations included, reducing services, avoiding duplication of services by combining with other parishes in the cluster, using a "bid system" and qualification criteria for services, and examining the tuition payment system.

Other recommendations in the area of stewardship of financial resources included calls for renewed efforts in Catholic Charities, increasing the endowment fund, and identification of new sources of funding,

Parish Structures to Support Stewardship (204 recommendations)

There were 204 recommendations involving structures. Ninety-seven of these had to do with **establishing or strengthening finance committees, stewardship committees** or other volunteer structures. In 29 different parishes, finance committees were recommended to be established, to be reactivated, to be reorganized, to increase in number of members, to be made more diverse, to have an expanded role, to become more open, or to be more operational. The establishment of stewardship committees (22 parishes), subcommittees for stewardship within existing finance committees, marketing or development committees, or expanded roles for existing committees were also identified.

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Eighteen parishes made recommendations to establish new **staff positions** or to empower existing positions. These included hiring a full time business manager, tuition management officer, maintenance personnel, a development director to be "shared" with other parishes, coordinator for parish services, salaried liturgical and educational person, and general recommendations to staff a stewardship office. Periodic staff evaluation and the use of diocesan scales for salaries and benefits was also recommended.

Fifteen parishes called for the establishment of annual **operating budgets** or other instruments to assist in planning and control of the assets of the parish.

There were 69 recommendations from 48 different parishes dealing with **physical plant**. These included recommendations to develop funds for capital improvement, a preventive maintenance program, sale of parish property, construction of additional facilities, and the expansion or improvement of existing facilities.

Additional Recommendations

In addition to these three major areas, other parish recommendations were also consistent with the National Conference of Catholic Bishops' Pastoral Letter on Stewardship entitled Stewardship: A Disciples Response**.**

Stewardship of the Church: Time and Talent (82 recommendations)

Recommendations for the stewardship of time and talent were less frequent than those for stewardship of the financial resources of the parish. These included suggestions such as "involving more people as family," "..investigating ways to involve more people," and developing mechanisms for recruiting new "time and talent" for the parish including recruiting days, developing a comprehensive list of "people resources", and identifying committees to take responsibility for managing and carrying out such activities. Volunteer development programs and training were recommended. Specific groups of people named to be recruited into a more active role in the parish included men, young people, youth, teenagers, retired people, children, maintenance people, skilled craftsmen and professionals. It is not clear how parishes not offering recommendations in this area propose to address the non financial aspects of stewardship.

Planning for Stewardship (34 parishes, 42 recommendations)

Thirty four parishes called for **further information** or **planning** as part of their response to the call to stewardship. Additional information requested was for a more complete, current parish census, "to know with whom and what we are working," and for future projections of various types. The projections were for parish based information and would require someone with access to parish information to make such projections. These included, future costs and estimates of future income, estimates of the money and staff required to fulfill the goals of the parish, "estimate (of) our ability to accommodate the growing number of parishioners at our Masses," a parish survey to find out "why do people stay away?" and "a 15 year projection of needs for the parish." Recommendations for additional planning included a need to "periodically assess parish priorities and goals," to "consult with parishioners when developing plans," to develop a "vehicle for maintenance assessment and long range planning," "assembling leaders to assist in setting parish goals and budgets," a "3-5 year marketing plan," and a recommendation to "present the plan to the parish at large for discussion and feedback."

Stewardship of Creation and Vocation (3 recommendations)

There was a very limited call for stewardship of creation or vocation. Two parishes recommended a need to "educate in social justice issue and community awareness." One other parish called for "actively seeking parishioners to participate in the 2 year Archdiocesan ministry and 3 year diaconate program."

Stewardship and Evangelization (31 recommendations, 24 parishes)

An encouraging finding was the number of parish recommendations that made a connection between evangelization and stewardship. 24 parishes made recommendations that specifically recognized a relationship between the number of active parishioners and the amount of time, talent and treasure available to the parish. Most of these involved developing a more welcoming community for new members and programs to actively engage current parishioners to become more active in their parish. "Have a welcome Mass and use the church bulletin to welcome new parishioners" "Continual open house–an invitation to come back and be renewed," "...bring more of the nominal Catholics back to an active role in our parish."

Other **(70 recommendations)**

Recommendations grouped in the 'other' category were frequently too general or lacked specification to permit the reviewer to identify what the parish pastoral councils had in mind at the time they were written. "To place God first in our lives." "Continue to improve." "Small groups." "Fiscal responsibility." are typical of this group.

Other recommendations under 'other' were very specific and, in some instances appeared to be quite focused and achievable for the parish but they were not common to other parishes. "Focus the annual Thanksgiving Mass to increase attendance by 25%." "The celebration of the 40th anniversary of the founding of the parish affords an excellent opportunity to revive interest and rejuvenate the entire parish community."

Conclusions and General Observations

Despite the distribution of <u>To Be a Christian Steward: A Summary of the Bishops' Letter on Stewardship</u> (USCC pub No. 568-2) in volume 3 of their parish self study resource material, Parish Pastoral Councils seem to be at very different stages with regard to their understanding of stewardship. There was an encouraging level of an awareness (though in not more than 50% of parishes) that stewardship of Church involves more than financial stewardship. Still, specific recommendations pertaining to the stewardship of finances outnumbered those for time and talent. It was also clear from the general language used in the plans that discussion of financial and physical plant resources predominated. Six of the seven questions in the parish self study instrument itself dealt with parish finances, budget, facilities, and staff (Appendix 10.1). Perhaps it was this emphasis that resulted in almost none of the parishes addressing a larger definition of stewardship that goes beyond stewardship of the Church finances. There is a need to identify how best to help parish leaders (pastors and parish pastoral council members) and parishioners become more familiar with the Church's teachings on stewardship. A means to help parishes make the connection between evangelization and stewardship (recognized in the recommendations of 24 parishes) also needs to be developed.

There is some evidence that Archdiocesan policies on finance committees and the parish budget are not well understood and may not always be observed. Efforts to foster stewardship in parishes cannot assume that a parish

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budget, functioning finance committee, effective communication about parish resources, and effective parishioner involvement in committees exist. Further clarification and communication of policies in these areas may be necessary. Stewardship education programs may need to incorporate references to the parish's needs in these areas as apart of stewardship.

Two particularly hopeful signs were the number of parish recommendations that acknowledge the need for better information and education and the various creative ways to distribute that to parishioners. Recommendations shed some light on the content of the stewardship education program to be offered, the audiences to be addressed and locations to hold programs. How the Archdiocesan offices might best support parishes in this education process is not clear. References to "Archdiocesan programs" that may not exist in the form described, suggest a need to help parish leaders to see a need for an ongoing commitment to stewardship as a process and to recognize the appropriate role of the development office as facilitator of parish efforts. Further investigation of ways to assist parishes in parishioner (especially parish pastoral leader) education needs to be undertaken. This could include a book or "how to" manual, education programs, and /or communications network set among interested persons in parishes and supported by appropriate technologies (e.g. phone chain, address labels, Internet conversation group).

An important group of recommendations were the large number dealing with the need to establish staff, committees, and budgets. There appears to be some recognition that parishes are not always organized to undertake the activities that an ongoing orientation to stewardship would require. Ways need to be identified to assist parishes in recruiting, orienting and developing staff and parishioner volunteers to carry out the work of stewardship, and to help form appropriate structures within parishes that parish leaders recognize as realistic and helpful.

Evaluation of parish efforts in these areas need to be informed by existing research. Both financial and time commitments are difficult to obtain from parishioners. In a recent national study, 73% of the parishes across the United States reported engaging in some type of increased offertory giving program to encourage parishioner commitment. When parishes adopt "tithing, other forms of stewardship or an annual pledge" they find that a little over 25% of the parishioners participate. In this same study, it was found that about 15% of the parishioners commit time to the parish. While half of the parishes report that more than 10% of the parishioners commit time only 1

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parish in 5 reported more than half of their parishioners committing time. (Murnion and DeLambo, 19)

The mandate to engage parishioners in stewardship practice is clear not only from Church teaching but from the parishioners themselves as they consider the future of their parishes. The pastoral councils have identified stewardship as an important part of their current pastoral plans. The challenge for the Archdiocesan administration is to appropriately support parish efforts while recognizing the wide range in parish preparation and their expressed needs.

Chapter Eleven

PARISH NEEDS FROM THE ARCHDIOCESE

Robert J. Miller
Archdiocese of Philadelphia

The needs that parishes identified in their parish plans that could be addressed by the Archdiocesan Office

Center (AOC) were summarized and subjected to extensive review by the Archdiocesan Secretaries and their staffs.

This included recirculating the list of needs that were developed back to the parishes:

-to determine whether the needs identified had been addressed during the course of the planning process,

-to obtain more detailed information about the needs and

-to solicit additional requirements that could have surfaced as a result of actions taken by the parish to

accomplish its plan or simply the passage of time.

A revised report incorporating additions and deletions made by the Regional Vicars and the pastors was distributed

to the responsible Archdiocesan offices in March, 2000 through the Central Administration Meeting. The

Archdiocesan office with primary responsibility was identified and provided with the full report from each parish to

provide the context. A total of 818 separate office actions were identified to support the parish plans. The number

of actions and the office assigned to provide support are summarized in Table 11.1.

Note: The full list of needs identified is located in a .PDF file and can be obtained from the Office for Research

and Planning (p:\user\rp\info\reports\needs\fullreport\needs7.PDF).

Table 11.1	**Number of Actions Required to Support Parish Needs and Offices Assigned**	
RV	Regional Vicar	143
OVRE	Office of the Vicar for Renewal and Evangelization	72
STS	Secretary for Temporal Services	67
FORM	Formation of Laity	54
SCHS	Secretary for Catholic Human Services	47
OCE	Office for Catholic Education	46
OD	Office for Development	42
OYYA	Office for Youth and Young Adults	40
CM	Church Ministries	33
OCOMM	Office for Communications	30
OW	Office for Worship	30
SC	Secretary for Clergy	25
OVFA	Office of the Vicar for Administration	22
X	(Code not on List)	16
SCLF	Secretary for Catholic Life and Formation	15
OPCMR	Office for Pastoral Care for Migrants and Refugees	13
FLO	Family Life Office	11
PFS	Parish Financial Services	11
MIS	Management Information Services	10
OBC	Office for Black Catholics	8
R&P	Office for Research and Planning	8
SEA	Secretary for External Affairs	8
IPCC	Inter-Parochial Cooperation Commission	7
OHR	Office for Human Relations	7
OHC	Office for Hispanic Catholics	6
ORE	Office of Religious Education	6
SCPP	Steering Committee for Pastoral Planning	6
CP	Capital Projects	4
PPCP	Parish Pastoral Councils Program	4
SAC	Speakers Approval Committee	3
SCE	Secretary for Catholic Education	3
Y	(Item Dropped by Recommendation of Steering Committee)	3
CO	Chancery Office	2
CST	Catholic Standard & Times	2
GS	General Services	2
HR	Human Resources	2
OPA	Office for Public Affairs	2
OVF	Office of the Vicar for Religious	2
RCIA	Rite of Christian Initiation for Adults	2
AC	Archdiocesan Congress	1
MDPF	Martin de Porres Foundation	1
NDS	Nutritional Development Services	1
OEIA	Office for Ecumenical and Interreligious Affairs	1
	Total Number of Codes Recorded	818

RECOMMENDATIONS FROM THE CLUSTER PASTORAL PLANS

Robert J. Miller
Archdiocese of Philadelphia

Robert A. Parfet
Archdiocese of Philadelphia

As they were produced and accepted by the Archbishop each of the 41 parish cluster plans was summarized and published on the Archdiocesan web site. These plans, as well as recent reports of actions taken to accomplish the plans, are located in web pages for each individual cluster in the Cluster Pastoral Planning section of the Archdiocesan website. These can be accessed through http://www.archdiocese-phl.org/pastplan/cluster.htm where links exist for each parish cluster in the Archdiocese.

These plans were analyzed to determine their primary goal areas. Because cluster plans were intended to complement not duplicate the work that parishes had already begun in their parish pastoral plans, the cluster plan goals were much more focused on those things that parish planners identified as needing to be addressed by parishes working together. The existence of a goal at the cluster level should not be taken as an indication of importance or of a high priority need (though in some instances that is the case) because the parishes frequently have already addressed the most important or high priority need of the individual parishes in their own parish plans. For example, very little is said in cluster plans about the area of worship. This should not be taken to mean that worship is not considered to be important but rather that, in the perception of the planners, this very important aspect of parish has already been adequately addressed by the individual parishes.

The cluster pastoral planners gave considerable attention to the projection of clergy to be assigned to parish ministry in the cluster . In 26 clusters (almost two thirds) the number of priests available for parish ministry was expected to decline. This fact, in addition to the shifting residence locations of the Catholic people from the city and first suburbs to the outlying suburbs, resulted in a large number of cluster plans containing recommendations to change structures--- to add or decrease parishes and/or schools and staff parishes by having two parishes share a pastor. Only 4 of the 41 clusters had no structure or staffing level change following cluster pastoral planning. One

of the most frequent structural changes were parishes sharing a pastor (occurring in 13 clusters 32%) Seven different clusters (17%) called for the suppression (5) or erection (2) of parishes. Twelve different clusters (29%) called for the opening or closing schools. Additions to schools occurred or have been planned in 15 clusters (36%). School recommendations were not always specifically mentioned in the cluster plan. Sometimes only a recognition of the need to address the expanding educational needs of the population and to continue to monitor and adapt existing school structures to meet the educational needs of the community resulted in followup committees and processes that culminated in these recommendations. These structural changes (Table 12.1) were actions taken to address goals (Table 12.2).

Note: The full list of cluster goals, identified in the planning activities, is located in a .PDF file and can be obtained from the Office for Research and Planning (p:\user\rp\clus\cGoalSum.PDF or p:\user\rp\clus\cGSbyCLS.PDF).

CLUS #	VICAR	priest assigned to parish ministry	parishes share one Pastor (twin)	suppress parish	open parish	close school	open school	addition to school	other structure
									Table 12.1 — Changes in Priest Staffing Levels and Structures Planned For in Cluster Pastoral Plans, 1996-2000
26	BUCKS	2						2	
27	BUCKS	-1							
28	BUCKS	0							
29	BUCKS	0							
30	BUCKS	1				1	3		
31	BUCKS	2						1	
41	CHESTER	0					1	2	
42	CHESTER	-1	2						
43	CHESTER	1				1	1	1	
52	CHESTER	-1					2	2	
53	CHESTER	0							
54	CHESTER	-2	2						
61	DELAWARE	1						1	
62	DELAWARE	0						1	
63	DELAWARE	-2							
64	DELAWARE	-2							
65	DELAWARE	-1						1	
66	DELAWARE	0						1	
67	DELAWARE	-4						2	
70	MONTGOMERY	-6	2			1			
71	MONTGOMERY	-4	2	1				1	
72	MONTGOMERY	-3							
73	MONTGOMERY	-2							
74	MONTGOMERY	-1	4						
75	MONTGOMERY	0					1	4	
76	MONTGOMERY	0				3		2	relocate parish, modify boundaries
77	MONTGOMERY	-1	2				1		convert personal to territorial
14	PHILA NORTH	0						2	
15	PHILA NORTH	-4							
16	PHILA NORTH	-6	1						close chapel
17	PHILA NORTH	-5	2						
18	PHILA NORTH	-2	2						Vincentians staff St Francis
19	PHILA NORTH	-2							
20	PHILA SOUTH	-3	1	1					
21	PHILA SOUTH	-7	8			1			
22	PHILA SOUTH	-6	2						
23	PHILA SOUTH	-2		3	3		1		
24	PHILA SOUTH	-3	2	1			1		
25	PHILA SOUTH	0							
32	PHILA SOUTH	-2							
33	PHILA SOUTH	-9	2	4		1	2	1	
		-75	**34**	**10**	**3**	**8**	**13**	**24**	

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The goal categories, the number of times that category was included in a cluster plan (goal count), and the number of different cluster plans in which the category was included (cluster count) are presented in table 12.1. A total of 242 cluster goals were identified. Two-thirds of the parish clusters identified evangelization and youth as the focus of their cluster goals. These two areas accounted for 25% of all of the goals developed in the clusters. About half (41%-53%) of the clusters identified allocation of priest personnel, lay leadership and participation, and adult religious education as important goal areas. About one-quarter to one third of the clusters (22%- 34% identified Catholic schools, service and community outreach, stewardship, religious education, and organization structure as the focus of their cluster goals.

Table 12.2				Summary of Cluster Plan Goals by Cluster
Includes 41 Clusters				
Cluster Count	%	Goal Count	%	Category
29	70.7%	30	12.4%	Evangelization
28	68.3%	30	12.4%	Youth
22	53.7%	24	9.9%	Priest Allocation
20	48.8%	22	9.1%	Lay Leadership/Participation/Ministry
17	41.5%	19	7.9%	Adult Religious Education
14	34.1%	15	6.2%	Catholic Schools
12	29.3%	14	5.8%	Service and Community Outreach
11	26.8%	13	5.4%	Stewardship
9	22.0%	11	4.5%	Religious Education (General/Other)
9	22.0%	9	3.7%	Structure/Organization
8	19.5%	9	3.7%	Sharing Cluster Resources/Strengthening Ties Between Parishes
8	19.5%	8	3.3%	Communication
8	19.5%	8	3.3%	Implementation
8	19.5%	8	3.3%	Family
7	17.1%	8	3.3%	Vocations
5	12.2%	5	2.1%	Worship
5	12.2%	5	2.1%	Appreciate Multi cultural/Historical Diversity
4	9.8%	4	1.7%	Personal Spiritual Growth
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Chapter Thirteen

EXPERIENCE OF PARISH PLANNERS WITH GROUP PROCESS

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Introduction

This chapter summarizes the discussions engaged in by nine focus groups conducted between May 9, 2000 and June 13, 2000. The purpose of the research was to ask Pastoral Planning participants about their unique and shared experiences with the pastoral planning process, to request their evaluation of different aspects of the process, and to collect their recommendations for improving Pastoral Planning in the future.

Separate discussions were held with Regional Vicars, Pastors, parish pastoral council members, and parishioners. All of the current and former Regional Vicars were invited to participate, and participants in the other groups were randomly selected to maximize the heterogeneity of their experiences with the planning process. As a result, participants represented the entire range of socioeconomic and demographic variation evident in the Archdiocese. The parish and cluster experiences were also varied, including urban, rural, and suburban areas; regions of high population growth and economic expansion, stable growth, rapidly diminishing Catholic populations and economic contraction, and areas with large influxes of non-Catholics and ethnic minorities with diverse languages and cultures.

Small and large parishes and clusters were represented as were personal and territorial parishes. Each of the focus groups had its share of participants who had experienced the challenges related to losing pastors, closing parishes, twinning parishes, and consolidating resources. Each group also exhibited a range of years of experience in the planning process including participants who were involved in early regional and parish planning prior to the initiation of the process currently being evaluated. All groups included participants who were involved in various combinations of parish and cluster pastoral planning, and those who were involved in the implementation stage only.

The focus groups ranged in size from four to twelve participants, with most of the groups comprised of

between six and ten participants. Each discussion ran for an hour and a half. With the signed consent of each participant (see Appendix 13.1 for a sample consent form), the discussions were audio taped and videotaped. This was done to ensure that all of the discussion details were captured for subsequent analysis. The tapes were erased upon completion of the analysis to protect confidentiality.

With the exception of parishioners, the response to the invitations to participate was remarkably positive. Participants were all offered a token of appreciation for their willingness to participate; however, even the incentive did not sway the parishioners. In spite of a concerted effort to include parishioners – an effort that included written correspondence with telephone follow-up, only four parishioners participated – all of whom were women, and one of whom who was, by chance, a parish pastoral council member. It is unlikely that these four women represent the average parishioner, as they were all deeply spiritual and involved parishioners, two of whom attend daily Masses. Nevertheless, these parishioners provided valuable insights that have been summarized in this report.

The Regional Vicars, Pastors, and parish pastoral council member discussions were similar in structure, as indicated by the similarity of the moderator's guides included in Appendix 13.2. The key difference between the guides is the reference point for the evaluation. The Regional Vicars were asked about their vicariates, clusters, and parishes; the Pastors were asked about their parishes and clusters, and the members were asked about their specific experiences as either parish pastoral members, cluster pastoral planning committee members, or both. In contrast, the parishioners' discussion was focused on their perception of changes in their parishes over the past five years, and their awareness of the planning process.

Two focus group discussions were held with Regional Vicars, three with Pastors, three with parish pastoral council members, and one with parishioners. Initially, the intent was to conduct three focus group sessions with each of the Regional Vicars, Pastors, parish pastoral council members, and parishioners. However, there were not enough Regional Vicars or parishioners available to fill three discussion groups.

The selection of three focus group discussions per target group of interest was methodologically motivated. If only one session is held with each target group, it is possible that the opinions expressed may not be representative of other target group members due to random selection and the small number of participants. Similarly, the selection

of only two groups may result in a divergence of opinions between the groups also due to random selection. If at least three focus group discussions are conducted, a marked divergence in opinion between two groups can be put in context if a third group is similar to one of the divergent groups.

In this series of focus group discussions, there was very little variation within the target group sessions. That is, the Regional Vicars in both groups expressed similar opinions, as did the three groups of Pastors, and the three groups of parish pastoral council members. There was some divergence in opinion between the Regional Vicars, Pastors, and council members, and this divergence is reflected in the different topics that received the most attention in the different discussions.

With the exception of one group of pastors and the parishioner group, all participants were asked to complete a checklist that provided them with an inventory of key aspects of the planning process. A sample checklist is included in Appendix 13.3. The purpose of the checklist was to provide the moderator with an overview of the planning process and to ensure that each group would have some comment on each key aspect. Participants were asked to complete the checklist by indicating if their experience with each of the listed aspects of the planning process was positive, negative, neutral or nonexistent.

The single group of pastors who did not receive the checklist was so engaged in the discussion that it did not make sense to interrupt the flow of their conversation to administer the checklist. Moreover, one of the pastors in this group came prepared with a written outline of concerns that did, for the most part, touch on most of the checklist items that were not previously discussed during the session.

Note that one other participant also came prepared with a written outline. This participant had served as a facilitator and was a member of one of the council focus groups. Although the written outlines have not been appended to protect the identity of these participants, the points made in each of the two outlines have been incorporated into the appropriate sections of the report.

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This chapter is organized into the following major sections.

01   Introduction

02   Methodology

03   Checklist Results Overview

04   Regional Vicars' Focus Group Discussions

05   Pastors' Focus Group Discussions

06   Council Members' Focus Group Discussions

07   Parishioners' Focus Group Discussion

08   Summary and Conclusions

09   Appendices

Each of the major focus group discussion sections (4 through 6) is further subdivided in to the following subsections:

A.   Most Helpful Aspects of the Planning Process

B.   Most Rewarding or Successful Results in Terms of Renewal

C.   Types of Challenges Faced

D.   Checklist Discussion Points

E.   Quality of and Satisfaction with the Plans

F.   Progress Made in Implementation

G.   Recommendations

H.   What Should Be Done Differently Next Time

The parishioner section deals with changes observed in the past five years, how parishioners were informed of the

self-study, and recommendations.

The comments in each of the subsections A through H are either direct quotes or very close paraphrases that

combine similar opinions expressed by several participants. These comments are organized to reflect the chronology

of the Pastoral Planning Process. This order begins with the formation of the parish pastoral councils and continues

with the development of the Parish Mission Statement, Parish Pastoral Planning (self-study), Cluster Pastoral

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Planning, and Implementation of the Parish and Cluster plans. The variations in the emphasis within each of the subsections reflect the differences in concerns expressed by the Regional Vicars, Pastors, and Council Members.

2. METHODOLOGY

A focus group model for research was designed to gather qualitative information about the experiences of Regional Vicars, pastors, members of parish councils, parishioners, and resource persons and facilitators who took active roles in the parish and cluster planning conducted in the Archdiocese between 1994-2000. This method was chosen because it allows for group interaction and greater insight into why certain opinions are held. Focus groups are particularly useful in planning the design of new programs and evaluating existing programs.

The focus group participants in this research were selected because of their experience with the planning process designed by the Archdiocese for the specific purpose of assisting the Catholics of the Archdiocese to develop, systematically, parish and cluster planning goals and objectives for the renewal and revitalization of parish life. All Regional Vicars were invited to attend, and pastors, parish council members and parishioners were randomly selected in the manner described below.

Regional Vicars

All past and present Regional Vicars were invited to participate in this research. Five of the six current Regional Vicars participated as did four out of seven past Regional Vicars. The combined opinions of both groups reflect the experience of all six Vicariates.

Pastors, Parish Pastoral Council Members, and Parishioners

The selection of potential focus group participants among pastors, parish pastoral members and parishioners used a two-stage sample selection process. In order to represent parishes that differed in size, type, and geographic location, a list of the 287 parishes in the Archdiocese was sorted by Vicariate, Cluster, parish type (territorial/personal) and parish size (as of December 31, 1998). From this stratified list, three groups of parishes were chosen from which focus group participants would be recruited. Beginning with three randomly selected starting points, every seventh parish was chosen for each of the following groups:

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Pastors,

Parish Pastoral Council (PPC) members, and

Parishioners.

Each of the samples contained 41 different parishes.

The current pastors (as of March 31, 2000) of each of the 41 parishes were invited by the Regional Vicars to participate in one of three focus groups. Of the 41 pastors chosen, 27 participated.

The Regional Vicars were provided with the list of 41 parishes chosen for the parish pastoral council sample. For each selected parish, the Regional Vicars' offices returned a list of parish pastoral council members who were involved in either or both of the parish and cluster phases of the pastoral planning process. The Office of Research and Planning sent a letter of invitation to each of the listed council members for which a current address could be located. In all, 157 council members were invited, and 31 (representing 23 parishes) participated.

The list of 41 parishes from which parishioners were to be selected was sub-sampled into a group of 18 parishes for convenience. The Office of Research and Planning mailed invitations to 10 randomly selected individuals from each parish. Of the 180 parishioners invited, only 35 responded, and 4 participated.

All of the persons invited to attend a focus group meeting were sent a written invitation with an assurance of confidentiality and a focus group fact sheet explaining the nature and purpose of the focus group research. Each person invited was asked to return a post-card indicating their first and second choice focus group based on dates and times scheduled by the Office of Research and Planning.

Follow-up phone calls were made to those who did not respond and to those who agreed to attend. The latter calls were used to confirm date and time of the focus group, and to answer questions.

There is only a marginal difference between the distribution of the percentages of those invited compared to those who attended with respect to the representation of participants from the different vicariates, waves, parish types, and parish sizes. As a result, the researchers are confident that the focus group participants reflect the range of pastoral planning experiences.

It is important to note, however, that those who attended chose to do so, and this may have led to some bias in the sample to the extent that participants may be more actively involved and hold stronger opinions of the pastoral planning process compared to invited non-participants. Most who attended expressed a positive attitude toward the research study even if their feelings about the planning process were mixed.

Table13.1 shows the characteristics of the parishes of the Archdiocese as a whole. Table 13.2 exhibits the characteristics of those parishes represented by the focus groups conducted with the pastors, parish pastoral council members, and parishioners.

Table 13.1   **Characteristics of the Archdiocese**

CHARACTERISTICS	NUMBER OF PARISHES	%
VICARIATES	287	100%
Bucks County	34	12
Chester County	29	10
Delaware County	45	16
Montgomery County	58	20
Philadelphia North	57	20
Philadelphia South	64	22
WAVES		
Wave One	84	29
Wave Two	70	24
Wave Three	86	30
Wave Four	47	16
PARISH TYPE		
Territorial	225	78
Hispanic	20	7
Polish	14	5
Spanish	5	2
Italian	16	6
Lithuanian	3	1
Tagalog	3	1
Oratory	1	0
PARISH SIZE		
Under 1,000 families	36	13
1,000-2,499	67	23
2,500-4,999	78	27
5,000-7,999	65	23
8,000+	41	14

Table 13.2   Characteristics of Parishes Represented by Focus Group Participants

CHARACTERISTICS	NUMBER OF ATTENDEES	% BY VARIABLE
VICARIATES	54	100%
Bucks County	8	15
Chester County	5	9
Delaware County	9	17
Montgomery County	12	22
Philadelphia North	10	19
Philadelphia South.	10	19
WAVES		
Wave One	15	28
Wave Two	12	22
Wave Three	13	24
Wave Four	14	26
PARISH TYPE		
Territorial	42	78
Hispanic	5	9
Polish	0	0
Spanish	2	4
Italian	4	7
Lithuanian	1	0
Tagalog	0	0
Oratory	0	0
PARISH SIZE		
Under 1,000 families	5	9
1,000-2,499	16	30
2,500-4,999	13	24
5,000-7,999	11	20
8,000+	9	17

Facilitators and Resource Persons

The focus groups comprised of facilitators and resource persons were used to debrief those who took a prescribed role in the planning processes. Everyone who facilitated a cluster meeting (or meetings) or who served as a resource person during the parish planning stage was invited. Those who participated represent persons who were willing, available, and interested. The focus group attendance was not a required function of their role.

Focus Group Moderators

The moderator of the focus groups conducted with the Regional Vicars, pastor, council members, and parishioners was chosen after an extensive review of applicants' qualifications, experience, and writing samples. Each applicant was interviewed and the final selection was made on the basis of the match between the goals of this research and the applicant's overall expertise. Heather Hammer, Ph.D., a Senior Study Director at the Temple University Institute for Survey Research was hired. Her resume is attached in Appendix 13.4.

The facilitator and resource persons focus groups were conducted by Evelyn Brannan Tarpey and Sister Janet Baker, staff members of the Archdiocesan Office of Research and Planning.

3. CHECKLIST RESULTS OVERVIEW

This overview of the checklist results is presented two ways. Table 13.3 reports the complete results including the percent of participants who had no experience or a neutral experience with different aspects of the planning process. Table 13.4 reports the percent computed from a base comprised of only those participants who had either a positive or negative experience, excluding participants with no experience or a neutral experience.

As indicated by the totals at the bottom of Table 13.3, the positive experiences outnumber the negative experiences overall. However, there are some exceptions in the individual aspects. These exceptions are parishioner awareness, which is negatively evaluated by the Regional Vicars and parish pastoral members, and the quality of communication within and among parishes, which is negatively evaluated by council members.

Table 13.3 also reveals that the Regional Vicars were, for the most part, removed from the parish level activity including formation and training of the parish councils, formation of the parish mission statement, and to a lesser extent, the parish pastoral council meetings which some of the Regional Vicars attended. Eighty percent of the

Regional Vicars indicated that they had either no experience or a neutral experience with the formation of the clusters.

Focusing on the totals in Table 13.4, the results for those participants who expressed opinions, it is clear that experiences are overwhelmingly positive overall, with between 72% and 87% of those participants who expressed opinions indicating that their experience with the process was positive. As in Table 13.3, there are some exceptions, and these are more clearly evident with the no or neutral experience responses deleted.

The clearest exception is parishioner awareness. Most of the Regional Vicars think that parishioners are not aware, and the Pastors and parish pastoral council member opinions are split. Experiences with the secular press and media are also mixed or mostly negative, as are experiences with the formation of clusters from the perspective of the Pastors and parish pastoral council members. Experiences with the meeting facilitators are mostly positive, with the exception of the Pastors who had mixed experiences. Mixed experiences are also evident with respect to the experience of Pastors and council members with the parish planning workbook, and the cluster council meetings. Also, more than two thirds of the council members had negative opinions of the quality of communication within and among parishes.

In each of the groups that completed a checklist, the reasons underlying the mixed and negative experiences were probed, and these reasons are presented in the Checklist Discussion Points subsections of the Regional Vicars, Pastors, and council members sections 4 through 6.

EXPERIENCE	VICARS			PASTORS			COUNCIL		
TABLE 13.3 EXPERIENCE WITH PASTORAL PLANNING COMPLETE CHECKLIST RESULTS									
	(+)	**(-)**	**( )**	**(+)**	**(-)**	**( )**	**(+)**	**(-)**	**( )**
Formation of Parish Council	0%	0%	100%	100%	0%	0%	88%	0%	12%
Training of Parish Council	20%	0%	80%	73%	13%	13%	65%	12%	24%
Formation of Parish Mission Statement	20%	0%	80%	80%	7%	13%	76%	24%	0%
Formation of Clusters	20%	0%	80%	33%	53%	13%	41%	29%	29%
Parish Council Meetings	43%	0%	57%	93%	7%	0%	82%	12%	6%
Cluster Council Meetings	80%	0%	20%	53%	33%	13%	29%	29%	41%
Parish Planning Workbooks	40%	20%	40%	47%	33%	20%	35%	29%	35%
Quality of Parish Plans Produced	60%	20%	20%	80%	7%	13%	65%	12%	24%
Quality of Cluster Plans Produced	80%	0%	20%	60%	27%	13%	35%	18%	47%
Suggested Scripture and Reflection Questions	60%	0%	40%	73%	13%	13%	65%	0%	35%
Availability and Quality of Statistical Data	80%	0%	20%	60%	40%	0%	59%	29%	12%
Cooperation and Support of Leaders	80%	0%	20%	67%	27%	7%	41%	24%	35%
Parish Pastoral Council Members	80%	0%	20%	87%	13%	0%	76%	12%	12%
Cluster Committee Members	80%	0%	20%	80%	13%	7%	59%	12%	29%
Meeting Facilitators	80%	20%	0%	47%	40%	13%	76%	12%	12%
Quality of Communication Within and Among Parishes	80%	0%	20%	67%	13%	20%	29%	53%	18%
Parishioners' Awareness	20%	60%	20%	47%	40%	13%	41%	53%	6%
Involvement of the Secular Press and Media	40%	40%	20%	27%	20%	53%	12%	47%	41%
Support of Archdiocesan Offices	80%	0%	20%	53%	27%	20%	59%	6%	35%
TOTAL	**55%**	**8%**	**37%**	**65%**	**22%**	**13%**	**54%**	**22%**	**24%**

EXPERIENCE	VICARS		PASTORS		COUNCIL	
	(+)	(-)	(+)	(-)	(+)	(-)
Formation of Parish Council	0%	0%	100%		100%	
Training of Parish Council	100%		85%	15%	85%	15%
Formation of Parish Mission Statement	100%		92%	8%	76%	24%
Formation of Clusters	100%		38%	62%	58%	42%
Parish Council Meetings	100%		93%	7%	88%	13%
Cluster Council Meetings	100%		62%	38%	50%	50%
Parish Planning Workbooks	67%	33%	58%	42%	55%	45%
Quality of Parish Plans Produced	75%	25%	92%	8%	85%	15%
Quality of Cluster Plans Produced	100%		69%	31%	67%	33%
Suggested Scripture and Reflection Questions	100%		85%	15%	100%	0%
Availability and Quality of Statistical Data	100%		60%	40%	67%	33%
Cooperation and Support of Leaders	100%		71%	29%	64%	36%
Parish Pastoral Council Members	100%		87%	13%	87%	13%
Cluster Committee Members	100%		86%	14%	83%	17%
Meeting Facilitators	80%	20%	54%	46%	87%	13%
Quality of Communication Within and Among Parishes	100%		83%	17%	36%	64%
Parishioners' Awareness of Processes	25%	75%	54%	46%	44%	56%
Involvement of the Secular Press and Media	50%	50%	57%	43%	20%	80%
Support of Archdiocesan Offices	100%		67%	33%	91%	9%
TOTAL	**87%**	**13%**	**74%**	**26%**	**72%**	**28%**

TABLE 13.4   EXPERIENCE WITH PASTORAL PLANNING
SELECTED CHECKLIST RESULTS

4. VICARS' FOCUS GROUP DISCUSSIONS

"The pastors set the tone. If the pastors use the meetings simply to disseminate information, then the members will

be passive."

A.   **Most Helpful Aspects of the Planning Process**

Parish Self-Study

§   The establishment of the parish pastoral councils.

§   The clearly defined structure of communication meant that nothing fell through the cracks.

§   Prayer was tremendously helpful in a context of severe downsizing – put the fear and anger in the proper

   perspective.

§   The inclusion and enthusiasm of the lay people energized the pastors.

§   Lay people spoke up even when they were critical of their own or neighboring pastors.

The Office of Research and Planning

§   Bob Miller and staff did a great job planning the self-study – the literature, the meetings, drawing in of the

   pastors. This was tremendous.

§   The information provided by the Research and Planning Office. In many cases, the data provided obvious

   evidence. The realization about how important it was to work together.

§   Training experience.

§   The facilitators.

§   The cluster planning effort by the Office of Research and Planning was also well done, however, it could have

   been better (See Recommendations).

The Cooperation and Dedication of Participants in the Planning Process

§   The people were willing to keep everything above the table, there were no hidden agendas.

§   The dedication of participants was critical.

§   People and priests came into the process with a love for the Church and goodwill.

§   Cooperation of the pastors.

§   Cooperation of individual parishes at the cluster level.

Applying Principles of Good Management

§   Perseverance and flexibility, keeping communication open, encouraging the development of more proposals, iterative adjustments, sometimes going back to the original proposal.

§   Selecting a few goals (3-4) was more realistic than 6-7 and it led to more successful cluster plans, particularly where there was an overpowering goal, such as a pastor dying and the need to consolidate neighboring parishes.

B.   Most Rewarding or Successful Results in Terms of Renewal

Realization that the Church is Bigger Than the Parish

§   Now the school principals from different parishes meet once a month.

§   The parishes seeing beyond themselves and developing a sense of unity. Broadening of the parish vision.

§   The realization of common interests, such as schools.

§   Now the priests are getting together on a regular basis and this is positive.

§   The developing awareness of and sensitivity to the needs of other parishes in the cluster. The contributions are developing a sense of community, recognizing differences, recognizing neighboring parishes.

§   Seeing parishes supporting the allocation of resources to other parishes and new initiatives, as needed.

§   Awareness and concern beyond the parish boundaries. What was seen as something that could never work changed during the self-study.

§   The priests now have the skills and a process to facilitate talking to each other.

Progress Made in the Seven Theme Areas

§   Great achievement in stewardship.

§   Renewal is based on evangelization, spreading the good news. Religious education is a key. The first

Philadelphia North plan is a good example. The Cardinal used this as a springboard and has done a tremendously fine job. Consider the Reconciliation Weekend that was so successful, also the Millennium, the Holy Year.

The Opportunity to Participate in Pastoral Planning

§ Being invited to be part of the planning and decision-making process of addressing the challenges, not just a central office making decisions.

§ Being invited to take a significant role in helping to reshape the thinking and presence of the Church in the future.

Clergy and Laity Working Together

§ Involvement of the laity in the planning process.

§ Seeing planned activities take place with hard work and enthusiasm.

§ There has been an overall awakening among members of the Church about the need for something to be done.

§ Planning process taught priests and people that they can talk to each other and trust each other.

C.   Types of Challenges Faced

Reluctance of the Parishes to Lose or Share Resources

§ Nobody wanted their parish closed so the process was painful.

§ The parish self-study led to parishes individualizing rather than uniting.

§ Priests have a sense that they have failed when a parish closes or is consolidated.

§ The engine became how many priests can we retain rather than how can we build up the Church.

§ There is also some denial of the negatives and these need to be recognized if they are to be dealt with.

§ Realizing that there had to be severe downsizing and identifying how it was going to happen both in terms of personnel and facilities.

§ Parishes that were close geographically refused to work with other parishes in the cluster.

§   Big parishes saw themselves as more important and self-sufficient, and this led to a lack of willingness to cooperate. Took a lot of work to get them to work with the other parishes.

Personal (National) Parishes

§   The unique concerns of personal (national) parishes.

§   Ethnic concentration and diversity, differences in cultures and language.

§   Industry dried up and the ethnic groups moved to other parts of the parish. How do you handle personal (national) parishes. These parishes are tremendously significant to the members who are now aging.

§   Two areas have a large Hispanic population, but it was hard to get them to cooperate. The others were quick to support the Hispanic interests, but there were questions about how to do this.

The Transition from Parish Self Study to Cluster Planning

§   Lack of smooth transition from the parish to the cluster plan.

§   What was missing was a transition from the parish self-study to the cluster planning, and this lack of transition is evident in the implementation.

Rapid Growth and Size of Clusters

§   Size of the cluster both in terms of the number of parishes and the distance from one end of the cluster to the other.

§   The size of the clusters and the large number of parishes (11-12), density of Catholic population in some of the clusters,

§   Recognition of the needs created by growth – for additional classrooms at all levels, a new high school was built.

§   Inheriting a plan from another Regional Vicar required trust of those who participated previously. To come in cold and be enthusiastic was a challenge, as was the challenge of growth within the vicariate – it was a pleasure to work in this context.

§ In some of the parishes where the distance between them was very great, it was hard to conceive of cluster goals as realistic, for example, the Youth Ministry.

Cluster Pastoral Planning

§ Too many meetings.

§ Pastors were reluctant to take on more work.

§ Nobody really knew what a cluster was. They knew parish, vicariate, Archdiocese.

Most Difficult Goals to Reach a Consensus On

§ The decision to suppress a parish could not be reached by consensus. It came to a close vote, but the recommendation was overturned and the pastor of one parish became the administrator of the other, and then they twinned.

§ The joining of personal and territorial parishes.

§ Reducing clergy was the most difficult goal.

§ Downsizing, closure, consolidation, twinning.

Most Difficult Challenges

§ Lack of parishioner awareness and involvement, and their general lack of information about the cluster planning process.

§ Getting the participants to analyze and interpret the data without becoming defensive.

§ Pastors did not want to be put through the process, they just wanted to be told what they had to do.

§ Overcoming the belief that the process was bogus. The attitude that a plan already existed. Many of the pastors felt that Downtown has a plan and no matter what the input is, the plan will proceed.

§ Getting the priests enthusiastic about the process. This is an ongoing challenge.

§ Getting the priests and parishes to take what they believed was a downsizing process seriously and see that there was some benefit to the process.

§ Dealing with demographic and spiritual changes. How can we best deliver the message of Jesus? This is through the pastors.

§ How do you combine personal and territorial parishes?

§ How to implement the plan. Everyone bought into certain goals because they were so important, but what do the concepts mean? For example, there are plans to implement more youth programs, but no agreement on who counts as youths. Are youths 11-17 year olds, older teens, etc.?

§ Everyone is tired of the meetings and overwhelmed by the workload.

§ How can we go forward? Nobody wants more meetings. A lot of priests don't expect cluster planning to continue with a new Archbishop. This process will end, therefore, it is difficult to drum up commitment to the process. This is disheartening.

Challenges Not Addressed by the Cluster Plans

§ One Regional Vicar noted two very important challenges that were anticipated, but not addressed in the cluster plans. Now that they have moved into implementation, these two challenges cannot be ignored. These challenges were seen as too complicated to deal with at the planning stage. Both had to do with consolidating regional schools.

D.   Checklist Discussion Points

The Average Parishioner

§ The communication was there at both the parish and cluster level, but the average person did not take the time to read and/or was not interested unless there was a structural change such as closing down a school.

The Cluster Planning Workbook

§ The part that got the most negative reviews was the section that tried to show parishioners how they could be affected by external influences. This was difficult to understand.

§ There is an easier way to tell people that there are positives and negatives. The part of the planning workbook that was difficult had to do with looking at strengths and weaknesses, and people did not understand this.

Cluster Pastoral Planning Meetings

§ Most people love their parishes, and are loyal to their parishes. It is the pastor who sets the tone. If the pastor uses the meetings simply to disseminate information, then the members are passive. Members must be well prepared.

§ There were too many meetings.

Meeting Facilitators

§ Facilitators play a key role and they need to be well trained.

§ Experiences were mixed, but mostly negative.

§ One Regional Vicar thought his facilitators were very good and very critical to the process, listened to bits of ideas and put them up on the flip chart so that fragments were not lost and instead, were clarified.

§ Most of the facilitators (8 in total) assigned to one Regional Vicar were very weak. This Regional Vicar had to facilitate most of his meetings. He stayed objective, but he shouldn't have had to do this. In fact, one or two of the worst facilitators gave their own opinions. Only one was excellent.

§ This Regional Vicar was given the option of getting rid of one of the facilitators midway through the process; however, he declined because he did not want to hurt the facilitator's feelings. Members of his committees commented on how the facilitators were not much help, and one pastor who was transferred realized that the facilitator was supposed to be more than an assistant.

§ One facilitator was good and the other was really bad. This Regional Vicar talked to the good facilitator and used this person instead. They worked closely together and were very successful.

Secular Media

§ Philadelphia Inquirer did an extensive study and wrote an objective report. However, the local papers ignored the planning process even though they were provided with press releases.

§ The local papers didn't get it. They ignored the positive side of the story, but sought out those who were complaining about downsizing – protests, letter writing campaigns, bitterness, etc.

§ Press was interested in Town Hall Meetings.

§   Had a small, but positive experience with the local papers.

E.   Quality of and Satisfaction with the Plans

The Regional Vicars' comments refer to cluster plans only.

§   All the Regional Vicars were satisfied with the cluster plans.

§   This was the first time through the process.

§   Some were very good and some were weak, but the process participation was positive.

§   Good plans, but a lot of similarities – plans were not addressing the unique features of each cluster.

§   The cluster plans improved with the later waves.

§   Quality varies from cluster to cluster in that the early waves had very brief plans, maybe 2-3 action plans compared to 6-7. The difference is due to experience. The early clusters have lost steam because they are well into the process, and they keep repeating the same plan from year to year. It doesn't provide the variety of challenges that later plans have.

§   All the plans in one vicariate were strong because the issues were so severe, structure rather than programs, and mostly mandated changes.

§   Later clusters benefitted because they had a better understanding of the process.

F. Progress Made in Implementation

The Regional Vicars' comments refer to cluster plans only.

§   All agreed that implementation progress was mixed.

§   Some of the parishes are working hard to implement their plans and others have put their plans on the shelf. The primary factor that differentiates these two types of parishes is the pastor. If the pastor meets with his parish pastoral council and sees the process as a consultation with parishioners and wants to learn, the implementation will work. If the pastor is doing this because he has to, the plan will sit on the shelf.

G.   Recommendations

Re-evaluate the Composition of Clusters

§   Look carefully at the size of the clusters and the way they were delineated. It may make more sense to re-assign parishes to different clusters.

§   Maybe certain things don't have to be at the cluster level if the parish is self-sufficient. Big parishes can handle their programs without reference to other parishes, and they should be allowed to do this. Not everything requires cooperation.

§   Be careful about allowing large parishes to opt out of involvement in the cluster because it will weaken the spirit of the cluster. Some activities should continue to be shared.

Limit the Number of Goals Set by the Clusters

§   Encourage planners to select 3-4 goals, not 6-7. This is far more realistic and leads to better plans.

§   Identify and emphasize one or two key goals. There are certain things that are given, such as evangelization, that need to be highlighted in the cluster plan, and dealt with creatively.

§   Remind the clusters to limit their goals to those they are willing to commit to and those that can be accomplished within the financial realities. This has led to good stewardship.

§   Action plans need to reflect the diversity among the clusters. There are unique issues that need to be addressed.

Keep Parishioners Informed

§   The results of the planning meetings must be presented to parishioners.

§   The one-page communiqué is effective. Pastors should include notes in the Parish bulletin and bring attention to the planning process at Mass. However, one page can only highlight the main goals. It has to be embellished and explained by the pastors to be effective.

§   Parish pastoral council members should get up and promote the process at Sunday Mass to kindle enthusiasm.

§   Pastors need a shot in the arm. Publicize success stories about the cooperation between parishes. Examples include Youth Ministry, Pre-Cana, and Pre-Jordan.

§   There need to be more publications that discuss cluster level activities.

§   Keep communication open.

§   Encourage lay people to express their opinions even when they disagree with their pastors.

Provide More Guidance for Transitions

§   The end of the self-study workbook needs a guide for creating a parish plan. This guide should include instructions about how to collect and analyze data, and how to write a parish plan.

§   We need more preparation for cluster planning.

§   The Regional Vicars were left on their own to figure out the transition from planning to implementation. This component also needs to be outlined and resources provided.

Other Recommendations

§   It's time for another self-study.

§   Facilitators need to be well trained.

§   Remind the pastors that this process is not optional.

§   Help participants face some of the tougher issues – the negative realities.

H.   What Should Be Done Differently Next Time?

§   Go to the parish pastoral councils to see what's happening at the parish level. The councils are tremendous assets.

§   Make better use of the self-study results to get the parishes to work together

§   Reduce the number of meetings.

§   Help people think outside of the box next time, particularly with respect to identifying external influences.

5. PASTORS' FOCUS GROUP DISCUSSIONS

> *"This focus group provided a much needed fallout that allowed tremendous venting.*
>
> *We want to see the final report.*

We want to know what is going to be done with the report."

A. Most Helpful Aspects of the Planning Process

Parish Self-Study

§   Evening prayer was very positive and people enjoyed it.

§   Written communication with parishioners works for those who read.

Cluster Planning

§   Having to face reality and deal with it. The Regional Vicar came in and said that the number of priests was going to be reduced and this forced people to work together to come up with a plan.

§   They had a positive view of twinning – at least they weren't closed completely. But, they did have to close a school, and their parish received enormous support from the other parishes in the cluster. Other schools opened their doors. This is a direct result of the process.

Implementation of Cluster Plans

§   Now that they are in the implementation phase, the parishes have formed two sub-clusters and they are working within these sub-clusters.

§   One pastor encouraged the parishes in his cluster to pursue common interests such as presentations on annulment. This year, they started by asking everyone if they wanted to recommit to the cluster, its goals, and implementation of these goals.

§   One cluster set up transition committees, they held 4 meetings this year, and pastoral council members were asked to respond to recommendations made by the transition committees.

Other Helpful Aspects

§   One Regional Vicar used his regular luncheons to inform the pastors and this was very helpful.

§   The spirit of the young people moving into the parish, even those who bring their non-Catholic spouses.

§   Input from the parishioners is critical.

B.   Most Rewarding or Successful Results in Terms of Renewal

Realization that the Church is Bigger Than the Parish

§   A positive result of the meetings is that the parishes are getting to know each other better.

§   Catholics realized that there are other Catholics outside of their parish.

§   Parishes cannot afford to be isolated. The process helps develop a collaborative spirit to overcome the

competitive spirit that can result from close identity with the parish.

§   It was nice to see that all of the other parishes had the same top priorities.

§   Brought parish leaders together.

Progress Made in the Seven Theme Areas

§   Tithing has made a huge difference with respect to stewardship in several parishes.

§   Progress is evident in liturgy, youth, education, and evangelization goals, and they came from the plan.

Clergy and Laity Working Together

§   Closing the substantial gap between leadership and membership.

§   Helped Regional Vicars get to know their parishes.

Other Successful Results

§   The process is more significant than the results. We have to go through the exercise in order to grow. The

process was painful, but it taught patience. He did not look forward to the cluster meetings, but he learned from

it.

C.   Types of Challenges Faced

Demographic Change

§   Blacks, Asians, and Hispanics have moved in. Baptisms have declined dramatically, and Masses have been

reduced. There was denial then anger, as the parish became aware of the circumstances.

§   How to integrate new families into the parish now that there are more ethnically diverse families moving in.

§   Many young families can't afford the Catholic schools.

Size of Clusters

§   The cluster challenge is the large size of the parishes. Hard to coordinate activities, but there is movement in the right direction.

The Shortage of Priests and Other Diminishing Resources

§   It is not clear that the parishioners have faced the reality of the reduction in priests. The priests are trying not to reduce the level of service, but this will also have to change.

§   Actual reductions in the number of priests are obvious problems for parishioners. What is less obvious is the growth of a parish with no change in the number of priests increases the workload immensely.

§   We need to pray for vocations to cover the shortage in priests.

§   You halve the number of priests, then double the number of committees to try to address the specific implementation needs associated with the general goals. This has been a learning process.

§   The threat of losing a personal parish is deeply felt.

§   This small tight parish community has had to take some painful steps towards reducing the number of Masses.

§   It is increasingly difficult to justify the dispersal of priests to small personal parishes.

Lack of Input, Support, and Trust

§   The renewal agenda was thrown at the priests without their input. A meeting like this should have been held before the process began. The priests should have been involved in the planning.

§   There is a lack of credibility because of the lack of trust.

§   Several pastors mentioned that their creativity was not supported.

§   The church has become more bureaucratic and every office has to justify its budget, as a result, the burden falls on the pastors.

§   Pastors are the first line of attack when a decision is made.

§ The priests have most of the responsibility but do not get the support that they need. They are often not consulted, but expected to attend events, etc.

§ Only the pastor was invited to cluster, the clergy should have also been invited.

§ Closing of the parish was horrendous. It was in the papers, there were many meetings and discussions, but no outside support with the exception of Bob Miller who called. The Regional Vicar did not. The parishioners felt that the pastor was lying to them. This is an example why many pastors felt that the planning process was a smokescreen.

The Formation of Clusters is Arbitrary

§ The choice of parishes within the cluster was arbitrary and done by people who had no sensitivity to the parishes involved.

§ Some of the clusters don't make sense. They should have been formed as groups of natural neighbors who already cooperate and share.

§ People need to come together and see themselves as a cluster. There is a long way to go to expand thinking to the level of the cluster.

§ The cluster is not a canonical entity and this gives a double message.

The Process is Bogus and Unlikely to Continue

§ The Archdiocese has a plan, the process simply goes through the motions.

§ The people are tired and very suspicious of the process. Who was behind it and manipulating it. There is frustration about using the cluster as a tool to promote Archdiocesan events.

§ Who designed all of this? Many Pastors felt that they were being set up for blame related to decisions.

§ The artificiality of the process was obvious. Cluster planning is an umbrella and a cover to deflect the blame for closing parishes away from downtown. They were just going through the motions.

§ Even bringing in an evaluation team to review and critique the parish plans might be perceived as saying that the plans did not match the Archdiocese plan therefore they required some tinkering.

§ It's just a matter of time until the next Archbishop and the entire cluster planning process may be dissolved.

The Transition from Parish to Cluster Planning

§ Should have been more time for priests and pastors to be educated about how the two components fit together before the lay representatives were included.

§ Some of the deep discussion was probably avoided because the lay people were there and the clergy did not want to appear to be uninformed.

§ There was less than a month between the self-study and the cluster planning and this was not enough time to digest the parish plan.

Lack of Parishioner Preparation for Cluster Planning

§ The less committed (more inactive) parishioners are, the more they will attack the pastor for tough decisions. The congregation is only 1/3 of the parish. How do you reach the inactive ones?

§ In some cases, the parishes entered into cluster planning determined to preserve their parishes having already experienced one wave of closures.

§ Parishioners are not used to being asked for their input because historically, the Church is not a democratic organization.

§ People still don't understand process yet they serve in an advisory capacity.

Most Difficult Challenges

§ The greatest cluster planning challenge was the reduction of priests. The Archdiocese is more willing to close personal parishes, putting these pastors under great stress.

§ There is a great deal of resentment against the Archdiocese because of the perception that the Archdiocese is out to get the personal parishes. There is much suspicion. The parishioners don't trust the Archdiocese Office (the "2's"). People don't trust anything that comes from the office. There was a lot of negativity to get past.

§ The cluster plans do not address the big issues like the reduction in the number of priests. What is going to happen 20 years from now? Others agreed that there is little attention paid to the long term. There was

reference to the article in America, "Why are we killing our priests," and the article "Saving Father Ryan."

§   Getting parishioners to understand what the cluster planning process is and how to get them involved.

§   The priests are weary and want a break. Downtown needs to review the results of this evaluation very carefully before moving forward. Nobody is excited about another round of planning. There is a great deal of angst in anticipation of the next process.

D.   Checklist Discussion Points

The Average Parishioner

§   People are drifting away.

§   Parishioners are unaware and disinterested. With all of the announcements in the bulletin, he only got one comment on the entire process in 3 weeks. Even the fact that the parish was moving didn't stir up the parishioners. No response was generated, not even a negative response.

§   Twinning was written about and announced in church, but nobody wanted to face reality.

The Parish Self-Study Workbook

§   The parish council wasted much time trying to figure out what the workbook meant.

§   The evaluation part was particularly difficult because of the ambiguous wording of the statements that had to be agreed with.

Availability and Quality of Statistical Data

§   The statistics were important, but they overpowered thinking and decision-making. The enormous stack of statistics was confusing to most.

§   The statistics got in the way of progress. Allocation of priests was not the central issue. They went to the county board to get population statistics. The statistics were an obstacle to free-thinking. If you start by measuring and saying you can't do something because of resources, this inhibits the process.

§   You had to take a university course to interpret the statistics. For example, the Census track data was impossible

to decipher. They would have been better off had someone provided them with a professional explanation.

§ Statistics were great but the pastor had to interpret and present them. He had the experience in planning to study and present them to lay people.

Meeting Facilitators

§ Experiences were mixed, but mostly negative.

§ Had the distinct impression that the facilitator had an agenda, and she tried to steer the discussion in the direction that the Regional Vicar wanted the discussion steered.

§ Had 2 facilitators. The first was not very good because she was nonexistent, the second entered the discussion expressing her own opinions. She also shut down some issues that came up for discussion.

§ Felt that the facilitator was looking over his shoulder, making sure that the pastor was doing things as needed. Everything could have been done in 3 meetings, was the facilitator trying to justify the job of facilitator? One of the priests actually said that the process was killing him and then 3 weeks later he dropped dead of a heart attack.

§ The facilitator did not bring the group together. She left them hanging. It was lucky that the Regional Vicar came through and acted as a facilitator.

Parish Pastoral Council and Cluster Planning Committee Meetings

§ Too many meetings, too tedious.

§ There were too many meetings and they took too long. Cluster planning could have been done in 3 meetings, not 11. Angered the members who saw the excessive number of meetings as a waste of time, and resulted in the resignation of a Regional Vicar.

Parish Pastoral Council Members

§ Good people who did not realize the importance of their role. Had the office come and talk to the council members to get them thinking. The stewardship committee is more effective than the pastoral council. You want them to come through with direction, but they need to be trained in leadership skills.

§ Inherited a council and didn't want to make too many changes. Cannot move them into more of a leadership

role although he has tried. They have assumed a passive role, like their role in church. The council takes no

initiative.

E.   Quality of and Satisfaction with the Plans

All comments refer to cluster plans.

§   Cluster goals were too broad to implement. Parish plans tend to be more focused, but both sets of plans did not

deal with the real issues. The more people, the more goals. Now there are all these general goals, and no real

plans for implementation. This was a shared experience.

§   Do the priests and laity really know how to plan? When a member goes to Congress, they know what to do to

get a bill passed? In the pastoral planning process, it was mostly sound bytes rather than give and take.

§   The cluster plan wasn't very realistic for most of the parishes.

§   One priest described his role in cluster planning as trying to justify his parish's existence. His church is

basically a service center for outsiders. They don't have much involvement in the cluster. The cluster plan does

not address the issues.

F.   Progress Made in Implementation

§   Mixed. There was general agreement among the pastors that more progress has been made in the

implementation of the parish plans compared to the cluster plans.

G. Recommendations

Re-evaluate the Composition of Clusters

§   There should be some flexibility in the composition of the current clusters where there is an obvious misfit.

However, the pastors also believe that it is, for the most part, too late to reconstruct the clusters. If the clusters

are formed according to interests, there is the risk of gerrymandering. Therefore, geographic clustering may be

better.

Improve the Credibility of the Process

§   The process needs to be evolutionary, not revolutionary. One of the lessons learned from regional planning was

to go slower, particularly for the laity who need time to absorb change.

§ The Regional Vicars need to take the initiative and put the issues on the table so that they can be debated. This may mean that some of the control is relinquished.

§ The departments in this building should be there to serve the parishes and not dictate to them. This results in resentment and mistrust. Eliminate the double talk.

§ Discontinue use of the term "twinning."

§ There needs to be a self-study of the Archdiocese Offices. Where is the planning process for the central administration?

§ Publication of the census figures for each parish on an annual basis would be helpful. Everyone needs to work with the same set of facts.

§ The planning process should not be seen as a punishment, and the administration should promote the value of the process.

§ Downtown needs to review the results of this evaluation very carefully before moving forward. Nobody is excited about another round of planning.

Provide More Guidance for Transitions

§ There needs to be more training in how to plan. The self-study was to gather information and interpret it rather than plan. Now that there was all of this information gathered, what were they supposed to do with it?

H. What Should Be Done Differently Next Time?

§ The Middle States School model of bringing in a trained evaluation team would have been helpful to see if the plans and statistics were realistic. Otherwise, it is too easy to put a positive spin on the existing conditions. This could have been applied to the parish plans prior to entering cluster planning.

§ Priests need to be more educated and informed about the process, and the role that the statistics play in the process.

§ There is a need for trained leaders.

§ We may be too concerned about formulating the plans rather than in the results. There needs to be a reasonable hierarchy of goals and these could have been formulated by several priests talking over lunch, not a long process. The idealism of the plan must be matched by the reality of the implementation.

§ Research and planning appears to have become its own end. Enough focus groups, enough surveys. The priests need to get together and talk and share regularly in their clusters.

§ People need to come up with more specific goals next time. The problem is that the same people may not be around, and the experience from the last time may be lost.

§ Get to the difficult issues sooner.

6. PARISH PASTORAL COUNCIL MEMBERS' FOCUS GROUP DISCUSSIONS

"The bottom line is where the envelopes go – that is finances. If one parish opens its doors to other parishioners, they are still going to support their home rather than the host parish."

A. Most Helpful Aspects of the Planning Process

Parish Self-Study

§ Trust in the process.

§ Most agreed that communication was critical.

§ One parish pastoral council recruited volunteers, and formed more organizations including a communication committee.

§ One religious sister who led the prayers at the meetings appreciated the scriptures provided in the Self-Study Workbook because they helped her focus. She also found the other parish self-study materials provided, and in particular, the direct questions, to be extremely helpful background.

§ Two members described how people were won over with prayer, and how "getting spiritual" brought them through the process.

§ Several members thought that the statistical data were terrific.

§ Good opportunity to take a look at themselves and assess their circumstances.

§ The formal structure of the self-study was helpful to two members. One of these council members was also a facilitator.

§ With two exceptions, the facilitators were very good at keeping people focused.

§ The parish pastoral council has been comprised of the same people for the past 6 years because of the need for stability.

§ One parish conducted its own survey before the workbook came out, and prioritized the parishioners' concerns. They had a 70% response rate from the parish, including inactive parishioners. This gave them a head start.

§ One pastor moved quickly after the initial survey to make visible changes (e.g. fixing pews), and this decreased parishioner anxiety about the process.

§ One affluent, Augustinian parish with a new, young pastor who was open to trying new things had a paid staff including the Directors of Liturgy, Social Services, and Youth Ministry, and this took a lot of pressure off of the pastor. They had hired a long-range planner to assist with the consolidation of their school, and found that applying long-range planning techniques such as visioning was very helpful.

§ The self-study was very helpful.

§ The workbooks were great.

§ The Sister who directed them was excellent.

Cluster Planning

§ Many members praised the leadership and support provided by their Regional Vicars. In one case, the cluster planning agenda was so cumbersome that the Regional Vicar put aside the agenda and concentrated on issues that were critical.

§ The later waves benefitted from the earlier waves in terms of leadership and guidance.

§ What made the process work for them was the replacement of the original cluster members with new members who did not have their heels dug in and who were willing to try new things and entertain change.

§ The collaboration between parishes was helpful.

§ One member attended a workshop on twinning and consolidation that was very helpful. More of these are needed. The workshop showed how churches are operating around the country.

B.   Most Rewarding or Successful Results in Terms of Renewal

Realization that the Church Is Bigger Than the Parish

§ The process enlivened the parish and resulted in a lot of sharing between parishes.

§ Now, one member can see everybody's side of everything.

§ All the pastors were fearful, but when the cluster plan was approved, there was a big get together. They have formed a cluster choir, and recently held a well-attended cluster liturgical workshop. They are meeting soon to try to organize adult education.

§ The process made parishes communicate with each other.

§ The process provided a platform for a discussion and cooperation between parishes, something that did not exist before the process.

§ Often, parish activities competed, now there is some coordination.

§ At first, this member was very defensive of her parish. Now, although she doesn't understand a lot of what's going on, she does see why some of the changes need to be made.

Progress Made in the Seven Theme Areas

§ One parish improved liturgy and worship as a result of pastoral planning. With respect to stewardship, the money was raised to renovate the church as a response to the self-study. The parish has grown spiritually by leaps and bounds.

§ One parish increased its spiritual activities and groups including prayer groups, senior groups, study groups, and Adoration.

§ One of the parishes has a Stewardship Fair once a year where all of the organizations have a representative and encourage new members.

Clergy and Laity Working Together

§   The process brought the laity and clergy together, demonstrating the need to train laity to assist in the
administration of religious activities.

C.   Types of Challenges Faced

Lack of Parishioner Involvement

§   After the initial surge of interest in parish planning, it has become more difficult to get parishioners involved.

Lack of Trust

§   The parishioners saw pastoral planning as another attempt to close things down. There was no faith in the
hierarchy. As a result, the parish pastoral council's role was to calm people down and inform them.

Reluctance to Lose or Share Resources

§   All the members of one parish pastoral council felt that they were spinning their wheels. They went to the
workshop on working in groups, but this didn't help because the facilitator was no good.

§   One member felt that the self-study process was an exercise in patting themselves on the back with very little
recognition of existing problems. Their self-study identified more strengths than weaknesses with no substance
whatsoever. Hers was a small urban parish worried about being closed, so there was little real communication
and a lot of making themselves look good.

§   There is reluctance to pool resources.

§   People were fearful and territorial. Nobody wants any hardship, nobody wants to sacrifice.

§   Sometimes the members were so angry, you could barely get them to pray. As a convert, this was an eye-
opening experience.

§   "When your parish closes it is like a part of you has been taken and you will never get it back."

§   Nobody is asking the hard questions because people want to hold onto what they have.

Lack of Support from the Pastors

§   The pastor was not supportive – he didn't come to meetings, so attendance was poor, and when he did start

coming to meetings, he shot down all of the council's suggestions.

§ They have a lame duck pastor who is not that interested in the process and the action plan has suffered because of this.

§ The pastors are causing the parishes to go their own ways again.

§ Most of the pastors in one member's cluster came into the process knowing that they weren't going to be around for the implementation.

§ One parish pastoral council had to "break the priest's arm" to get him to say anything about the process after Mass.

Cluster Composition

§ One problem is the combination of big and little parishes in one cluster. The big clusters can take care of themselves. Clusters should be more efficient and homogeneous.

§ It is difficult to coordinate parish activities in the cluster due to the large distance between parishes.

§ The small parishes don't have the facilities to host events for the cluster, so these are held at the large parishes.

§ There are big differences in the needs of the different parishes – gives the appearance of not working at the cluster level.

§ Many members have observed the large parishes dominating the cluster.

§ Whoever made up these clusters had no idea what they were doing. The clusters are arbitrary, some parishes are too far from one another, many parishes have nothing in common, and no interest in the other parishes in the cluster. The bigger the cluster, the bigger the problem.

Shortage of Priests and Other Diminishing Resources

§ One parish with 5,000 parishioners only has one priest. Even though the other pastors in the cluster said they would come to help with Masses and hospital visitation, there are so many other aspects of parish life that are being neglected due to the shortage of priests.

§ There is a need for more deacons, both female and male. The laity need to be trained so that they can assume more responsibility in the church to keep it alive.

§   There are definitely not enough African Americans ordained. There are eight. This says everything about the way the church views African American Catholics.

§   They knew that by the year 2000, they had to eliminate a certain number of priests from the cluster. This was a de facto goal, and they had to determine how to do this.

Lack of Understanding of the Process

§   It was difficult at the beginning because people did not understand the purpose or function of the parish pastoral council.

§   One member thought that the explanation of the process that they provided to the parishioners was not adequate because most parishioners did not understand what was going on.

§   One parish pastoral council member wished he had known where the process was going, it would have simplified the process.

Reaching a Consensus

§   Consensus was difficult to reach because topics were approached from the parish's perspective.

§   Decision-making by consensus was horrible. It bogged the process down. This member would prefer a vote.

§   One cluster planning committee reached consensus only because the members were all tired of meetings.

Other Challenges Faced in Parish Self-Study

§   One parish pastoral council member doesn't see how twinning can work. The remaining inner city priests are all going to have heart attacks from the overload of work caused by twinning.

§   There are a lot of senior citizens who were resistant to the financial burden of supporting a school. It took 5-6 years to reach agreement.

§   People don't change quickly, and those who tend to participate are the ones who are in the inner circle or old guard of the parish – they tend to be older, influential, wealthy, and conservative.

§   One of the initial problems was that the meeting agenda was so rigid – ten minutes to do this, then twenty to do that. Some people were fearful.

§   There were battles over listening when others talked and staying on the topic.

Other Challenges Faced in Cluster Planning

§   People have fallen away from a great plan. This cluster pastoral planning committee member is concerned that the priests don't believe that they are going to lose pastors.

§   Why close down the small, financially solvent parishes and force them to join large debt-ridden parishes?

§   The poor box is always generously filled for the sister parish, but the neighbors are often neglected. This is an issue related to the territoriality of money.

§   The cluster planning committee experience was horrendous. There were 8 parishes with diverse needs. There were 24 people and 25 opinions. They met for 11 months, for 2 ½ hours every month.

§   There is a shared concern at the parish and cluster levels about how not to lose the youth after confirmation when they tend to disappear and go to public school.

§   This member's council members were overwhelmed at cluster planning by how much more official everything was.

§   This member's council had great difficulty changing their perspective from the parish to the cluster. They could not identify with the cluster.

§   The challenge in the cluster planning was how to deal with growth – and one particular parish where growth was highest. They did not have the necessary time to devote to the other important issues because of the needs of this parish.

Most Difficult Challenges

§   Most members agreed that increasing the involvement of parishioners is the most difficult challenge.

§   The challenges related to the shortage of clergy were often overwhelming.

§   Reaching decisions by consensus.

§   Finding a way to make the cluster meaningful to parishioners.

§   There is a shared concern at the parish and cluster levels about how not to lose the youth after confirmation

when they tend to disappear and go to public school.

§   Others thought the biggest problem was the transition from the pastoral to cluster planning. There wasn't enough preparation.

§   Getting the process moving was the most difficult part.

D.   Checklist Discussion Points

The Average Parishioner

"You could tack it onto their foreheads and they would claim they didn't see it."

§   Communication is the most important thing. When they started putting inserts in the newsletter, the parishioners didn't even know what a cluster was, so the council had to explain things from the beginning.

§   90% of the problem with communication is that parishioners don't read.

§   Parishioners are generally seen as apathetic and disinterested.

§   If parishioners read the bulletin, they get the information they need if the pastor write up the news.

Meeting Facilitators

§   One of the two facilitators who received a bad review did the best she could, but she wasn't very strong and didn't appear to know what was going on. As a result, the Regional Vicar ended up doing most of the facilitating.

The Pastors

§   The pastors received mixed reviews. Several of the council members praised their pastors in superlatives. Many others complained that their pastors provided no guidance or were obviously disinterested in the process.

§   One parish pastoral council member spoke of her current pastor, who has been with the parish for one year and has not yet met with the council. She recently resigned her position in frustration.

§   One member said that her parish pastoral council had to "break their pastor's arm" to get him to talk about the planning process after Mass.

Cluster Planning

§ Most described the cluster planning process as tedious, frustrating, and too drawn out. Most thought there were too many meetings.

§ The training was not very helpful.

§ Many described the process as confusing, complex, and lacking in any apparent goals. This led to many heated discussions and arguments.

§ At the cluster level, the parish plans were just plugged in.

Secular Media

§ It's difficult to get coverage unless it is negative publicity.

E.   Quality of and Satisfaction with the Plans

§ Several members thought that most of the parishes in their clusters came up with the same plan reflecting the same needs (Youth Ministry, volunteers, etc.) regardless of what the unique needs of each parish were.

§ Many thought that the parish plans were excellent.

§ Most were more reserved about the quality of the cluster plans.

§ One member described his cluster's plan as cumbersome.

F.   Progress Made in Implementation

§ Most members saw significant progress at the parish level.

§ At the cluster level, there is a lack of continuity between the planners and the implementers. As a result, little progress is being made. The implementation committee may not have the same understanding, or the benefit of the background.

§ One cluster pastoral council member observed that there is nothing going on in terms of implementation even though the process is really good, and the documents are great. Perhaps the leaders have backed away too much.

§ Most council members were either unaware of progress made at the cluster level, or aware of very little progress.

§ Youth Ministry and evangelization were given priority and there is progress in these areas.

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G. Recommendations

Re-evaluate the Composition of Clusters

§   Re-evaluate the size and composition of the clusters. Many of them are too big (10-12 parishes), too geographically dispersed, and too diverse in terms of their composition and needs. The decisions appear to be arbitrary and this makes it difficult to form a sense of community.

Provide More Training

§   More input from the Archdiocese including training and information about the experiences of other cities.

§   The process needs to be clearly diagramed. We start here, and go here, until we reach the goal.

Keep Parishioners Informed

§   There is a place for the written word with reinforcement, starting with the pastor and priest talking about the process and cluster from the pulpit. Leadership needs to talk to the parishioners throughout the process and then support the oral explanations with written explanations, and have council members also talk about their accomplishments at Mass.

§   Educate parishioners about the cluster and the need to give up the parish identity.

§   There should have been more information provided to parishioners.

Provide More Guidance for Transitions

§   There should be a better way of carrying planning into implementation.

Other Recommendations

§   The councils need to encourage younger parishioners with families to join – because the majority of the council is elected, this requires change on the part of the parishioners – the old guard must be willing to nominate young parishioners.

§   There need to be more priests. Perhaps the Church should consider allowing married men and women into the priesthood.

§   What is needed is leadership from the Cardinal in the same way that people were told to go to confession. The

Cardinal is respected.

§ Really good facilitators are crucial for moving the process along.

§ Things are changing and it's time for another self-study.

§ This was a good first step, but not a unified or unifying step. We have to focus more on faith.

§ The council members need measurements to tell them whether or not the process has been successful.

§ There should be lots of committees and subcommittees, each with their own little project. Assuming that the implementation committees can do it on their own is mistaken.

§ At the cluster level, the parishes can compare CCD, and pre-Canaan resources and classes and the parishes with active classes can come in and train parishioners in other parishes to conduct their own classes vs. sending parishioners outside of their parish to attend these classes.

§ It would be great if people could transfer the dynamics that operate at the parish level to the cluster level to make all parishes feel the deep attachment to their cluster than parishioners feel for their parishes. There needs to be a sense of cluster identity and this requires work.

H.   What Should be Done Differently Next Time?

§ Have the Office of Research and Planning provide us with statistics that the average parishioner can understand. Most of us are average, and many of us could not comprehend the meaning of the statistics provided.

§ Devote more time to writing the mission statement. Include specific goals. Two members, including a facilitator, thought that the mission statements were vague and useless. The mission statements would have been much more effective had they stated specific objectives.

§ Send the parishioner survey to all parishioners rather than a sample. If all parishioners are included, nobody will feel left out.

§ Councils need to review the verbatim responses to the survey as soon as possible. One member did not like the survey and workbook at all because of the scales (strongly agree to strongly disagree). This council did not get the open-ended parishioner survey responses until well after they had written the plan and these comments

would have provided the insight they needed for planning.

§   One member could not understand why the focus was on Youth Ministry when the parishes in his cluster are getting older.

7. PARISHIONERS' FOCUS GROUP DISCUSSION

The primary concern of the three women with school-aged children was the quality and affordability of Catholic education, the proximity of schools, and the religious activities and groups available to keep Catholic children interested in Catholicism after confirmation. Parishioners with children are very aware of the ramifications of closing and consolidation of schools – and they described both positive and negative experiences related to the welcome their children received when they attended or were rejected from another parish's school.

The four parishioners had a basic knowledge of the purpose of the cluster plan, that is, to encourage cooperation between parishes and the pooling of resources. However, they were not aware of planning activity at the cluster level with the exception of shared activities announced in the parish bulletins. Their perception is that there is a duplication of services offered by parishes within the same cluster, and there is still competition between parishes.

Two of the parishioners were in parishes that twinned and they talked about the experience. One parishioner sees twinning as a transitional stage taken prior to closing a parish. She believes that twinning is used to calm parishioners and prepare them for a future closing.

The four parishioners are aware of the shortage of priests and the need to pray for vocations. They share the opinion that the problem with many of the current priests is that they don't deal with the realities currently faced by parishioners.

There was a great deal of curiosity about each other's parishes.

A. Changes Observed in the Past Five Years

§   Growth and ethnic diversification of parish communities.

§   Many young families don't send their children to Catholic schools – education is very sad, and it is most pronounced in the upper grades.

§   Non-Catholic children attending Catholic schools.

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§   The reduction in the number of priests.

§   The need for twinning and consolidation.

§   The pastors are very overworked.

B.   How Were Parishioners Informed of the Self-Study?

§   They read the bulletin. They also received the self-study questionnaires. The results were analyzed and
    published in the bulletin. The pastors also talked about the self-study after Mass. However, even though there
    was information in the bulletin, most parishioners ignored the announcements, they weren't interested, or they
    didn't understand what cluster planning meant until they had to face the reality of twinning and closing. At this
    point of realization, some asked how the council could have let this happen.

§   One pastor held monthly meetings with the parishioners to keep them informed about the twinning process.
    About 30 parishioners (out of 400) attended these meetings, and it was the same 30 parishioners each time.

C. Recommendations

Increase Parishioner Awareness and Involvement

§   Involve the younger people. Bring in young, enthusiastic pastor, who is in tune with current concerns. Such a
    pastor is needed to renew and generate interest. One parishioner saw this work with respect to a Perpetual
    Adoration program.

§   Call people personally, organize a welcoming committee to greet each person. People are often hesitant to
    participate and the personal approach is often all that is needed to get new members to volunteer for
    organizations and committees.

Other Recommendations

§   Develop CYO and CCD programs that are responsive to the current concerns of teens. Make the programs fun
    and interesting first, and then slip the religious and value-laden lessons in. If the youth groups are fun and
    relevant, the parishes may be able to keep the youth involved.

§   Encourage more cooperation at the cluster level, more cluster events at different parishes within the cluster to
    get the parishes acquainted with each other.

§   Increase the role of lay people, and particularly women.

8. SUMMARY AND CONCLUSIONS

This chapter summarizes the discussions engaged in by nine focus groups conducted between May 9, 2000 and June 13, 2000. The purpose of the research was to ask participants in the Pastoral Planning Process about their unique and shared experiences with pastoral planning, to request their evaluation of different aspects of the process, and to collect their recommendations for improving pastoral planning in the future.

For the most part, the results of Pastoral Planning were positively evaluated. The most rewarding aspects and successful results in terms of renewal at the cluster level include enlightening parishioners to look beyond their individual parishes and see that the Church is larger than the parish, and getting parishes to see the positive aspects of cooperation with other parishes, including the sharing of scarce resources. Several Regional Vicars and Pastors also cited the participation of laity in Church planning as a welcome innovation. New cooperative programs have been developed at the cluster level in the areas of Youth Ministry, Pre-Cana, Pre-Jordan, and Perpetual Adoration, and some parishes have welcomed their neighbors to attend Masses and enroll in their schools. There is also evidence of significant progress in stewardship, evangelization, and worship in numerous parishes.

Whereas the results of Pastoral Planning are positively perceived, and there is some recognition that it is time for another self-study, the Pastoral Planning process itself is described as miserable, painful, tedious, confusing, complex, drawn out, adversarial, and bogus. With the exception of the Regional Vicars who enjoyed Pastoral Planning and had great faith in its intent, the Pastors and Council Members were united in their criticism. Underlying their negativity is a deep-seated suspicion about the motivation behind Pastoral Planning. Most of the Pastors and many of the parish pastoral council members thought that the plan was set in place by the Archdiocese prior to the commencement of Pastoral Planning, and that the purpose of the process was to deflect responsibility for the tough decisions away from the Archdiocese. These tough decisions include decisions to close and twin parishes, reduce the number of Masses, close or consolidate schools, and re-distribute the activity of a rapidly decreasing pool of pastors.

Most participants, including the Regional Vicars, are very concerned about the morale and workload of the

Pastors. The Pastors are exhausted, disillusioned, angry, and overworked. They are frustrated by the lack of parishioner awareness and involvement, they are deeply concerned about the diminishing number of priests, and they feel as if decisions are thrust upon them by the Archdiocese without their input. Many of the Regional Vicars and parish pastoral council members who were critical of the lack of interest and support exhibited by the Pastors attributed this problem to the burden that must be borne by the Pastors due to the shortage of clergy.

In general, the experience with the parish self-study was more positive than the experience with cluster planning. However, there is a concern that the parish self-study was, in some cases, more of an exercise in making the parish look good, in an attempt to avoid twinning or closure, than it was an honest examination of the strengths and weaknesses of the parish. Another factor that contributed to the difference in perception of the parish and cluster level planning experiences is the significance of the parish to participants in the process. Active parishioners love their parishes. They are loyal and territorial. Moreover, the parish has deep canonical meaning to them as the smallest unit of the Church. In contrast, the clusters are seen as arbitrary constructs that tend to be comprised of parishes that have little in common, are too geographically dispersed to share activities and resources efficiently, or both.

Whereas the parishes are identified with Saints and saintly deeds, each cluster is identified by a number. The challenge for the Archdiocese is to find a way to get pastors and parishioners to see the cluster as a meaningful unit with spiritual significance. One alternative might be to re-examine the composition of the current clusters and adjust them in a way that encourages a sense of community within the cluster.

The weakest components of the process are the lack of guidance and training with respect to the transitional stages from parish self-study to cluster planning, and from planning to implementation. There is also a need for more training on how to write a plan.

The most helpful aspects of the process are the scriptures and suggested readings, well-trained facilitators, the enthusiasm of lay participants, the structure and guidance provided by the workbooks, and the support of Dr. Miller and his staff. Many acknowledged the potential contribution that could be made by the statistical data provided. However, most believe that the statistical data need to be presented in a format that an average person can

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understand. In their current format, the statistical data are overwhelming both in volume and complexity.

A succinct summary of the entire series of focus group discussions may be compiled by comparing the agreement between the Regional Vicars, Pastors, and parish pastoral council members in key areas. These areas are: the most helpful aspects of Pastoral Planning, the most rewarding or successful results in terms of renewal, the types of challenges faced, and recommendations for the future. The common opinions shared by the Regional Vicars, Pastors, and council members are evident in the most helpful aspects of the planning process, most rewarding or successful results in terms of renewal, types of challenges faced, and recommendations. These common opinions are listed on the next page.

Common Opinions Expressed by the Regional Vicars, Pastors, and Parish Pastoral Council Member Focus Groups

Most Helpful Aspects of the Planning Process

- § Parish Self-Study: prayer and communication with parishioners

- § Cluster Planning: collaboration between parishes

Most Rewarding or Successful Results in Terms of Renewal

- § Realization that the Church is bigger than the parish

- § Progress made in stewardship

Types of Challenges Faced

- § Reluctance to lose or share resources

- § Perception that the clusters are arbitrary

- § Priests perceive that the Pastoral Planning process is bogus

- § Growth and size of clusters

- § Reaching a consensus at the council meetings

- § Shortage of priests and other diminishing resources

- § Lack of parishioner awareness and involvement

- § Too many council meetings

Recommendations

§   Re-evaluate the composition of clusters

§   Keep parishioners informed

§   Provide more guidance for transitions from self-study to planning and from planning to implementation

Chapter Fourteen

CLUSTER PASTORAL PLANNING COMMITTEE MEMBERS' EVALUATION OF CLUSTER PASTORAL PLANNING

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This chapter summarizes the written evaluations of the cluster pastoral planning process made by most of the members of the cluster pastoral planning committees, which met in the period of 1996-1999. The appendixes to this chapter contain the responses to the questions asked during the evaluation of this process.

METHODOLOGY: Participants

The number of parishes assigned to a cluster range from 3 to 13, with an average of seven parishes per cluster. The cluster planning committee consisted of the pastor and two representatives from each of the parishes within the cluster. The Regional Vicar chairs the cluster pastoral planning committee. A facilitator trained by the Office for Research and Planning assisted the cluster pastoral planning committees with their work.

Evaluation of the process

The participants of each cluster pastoral planning committee were encouraged to evaluate their work together at the end of each meeting. Prompts to evaluate were listed in the manual and time was allotted on the suggested agenda for each meeting. From this evaluation, committee members could learn how they were working together and if they needed to make modifications to their practices as a planning group.

Parishes from the 10 clusters in Wave 1 are not included in this summary evaluation as evaluations on the cluster planning process were not available at the time of Wave 1's completion. One cluster pastoral planning committee in Wave 1 chose to evaluate their experience of the process at the end of their time together. The result of this evaluation is not a part of this report, as it was done only for the information of that committee. As the process continued, it became evident that there was a benefit to having the participants evaluate the totality of their

experience of this process. In Waves 2, 3 and 4 formal evaluation of the participants' experience of cluster pastoral planning was encouraged, but optional. Sixty five percent of these groups chose to evaluate the process.

Table 14.1:   Evaluations by Waves

Wave	# of Cluster Committees	# Completing Evaluations
2	11	8
3	12	5
4	8	7
Total	**31**	**20**

Participants Response

At the end of their work together, 20 cluster pastoral planning committees submitted evaluations of their experience of this process. Although all members of these committees received evaluation forms, some did not complete them.

Table 14.2: Rate of Return

Cluster	Eval Distributed	Eval. Returned	% of Return
15	33	NA*	NA
18	27	23	85
19	21	16	69.5
22	30	30	100
25	9	9	100
28	15	9	60
29	18	18	100
32	18	11	61
41	12	12	100
53	12	5	42
62	21	6	28
64	21	16	76
65	18	16	88
66	21	6	28
67	15	9	60
71	30	25	83
73	24	23	95
74	18	15	83
76	15	9	60
77	12	9	75
Total	**357**	**267**	**75**

* The facilitator recorded the comments made to each question, but did not report the number of evaluations returned.

Instruments utilized

Two instruments were developed by facilitators who were working with cluster pastoral planning committees. One was a Likert scale evaluation, which contained 8 questions. The other consisted of 4 open ended questions. (See attachments A and B). A sample of both instruments was sent to those facilitating other clusters and they were encouraged to give participants an opportunity to provide feedback on their experience. Several felt that a combination of the two sample instruments provided a broader picture of the total experience. This hybrid

instrument (Likert plus 4) was used by 10 cluster committees in waves 2, 3 and 4. In wave 4 an additional question was introduced concerning a change in perception (Likert plus 5) and this was used by 6 clusters committees.

Two clusters in Wave 2 used the four open ended question instrument. A cluster in Wave 3 used an evaluation tool which consisted of twelve scaled questions: six addressing general group process concerns and six concerning issues of individual participation.

Table 14.3: Evaluation instruments:

Type of instrument	# of clusters
4 open ended questions	2
Likert scale with 8 questions, plus one open ended question	1
Likert scale with 8 questions, plus four open ended questions	10
Likert scale with 8 questions, plus five open ended questions	6
Twelve scaled questions	1

Analysis of Responses to Likert Scale Evaluations

Of the twenty cluster committees that conducted an evaluation at the end of their work together, 17 utilized an eight question Likert scale instrument, followed by a various number of open ended questions. Cluster committee members were asked to circle a number from 1 to 5 based upon their degree of agreement with the question. High numbers indicate a more favorable response. Following each question's rated response, there was an area for comments. A total of 192 Likert scale evaluations were returned. The specific answers and comments for each question are summarized in the next section of this report, ***Summary of Evaluations Using the Likert Scale***

The first two questions asked about the newly created pastoral plan. The majority of those participating in the evaluation process responded favorably in regard to their overall satisfaction with the strategic plan for their respective cluster (30% indicating a rating of 5, 46% a rating of 4). This item received 53 comments. In addition, participants indicated their strong support for the implementation of the cluster pastoral plan (66% indicating a rating of 5, 26% a rating of 4) and made 49 comments.

Questions three and four inquired about the planning process. Cluster committee members felt that their plans reflected a high degree of participation and input from those on the planning committees (40% indicating a rating of 5, 38% a rating of 4). This item received 61 comments. However, the responses indicate some ambivalence regarding the productivity of the cluster meetings (18% indicating a rating of 5, 46% a rating of 4, 28% a rating of 3). 65 comments were made in regard to this item.

Questions five and six concerned the personnel and material resources supplied by the Archdiocese of Philadelphia to support the cluster pastoral planning process. The facilitators for the planning process received favorable ratings, with the majority of respondents indicating that the facilitator was helpful to the planning process (50% indicating a rating of 5, 34% a rating of 4). 85 comments were made concerning this item. Participants were least satisfied with the manual provided to the cluster planning committees as a guide for their meetings (14% indicating a rating of 5, 32% a rating of 4, 35% a rating of 3). It is important to note that this is the only question on the evaluation with a mode of 3. This item received 88 comments, the largest number given for any one item.

The last two questions required the respondents to reflect on their experience as a member of the committee in order to make some assumptions about the future of their cluster of parishes. The participants appear guarded in their belief that the plan will have an impact on the parishes of their cluster (26% indicating a rating of 5, 46% a rating of 4, 26% a rating of 3). The committee members seem hopeful that their parishes will work together to make the cluster pastoral plan a reality (33% indicating a rating of 5, 43% a rating of 4). There were 66 comments made for each of these items.

Valid responses to these eight items ranged from 182 to 192. Invalid responses were due to participants circling more than one response for an answer or indicating a response other than the five choices provided. On some evaluation forms, committee members did not respond to all questions. That is why the total number and the valid number may differ.

While a statistical analysis can serve as a indicator of the "mind" of the group, a review of the comments related to each question can furnish a better understanding of the issues identified by the respondents. The **"Likert**

Scale Summary" section of this report provides an account of the responses to each of the eight questions and includes all comments made by the committee members.

Open Ended Questions in the Evaluation Process

Open ended questions were asked of nineteen cluster pastoral planning committees in the evaluation of their experience of this process. In two instances, they were used exclusively. In all other cases, they were used in conjunction with an 8 question Likert scale instrument.

The number of open ended questions following the 8 Likert scale items varied from 1 (used by one cluster and identified as Q9) to 4 (used by 18 clusters and identified as Q10, Q11, Q12 and Q 13). Q 15 and 15a were added in Wave 4 and answered by 6 cluster committees.

Table 14.4: Responses by item:

Item		# of Responses
Q 9	Overall comment on the Cluster Pastoral Planning Process	6
Q10	What were the strengths of this process	229
Q11	What did you enjoy most about your experience on the Cluster Committee?	223
Q12	What are the weaknesses of the process?	223
Q13	What could be done to improve the Cluster Pastoral Planning Process?	173
Q15	Has your experience as a member changes your opinion of the process?	43
Q15a	Please explain answer to question 15	49

Because the total number of responses to this evaluation is small, no attempt was made to codify the comments of the cluster pastoral planning member. The review of the complete comments can yield a better understanding of intent and context, as well as the language being utilized to describe the experience of the process. The complete listing of all responses received can be found in Appendix 14.1: Summary Report of Participants Evaluation of Cluster Pastoral Planning.

RESOURCE PERSONS/FACILITATORS EXPERIENCE WITH
THE PASTORAL PLANNING PROCESSES

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This chapter summarizes the discussions engaged in by two focus groups of resource persons/facilitators. Resource persons and facilitators were hired and trained by the Archdiocese to assist the parishes and clusters in their respective planning processes. The focus groups discussed the parish/cluster planning processes conducted throughout the Archdiocese of Philadelphia between 1994-2000. The material covered paralleled the focus group discussions held with Regional Vicars, Pastors, parish pastoral council members, and parishioners. The results of the clergy/laity groups are summarized in a separate report.

FOCUS GROUP PARTICIPANTS

A total of 42 current and former resource persons/facilitators were invited to participate in the focus group research process to maximize the heterogeneity of experiences among persons in these roles. In all, 17 resource people/facilitators volunteered to participate. Of these four worked only as resource people who took a consultant role to pastors during the parish self-study process. Six participants facilitated cluster committee processes, seven had experience in both roles.

Because of this mix the participants represented a wide range of socioeconomic and demographic situations present in the Archdiocese. The participants who worked in parish and cluster experiences covered urban, and suburban areas; regions of high population growth and economic expansion; areas of stable growth, rapidly diminishing Catholic populations and economic contraction as well as areas with recent influxes of non-Catholics and ethnic minorities. This latter group while small brought unique experiences of diverse languages and cultures to

parish life and parish/cluster planning processes. Participants represented both small and large parishes and clusters as well as personal and territorial parishes. Participants themselves were also members of parishes reflecting the same diverse mix of variables.

The groups ranged in size from 7 to10 participants. Each discussion ran for 2 hours. Both sessions were similar in structure, and followed the attached moderator's guide. (Appendix 15.1)

The participants were positive in their response to the invitation to participate and enthusiastic in offering their experiences. Participants were all given $10.00 for transportation and meal expenses.

ORGANIZATION OF REPORT

This report is organized into four major sections. The first section deals with the quality of training, support received and role issues that the participants experienced in their roles as resource person and/or facilitators. The second section offers insights into the parish pastoral planning (self-study) process. The third section describes the cluster pastoral planning process. The fourth section summarizes the general recommendations of the participants and the conclusions of the researchers. The concepts addressed in each section represent the particular concerns of the participants as they were asked to comment on each general topic.

Section I.   Facilitator/Resource Persons' Training and Support

A. Quality of Training

The participants shared a positive experience of their training. They described it as feeling well trained and prepared for their roles in pastoral planning. They characterized the training as well structured, upbeat and optimistic. They found the materials distributed to be very helpful and referred to these often in their work. The training sessions inspired confidence in the participants and at the completion of it they felt anxious to "get started.".

In addition to developing skills and a better understanding of pastoral planning and the issues of group decision making, the early training sessions provided the participants with opportunities for developing informal support groups among themselves. The on-going training sessions created a safe environment in which they felt

comfortable to ask questions and share difficulties about their role.

Those involved in the first wave of cluster pastoral planning acknowledged that the training they received could not have anticipated all of the challenges. Those involved in later waves of cluster pastoral planning stated that some of the most beneficial parts of their training came from what they learned from experienced cluster facilitators.

The participants expressed that they understood that any training for these roles would be incomplete because this was a new undertaking. "How could you train for the reality of this process?" There were too many unique situations to role play all the variations.

Recommendations:

Resource persons: Include some training on dealing with issues of power and conflict. Develop some tools for dealing with resistance, especially to laity in positions of authority and other clergy laity tensions.

Cluster facilitators: Preparation is needed to understand the many expressions of fear and ways of dealing with it. The level of fear in the cluster committee meetings was underestimated.

B. Support Received

Participants described a sense of helpful support from the staff of the Office for Research and Planning. They said that the staff was accessible, never made them feel that they were a bother, and were responsive to their concerns, questions and needs for clarification and/or direction. They commented that the staff of the Office for Research and Planning provided material and handouts to assist them in their work as well as suggestions for interventions. Participants noted that the stability of staff is an important issue because a level of trust needs to be established before one feels comfortable to admit to uncertainties and questions about their roles.

Facilitators who were involved in several waves of cluster pastoral planning noted that they saw the level of expectation rise in terms of facilitating skills. This was reflected in the training sessions as well.

The participants appreciated the phone calls initiated by the staff from the Office for Research and Planning to check with resource person/facilitators "to see how things were going". They said that this provided an

opportunity to voice concerns that they might have hesitated to call about because it was "no big deal" or they assumed that they should know how to handle it.

They spoke of the informal network of support that they had with one another, especially the "buddy system" in cluster pastoral planning. When two facilitators were working in the same Regional Vicariate they would frequently call one another to compare experiences and offer mutual "buddy" feedback. They would let each other know what worked and what was challenging.

Facilitators felt supported in their work by the Regional Vicars. They also noted that as the beginning waves de-mystified the process for the later waves the pastors gained confidence in the process and seemed to offer support to one another. This ameliorated the original resistance to the process and the understanding of the facilitators' role seemed better accepted.

A few participants said that they had come into pastoral planning expecting a holy and enriching experience. What they experienced was not always as holy and enriching as they had imagined but the support and training that they received helped them with the sometimes unpleasant attitudes they encountered.

Recommendation:

Maintain the on-going support and training sessions for resource people/facilitators during pastoral planning.

C: Experiencing the Role of Facilitator

The participants were asked to describe how they functioned as facilitators. Did they lead the discussion? Focus group back to the topic? Mediate arguments or some combination of these? All participants agreed that at some time throughout the process they did all of these. Many said that their roles varied according to the situation. The facilitators described how in a variety of ways their role with the cluster pastoral planning group was influenced by the Regional Vicar with whom they worked. They reported that many of the Regional Vicars had a good understanding of and made good use of the process, while others often assumed both the chair role and the facilitator role.

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They felt that their role was greatly defined by the leadership style of the Regional Vicar. The Regional Vicars had different perceptions of chairing meetings. Some worked well as co-facilitators and the facilitator and Regional Vicar work as a team. Other Regional Vicars had confidence in the facilitators' abilities and allowed them to facilitate the group. Some Regional Vicars initially did not have confidence in the skills of the facilitator and tried to facilitate the group themselves. Over time their trust in the facilitators' abilities grew and they moved into the role of chair. A particular problem occurred when some Regional Vicars were hesitant to lead and relied on the facilitator to handle the cluster group. When this happened the cluster planning group began to look to the facilitator for answers to their questions about pastoral issues and associated the facilitator with "downtown."

In terms of their roles in the agenda sub-committee meeting, the facilitators said that this varied with the group. Some facilitated this meeting as well. In other situations the Regional Vicar facilitated this meeting. There were agenda groups which took ownership for the meeting and the facilitator's role was to help develop the agenda for the next meeting.

The participants were asked if they experienced their role being modified by circumstances (i.e. size of group, topics). The size of the group did not necessarily change the role of the facilitator but it did make meeting management a challenge. It also limited the amount of time each member had to speak. A few facilitators reported that when the topic of priest personnel was introduced the Regional Vicar took over the role of facilitator.

Recommendations:

- Conduct a training session specifically about the complementary roles of the Regional Vicar and the facilitator so that they can work in tandem within another.

- Provide some opportunity for the Regional Vicar and facilitator to meet prior to beginning work with a specific pastoral planning group to strategize their interventions.

Section II.   Parish Self-Study Process

A. Prayer

Those who served as resource people and who were invited to attend parish planning meetings reported

that prayer was an important part of the parish meetings. People experienced shared prayer (although all were not always comfortable with it) and learned that the laity could lead prayers. They often discovered that prayer made a difference when discussions in meetings became difficult.

B. Membership

They said that the pastors were key to these meetings. The dynamics from the outside came into the meeting room. The parish pastoral councils learned that they had two reasons to be meeting: to consider pastoral issues and to do God's work. The membership of the parish pastoral councils was seen as important. It was the impression of the resource persons that the choice of members for the council, made by the pastor, sometimes appeared to represent special interests rather than needs of the parish in general.

C. Role of Laity

The resource persons observed that laity sometimes struggled in their new role in parish pastoral planning. It was noted that as time passed, greater confidence in the lay leadership seemed to develop. They also reported that the data and statistics involved in parish self-study "scared some people."

D. Parish Readiness

The readiness of a parish to accept the process was sited as an important issue. It was suggested that when a parish was ready, the parish planning process worked. When it was not ready, the support offered made little difference.

Recommendations:

- Encourage pastors to select members of councils representative of the general parish population.

- Educate the laity about their responsibility for parish development.

- Encourage parish readiness for planning before the process begins.

Section III.   Cluster Pastoral Planning Process

A. The Workbook:

All of the participants who facilitated a cluster pastoral planning group reported that they found the workbook helpful. They described it as a "good guide". Many said that they could not have survived without it. They appreciated the freedom to use it as they needed it.

Facilitators from Wave 1 commented that they felt free to make adaptations and felt good about sharing them with the staff of the Office for Research and Planning. When the workbook was revised between waves 2 and 3, they said that they knew that their suggestions had been implemented.   One participant described the workbook as a "double edged sword" because in some instances it was very structured and required careful use of time but it also gave the planners a broad look at what needed to be accomplished in the planning process to develop vibrant parishes within clusters. Some thought that there was too much information in the workbook for the cluster planners. They suggested a guide for the Regional Vicar and facilitator and an abridged workbook for members with handouts and homework sheets as supplements. Some of the language was difficult because words like "objective and alternative" were used in ways different from their everyday usage.

Recommendations:

- Make it smaller.

- Do not number the meetings. When people needed more time to work on a particular concern, they had the feeling that they had fallen behind.

- Find a way to color code the work.

- Eliminate the analysis charts for discovering alternative ways. Planners generally found them very confusing. "They were theoretically sound, but not practical".

- Use language that is more familiar to people.

B. Decision Making:

The most difficult topics on which to reach consensus were the assignment of priest personnel, the closing of parishes and issues involving schools. Some facilitators reported that the laity seemed reluctant to get involved in the discussion of the assignment of priests. One participant hypothesized about the origin of the laity's resistance:

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"Was it because the laity felt that they lacked the knowledge to make decisions about the priests or could it be that they felt stifled in their response by the clergy in the room". Others described a sense of being "moved to the side" when the issue of the assignment of priest personnel was being discussed.

Often after addressing these very difficult issues and reaching consensus on them, the cluster planning committees had a sense that they were running out of time or had depleted their energy for the planning process and the committee members then resisted or gave only limited time to the discussions and decisions concerning the other goals of their plan. Other difficult issues for the cluster planning members were decisions about setting priorities and developing ways to share resources.

The facilitators observed that certain factors helped the group come to consensus on difficult issues: prayer and reminders of the theological purpose of pastoral planning. The time between meetings also gave the members a chance to reflect on decisions that needed to be made, come to some peace about it and "have the reality of the decision set in". The length of meetings and the time of day were also mentioned as a factor in consensus building - "Time constraints encouraged reaching consensus". One facilitator observed that the risk here is that the consensus made under pressure wouldn't stick when it came time for implementation.

Facilitators found large clusters to be a challenge. They found that it was difficult to give everyone, who desired it, a chance to speak. They also said that it took the group a great deal of time to reach consensus.

Recommendations:

- Build more meetings into the process when restructuring of parish communities is part of the plan.
- Cluster planners need to determine the best time of day or week to meet that will maximize the quality of the work.

C. Information:

The participants felt that some time in some clusters was wasted in disputing policies and definitions. It was recommended that, whenever possible, policies and preferences be stated early in the planning process so that the time of the group can be used more wisely. It was also suggested that having ready access to certain information (i.e.

the responsibilities of a priest in residence, the definition of a "regional school" etc...) would help the process move along. The facilitators stated that it would be beneficial if the Regional Vicars established the non-negotiable items (those that must be included in the plan) early in the process.

Recommendations

- Provide planning groups with information concerning policies and definitions early in the process

- Regional Vicar needs to articulate the non-negotiable items early in the process

D. Prayer:

The cluster pastoral planning process provided an opportunity for shared prayer and for a variety of prayer forms to be experienced. Prayer was often used in the midst of making difficult decisions and to remind the members of the theological purpose of pastoral planning.

When planning groups were pressed for time, the quality of prayer was sometimes sacrificed. The prayer time was seen by some as something that could be shortened in order to give the group more time in the meetings. When meetings ran long, the ending prayer was sometimes just a sentence or two.

Recommendation:

- In preparation for work on a cluster committee the members need to understand the importance of prayer in their work together.

E. Preparation for Cluster Planning Meetings:

The preparation for meetings by the members of the cluster planning group was the key to good meetings. Homework was seen as crucial to the decision making of the group. Every group contained members who came unprepared. Many agreed that the groups tended to self-monitor in terms of preparation and members began to come prepared because they saw that others were doing it. Some groups color coded homework assignments and they were collected as members entered the meeting.

F. Cluster Planning Committee, Agenda Sub-Committee:

All facilitators were members of the agenda sub-committees. While some facilitators found that the agenda sub-committee looked to them to facilitate these meetings others said that the Regional Vicar generally led these meetings. All felt that the sub-committees were beneficial in charting the work that needed to be done for the next meeting. The length of these meetings seemed to depend upon the meeting style of the Regional Vicar and the topics that were being discussed. One person commented that the length of the agenda sub-committee meetings "beat me down". There was an appreciation for the additional time commitment made by the members of this committee.

There was also some concern about the skills of the people chosen for roles within the committee.

Recommendations:

• The length of agenda sub-committee meetings needs to be more reasonable. The parameters and purpose should be well defined.

• Skills and abilities of secretary and communication liaison need to be determined prior to their assignment to these roles.

G. Trust issues in cluster pastoral planning:

Several facilitators remarked that the belief that "downtown" had an agenda was held by many of the planners and this became an obstacle to the work that needed to be done. The suspicion was expressed in many ways and took time and energy away from the work of the group. ("Downtown" is a term used by some of the pastoral planners that means any and all of the administrative offices of the Archdiocese.) Some planners believed that the facilitators were agents of "downtown" and were guiding the decisions in the direction that the Cardinal wished. They did not see them as impartial supports for the process. Some planners asked the facilitators if they (the planners) had done what the Cardinal wanted them to do.

Recommendation:

• Foster trust, eliminate fear. Help participants to recognize that fear = chaos, and trust = success.

H. Obstacles to ownership of the Plan:

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Some facilitators found that the planners used complaints (i.e. about the workbook, the composition of clusters) as excuses for not moving forward with the planning process. It seemed that other planners engaged in "word smithing" to avoid making decisions. Some facilitators stated that it appeared that planners enjoyed meeting others and sharing ideas but resisted the process. A few facilitators saw planners looking to the pastor and following his lead when decisions had to be made.

Recommendations:

- In the training sessions, make clear the overall goals of cluster planning and emphasize the importance of each person's ownership of the decisions.

Additional observations made concerning the overall process:

Communication with Parishioners:

- The facilitators felt concerned about the lack of feedback coming from the parishes and parish pastoral councils to the cluster committees.

- They suggested that perhaps the parishioners could be given more opportunities to offer feedback, i.e., town meetings within and among the parishes in each cluster.

- Facilitators expressed concern that they were hearing very little about the implementation of the cluster plan for their own parishes.

Attitude of Planners:

- General comments about the planning process indicate a lack of value for the time given to the process, e.g., "if it isn't broke, don't fix it."

- Issues from the past were raised, but not dealt with. May have needed time to deal with this so that healing could take place and the group could get on with the future.

- Morale and enthusiasm were low in some clusters. One facilitator said that the planners described their communities as "impoverished", with one pastor noting that "change was not going to happen."

- Need to pay closer attention to the non-verbal behavior. The negative behavior of some of the planners gave "a toxic atmosphere to the committee meetings".

- Some facilitators expressed concern because they saw little change in attitude as the process progressed.

- Pastors who are members of religious orders were often treated as "non-entities."

- Regional Vicars needed the good will of the planning members and some seemed hesitant to challenge attitudes and lack of ownership.

Skills of Planners:

- Finding people to write the final report was difficult at times. People were hesitant. Some members of the cluster committee described themselves as reluctant to develop "a document that Cardinal would be reading."

- Many on the planning committee described themselves as "over committed".

- Members lacked clear presentation skills when offering information to the whole group.

Section IV.   General Recommendations and Conclusions

When asked about their own professional growth through the process and for general recommendation about future planning the participants offered a wide range of recommendations concerning training, general collaboration among clergy and laity, and ideas for any development of a planning process in the future. These are for the most part the comments of individual participants.

A. Recommendations for future training:

- "Involve those who have been through the process in future training. They can speak to the barriers and obstacles".

- "Include training in communications for parish pastoral councils and pastors".

- "In training sessions, the role of the Chair was not explained clearly. Provide opportunity for Chair to 'role play' this role".

- "As the facilitator was utilized in the training process, I felt I was made to look like the most important part of the process. Find ways to reflect better to the planning group the reality of this role".

B. Recommendations for ways to foster collaboration among the participants:

- "Make future groupings [of clusters] appear more natural. Give parishioners more say about who they are clustered with".

- "Hold preparatory meeting for the participants. Invite them to share their understanding of their role, the major issues their cluster is facing and the expectations they have for the process and one another".

- "Have meeting with the Regional Vicar, facilitator and pastors (without the parishioners) in order to get to know one another a little and talk about the work that they are about to undertake".

C. Recommendations for future planning:

Future planning will look different. The laity have been engaged in the present planning processes. They have a better understanding of their responsibilities and role. The Church in the 21st Century will reflect this. Some of what we encountered in this process has already changed'.

"Selection process for committee members needs to be adjusted. Many of the cluster planning committees had a predominance of members who were pre-occupied with the "bottom line". The process also needs those who can be prayerful, creative visionaries".

"Need to get the right people in the room. Find ways to access them and seek them out".

"Continue to find ways to insure that information gets back to the parishes and parishioners and that they give feedback to the planners".

"Provide some training concerning implementation issues while the planning process is taking place".

D. Facilitators in the future

When asked if they would be willing to be involved in this role in a future planning process all but one participant responded positively. The one person who said no is about to adopt a child and recognized that her time

will be limited. Everyone said that this had been a enriching and graced experience. It was an imperfect process, but the positives outweighed the negatives. Most felt that they had grown both professionally and personally. Many stated that they had greater insight into their Church.

Conclusions:

These are the major themes and issues identified by the resource people as they reflected on their experience. Because of changing variables over time, a wide range of circumstances cluster to cluster and the different degrees of training and experience each participant brought to their experience it is difficult to generalize from the comments collected. They worked with different clusters of parishes and with different Regional Vicars, addressing different circumstances and needs. The clusters were of varying sizes, ranging from 3 to 13 parishes.

The pastoral planning processes at the parish and cluster level took place over 6 years. Parishes were organized into groups called waves to participate in the pastoral planning activities in sequential time periods. On average it took about 1 year for parishes to conduct a parish self study and write the parish plan and about 1 to 2 years to engage with other parishes in cluster pastoral planning and write a plan. Resource person support of parish pastoral planning in waves 3 and 4 took place simultaneously with facilitation of cluster pastoral planning committees in waves 1 and 2.   The facilitation of all of the cluster planning took place over 4 years. This provided an opportunity to refine each process and to come to a better understanding of the level of skill needed by the resource persons and facilitators.

The resource persons/facilitators of wave 1 were the trailblazers. They provided the Office for Research and Planning with insights about the reality of the process. Their feedback was invaluable in understanding the dynamics and needs of a parish engaged in pastoral planning and in refining and revising the cluster pastoral planning process and the workbook.

The skill requirements and training program for resource persons/ facilitators changed over time as well. In preparation for wave 1, the Office for Research and Planning hired individuals with good communication and "people" skills and the ability to reflect on their experiences, and trained them in group process theory, facilitation

skills and pastoral planning. As the process progressed, the Office for Research and Planning hired those with facilitation skills and experience and provided training in the area of pastoral planning.

While the focus group material spans a wide range of variables the panoramic view that is offered did provide the researchers with a qualitative impression of the resource person/facilitator role that the written plans could not provide. It is the hope of the researchers that the material gathered will be able to give some direction to the future planning processes especially in the area of group process and the human face of organizations.

Chapter Sixteen

ONGOING EVALUATION

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Essential to action research is the cyclical process that results from regular systematic evaluation. Evaluation results in revisions to the plan and new actions to accomplish the plan. The results of these new actions are themselves ultimately evaluated. This gives rise to the next round of revision. In order to monitor and facilitate this process, the Steering Committee for Pastoral Planning (SCPP) was appointed to succeed an essentially operational group (Cluster Pastoral Planning Transition Team (CPPTT)) in 1998. (Appendix 16.1) In this action research process, evaluation and revision takes place in several ways at the parish level, at the cluster level, and at the level of the whole Archdiocesan organization.

Parish Level Evaluation

   Annual Pastoral Report. Annually, each Pastor is required to file a Pastoral Report with the Chancery Office of the Archdiocese. In 1999, questions (Items 133 -136 in appendix 16.2) were included in this report to prompt the Pastor to consider the actions taken to accomplish the parish plan and the effect of these actions on the parish. Responses to these questions are reported to the Regional Vicars, the Vicar for Administration and the Cardinal. In addition, pastors are prompted to consider the questions in consultation with their parish pastoral council. This regular annual consideration of the actions taken to accomplish the parish plan and the results of those actions was intended to alert the Pastor and others to identify what worked and the need to take different actions.

   The Annual Self Assessment of the Parish Pastoral Plan. In August 2000, the Regional Vicars prompted the Pastors in consultation with the parish pastoral council to more formally review, on an annual basis, the pastoral plan, the actions that have been taken to accomplish the plan, and the effects of the actions taken. Such a review was intended to result in an understanding on the part of the pastor and parish pastoral council regarding the reasons actions were taken or not and whether, in the face of action taken, the desired effect was at least partially achieved.

This review also provided an opportunity for the parish leadership to conduct a scan of the changing environment in which the parish is carrying out its mission.

Such a review could result in additions and deletions to the plan goals, objectives or actions identified to accomplish the objective. It may also prompt a reconsideration of the resources available to accomplish the actions.

The complete communication sent by the Regional Vicars to the Pastors is attached (appendix 16.3). The amount and quality of constructive activity identified by the pastoral councils in the ongoing Annual Self Assessment of the Parish Pastoral Plans and the extent to which those activities accomplish the stated goals must be the subject of ongoing evaluation conducted by the Research and Planning staff cooperating with diocesan leadership and the individual parish pastoral councils.

Cluster Level Evaluation

Annual Pastoral Report. In 1999, questions (Items 137-138 in appendix 16.2) were added to this report to prompt the Pastor to consider the parish actions that were taken to accomplish the cluster pastoral plan and the effect of these actions on the parish. Responses to these questions are reported to the Regional Vicars, the Vicar for Administration and the Cardinal. In addition, pastors are prompted to consider the questions in consultation with their parish pastoral council. This regular annual consideration of the actions taken to accomplish the cluster plan and the results of those actions on the parish were intended to provide the Regional Vicars and the Pastor with some information about the effect of the actions taken to accomplish the cluster plan on the parish.

Cluster Implementation Committee. Actions take to accomplish every cluster plan were identified and monitored by the cluster implementation committee chaired by the Regional Vicar. Every Pastor was a member of a cluster implementation committee. The Pastors responses to the cluster question in the Annual Pastoral Report were intended to begin the process of gathering information about the effect of actions taken to accomplish the cluster plan.

Review of the Cluster Pastoral Plan. In 2002, SCPP proposed that every cluster implementation committee, in consultation with each parish pastoral council , review the cluster plan to determine if the plan had

been accomplished, if further actions were still required or if the plan was no longer adequate to address the current needs of the cluster. This determination on the part of the Regional Vicar, Pastors and lay member of the parishes who served on these groups set in motion the next cycle of planning at the level of cluster.

Archdiocesan Level Evaluation

In 2001, the Archbishop announced a Synod to be conducted in the Archdiocese to consider those issues that the clergy and laity identified as important to be addressed in the Synod through a series of consultations. Much of the information that the people of the Archdiocese drew upon in order to identify issues were those that arose in the parish and the cluster pastoral planning that immediately preceded the Synod consultation. Members of the Synod also drew on information developed as a byproduct of parish and cluster pastoral planning including the findings summarized in this publication. The recommendations of the Synod, informed in part by the successful and failed experiences of trying to implement parish and cluster plans, were intended to forwarded to the Archbishop as of the writing of this book. This most recent cycling of the action research to the Archdiocesan level through the Synod will be the subject of ongoing evaluation conducted by the Research and Planning staff cooperating with the individual parish pastoral councils as the Synod recommendations are implemented in parishes.

Finally, the action research project as a means to accomplish large scale organizational change in the Archdiocese continues to be the subject of study by the researchers, as reported in this publication.

Chapter Seventeen

CONCLUSIONS

Robert J. Miller
Archdiocese of Philadelphia

The Church as Communion is our loving fellowship and union with Jesus and other baptized Christians in the

Church, the Body of Christ, which has its source and summit in the celebration of the Eucharist by which we are

joined in divine love to the communion of the Father, Son and Holy Spirit.

(Glossary of the Catechism of the Catholic Church, 2nd ed. Communion)

Communion finds its expression in the parish , among groups of parishes, and in the Archdiocese as well as the universal Church. In communion, the members are called to love God, others and self and so be a communal witness of the love by which Christ saved the world. The ambitious, large-scale change activity that is being reported here is possible because of the dynamic reality of the communion that exists among all the members of the church, clergy, religious and laity. It is also intended to further enhance this communion.   It does appear to be having a discernable effect in causing a fundamental change (renewal) in parish communities. This conclusion is based on a triangulation of methods and several types of data support this conclusion.   We considered the experience of the clergy, religious and laity in parish pastoral councils and cluster planning committees as action researchers. We considered the data and process structure inputs, the findings from the parishioners' surveys, the goals of the parish and cluster plans, and the findings from the focus groups in drawing these conclusions. Nevertheless, they will always be tentative––dependant on the findings from the ongoing local evaluations of the parish and cluster plans.

The parish and cluster plans appear to be congruent with the findings of the parishioners' surveys. The goals identified in parish and cluster plans reflect an understanding of the teachings of the Church and appear to

contain the aspirations of the parish planners if not a large part of the parishioners. The effect of the participation of

the parish pastoral council members and other parishioners is generally recognized as desirable and valuable to the

parish and the cluster and consistent with the teaching of the Church. The nature of the decision making process

used was generally recognized as desirable. Many parish based action research projects have begun. Through the

data collected by the Office for Research and Planning, there appears to have been the development and training

necessary for the local people to become the researchers in their own pastoral planning activity. Through the

direction of the Archbishop, parish leadership has been empowered to conduct research, appreciate what has been

working well, choose the local problems, and implement solutions. Parishioners and pastors are working together to

establish the future directions of their parishes by making more democratic decisions about parishes' strengths,

limitations and goals. Through the practice of higher participation at the local level, there is evidence to suggest that

a reconstruction of parish may be taking place. New limits in participation and democratization of decision making

suggest increased levels of cognitive dissonance and emergent social construction consistent with the nature of

Church as Communion.

This study, although conducted within a hierarchal structure, is introduced and embedded in a different

structure that exists for this purpose. The development, implementation, and participatory nature of the parish

research projects create a social construction within the archdiocese and parishes of complex multilevel interactions.

As the pastoral planning has emerged, the church structure shifts toward a model involving multi level interactions.

In brief, during pastoral planning the archbishop, Regional Vicars, pastors, parish pastoral councils, parishioners,

and archdiocesan staff become a partially ordered level structure.[4] (Kontopoulos, 1993)

The pastors, parish council members, and cluster pastoral planners have become the voice and information source for

future administrative decisions, and have been invited to develop local solutions for local problems. The pastors and

parish council members approach their problem as value laden researchers, who realize their stake in the research

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[4] This occurs, albeit through the permission of the Archbishop, who is the leader of the hierarchy and controller of the
power structure.

process (the life, development, and stewardship of the local parish, the Archdiocese and the Catholic Church in their community).

The pastoral planners understand the contextual focus of their research. They are encouraged to discover the local problems, see them within the context of their cluster of parishes, the Archdiocese, and the Catholic Church; and create a plan to solve these problems. We can argue that this, in theory, will be taken seriously because of the needs, goals, and fears of the local parishioners. Pastoral planning becomes important to pastors and parish councils because the voice of the parish emerges in the parishioners' survey and the information derived from it. Pastors and parish council members further understand the local context of their parishes from information derived from surveys and other sources they identify or that are identified by the research and planning staff.

The pastoral planners are the owners and interpreters of the data. They are encouraged to uncover the problems of the local parish from within their own context, from their own standpoint. It is in the construction of reality that becomes the measuring criteria for the data of pastoral planning. "Since action research focuses on the problems of both practical and theoretical importance, it requires those who experience or 'own' the real world problem to be actively involved with the researcher at least in selecting the problem and sanctioning the search for solutions." (Eldin and Chisholm, 1993, 129). Through our model, the owners of the problem become the researchers with the help of the Archdiocesan organizational structure. They are empowered with the ability and right to propose and implement solutions (i.e., the Pastoral Plan).

The purpose of this book has been to capture the process of introducing large scale organization change through action research and to report the most important findings from the action research projects that have been conducted among the parishes of the Archdiocese of Philadelphia. These finding will be available to those responsible for leading these planing activities in the future, whether in the Archdiocese of Philadelphia or elsewhere. The research method used for this analysis is that described in action research. This method is a process of cyclical inquiry that involves identifying problems, planning action, implementing actions, and evaluating outcomes. This research activity is carried out by those experiencing the circumstances by whom problems are

defined; plans are conceived, implementation is undertaken; and outcomes evaluated. The parish pastoral council members have acted as the primary researchers in the parish self-study process and the cluster pastoral planning committees acted as primary researchers in the cluster pastoral planning process. Their conclusions were reflected in the writing of their pastoral plans.

The action research process assumes that change and learning in the parishes will be self generating and self maintaining (Elden and Chisholm, 1993). Consequently, in their role as the researchers involved with these parish based action research projects, the research and planning staff needs to continue to participate in the evaluation of the implemented parish plans, (the final phase of action research) with the parish leadership. The vehicles for this ongoing evaluation, the annual self assessment of the parish pastoral plan and the review of cluster pastoral plans, have been put into place. (Appendix 17.1)

A key component of any classically defined action research project is the diffusion of knowledge. The researchers must not only choose a problem and a solution, but there must be a high chance of leveraging the research findings into a larger application that goes beyond just a good idea (Eldin and Chisolm, 1993, 130). To this end, the Archdiocese of Philadelphia and the authors offer this book.

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