



# Building Up the Body of Christ <sup>Eph. 4</sup>

## Building Up the Body of Christ: Parish Planning in the Archdiocese of Baltimore

*And he gave some as apostles, others as prophets, others as evangelists, others as pastors and teachers, to equip the holy ones for the work of ministry, for building up the body of Christ.  
Ephesians 4:11-12*

At a priest convocation last fall, the Archbishop and priests of the Archdiocese held a lengthy conversation about the priest shortage and its effects on their lives and that of their parishioners. The effects of this shortage are being felt now throughout the Archdiocese and are expected to worsen in the coming years; 72 of our 153 active-duty priests will become eligible for retirement (age 70) over the next 15 years, an average of just under five men per year. Currently, 17 of our 153 active priests are over the age of 70. If the current trends hold, the number of active priests will be reduced from 153 to fewer than 100, probably as few as 93, over the next 15 years. At the request of the priests of the Archdiocese, the Archbishop pledged to develop a planning initiative that addresses the future direction of the Archdiocese in light of the priest shortage.

*Building Up the Body of Christ*, the Parish Planning Initiative of the Archdiocese, will assist both parishes and the Archdiocese in planning for the future. This initiative was developed after consultations with priests, including pastors and representatives of the Consultors and Presbyteral Council, and laity, including parish Corporators and representatives from Pastoral Councils and Finance Committees.

**Goal of the Planning Process:** The goal of the Parish Planning Initiative is to support the essential evangelizing mission of the Church by assessing and reorganizing the parishes of the Archdiocese through effective planning. It will review the allocation of clergy and lay resources and evaluate temporal resources for the purpose of creating mission-driven, vibrant, and welcoming Catholic parishes and communities.

**Focus of the Planning Process** – The planning process will center on three primary areas:

Mission and Parish Life – Parishes (their number and location) and their liturgical life and evangelization ministries will be examined in order to assure that parishes in the Archdiocese of Baltimore are centers for vibrant worship, sacramental, and catechetical life.

Human Resources – The number and availability of priests, as well as the roles and responsibilities of Priests, Deacons, Pastoral Life Directors, Lay Ecclesial Ministers, and Business Personnel and their allocation, will be reviewed. Priest vocations will also be a major focus.

Stewardship – The temporal and human resources of parishes and the Archdiocese, including financial and physical resources, will be examined with the objective of developing parishes that are sustainable in ministry and operation.

The planning process will examine individual parish, regional, and Archdiocesan needs and perspectives. The planning process envisions a full research component, an opportunity for all constituencies to participate in the planning process, evaluation of current parishes, local and Archdiocesan planning, and, eventually, implementation of those plans.

**Principles of the Planning Process** – Throughout the pre-planning consultations there were many recommendations concerning the planning process. Responding to those suggestions, the parish planning process will have:

- ❖ Goal-oriented focus with an Archdiocesan-wide scope;
- ❖ Transparency;
- ❖ Ongoing dialogue and communication among all constituencies;
- ❖ Consistent lay involvement;
- ❖ Openness to new models and ideas;
- ❖ Commitment to implementation; and
- ❖ Strong leadership at all levels.

### **Key Initial Administration & Tasks**

Given the recent announcement of Archbishop O’Brien’s transition to Apostolic Administrator of the Archdiocese of Baltimore, this plan anticipates an initial period focused on research and getting ready to kick off a more detailed planning process, should the new Archbishop elect to do so, that involves parishes working in clusters.

During this initial 12-15 months of the parish planning process, a collaborative administration of tasks will occur. The Auxiliary Bishops will be closely involved and will: review all drafts and final documents; attend and participate in all public meetings; and meet monthly (or more as needed) with the Office of Research and Planning. The Office of Research and Planning will coordinate the tasks and timeline listed below and will report periodically to the Apostolic Administrator.

An Archdiocesan Parish Planning Board (APPB) will be appointed by the Apostolic Administrator and will be comprised of the Vicar Bishops, the Vicar General, plus 22 additional members, including: 10 priests, 10 lay people, one deacon and one woman religious. Priests will include eight diocesan priests and two religious order priests. At least one Pastoral Life Director also will be included. Lay members will represent a broad array of expertise and experience. The Board will be led by two co-chairs, one an Archdiocesan priest and the other a lay person. The Vicar Bishops and Vicar General will serve as non-voting, *ex officio* members. The Chancellor will serve as the non-voting, *ex officio* Secretary to the APPB. Initially, the APPB will oversee the research phases of the planning initiative. Later in the planning process, the APPB will work with Cluster Planning Groups, review cluster plans, oversee the coordination of plans, and make recommendations to the Archbishop concerning adoption of cluster models and plans.

### Phase 1: Planning Research & Organization

- Research on all Current Planning Initiatives in the Archdiocese October – December, 2011
  - Meetings of the Vicar Bishops, Office of Research & Planning (ORP), and representatives of groups, clusters, or regions that have already initiated some parish planning efforts will take place to review

the objectives and the history of the planning progress to date. A report for the Apostolic Administrator summarizing work to date will be prepared by ORP.

- Research on Best Practices for Parish Planning September 15 and ongoing
  - To determine best practices, the following will be examined: 1) other dioceses' planning efforts; 2) previous merger and cluster experiences in the Archdiocese of Baltimore (AOB); and 3) recommendations from research and non-profit organizations concerning parish and church management.
  
- Research on Archdiocesan Demographic Profile September 15 and ongoing
  - Research that provides a demographic summary of the Archdiocese (examining census data in jurisdictions of the Archdiocese) will be coordinated by ORP, working with the Center for Applied Research in the Apostolate. A 10-12 page *Diocese At a Glance* document will be prepared and widely disseminated.
  
- Development of Priest Forecast September 15 and ongoing
  - ORP, working with the Center for Applied Research in the Apostolate and the Office of Clergy Personnel, will coordinate research to support the development of a twenty year forecast for priest personnel availability. This will include:
    - Survey/Consultation of every Diocesan Priest – A survey and follow-up consultations (where needed) will be used to learn about and assess the health and retirement plans of diocesan priests in order to adequately forecast the number of priests available to serve in parishes over the next twenty years.
    - Consultation with Religious Orders – Meetings with the provincials of religious orders will take place to improve our estimates for priest personnel needs in the future.
    - Ordination Assessment – An assessment of the number of new priest ordinations will be included in the forecast.
  
- Parish Facilities Assessment September, 2011 – March, 2012
  - The Division of Facilities Management will evaluate the physical plant facilities of each parish and determine current and future facility maintenance needs and costs.
  
- Parish Profiles prepared by AOB and sent to parishes September – December, 2011
  - A parish profile for every parish will be developed and shared with the parishes as part of the planning process. These profiles will include: parish registration; Mass attendance; diversity; sacraments; RCIA; religious education; ministry & outreach; volunteers; services; stewardship; five-year financials; parish maps (four); and facilities information.
  - After review by the Parish Leadership Team (see below), the parish profiles will be posted on the AOB parish planning website.
  
- Metrics and Assessment Research September 15 and ongoing
  - This research involves:
    - Review of objective metrics that can be utilized to assess parish vitality, viability, and sustainability.
    - Review of parish self-assessment and third party evaluation instruments to determine the best instruments (or combination of instruments). This will include a review of the *14 Criteria for a Healthy Parish* previously used by the Archdiocese, as well as other instruments, such as the National Leadership Roundtable on Church Management's *Parish Ministry Assessment Tool*.

- Development of Models September 15 and ongoing
  - The above metrics and assessment research will be complemented by a review of existing, potential parish models and possible variations on these. In addition, the rationale for use of each model and the factors related to model adoption will be prepared to help foster the appropriate use of models.
  
- Listening Sessions with Special Populations November, 2011 – May, 2012
  - ORP will organize listening sessions in regional locations with Catholics from the following constituencies:
    - Hispanics;
    - African Americans;
    - Other ethnicities represented in the Archdiocese;
    - Archbishop's Board of Financial Administration;
    - Community, Civic and Philanthropic Leaders;
    - Youth; and
    - Young Adults

These meetings will be conducted to hear their advice, suggestions, and recommendations on the planning process as well as substantive suggestions for new pastoral paradigms.
  
- Vocations Study & Plan September 15 and ongoing
  - ORP, working with the Office of Vocations, will conduct a separate vocations study and strategic plan that is coordinated with the broader parish planning initiative.
  
- Development of Evangelization Plan September 15 and ongoing
  - ORP, working with the Department of Evangelization, will develop an evangelization plan to address parish leader concerns (noted at the Archbishop's recent Consultations). This research will look at both current parishioner satisfaction and former parishioners' reasons for leaving the Church as they relate to parish life. Consideration will be given to conducting exit surveys (through phone or email) to capture information from this latter group. If budget permits, focus groups with former and current parishioners could be conducted. Parishioner satisfaction research will support both the parish planning initiative and the Archdiocese's broader evangelization priorities.
  
- Development and Implementation of a Communications Strategy September 15 and ongoing
  - A comprehensive communications strategy will be developed to assure that all constituencies are kept informed as the parish planning initiative is carried out. Traditional strategies – through pulpit announcements, Bulletin and *Catholic Review* articles – will be supplemented by email communications, social media, direct mail, and web postings.
  - Central to this effort will be a new website (linked to Archbalt) that will serve as a communications hub on all aspects of parish planning.
  - Email sign-up will be available and interested persons will receive updates on the planning process. Communications through existing parish networks and social media will also be tapped to assure that multiple mediums reaching different demographic groups are utilized.
  - In later phases of the planning process, the laity will be encouraged to submit comments and suggestions through the website.

## Phase 2: Work of the Parishes

- Each Pastor/PLD identifies the Parish Leadership Team January, 2012
  - Parish Leadership Team consists of: the Pastor/PLD and four lay members of parishes, at least three of whom must be chosen from: Corporators, Pastoral Council, Finance Committee, or the Chair of another parish committee. In selecting the four lay members, the pastor should seek to select a group that reflects the demographic makeup of the parish. Associate Pastors, Deacons, and staff may not be on a Parish Leadership Team.
  
- Parish Leadership Team reviews Parish Profile February – March, 2012
  - Parish Leadership Team reviews parish profile and communicates with ORP regarding any discrepancies.
  - If needed, a meeting is held to finalize the parish profile.
  
- Parishes prepare Parish Inventory of Ministries and Activities February – March, 2012
  - The Parish Leadership Team works with parish to develop a Parish Inventory of Ministries and Activities that includes a detailed identification of all worship, sacramental preparation, religious education, youth and young adult activities, social justice outreach, committee information and activities, stewardship activities, community activities and other ministries/activities/events of the parish.
  
- Parishes conduct Parish Self-Assessment and submit these to the Archdiocese. April – June, 2012
  - While the profile and inventory are detailed and create a facts database about each parish, the self-assessment is evaluative looking at present performance and future desires and opportunities.
  - To help assure some consistency, the self-assessment by parishes will be preceded by an Online Tutorial on How to Conduct a Parish Self-Assessment.
  
- ORP review of Parish Self-Assessments June – August, 2012
  - Vicar Bishops and ORP review each parish self-assessment and prepare a summary assessment sheet, including any issues or concerns, and this summary assessment is shared with the parish.
  
- Parish Leadership Team reviews summary assessment sheet August - September, 2012
  - Parish Leadership Team reviews summary assessment sheet and submits additional information, clarification, or rebuttal to the Vicar Bishops and the Office of Research & Planning.

## Phase 3: Work of the Clusters

**NOTE:** Phase 3 involves the work of area or regional cluster groups. For the past several years, some regions of the Archdiocese have already formed cluster groups and initiated planning efforts. The following list of tasks may be adjusted depending upon where a region or cluster may be in its planning process. All steps are included here to demonstrate the critical steps in cluster planning. In addition, because the process below allows a parish to submit a recommendation on the cluster where it believes it belongs, it is possible that changes to existing clusters may occur if supported by convincing rationale. Such changes could also be requested by the Vicar Bishop or ORP. The APPB will make recommendations to the Archbishop concerning requested cluster changes.

- Parish Leadership Team submits its suggested Cluster Group to the Parish Planning Board.
- Consultations between Vicar Bishop, ORP, and Parish Leadership Teams are held where there are differences over cluster composition. Unresolved cluster composition differences are reviewed by the APPB who makes a recommendation to the Archbishop.
- Archbishop announces his appointment of Clusters.
- The Allocation of Priest Personnel for the Archdiocese for the next fifteen years is announced and the numbers of priests (given in the form of a range) available to the cluster over a multi-year period is shared with each cluster.
- Cluster Planning Group is identified for each Cluster.
  - Each Cluster will identify a Cluster Planning Group, with each parish in the cluster having equal representation. Members of the Cluster Planning Group will include the Pastors of each parish in the cluster plus 1-3 lay representatives from each Parish Leadership Team, as identified by the Pastor. The number of members will be affected by the number of parishes within each cluster, with a goal of having no more than 25 people (and preferably less) on each Cluster Planning Group. The APPB will determine the size of each Cluster Planning Group.
  - Each Cluster Planning Group submits a written report to the APPB and ORP after every meeting.
- The Allocation of Priest Personnel for the Archdiocese and the range of priests available per cluster, as well as the parish profile, parish self-assessment and summary assessment sheet for every parish in the cluster are shared with each Cluster Planning Group.
- Each Cluster Planning Group meets, with a Facilitator, to begin an initial review of parish assessments and profiles, possible parish models and its priest allocation, and to plan its meeting with parishioners, as well as to discuss issues for review at its regional meeting.
- Regional Meeting of Cluster Planning Groups – Facilitated meetings are held regionally to allow Cluster Planning Groups to discuss together cross-cluster issues. Unresolved issues from regional meetings are referred to the APPB for resolution.
- Meetings with Parishioners – A facilitated meeting is held in each cluster for parishioners (of parishes in the cluster) to learn about the identity and profile of the cluster and its priest allocation, and to begin to hear about models.
  - Parishioner feedback is sought in table groups.
  - Depending on the size of the cluster, this may require more than one meeting.
- Each Cluster Planning Group meets, with a Facilitator, to review possible parish models and its Allocation of Priest Personnel, decide on a proposed model for the cluster, and prepare an annotated outline on how such a model would operate within the cluster.
  - In making its recommendation, the cluster considers the data (profiles, inventories, assessments, parishioner feedback) concerning the parishes in the cluster.
  - This will likely require a series of facilitated meetings.
  - Note this is not the proposed plan for implementing the model but just an annotated outline so that the Archdiocesan Parish Planning Board can understand the rationale for the model selected.

- Each Cluster Planning Group submits its recommended model and annotated outline (including how it will address the range of priests available to the cluster over time) to the Archdiocesan Parish Planning Board.
- Archdiocesan Parish Planning Board makes a Preliminary Recommendation regarding a model for each cluster, along with its rationale, and sends to clusters.
- Each Cluster Planning Group meets, with its Facilitator, to discuss the APPB recommendation and plan a Listening Session.
- A Listening Session is held for parishioners in each Cluster to discuss APPB recommendation.
- Each Cluster Planning Group meets, with its Facilitator, to discuss the APPB recommendation and prepare a Response.
- Each Cluster Planning Group sends its Response (with a rationale) to the Archdiocesan Parish Planning Board regarding the Preliminary Recommendation (recommended model and annotated plan outline) for its cluster.
- Final recommendation of the Archdiocesan Parish Planning Board along with its rationale is sent to the Archbishop.
  - One of the responsibilities of the APPB will be to assure that the recommendations sent to the Archbishop regarding model adoption match the overall priest personnel allocation, as well as the range of priests available to each cluster over time.
- Archbishop determines whether he needs additional information or a hearing with any cluster prior to issuing final decisions with respect to cluster models.

#### Phase 4: Decisions and Implementation

- Archbishop announces final decisions on Cluster Models and Plans.
- Each Cluster Planning Group develops a detailed implementation plan with timelines for applying the model for its cluster.
- Implementation occurs following the timeline.
- Each Cluster Planning Group has semi-annual meetings with Vicar Bishop and ORP to discuss implementation milestones and concerns.