

Decided by the Holy Spirit and by Us

Acts 15:28

A Handbook for Parish Councils



Diocese of Pueblo

2016

Diocese of Pueblo Mission Statement

The Diocese of Pueblo, in service to Jesus Christ and led by its Bishop, oversees the Church's pastoral ministries of word, worship, charity and justice to everyone across the Diocese, and holds in trust the property and goods of all Diocesan entities.

Vision Statement

Empowered by the love of Christ and in communion with one another, we further God's Kingdom through fidelity, love and generosity.

DECLARATION OF RELIGIOUS MISSION AND PURPOSES OF THE DIOCESE OF PUEBLO

In his divine plan for the salvation of the world, Jesus Christ “established and sustains here on earth his holy Church” (Lumen gentium 8). To the church he has entrusted this mission to be fulfilled in the world. The diocese of Pueblo “in which and from which exists the one and unique Catholic Church” (canon 368) is constituted and organized in order to fulfill this mission Christ has specifically entrusted to it. The diocese of Pueblo has been entrusted for pastoral care to the bishop of Pueblo with the cooperation of the presbyterate of the diocese so that “adhering to the bishop and gathered by him in the Holy Spirit through the gospel and the Eucharist, it constitutes a particular church in which the one, holy Catholic church of Christ is truly present and operative” (canon 369). Proper to its ends and in the fulfillment of its mandate, the diocese of Pueblo pursues in particular the following ends: to proclaim the Gospel to all¹, to order divine worship², to teach the faithful of Christ³, to build up the community of the faithful of Christ⁴, to provide decent support for the clergy and other ministers⁵, to train, educate and facilitate the ministries of clergy, religious, and laity⁶, to perform the works of the sacred apostolate⁷ and of charity, especially toward the needy⁸.

¹ Including, but not limited to, building, owning and operating, or delegating the operation thereof to a diocesan entity, houses of worship, houses of ecclesiastical administration, meditation gardens, prayer paths, cemeteries, youth camps, campus ministries, retreat and conference centers, places for storage, and places of hospitality upon such land as is essential to the functioning of such edifices, or which may be required by building and zoning standards, to provide parking, or to provide supporting services for such building or edifice.

² Including, but not limited to, the celebration of the sacraments, other acts of worship, conduct of funeral and burial services.

³ Including, but not limited to, providing religious education classes, seminars, conferences and workshops on spiritual, moral, ethical, cultural and educational subjects; marriage preparation classes; literacy and GED classes; day care for preschool and school age children; preschool, elementary and secondary education; building, owning, and operating suitable structures for these purposes upon such land as is essential to the functioning of such edifices, or which may be required by building and zoning standards, or to provide parking or other supporting services for such building or edifice.

⁴ Including, but not limited to, the hosting of or making provisions for social events, receptions, dances, dinners, fairs, bazaars, bingo, athletic events, ecclesiastical support groups.

⁵ Including, but not limited to, owning and maintaining such individual or group dwellings as rectories, convents, monasteries, and other places of residence for staff.

⁶ Including, but not limited to, the maintenance of seminaries, novitiates, juniorates, houses of formation, and other institutions used for the formation of members of the clergy and other religious communities.

⁷ Including, but not limited to, hospital and medical care, ministry to the handicapped, immigration and resettlement services, family and children services, hospice, adoption, foster care and pregnancy counseling, individual, family or marriage workshops or counseling, senior centers, Catholic youth centers, centers for women and children, alcoholic and drug rehabilitation counseling; and building, owning and operating suitable structures for these purposes upon such land as is essential to the functioning of such edifices, or which may be required by building and zoning standards, or to provide parking or other supporting services for such building or edifice.

⁸ Including, but not limited to, charity provided through Catholic Social Services of (Diocese of Pueblo, Inc., and its affiliated agencies, Catholic community services, Catholic parishes and other Catholic organizations, shelters for the homeless, food banks, sandwich lines and soup kitchens, clothing banks and emergency assistance centers, as well as community-building activities like providing playgrounds, open areas, and picnic areas. As a part of its citizenship and outreach mission to the community, the diocese of Pueblo may provide: places to support public elections, space for minority groups to improve themselves, meeting space or office space for other religious, schools or charitable community, national and world organizations, including, but not limited to, Alcoholics Anonymous, Boy Scouts, Big Sisters, veterans' organizations, senior citizen's groups and mental health groups.

Table of Contents

The Diocese and the Parish	1
The Bishop of Pueblo, a Corporation Sole	2
The Pastor's Role in the Parish	3
The Parish Pastoral and Parish Finance Council in Law	4
Some Clarifying Observations	5
What Council Leadership Ministry Is	6
What Council Leadership Ministry is Not	7
Council Mission	8
The Pastoral Council's Focus: Pastoral Planning	9
The Finance Council and Planning	10
Planning's Aim: Conversion and Transformation	11
Discernment Decision Making	12
The Discernment Process	13
The Council Meeting	14
The Meeting Chair	16
Some Meeting Mechanics	17
The Place of Confidentiality	19
Council Election	20
Council Membership Eligibility	21
A Word about Other Parish Leadership	22
Appendix I: The Corporation Sole Organizational Chart	25
Appendix II: A Planning Process for the Parish	26
Appendix III: Planning in the Small Parish Community	30
Appendix IV: A Spirituality-Based Discernment Process	33

The Diocese and the Parish

This handbook articulates the Diocese of Pueblo's expectations for the governance of its parishes. In order to set the larger context for these expectations, it is helpful to reflect on the meaning of the terms *diocese* and *parish*, and the relationship between the two.

The Diocese

The Roman Catholic Church is "one Body" composed of a multitude of particular churches. In the Latin Rite, a particular church is called a diocese and embodies the fullness of the one Catholic Church. The diocese is neither a branch, nor a division of the Church. Rather, the diocese is the fundamental unit that constitutes the Church; it embodies in a particular territory, for a particular community, the whole Catholic Church as an organic unity.¹

The Diocese of Pueblo, then – the physical territory and the portion of the people of God entrusted to the Bishop of Pueblo as its shepherd – “constitutes a particular church in which the one, holy, catholic and apostolic Church of Christ is truly present and operative (can. 369).”

As its shepherd, the Bishop of Pueblo is the visible source and foundation of unity for the Diocese.² Charged to protect the unity of both the universal Church and the Diocese, the Bishop's office binds him to promote the common discipline of the Church through the exercise of his legislative, executive and judicial power according to the norm of law (can. 391, 392).

The Parish

A parish is a certain community of the Christian faithful stably constituted in a diocese. As a general rule a parish is geographical, that is, it includes all the Christian faithful of a certain territory (can. 518).

The pastoral care of a parish is entrusted to a pastor as its proper shepherd (can. 515). The pastor exercises this pastoral care under the authority of the diocesan bishop as his co-worker.³ The pastor fulfills his parish shepherding ministry with the cooperation of other presbyters and deacons, and with the assistance of lay members of the Christian faithful (can. 519).

The Relationship Between the Two

The focal symbol of the bishop's authority in a diocese is the *cathedra*, the chair in his See City from which he preaches and presides at Eucharist. The *cathedra* is so weighty a symbol that a church is built to house it: the cathedral, the church of the chair. When the bishop presides at Eucharist from the *cathedra* surrounded by the priests, deacons, religious and faithful of the diocese, the whole Church is present in its organic unity as one Body in Christ.

The presider's chair in the parish church stands as a symbol of the bishop's *cathedra*, and it participates in the *cathedra*'s reality. That is, the presider's chair in the parish assembly is the bishop's chair in the parish church and a symbol of his authority. The presider's chair is entrusted to the pastor as a co-worker with the bishop charged with the pastoral care of the parish community.

¹ See the Vatican II *Decree on the Pastoral Office of Bishops in the Church*, #22.

² See the Vatican II *Dogmatic Constitution on the Church*, #23, and *Decree on Bishops*, # 11.

³ See the Vatican II *Decree on the Ministry and Life of Priests*, #2.

The Bishop of Pueblo, a Corporation Sole

The structure of the Pueblo Church in civil law mirrors the ecclesial relationship between the diocese and the parish. The Diocese of Pueblo is a legal corporation recognized by the State of Colorado. It is a “corporation sole,” that is, all of the parishes of the diocese are part of the integral whole that is the legal corporation: “The Bishop of Pueblo, a corporation sole.”⁴

While the pastor of the parish serves no official corporate function, his service relative to the good order of the parish may be considered roughly analogous to that of a Chief Executive Officer serving on the corporation’s behalf.

The purposes of the corporation are:

- To support the ministry of the Diocese and of the Bishop of Pueblo by assisting him in administering the temporal affairs of the Diocese;
- To hold property for the use and benefit of and in trust for the Diocese;
- To hold property for the use and benefit of and in trust for the respective Catholic entities located within the geographical boundaries of the Diocese;
- To hold property in order to ensure the restrictions placed on the use of the property by donors or others are honored; and
- To have perpetual succession and existence as afforded to a corporation sole under Colorado law.

The corporation has the legal authority to transact parish business, and sets certain guidelines for the pastor’s and parish’s acts:

1. The pastor has the authority to act alone in financial and property transactions of less than \$1,000.
2. For financial and property transactions between \$1,000 and \$5,000, the pastor must seek the counsel of the pastoral and the finance councils before he may act.
3. For financial and property transactions between \$5,000 and \$10,000, before he may act the pastor must seek the counsel of the pastoral and the finance councils and submit a request to the Bishop, who approves or disapproves action.
4. For financial and property transactions above \$10,000, before he may act the pastor must seek the counsel of the pastoral and the finance councils, submit a request to the Bishop, and submit a request to the Diocesan Finance Council, which acts as a consultative body to the Bishop of Pueblo by making formal recommendations for his consideration.

These guidelines pertain to the following categories of transactions:

- a. sale, purchase, mortgage or gifts of real estate.
- b. granting of easements.
- c. lease or rental agreements.
- d. stock transfers or sales.
- e. major capital improvements or renovations.
- f. new construction.
- g. service contracts
- h. borrowing of money
- i. litigation

⁴ See Appendix 1, p. 30, for an organizational chart, “The Bishop of Pueblo, a corporation sole”.

The Pastor's Role in the Parish

As co-worker with the Bishop, the pastor is the shepherd of the parish entrusted to him (can. 519). Church law specifies his role in the parish as follows

The pastor of the parish is obliged:

1. to announce the word of God through preaching and catechesis
2. to promote the Gospel by just and charitable works
3. to oversee the education of children and evangelize
4. to see to it that in every way the Eucharist is the center of the parish assembly of the faithful
5. to see to it that the sacraments are devoutly celebrated
6. to stimulate family prayer
7. to stimulate full, conscious and active participation in the sacred liturgy (can. 528)
8. to represent the parish in all legal affairs (can. 528)
9. to oversee the parish's goods

The pastor must strive:

1. to come to know the faithful
2. to come to share life with the faithful
3. to acknowledge the proper role of the lay faithful in the church's mission
4. to promote the proper role of the lay faithful in the church's mission (can. 529)

From a practical point of view, in the collaborative governance structure of the parish, the pastor's role is

- a. to oversee, enable and monitor all parish Gospel ministry service
- b. to strive to build consensus on the parish's vision and its direction
- c. to equip pastoral leaders for their ministry
- d. to insure that pastoral leaders, paid and volunteer, are set free to do their ministry within the parameters set by the job description.

Though a wise pastor will carefully and confidentially consult with his pastoral council and finance council about these areas of parish life, a pastor's inalienable responsibilities for the parish are as follows:

- faith and morals
- finances
- property
- law
- personnel

Whether the pastor consults with the councils or not in his exercise of these responsibilities, the bishop and the corporation will ultimately hold only the pastor accountable in these areas.

The Parish Pastoral and Parish Finance Council in Law

The community of faith that is the Church has always gathered in groups to discern and exercise the Holy Spirit's gifts. This ancient tradition is grounded in Jesus' calling disciples to himself,⁵ his establishing the new Israel with the designation of the Twelve⁶ and in the stories of the bestowal of the Holy Spirit.⁷

The age-old pattern of coming together to discern the Spirit's gifts arises when Peter gathers the disciples to elect Matthias one of the Twelve (Acts 2:15-26). The pattern continues as leadership gathers the community to elect assistants to wait on table (Acts 6:1-7), to send Barnabas and Saul on mission (Acts 13:1-3), to hear Paul report about his missions (Acts 14:27), and to shape policy for opening the Christian Way to the Gentiles (Acts 15:1-21).⁸

These foundational experiences of the community accessing the Holy Spirit's power have inspired the Church throughout the ages to gather councils, synods and assemblies of all sorts, trusting the Holy Spirit's movement within and among the community leadership gathered.

This tradition motivates the Church in its *Code of Canon Law* to permit two consulting groups for every parish in which the pastor and parishioners gather to discern the Spirit's gifts.

The first parish consultation group is the pastoral council.

If the diocesan bishop judges it opportune after he has heard the presbyteral council, a pastoral council is to be established in each parish; the pastor presides over it, and through it the Christian faithful along with those who share in the pastoral care of the parish in view of their office, give their help in fostering pastoral activity. This pastoral council possesses a consultative vote only and is governed by the norms determined by the diocesan bishop (can. 536).

Canon 536 calls the pastor to consult with the pastoral council about focusing, guiding and monitoring the parish's ministry life (ministry structures, staff member numbers and job descriptions and ministry evaluation) and its long-range planning.

The Code names the second consulting group the finance council.

Each parish is to have a finance council which is regulated by universal law as well as by norms issued by the diocesan bishop; in this council the Christian faithful, selected according to the same norms, aid the pastor in administration of parish goods (can. 537).

Canon 537 calls the pastor to consult with the finance council about focusing, guiding and monitoring the parish's administration ministries: finances (budget, financial stewardship, gifts of money and stock), property (buildings, grounds and gifts of real estate), personnel (salaries and benefits) and law (personnel policies and the disposition of parish property).

In accord with the law, the Bishop of Pueblo requires that a pastoral council and a finance council be established in every parish or parish cluster. This handbook offers guidelines and suggestions for both of these parallel consultation groups in the parish.

⁵ Matthew 4:18-22, Mark 1:16-20, Luke 5:1-11, John 1:35-51.

⁶ Matthew 10:1-15, Mark 3:13-14, Luke 6:12-16.

⁷ Acts 2:1-4, John 20:19-13

⁸ The title of this work is taken from the Council of Jerusalem's letter to the Gentiles that delivers its decisions with the astonishing words, "It has been decided by the Holy Spirit and by us ..." (Acts 15:28).

Some Clarifying Observations

At the same time as the Church requires the pastoral council and the finance council, and does so in universal and particular law, the Church is careful to offer clarity about its expectations. It is well, therefore, to make some observations about the legal mandate and its implications.

The Pastor and Council: a Collegial Relationship

When canon 536 endorses the pastoral council in every parish, the passive voice in the second phrase of the canon and the statement that the pastor presides over it in the third phrase of it tell us that, as the Church sees it, the pastor and council join together in an organically collegial relationship. The pastoral council's ministry is united to the pastor's and extends it.

To state the point more directly, the parish's pastoral council is not an *adversarial* body in relationship *to* the pastor. Rather it is a *consultative* body in relationship *with* the pastor.

The Council Fosters Pastoral Activity

Canon 536 further states that the pastoral council's purpose is to help foster pastoral activity. That is, its purpose is ministry. To state the point more directly, the purpose of the pastoral council is to do the very hard work of building consensus in the parish about the community's vision of Gospel ministry and its implementation of that vision. Consensus is a gift of the Holy Spirit that the Church calls us to build within and across our faith communities so that we may be one, thus mirroring the life of the Trinity across the Church and to the world.

The Pastoral Council and Finance Council: Parallel Entities

Canon 536 about the pastoral council is immediately followed by can. 537 about the finance council. There we see that the finance council and pastoral council are parallel consultation entities. Focusing specifically on questions of the parish's material gifts and the ministries surrounding them, the pastor and the finance council join together in an organically collegial relationship that extends the pastor's ministry and fosters focused pastoral activity.

The Relationship Between the Two Councils

Because each council has a distinct purpose, no matter how large or small the parish community, each council is to be comprised of different persons.

The link the law articulates between the pastoral council and the finance council in their ministry is the person of the pastor, who presides over each. While wisdom and sound theology suggest structuring an even broader linkage between the two councils, the law also suggests that the shape that interrelationship takes depends upon the pastor.

The Pastor and the Councils

The law implies that, in his role as presider over the councils, the pastor is not apart from but participates with each council in the consensus-building process. That is, the pastor shapes the council agenda, defines the extent and the limits of council decisions, provides maximum information to the councils so they can offer the best consultation possible. Thus the pastor shares as a partner with council members in the movement toward council consensus as well as whole parish consensus and harmony.

What Council Leadership Ministry Is

Council leadership – pastor and council together – is a spiritually-based process, a ministry with, for and within the parish community. Four major theological themes undergird the mission and exercise of council leadership ministry in the parish community.

A Ministry of Justice

The personal virtue of justice calls us to establish right order in relationships for the sake of building-up the common good. Leadership in the parish community, the pastor in consultation with his pastoral and finance councils, is a ministry of justice. The purpose of pastor and council leadership ministry is to establish and oversee right order in parish relationships for the sake of building up the effectiveness of the parish's Gospel ministries and its faithful stewardship of the Spirit's gifts. Leadership, pastor and councils together, is a fundamental ministry of justice for the sake of the parish, the Diocese of Pueblo and the Church.

A Ministry of Communion

Parish leadership assembles as the Body of Christ, all brothers and sisters in Jesus Christ. Properly speaking, council members have no constituency. They represent the whole Body of Christ that is the parish community, not merely a part of it. The pastor and council gather as a sacrament of ecclesial communion, all bound together by the sinews of being washed clean and incorporated into Christ by baptism, nourished in Eucharist and animated by the Holy Spirit. The assembled pastoral leadership group expresses sacramental communion, all one body in Jesus Christ.

A Ministry of Participation

Pastor and council gather as one body, yet each person has a complementary role to play as he or she participates in a common pastoral ministry. The role of each group member is to be the whole parish's head, heart, eyes, ears and hands in consultative counsel, and to provide expertise to help pastoral leadership make discerning decisions about the parish's present and future. While Church pastoral leadership groups serve a consultative function, experience makes it clear that as trust builds the pastoral leadership group can effectively serve a deliberative one, pastor and people bound together in solidarity, participating together in a complementary way to make discernment decisions for the sake of the parish's Gospel mission.

A Ministry of Discernment

The decision-making process – pastor and council together – aims to sort through to what it is that God wants of the parish community. Discernment decision-making requires that all around the table pray, discuss and sort through to a unanimous conclusion about what it seems God wants. Discernment takes time and can be messy; it includes experimentation, soliciting opinions, and “wait-and see” as the group watches for external confirmation of its decisions, or lack of it. The pastor and council discern under the umbrella question: what does God want of us? The pastor and council rest with a unanimous decision that meets and affirms this standard for everyone around the table: can I live with this decision?

What Council Leadership Ministry Is Not

Certain themes in American culture inform our understanding of governance as we gather around a leadership table. These themes arise from our national history and the wide affirmation we give, generation after generation, to our government structures. Yet these themes create conflict for many who enter parish leadership because the Church's grounding, structure and priorities differ markedly from those of our nation. It is necessary, therefore, to be clear about what leadership ministry in the parish – pastor and council together – is not.

Communion, not Representation

The cry at the time of the Boston Tea Party was “No taxation without representation.” Ever since, American constitutional tradition seeks representation for the people's opinion on every issue of concern to the country. The American notion of representation in a leadership group includes within it the understanding that a person comes forward into leadership to stand up for a constituency so its voice can be heard. This notion presumes, therefore, a certain “us” and “them” in gathering for group decision-making. While representation might need to be broadly considered in a parish's council, from an ecclesial point of view the pastor and council assembled is foremost an expression of communion, not an exercise in representation.

Participation, not Checks and Balances

The notion of checks and balances in governance leaves us Americans feeling secure in the interplay of our government institutions. However, the notion of checks and balances presumes polarity – sometimes cooperative, sometimes adversarial – within governance structures. The pastor and council gather to focus, guide and monitor together the parish's Gospel ministry. Leadership accountability is a high value that needs to be kept solidly in place, and that accountability rests in the council functioning as one body for the parish's good. The pastor and council gathered is not about checks and balances, but rather it is about common participation together in shaping Gospel mission.

Discernment, not Legislation

Our American notion of the decision-making process in governance is that legislators exchange wide points of view among as many as possible, then the majority comes to agreement through majority vote on what is the best course for the most. American decision-making processes presume majority rule and some horse-trading to get to it. The result of that process is law. From an ecclesial point of view, the majority's opinion is an important datum in ecclesial decision-making, but not the aim of the process. The aim is what God wants, and the result is subject to internal and external verification. The councils are engaged in a discernment process, not a legislative one.

Being Clear about the Differences

Instructing prospective and current council members about the above differences between ecclesial and American leadership group assumptions allays both fears and difficulties, and yearly reminders can be very helpful. This responsibility is largely the pastor's.

Council Mission

The pastoral council and finance council, even as they aim toward building consensus around a common vision for the parish, each have a distinct mission in their consultation relationship with the pastor

The Mission of the Pastoral Council

The pastoral council offers the pastor consultation regarding:

1. the focus, guidance and monitoring of the parish's ministries
2. pastoral planning for the parish⁹
3. any matter that warrants corporate review
4. all matters the pastor chooses to bring before it

The Mission of the Finance Council

The finance council offers the pastor consultation regarding:

1. the focus, guidance and monitoring of the parish's administration ministries (finances, property, personnel, law, administrative staff)
2. the yearly budget, financial stewardship, endowment monies, property management and development
3. any matter that warrants corporate review
4. all matters the pastor chooses to bring before it

The Councils in Collaboration

The linkage established between the councils is at the discretion of the pastor. Ordinarily, the following principles practically apply:

1. Each council is comprised of different persons who serve each council's distinct mission.
2. Because its focus is the broad range of Gospel ministries in the parish, the pastoral council serves as the parish's ultimate consensus-building consultation body.
3. For the purpose of building consensus in the parish, it is wise for the pastor to ask the pastoral council to review major finance council matters, notably the yearly budget and all corporate matters.
4. In a pastoral council review, finance council recommendations deserve consummate respect and every benefit of doubt.
5. During a time of disagreement between the councils about a major parish matter (the yearly budget, erection of a building, hiring a new staff member, etc.), growing toward consensus among parish leadership and the parish as a whole requires that the councils be brought together to enter into discernment and establish a common consensus decision.¹⁰

⁹ See Appendix II, p. 31, and Appendix III, p. 35, for an outline of a planning process that might be used by the councils.

¹⁰ See Appendix IV, p. 38, for a spiritually based discernment process.

A Pastoral Council's Focus: Pastoral Planning

"Where there is no vision, the people perish," says one translation of Proverbs 29, 18. Vision wakes people up, rouses their enthusiasm and focuses their energy into forward movement. The focus task for the pastor and council together is to offer the parish vision. Vision requires planning.

Planning is the backbone of council ministry, giving contour and thrust to the parish's forward movement, striving to reach consensus about the parish's identity, image, characteristics and direction. Coordinated pastoral planning within the councils and across all parish leadership groups is vital to the ongoing life of a parish community.

The Pastoral Council and Planning

The pastoral council serves as the parish's planning group. Its charge is vision; that mandate is the steel spine that holds the pastoral council process together. Planning is the top priority for the council and the engine for its meetings. If other matters intervene, which they always do, the planning process pauses in order to accommodate them. Approving the yearly budget, discussing the rising crisis, debriefing the bishop's pastoral visit and sorting through the pastor's latest personnel quandary continually interrupts the flow of the planning process. Nonetheless, planning is the task that holds everything together for the pastoral council.

The Planning Process

An effective council process demands a good planning process (see appendices II and III for excellent options). Whatever might be selected, the planning process needs to be clear, complete, carefully articulated, easy to follow and promising for the results the council seeks. A poor planning process leaves in its wake a rather chunky stew, both in people's minds and on paper, and neither staff nor parishioners will be able to grab hold of it or use it. The process that works will be the process that outlines explicit tasks for particular persons and groups to accomplish at precise time intervals with specified results. Nothing less is worth the council's time and effort.

Writing a good five-year plan will take the pastoral council, in collaboration with the finance council and commissions and committees, a year-and-a-half or more. This time frame is quite ordinary. A highly participative process, including the gathering of accurate data, focus group discussions and ministry commission input, requires generous time if it is to be a consensus-building process for pastoral leadership and the parish as a whole. The process is far more important than the document itself when it comes to planning.

After the plan is published, a monitoring process for the plan will demand extensive council involvement with staff and ministry commissions and committees. Major parish projects outside of the plan may arise, which may require plan revision. A new planning process will also need to begin as the old plan schedule runs out.

Planning Never Ends

The typically five year cycle of planning never ends, and it ought not. Pastoral planning is the backbone of the pastoral council process, its first responsibility as wise vision keeper for the parish and its ongoing task as the consensus-building engine for the parish community.

The Finance Council and Planning

The parish's finance council focuses its activities around parish infrastructure planning and discerning proper direction so the parish will remain secure legally and financially in the present and for the future. These overarching responsibilities demand in a practical way that the council spend its time monitoring financial giving and income/expense trends, planning the short- and long-term budget and maintenance schedule, and discerning, with the Spirit's help, what direction parish development ought to take. The parish community's wise vision keeper with regard to its infrastructure and security, the finance council engages itself, in collaboration with the pastoral council, in building consensus around vision for the parish's future.

The Council's Tasks and Decision-Making

Planning is the backbone of the parish's finance council as well. Because this council attends to money and property, its process is less shaped by a formal structure like a long-range planning process than it is by the council's singular tasks: writing or at least approving the yearly financial report, constructing the yearly stewardship appeal, pulling together the yearly budget, reviewing monthly and quarterly financial statements, responding to the periodic building maintenance surprises, determining the yearly endowment distribution and constructing the upcoming capital campaign. Sometimes regularly and sometimes in fits and starts, task governs finance council planning.

Finance council decision-making relies on the same discernment process as the pastoral council, and is governed by the same two questions. The nature of its concerns, however, leads to a more informal decision-making process. Money discussions can be quite intense, but may require no major decisions. Maintenance surprises can lead to review and hand-wringing, as well as censure, but the fix generally solves it and the payment amount is often out of control. Fuzzy financial reporting can glaze-over the participants' eyes or elicit brisk questioning, but typically requires tweaking, not direction. Fiscal long-range planning into a second year is tentative business; planning beyond three years is just short of a waste of time. The budget approval process, building facilities or setting in place a capital campaign demands the most discernment work for a finance council, but only the budget is a yearly, frequent-meeting process.

The Finance Council's Practical Functioning

The pastoral and finance councils are complementary leadership groups that depend on one another in their functioning. The finance council, usually tempted to go it alone based only on numbers, constructs the budget in accord with the pastoral council's priorities. Its money and property recommendations, though most often accepted as they are by the pastoral council, may go forward only with the pastoral council's recommendation to the pastor. At the same time, the pastoral council will often shrug its shoulders over concerns that have oppressed the finance council. Yet, just as often the pastoral council will rely heavily on the finance council's recommendations and accept them.

In its practical functioning, the finance council intuitively feels like a highly technical subcommittee of the pastoral council. Peace holds sway, however, when every care is taken to treat them as equals and bring them into respectful agreement with one another as peers.

Planning's Aim: Conversion and Transformation

Only when the archer focuses the target clearly can the archer strike the bull's eye. Pastoral planning's aim is two-fold: personal conversion to Jesus Christ and transformation of the parish community into the pattern of life Jesus has taught us.

Personal Conversion

Parish life in all its facets – worship, religious education, spiritual formation, pastoral care, community building and the ministries of charity, justice and administration – endeavors to call people to know Jesus Christ, to grow in mature adult faith and to love the Church. An effective parish's life calls people unceasingly to enter into paschal mystery, and embrace it as the pattern for interpreting life experience and finding God's presence in it. To this end, the effective parish community invites people to profound personal prayer and rich sacred liturgy, to growth in the knowledge and love of Jesus Christ and witness to God's abundant gifts, to loving outreach to people in need and joyful celebration of people for who God has given them to be, and to a Gospel-based ordering of community relationships within the parish and beyond it. The rationale for every element of parish life needs to be inviting parishioners to loving, committed relationship with Jesus Christ and conversion to his way of life.

The Parish: A Transformation Community

Every element of a parish's life teaches parishioners and the world beyond the parish who the faith community believes Jesus to be and who it believes itself to be in response to Jesus' life and ministry.

Pastor and leaders together, then, need to ponder the simple fact that the effectiveness of the parish's ministry and the Church's mission depends very significantly on how the parish structures its leadership relationships. Effective parish pastoral leadership and power distribution finds its motive in the church's mission, its principles in sound theology, its focusing images across our tradition, its practices in common sense, its energy in people working together in common cause and its ground in the goodness of God revealed to us by the transforming pattern of life Jesus has shown us. At the same time, bad leadership, like bad liturgy, destroys faith.

Whether the pastor controls parish leaders, passively lets them fumble around or trustingly nurtures wide participation in focusing, guiding and monitoring parish life, whether the people submissively take orders, manipulate for power or enter into communion relationship with the pastor to establish a visionary, Gospel-based mission – all of these patterns set benchmarks for the effectiveness of a parish's life and teach a parish community about Jesus Christ and his mission.

Let Us Be What We Preach!

The mission of a parish is to invite people of all ages and walks of life into an experience of the life-changing power of a personal encounter with Jesus Christ. Pastoral planning's aim is to shape how parishioners and the faith community embrace transformation into Jesus Christ as a way of life. No other aim is worthy of the effort. The critical question planning asks pastor and leadership together, therefore, is this: what does God want our parish life to teach about the identity, image, direction and accomplishment of Jesus Christ and the life he offers?

Discernment Decision-Making

Discernment is the essential mode of council decision-making in the parish because the pastor and the councils are about God's business, not their own, not one another's. Trust in God, prayerful reflection, and the freedom to abide by whatever it is that God wants of us – these are the attitudes that must ground parish decision-making. Discernment can be tough and it is often surprising. Still, it is our way of life with God in the Holy Spirit.

What Does God Want of Us?

The first and most fundamental question in discernment decision-making is: what does God want of us? Discernment seeks God's will for parish leadership and for the community. All parish decision-making, therefore, in every instance shakes out into this penetrating-between-the-bone-and-the-marrow question. It is the pastor's role to keep that question ever before the council's mind and in its members' hearts. The pastor does that because it underlines the reality that the parish belongs to God and to the Church, not to the council; the parish's vision and direction belong to the whole community, not to the council; council decision-making is grounded in prayer, not pastor-pleasing, whim, the best bargain, parishioner polls, people-pleasing or even educated guesswork. The council's work is nothing less than sorting through the gifts and demands of the parish community's relationship with God.

Can I Live with It?

Discernment decision-making aims at unanimous decisions. Unanimity offers the best hope, practically and before God, of the rightness of the decision. Setting the bar at unanimity places a second question for the participants in the discernment process: can I live with this decision? That is the practical base line for discernment decision-making. Not "Do I like it?" Not "Do I want it?" Rather, "Can I live with it?"

If a person cannot live with a decision being made by the group, that fact raises fundamental questions about the advisability of the decision. God lives deep within each human person, somewhere underneath our emotions and even below our experience of what we call "the gut." If at that level a person cannot live with a decision, then the discernment process needs to plunge deeper and deeper into the sorting, before God, until unanimity is achieved.

If "what does God want of us?" is at the heart of what is essentially a spiritual process and "can I live with it?" is the practical baseline-before-God question for the participants, achieving unanimity is almost guaranteed.

The Group Publicly Stands by a Consensus Decision

When a consensus decision is achieved, especially in matters of moment, the chair or pastor needs to ask every member of the council to speak out loud his or her agreement with it. That is, **problem resolution must take place within the meeting.** Why? Because once a decision is made, for the sake of the common good, everyone on the council, including the pastor, must stand with it publicly. In matters of moment, each member of the leadership group needs to speak his or her consensus in the decision because when they leave the council meeting room they go forth as ambassadors, not partisans.

The Discernment Process

What follows are the essentials of the discernment decision-making process.¹¹

State the Question

Formal discernment begins with a highly discriminating and very careful statement of the question. Unanimity about the question itself establishes the extent and limits of the decision to be made and begins taking the group down the path of consensus decision-making.

List the Cons

The cons need to be listed first because they tend to get lost. Go around and around the room letting each person speak until all of the cons are, to the group's satisfaction, exhausted.

List the Pros

Next, list the pros. Go around and around the room letting each person speak until all of the pros are, to the group's satisfaction, exhausted.

Seek Areas of Common Agreement

After the listing of cons and pros, open the discussion wide to seek areas of common agreement. Oftentimes seeing common agreement awakens insight and breaks down barriers.

Reflect and Pray

Break for reflection and prayer, then come back and seek further insights and common agreement. Then break for reflection and prayer again. The process of building tension then releasing it, bringing the group into focused discussion with each other then leaving them alone with God to sort through their thoughts and feelings, frees the participants to open to themselves deep within to God who abides there.

Decide

Eventually this process will lead to further and further agreement, then a decision. Extending the process until its completion serves it well. If that's simply not possible, repeating it at the next meeting should bring it to conclusion.

Watch for Decision Confirmation

Once the decision is made the process continues. As time passes, the council needs to attend to factors among group members that might stand against the decision. It also needs to attend to external factors that might preclude it, like lack of funds, the pastor's death, etc. The making of a decision is not its confirmation; rather a decision's confirmation comes afterward. The council needs to remain alert to that confirmation, or lack of it, and adjust accordingly.

¹¹ Occasionally a formal consensus decision-making process can be necessary to come to unanimity about a major parish matter. Please see Appendix IV, p. 38, for complete information about such a formal discernment process and the attitudes underneath it.

The Council Meeting

The pastoral council and the finance council serve as a conduit for the Holy Spirit's work in the parish. Therefore, two complementary elements must be strongly, solidly in place for the meeting: stout content and effective process.

Stout Meeting Content

Seven rules of thumb govern council meeting content.

1. **The pastor invites the councils to make real decisions that focus, guide and monitor the parish and its ministry life.** Parish and ministries planning, the hiring of staff members, sudden reduction in staff force, staff salary-raise proposals, the rectory budget, the renovation of the offices, the stewardship appeal theme and presenters, the clash with the neighboring property owner about the parking lot – all large, real, directional items for the parish need to be brought to the respective council for review and decision.
2. **The pastor gives the group everything it needs to make good decisions.** Information sharing makes or breaks decision-making. Objective details, unvarnished and without slant, provide a council with the grist for well-informed and balanced decision-making. When in doubt, share the information. If the pastor needs confidentiality, ask it.¹²
3. **Careful decision-making requires that the pastor trust the council with confidential material.** If the group knows only some details, it makes only partial recommendations. Full decisions require full disclosure, full transparency.
4. **The pastor keeps the decision-making process spiritually grounded.** What does God want of us? That's the umbrella question for all council considerations. Before God, what can I live with? That's the bottom line for each member of the council personally.
5. **The pastor participates as an equal in the consensus process.** This equal participation demands the pastor's frankness about his perception of what God wants and what is personally livable. The pastor seeks meaning along with the members of the council, and needs to be every bit as vulnerable in the decision-making as the rest of the group. The pastor's participation as an equal forges strong, sustainable decisions and mutual trust.
6. **The pastor publicly honors council decisions.**
7. **The chair remains accountable for council decisions to the council and to the parish short and long term.** The proof of trust rests in the follow-up. If the decision is right and good, it needs to be followed to the letter. If upon further consideration it is questionable, it needs to be brought back to the council for review.

¹² See page 24 below for a full discussion of the place of confidentiality.

Effective Meeting Process

Meeting process is equally important as its content. The council meeting's aim is to serve as a conduit for the Spirit's gifts. Effective process requires that the leader and the group as a whole establish rules to shape expectations. Ten basic rules govern all council meetings:

1. **When council members cannot make it to a meeting, they should communicate that to a designated person.** Council leadership is a commitment.
2. **Participants need to come on time.** If a meeting starts promptly, the group can begin business and accomplish more. The meeting can also end on time.
3. **All council members need to participate fully and forthrightly in the meeting process.** The parish needs the best thinking of everyone in the group if it is to serve the parish well.
4. **Council members must honor what other participants offer:** introverted or extraverted, a gift for chairing, for subcommittee work, for writing outside the meeting or for hospitality.
5. **Council members must be encouraged to "bat the camel on the nose."** If one participant is having trouble with another, then he or she ought to deal with the trouble forthrightly and kindly outside the group. If a group member sees bothersome patterns arising within the group, then he or she needs to ask the group to talk about them, and the group needs to honor the request. Batting the camel on the nose prevents the whole smelly camel from getting into the tent.
6. **All our words must pass through three gates.** The first gate is truth. All our words must be true. The second gate is necessity. All our words must be necessary. The third gate is kindness. All our words must be kind. All group participants do well to remember the three gates.
7. **Council members need to pray: What is it that God wants of us?** Council meetings are about the great work of Gospel ministry. If council members have a personal agenda, they need to be forthright about that or drop it. Seeking what God wants for the parish is about submission to the Holy Spirit's power, not fulfilling personal agendas.
8. **Council members need to ponder: what can I live with?** The council's process is essentially spiritual and intended toward unanimity. If someone cannot live with a decision, the group needs to thrash that out, talk it out, pray it out. That's why the fallback consensus process is offered in Appendix II.
9. **Confidentiality expectations require careful review.** The ability to share confidential material allows the pastor and council members to speak freely and securely, enables the council to make well-informed decisions and permits the council to take the time it needs to decide a matter without interference.
10. **Council members need to publicly support consensus decisions.** In meetings people can argue points of view, but when council members leave the room, they need to stand by the consensus achieved and be able to explain it with clarity and enthusiasm.

The Equal Value of Process and Content

Real Gospel ministry decision-making, combined with an effective, efficient, spiritually-based process, results in the council's channeling the Spirit's gifts in the parish as the council discerns what God wants for it and from it for the sake of its Gospel ministry.

The Meeting Chair

Competent meeting chairing is an acquired skill. The meeting chair makes or breaks meeting effectiveness and the good experience of the participants. Two questions about meeting chairmanship deserve particular reflection: Who chairs? What does effective chairing look like?

Who Chairs the Meeting?

For a council, the right meeting chair is the pastor. The selection of a chair other than the pastor risks distorting the meeting and setting-up the chair for embarrassment, manipulation or failure. Clean lines of authority and accountability demand that group leadership follows the natural line of responsibility if at all possible.

That said, the first principle of meeting chairmanship is that the responsibility for chairing a meeting ought to rest with the person who best runs a meeting. If the pastor cannot lead a meeting capably, the value of a well-run meeting is higher than that of any particular person leading it ... if the pastor will honor that leadership.

Rotating chairmanship is ill-advised. Elected chairmanship is a not-at-all-worth-it shake-of-the-dice. Consequently, since fill-in chairmanship ought to rest with the council member most competent, that qualification may need to be discerned and it may take some time and testing to do that. Neither inclusivity nor popularity warrant derailing effectively-run meetings. The most capable ought to chair meetings. Chairing the council is simply a function, not an office.

The Competent Chair

A particular constellation of skills in a chair comfort council meeting participants and build trust in the chair. The competent meeting chair:

Listens well ...

accurately summarizing
helping the group sort
clarifying ideas
focusing ideas into context
writing contributions down

Integrates ideas ...

keeping the overarching context to the fore
relating ideas to one another
offering organizational options
asking provocative questions
detaching from his or her own point of view

Respects meeting participants ...

encouraging participation
honoring every participant
letting clarifying discussion run
bringing wandering discussion back to the point
landing the discussion at meeting's end
landing the meeting with an effective summary

Some Meeting Mechanics

Establishing the Agenda

Agenda items are either (1) agreed upon at the end of the previous meeting, (2) submitted to the chair in-between meetings, or (3) they are set by the chair in consultation with the pastor. The first is by far the most hospitable method for establishing the agenda. Setting a proper agenda is half of any meeting's accomplishment. The importance of a well thought-out agenda, sent out to meeting participants beforehand along with its supporting documentation, cannot be underestimated. The council develops its sense of the pastor's and the chair's openness to being accountable through its experience of the agenda assembly process. The agenda-setting process builds trust or undercuts it.

What's Not on the Agenda

Matters that can be handled between two group members, asking the group to make a decision that is one person's responsibility, putting someone on the spot or an item calculated to irritate – such matters need to be kept off the agenda. If there are such matters, then the person to whom the meeting belongs should talk to the submitter about why the item will not appear.

Sending Out the Agenda

If the pastor does not chair the council meeting, the agenda needs to be run by the pastor for his consent before the agenda is sent out. The agenda ought to be in the hands of each council member at least three days before the meeting's scheduled time.

The Shape of the Agenda

All agenda items are assigned a discussion time so the chair can determine what business can be accomplished and what needs to wait. This exercise forces clear prioritizing. Time allotment also structures the meeting and alerts meeting participants to the anticipated depth of item discussion.

Meeting Schedule

For the sake of process continuity and momentum, effective council long-range planning and consensus building work would require that meetings be scheduled as close as possible to every other week for ten months a year. Infrequent and irregular council meetings cannot well serve serious pastoral leadership and all it requires. In the Diocese of Pueblo, meeting at least every six weeks is the minimum requirement for parish pastoral and financial councils.

Meeting Length

Nothing worthwhile happens in a meeting beyond 90 minutes. Long meetings tire people, drain energy, and lead to fuzzy thinking, crankiness, manipulation and bad decisions. If a meeting extension is necessary to complete an item's discussion, then group permission should be sought. If given, the extension ought to be less than 15 minutes. Failed permission means the meeting ends on time.

Meeting Start

Every meeting ought to begin with a brief information sharing segment to put everyone at ease and dispel any concerns beyond those on the agenda. After the information segment, the chair needs to offer the group a brief overview of all the items upcoming. This overview allows members to offer caveats based on unknowns or new information. It also gleans for the chair informal consent to what is to come.

The Meat of the Meeting As the chair moves through each agenda item, he or she needs to offer a very brief contextualizing introduction. Meeting participants require constant reminders about what agenda items mean for the parish and its Gospel ministry. Developing the context saves time in meeting discussions because people forget where an item comes from, how it fits, what it is connected to, why it is important, or why it needs to be discussed at this time.

Meeting Wind-down The meeting needs to approach its landing 10 minutes before the projected end time. By 6 or 5 minutes before meeting end, the last three always-stable agenda items need review.

1. The chair summarizes the meeting. A précis allows the group to offer clarifying and forward moving observations that sharpen agenda planning.
2. The chair asks what will be on the agenda next time. Consent about the upcoming agenda items bolsters group participation for the next meeting, affirms the group members' value and simplifies agenda assembly work.
3. The chair affirms the date, time and place of the next meeting. If meetings are scheduled in advance this task is simple, if not, it will likely require some processing time.

Minutes Minutes ought to record only group decisions. A terse summary of reports can be helpful. Recording meeting discussion is unnecessary. A brief listing of decisions and bottom-line report results ought to accompany the next meeting's agenda when it is sent out. The parish files should attach these summaries to the meeting agenda in a file folder for a permanent record. Summaries may also be shared in the bulletin.

Meeting Prayer The Holy Spirit's presence and power is invoked in prayer at every meeting start; God receives the glory at meeting's end.

Some parishes structure an extended reflection on the Sunday readings. Others pray briefly. Yet others invite participants to take turns offering prayer. Still others share prayer. All of these can work. Some, however, take time and either extend the meeting or limit work. Some can be an imposition and uncomfortable.

Hurling javelins to the heavens is an ancient and venerable way to understand prayer. The image well-characterizes what council prayer ought to look like.

At meeting start, a brief and relatively formula-oriented prayer puts most people at ease and serves well. Done mindful of the liturgical year, this prayer form can be instructive and moving.

The meeting ought to end always with the briefest of prayers, a set formula. The doxology, "Glory be to the Father ..." works extremely well. People respond instantaneously and automatically, the prayer is appropriate and the praying says, "The End."

Public vs. Private Meetings Because the council belongs to the pastor, because it is about communion not representation, about participation not checks and balances, about discernment not majority rule, and because effective counsel to the pastor requires the sharing of confidential material at most meetings, it is recommended that council meetings not be public events. It is also heartily recommended that the reasoning for executive session meetings be explained regularly to the parish community. Certainly it is appropriate to invite people and groups into the council meeting from time to time in order to reflect on particular issues.

The Place of Confidentiality

Complete information exchange, thorough discussion, clear good counsel and balanced decision-making require council members to keep confidence with the pastor and one another.

Confidentiality offers the pastor the opportunity to share information at length and in depth so the councils can make sound, evenhanded recommendations. Confidentiality offers the council members the assurance that what they say will not be bandied about or judged in the parish community at large, and it frees the council's process to be deep and wide-ranging.

Lack of confidentiality boxes a council out of some decisions, inhibits its making fully reasonable decisions, undercuts trust and diminishes the council's and the pastor's effectiveness all-around.

Confidentiality vs. Secrecy

Confidentiality differs from secrecy. Secrets are about information in the moral realm. Secrets are never part of council decisions. Confidential information, however, is part of most effective council meetings.

Confidentiality means holding specified information within a particular and designated network of persons (the council) for the sake of the common good of persons in the group or groups of persons. The aim of the council's decision-making process is the common good. Therefore, the common good often demands that some matters be kept confidential (typically matters of personnel, law, finances and some relationship issues) in the decision-making process.

Keeping a matter confidential means that council members share confidential council matters with no one. This standard must be able to be met by every council member.

The one exception for sharing confidences might be the council member's spouse. Couples have different expectations of one another in this area; whatever their expectations, they ought to be respected. However, if a member shares confidential council information with a spouse, then the spouse, too, must keep the same confidence the council member keeps. If a spouse breaks confidence, the council member is responsible.

The breaking of council confidences – either by the council member or a spouse – may require that the council member be asked to leave the council.

Clearly Label Confidential Material

Keeping confidence requires that the pastor name clearly on the agenda and in the meeting any matters that are executive session, that is, matters to be kept confidential. Ordinarily the issues to be kept confidential for the sake of the common good of the parish are as follows: matters pertaining to persons and their relationships, parish benefactor information, all personal salary matters, matters of personnel discipline and termination, matters of hiring, parish legal matters, the particular meeting exchanges of council members and the meeting discussion of controversial matters not yet decided (budget, etc.). A parish's charitable concern for people and just concern about matters of personnel, law, finances and property offer wonderful prisms through which a pastor might consider what information ought to be shared and what ought to be kept confidential.

The risk of sharing information and asking confidentiality is worth it because of the enormous benefits full information brings to decision-making, as well as the consequent trust.

Council Election

The ecclesial concept of election to leadership also differs from American assumptions. The American notion of election is running for office, secret ballot and majority rule. The ecclesial notion of election does not preclude American assumptions, but modifies them.

Ancient Church Election Traditions

Whether the position to be elected is pope, Eastern Rite patriarch or abbot, election rules require more than simple majority rule. The aim of election in a church setting is the largest possible agreement, effectively discernment toward consensus. Consequently, except for extenuating circumstances, two-thirds is most often required for election to an ecclesial office.

In the church, people do not run for office either. Instead, they are nominated, then their qualifications are discussed by the group, as a whole or on the side, in what is a personal and group sorting process that leads to balloting.

Contemporary Parish Election

In a parish setting, discernment-oriented election to a council position makes sense. Some parishes enter into an extensive process of community-wide prayer and reflection in which people are recommended or personally moved to come forward. Other parishes begin the process with a council discussion, then invite volunteers forward in the bulletin, tap people on the shoulder or ask people whose name surfaces if they are interested in serving. These “elected” are then interviewed to discuss candidate interest and suitability, and clarify mutual expectations. Methods vary widely across parishes. All, however, are a form of “election.” Given the nature of pastoral leadership, a discernment-oriented election method best serves the parish setting.

Key to the process is clarity about expectations. Clear expectations need to be published in the bulletin. It can be very helpful to articulate them in an interview discussion with interested parishioners. Given clear expectations, methods of election may range from pastor appointment, through casting lots, to parish-wide voting from a slate of vetted candidates.

Many have observed over the years that “election” to a pastoral council differs considerably from that of “election” to a finance council. Finance council ministry requires technical interest, expertise and experience that is unnecessary for pastoral council ministry. Often parishes feel blessed to have 5 finance council members, when 9 pastoral council members are relatively easy to raise up.

Election American Style is Least Suitable

For the sake of setting reasonably accurate expectations for a pastoral leadership group, the American style of election to a council is least suitable. It runs the very high risk of bringing people into leadership who are focused on representation rather than communion, checks and balances rather than participation and legislation rather than discernment. These suppositions in pastoral leaders can create a terrible drag on the leadership group’s process, and real conflict. Pastoral leaders are best elected by expectations-clarifying discernment, not majority rule.

Council Membership Eligibility

Clear expectations make good council members. That clarity demands that eligibility requirements for council membership be made clear.

The ministry described in this handbook requires that a council member be a registered parishioner willing to support the current council processes.

Further, a prospective council member needs to make a three-year commitment to regular meetings, perhaps as many as every other week for 10 months per year if the parish wishes to be seriously committed to planning, which could mean as many as eighteen meetings over ten months, summers off. Continuity in decision-making discussions, leaving room on the agenda for the surprise concerns that inevitably interrupt planning, keeping well-informed about parish life and growing in mutual relationship enough to feel comfort and trust in the group – all these factors demand semi-monthly meetings for council leadership committed to planning. Monthly meetings or less – the Diocese of Pueblo requires at an absolute minimum that councils meet every six weeks – slows serious long-range planning momentum, curbs participation in real decision-making, compromises full information exchange and hobbles the trust-building in relationships that makes council members truly pastoral leaders for the parish. But however the pastor and councils choose to schedule the meetings – for planning or minimally – one who would serve on the council also needs to be willing to participate in discussion, prayerfully discern the parish's future and keep confidences.

The bottom line expectation for council membership also needs to be crisply clear. The councils, pastoral and finance, belong to the pastor. They are the pastor's consultative bodies. In collaborative relationship, the council is the pastor's sounding board, guidelines establisher, idea sorter and vision forger.

The councils have no status whatsoever on their own, nor do the council members. Their immeasurable value rests in their collegial ministry with the pastor.

Council Membership Eligibility

Participation in Sunday Eucharist
Understanding the organically collegial relationship between the pastor and council
Registered parishioner
Support of the current council processes
A three year commitment
Faithful attendance at meetings
Participation in discussion
Commitment to prayerful discernment about the parish's future
Ability to keep confidences

A Word about Other Parish Leadership

Across our parishes, hundreds of staff and parishioners, paid and volunteer, sustain Gospel ministry (worship, religious education, spiritual formation, pastoral care, community building, justice, charity, administration). These dedicated men and women, often in awkward circumstances, make an enormous and indispensable contribution to the ministry life of our local church. Their effectiveness rests in their collegial relationships with the pastor, their colleagues and their fellow parishioners as they collaborate together in parish Gospel ministry commissions and committees. What follows is a brief description of other leaders and groups.

Pastoral Staff

In a collaborative relationship with the pastor, the pastoral staff member holds broad discretionary oversight responsibility over particular ministry areas in his or her portfolio, for example liturgy, religious education, a particular mission (the *major domo* as it is called in some of our communities), including everything from that particular ministry's vision to its implementation particulars. The pastoral staff's role as a group gathered is to join with the pastor to reflect together on the whole parish's Gospel ministry. Pastoral staff members may be paid or volunteer.

Administrative Staff

In a collaborative relationship with the pastor and pastoral staff, administrative staff members provide ongoing support for the Gospel ministries of the parish mainly in the areas of communications (receptionist, bulletin editor), finances (business administrator, bookkeeper), property management (maintenance) and record keeping (secretary).

Ministry Commissions

The ministry commission's mission is to focus, guide and monitor a particular Gospel ministry area – or group of them – in a collaborative relationship with a pastoral staff member (Worship Commission, Faith Formation Commission, etc.). The function of the ministry commission in relationship with the pastoral staff member parallels that of the pastoral council in relationship with the pastor. That is, the ministry commission assists with planning for the Gospel ministry area(s), offers recommendations on any ministry direction concerns that would be brought before the pastoral council, reviews the ministry area budget before it goes to the finance council and consults with the pastoral staff member on all matters he or she brings before it.

Committees

A committee is a group of people appointed to consider, investigate or report on matters of a certain kind. This task-oriented group may be structured by the pastor, a council, a member of the pastoral staff, or a commission. A committee is always and only *ad hoc*.

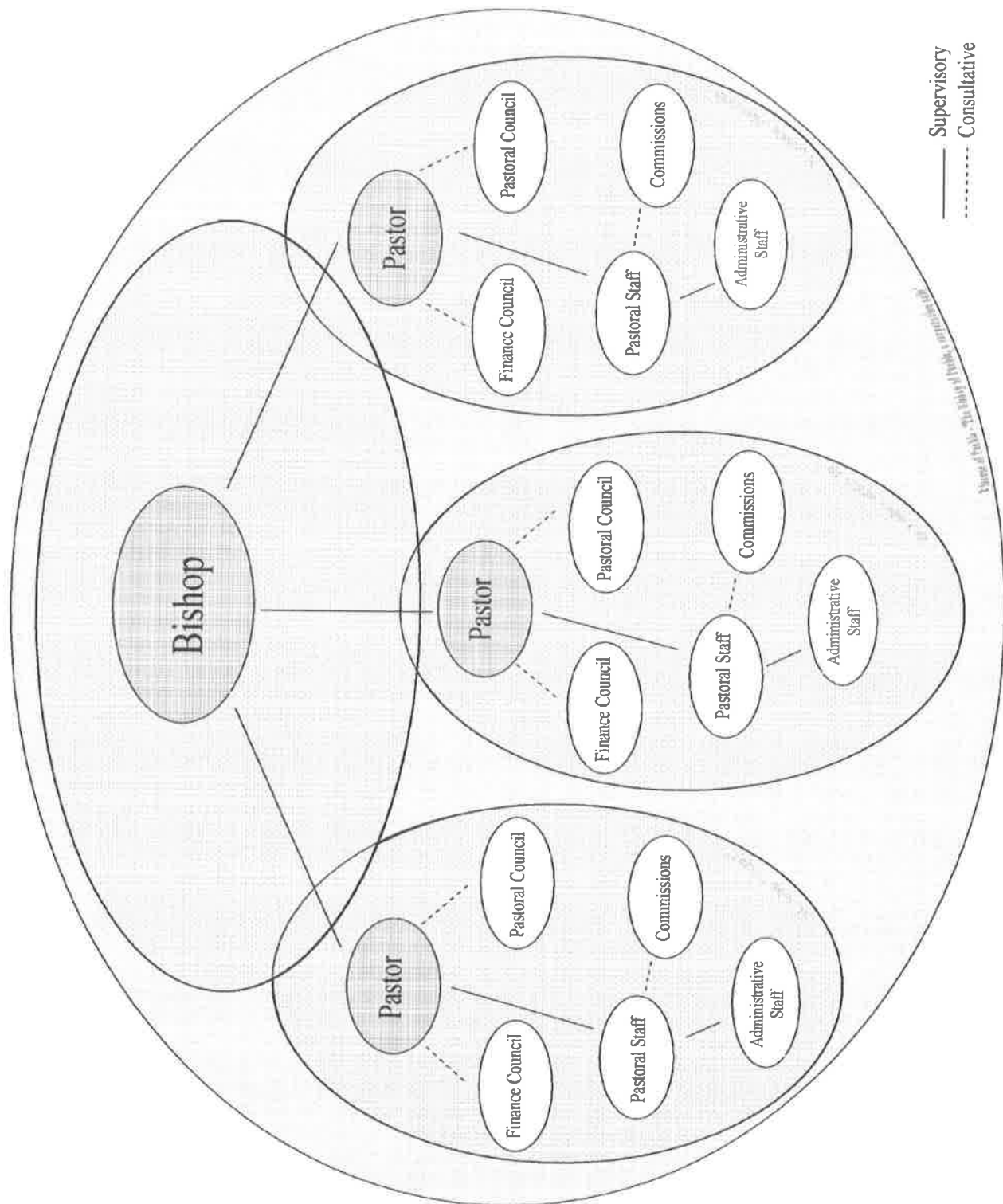
Board

A board is a group of persons who gather to manage or control an entity in an ongoing way. Parishes have no boards.

The careful structuring of both the pastoral and administrative staffs in the parish, as well as the commission and committees – a structuring that respects their differences yet honors their interdependence and complementary functions – expresses and mirrors the communion we share as we participate together in pastoral leadership in the Church.

Appendices

Appendix I: The Corporation Sole Organizational Chart



Appendix II: A Planning Process for the Parish¹³

What follows here is a “do-it-yourself” kit on planning based on a system developed by Dr. Robert G. Smith of Ohio State University. It is designed to help one person, or several people, plan anything they may want to plan. It is enormously helpful in a parish setting for doing whole parish or particular ministry planning.

In planning we try to relate what we think we are doing with what we actually are doing so we can build on past and present trends to provide an intelligent framework for future development.

The following pages provide you with:

- A. A chart to the eight basic steps in planning
- B. An outline of the planning process
- C. An explanation of planning steps and terms.

Since the proof of the process outlined in these pages lies in the planning process itself, the best way to understand what follows and test its worth is to take a single, simple area of present concern, work it through the planning process and see what happens.

The Process Itself

The basic purpose of planning is to establish as high a correlation as possible between what we are thinking and what we are doing so that we may build on the recognition of past and present trends in our experience to provide an intelligent framework for future development.

See page 16 above for planning’s aim, and see footnote 13 below and Appendix III, p. 35, for planning process suggestions to be considered by smaller parishes.

¹³ The Center for Applied Research in the Apostolate (CARA) in Washington D.C. uses 4 categories to distinguish among the 19,000 parishes in the United States: family parishes (up to 200 households), community parishes (201 – 549 hh), corporate parishes (550 – 1200 hh) and mega-parishes (1201 hh and above). The Appendix II process, while apt for any parish, is especially useful for corporate and mega parishes.

BASIC STEPS

1. What do we think we are doing?

DESCRIBE BASIC PURPOSE:

- a. Describe basic beliefs
- b. Describe basic purpose (mission)
- c. Describe basic functions

2. What do we think conditions our doing it?

DESCRIBE RESOURCES AND CONSTRAINTS:

- a. Describe organizational structures
- b. Describe basic policies
- c. Describe basic characteristics
- d. Describe strengths
- e. Describe weaknesses
- f. Describe environmental factors
- g. Describe present assumptions

3. What do we intend to do?

FORMULATE GOALS AND OBJECTIVES: What do we intend to do?

- a. Establish general goals
- b. Establish specific objectives

4. How are we going to do it?

PLANNING

- a. Collect necessary data
- b. Analyze trends and note planning gaps

5. Establish general strategies

6. Design alternative programs

7. Assign action responsibility

BUDGETING PROGRAMMING

: Allocate resources

COORDINATING

- a. Coordinate activities
- b. Establish implementation schedule
- c. Initiate component planning

EVALUATING: review, evaluate and recycle the results

BASIC RESULTS

IDENTITY

IMAGE

DIRECTION

ACCOMPLISHMENT

Summary of the Planning Process Steps

STEP 1: DESCRIBE BASIC BELIEFS, PURPOSE, AND FUNCTIONS

A. Beliefs

A listing of widely accepted convictions – not subject to further debate – which provide a foundation for planning. Beliefs frequently take the form of value statements.

B. Basic Purpose (mission)

The broadest, most comprehensive statement possible describing continuing purpose.

C. Basic Functions

A listing of the separate, major, ongoing activities.

STEP 2: DESCRIBE RESOURCES AND CONSTRAINTS

- A. Organization
One or several charts describing the lines of authority, responsibility, accountability and communication.
- B. Basic Policies
Listing of arbitrary but specific limits placed on the freedom of decision by those who make policy. Such policies cannot be changed or violated without changing the nature of the operation.
- C. Basic Characteristics
Listing of the special identifying traits of the operation or group in question.
- D. Strengths
Positive evaluation of some of the above characteristics. Can be done by simply placing “+” before certain characteristics.
- E. Weaknesses
Negative evaluation of some of the above characteristics. Can be done by simply placing “-” before certain characteristics, or a “+/-” if their evaluation is mixed or neutral.
- F. Environmental Factors
A description of the context within which the operation takes place, especially in terms of extrinsic factors which influence the operation and over which it has no control.
- G. Present Assumptions
Problematical statements about the future which cannot be predicted by logical processes and which are beyond the control of the operation, but which are taken for granted in planning.

STEP 3: FORMULATE GOALS AND OBJECTIVES

- A. Goals
Quantitative or qualitative statements which express in broad terms what the operation intends to achieve. Since they are so broad as never to be fully realizable, goals, express a continuing intention and, in this way, serve as a guide both in formulating specific objectives and in every subsequent step in planning. The formulation of goals marks a turning point in the planning process because it attempts to describe an operation in terms of what it ought to be.
- B. Objectives
Specific and measurable ends towards which effort is directed and which represent a partial realization of a continuing goal. Objectives may be short-range, but they should be achievable within a certain time which is usually specified. Together with continuing goals, objectives inform all the subsequent steps of the planning process.

STEP 4: COLLECT DATA ON INTENDED OBJECTIVES AND ANALYZE TRENDS

A. Data

The facts which are necessary to develop an information base for analysis of trends in areas specified by the goals and objectives.

B. Trend Analysis

A study of the general lines of development over several years within areas specified by the goals and objectives. The projection of these trends into the future is based on the assumption that they will continue at the same rate unless modified by planning or by a change in environmental factors.

C. Planning Gaps

The planning gap refers to the difference between the development projected in terms of the trend analysis and that intended in terms of the goals and objectives. Programs are subsequently devised to bridge the gap between the projected and the intended trends.

STEP 5: DESIGN PROGRAMS TO ACHIEVE STATED OBJECTIVES

A. Strategies

Broad guidelines for employing resources to afford maximum support of goals and achievement of specific objectives.

B. Programs

An elaboration of strategies in terms of alternative possible approaches for achieving the stated objectives. It is important to explore and weigh all the options at this stage. Usually formulated as proposed projects.

C. Action Assignments

The responsibility for any action in planning and, more specifically, for the implementation of programs should be assigned to a specific person or group, along with a time for its accomplishment.

STEP 6: ALLOCATE RESOURCES TO ACHIEVE STATED OBJECTIVES

A. Allocate Resources

Budgetary analysis and estimates of resources needed for new and improved programs.

STEP 7: COORDINATE AND SCHEDULE ACTIVITIES TO ACHIEVE STATED OBJECTIVES

STEP 8: REVIEW AND EVALUATE PROGRAMS IN TERMS OF INTENDED OBJECTIVES AND RECYCLE THE RESULTS

Appendix III: Planning in the Small Parish Community¹⁴

Planning requires a hard-nosed appreciation for a parish's concrete resources: the people, the experience around the table, what works and what doesn't. If these resources are respected for their gifts and limitations, the planning process will bear much fruit. A modified, realistic approach to the elaborate planning process found in Appendix II can keep planning, even in the smallest parishes, not only workable, but exciting.

Basic Step 1: Identity – Describing Purpose

Because they focus the parish's fundamental purpose, the first constellation of three markers in planning¹⁵ shapes everything that follows in the process. Beliefs state the parish's fundamental values as a unique entity among the parishes of a diocese. Articulating common beliefs, by far the most tedious task of planning, coheres for the planning group the parish's singular personality. Once a parish's beliefs are developed, composing a mission statement flows quite naturally, and the listing of parish functions can be downright brisk.

The completion of basic step 1 usually results in three sets of statements that endure as the parish's basic identity statements. Engagement in this phase of the process, therefore, reaps an indispensable and deeply rewarding harvest for all of planning, and for the long haul, in terms of both process and outcome.

Basic Step 2: Image – Describing Resources and Constraints

Step 2 of the planning process experientially falls into two distinct segments: the organizational chart and basic policies segment,¹⁶ and then the segment that comprises characteristics, environmental factors and the assumptions underneath the parish's future reality.¹⁷ This step requires careful thought in the former segment of it and far-reaching data gathering in the latter. Done well, it results in an accurate picture of the parish's power distribution, policies, traits, context and future. Few parishes have an accurate picture of themselves. This step of the planning process achieves that accurate picture.

The earlier two markers within this step, which make explicit the parish's lines of accountability, require a picture and set of policy statements that mirror precisely the parish's pastoral leadership configuration. As parish leaders confront the picture and policies, warts and all, they may choose to modify or even reshape the lines of accountability so these lines might more clearly and carefully articulate reality or appropriate ecclesial structures. This clarity and care contribute significantly to establishing good order and setting realistic expectations for all of parish life.

¹⁴ The Center for Applied Research in the Apostolate (CARA) in Washington D.C. uses 4 categories to distinguish among the 19,000 parishes in the United States: family parishes (up to 200 households), community parishes (201 – 549 hh), corporate parishes (550 – 1200 hh) and mega-parishes (1201 hh and above). The Appendix III process, while usable for any parish, is especially useful for family and community.

¹⁵ See p. 32 above, 1a-1c.

¹⁶ Ibid., 2b and 2b.

¹⁷ Ibid., 2c-2g.

The latter five markers move away from parish leadership to the parish as a whole. These markers reveal to parish leaders – based on city, county, diocesan and national data – who the parish is geographically, demographically, economically, sociologically and sometimes even theologically. The picture the data gathering draws in this segment of planning lays out and evaluates quite concretely the limits and possibilities for the parish's life and future. This picture is indispensable to sound planning.

Without step 2 of the planning process, a parish risks planning within and for a fictional reality. As the parish gains an accurate sense of itself during this second basic step of the process, however, planning invites pastoral leadership and the parish to accept and express the parish ... as it is. Seeing and accepting what is – the gifts God has given the parish community as God has given them – is the only possible ground for the parish's appreciation of its blessings and potential for forward movement.

Basic Step 3: Direction – Initiatives Not Goals and Objectives

While goals and objectives as we commonly understand them hold great value for larger parish communities, considerations of time, resources and efficiency suggest that the small parish community best serves its interests by simplifying this third basic step of the planning process.

In place of goals and objectives, the council might work instead on listing out ideas for parish ministry into the categories:

- major initiatives
- minor initiatives
- things to stop doing
- ideas tabled for now

Done in consultation with pastoral staff members, these items might best be conceived as “bullets and short descriptions rather than every detail.”¹⁸

A method for arriving at the initiatives list might be to review and consider every constituency in the parish – engaged, married, expecting, single, adult, parents, children, youth, young adult, etc. – reflecting on what primary focus ministry with each group might take this coming year. Strive to do something for everybody. Then ask a representative sample of each constituency for feedback. Some initiatives might need to be cast more modestly. Others may need to be tabled for now. Yet others may need to be enlarged. Once feedback has satisfactorily shaped the initiatives, then implement them for the next year.

Rooted in basic steps 1 and 2, as well as in evaluative feedback from pastoral staff and parishioners, this process of establishing and implementing initiatives might be done in the parish every year. While great care needs to be taken to implement the yearly initiatives neither too quickly, nor too slowly, yearly multi-pronged initiative implementation stimulates parish life and offers great rewards of growth, experience and insight.

¹⁸ William Huebsch, *Dreams and Visions: Pastoral Planning for Lifelong Formation* (Mystic, CN: Twenty-Third Publications, 2007, p. 149. See pages 57–119 and 125–154.

Basic Step 4: Accomplishment – Considerations and Evaluation

The yearly initiatives need to be adjusted according to their mission value based on ongoing feedback from parishioners. They need to be evaluated yearly as well. Wide parishioner participation in the feedback and evaluation process helps enormously to build confidence and trust in parish leadership as well as active commitment to parish community life. Wide participation can also kindle abundant ideas for further initiatives.

Based on parishioner and staff feedback and evaluation, keep or modify the yearly initiatives that accomplish the parish's mission.¹⁹ Discard what fails to contribute to the mission or goes awry. Don't let up on the process.

The Adjusted Planning Process

This simplification of the planning process can work well for any parish community, including larger parishes in the early years of starting a planning process. This more abbreviated process is especially valuable for the small parish community in an ongoing way because it makes efficient use of resources, increases parishioner buy-in, sustains interest, focuses immediate action, reaps quick results and invites, both in the short-run and in the long-run, wider and deeper engagement from the parish as a whole.

If implementing the simplified process reveals long-range goals the parish needs to consider – a building, establishing an endowment, etc. – all the better. Then the councils can establish long-range goals, develop objectives for them and flesh out what accomplishment needs to look like in accord with the full planning process.

The Diocese's Role in Planning

The role of the diocese in the parish's planning process is encouragement, resources and support. If parish pastoral leadership needs orientation to the planning process, help with jump starting it, data, or support along the way in any stage, diocesan staff members are available to consult with the parish. Diocesan staff members are only too happy to assist because the parish pastoral planning process, solidly grounded, carefully focused, and realistically and creatively pursued, builds up the Body of Christ not only in the parish, but also across the diocese.

¹⁹ See page 16 above.

Appendix IV: A Spirituality-Based Discernment Process

While the very nature of a parish leadership group's responsibilities demands openness to the Holy Spirit under the question "What is it that God wants of us?" there are times when a leadership group cannot come to immediate and clear consensus about an issue. In these moments, the nature of relationship in the Holy Spirit calls for entry into an ever-deeper dialogue among the members of the group with the Scriptures, with our God who is a community in love and mission, with the tradition of the discipleship community and with each other.

Each and every person is an equal partner in this dialogue. However, as the insights, attitudes, convictions and values of the Word and the tradition meet with the insights, attitudes, interpersonal environment and social environment of the divine and human experience within each individual, each has an absolutely unique gift to offer in decision-making. Because of this reality, and because the decisions of the leadership group are intended to draw them more and more deeply into unity with God and the whole discipleship community, the leadership must always remember that it must be a people about the business of discerning the gifts and demands of our relationship with God.

Pastoral leadership groups, then, have no room for projections and power struggles, for nit-picking and silent deals, for huffiness or resignation to fate. Each member of the decision-making body is a disciple of the Lord. Each brings absolutely unique gifts to the group. Each is absolutely necessary to the discernment process of the group as a whole. It must be said at the same time that no individual is as smart as the discipleship community; the power of the Holy Spirit burns within and rushes over groups, revealing God's way in the assembled community. Consequently, unanimous consensus, discernment of spirits, is the way for the community of disciples to participate together in the mystery of God's ongoing revelation of himself to and within the community that is the Church. And while unanimity is an ideal that may not always be achieved, the discipleship community needs to make every effort to achieve it.

The particular discernment process outlined below is a way for a parish leadership group to be more certain of God's presence, to verify God's way, and to share fully, each disciple respecting every other's distinctiveness, all participating equally, in the business of discerning the gifts and demands of our relationship to God. This process finds its origins in the Jesuit community, and reflects the experience of St. Ignatius Loyola and his companions as they worked through the first questions about their community.

The Attitudes Grounding the Discernment Process

The discernment process must begin with three viable attitudes: faith, prayer, and freedom. The formal process itself, which builds on these attitudes, includes focusing the issue, separating the issues into cons and pros, then seeking areas of agreement and attempting consensus. Finally, the decision is monitored over weeks and months for both interior and exterior confirmation.

Faith

Faith rests in awareness. Faith includes awareness of God's acting in my individual life as well as awareness of how God works with me individually. God's work with each person has particular patterns, notes and characteristics from which the person's holiness develops. Faith also includes awareness of how God works with the particular group in which the decision is being made. Each group has its own charism, its own common identity, which focuses its energy. At the time of discernment, this awareness should be heightened so that the decision is made explicitly in an atmosphere of faith. The question of all discernment is, at rock bottom: what does God want of us?

Prayer

Prayer demands an abiding sensitivity to those things which urge us close to God and nurture faith, hope and love. It also demands an abiding sensitivity to those things which urge us away from God and nurture faithlessness, hopelessness and indifference. Prayer demands as well a realization of both personal and corporate sinfulness, and a willingness to face our weakness honestly. Communion with God in prayer is the beginning, middle and end of the discernment process. Dependence on and honesty before God are the attitudes which ground discernment.

Freedom

Freedom is the willingness to be responsive to whatever God may be asking. Freedom is detachment from the options placed before the group in the decision-making process. Freedom is an attitude of mind and heart that leads us to desire only pleasing God: wanting what God wants, receiving honor or scorn, riches or poverty, fame or being hidden, in whatever measure God wants it for us. The discernment process calls us to ask God for freedom from any hesitations or blocks in the decision-making process.

The Process Itself

The following steps constitute the process itself, and ordinarily need to be followed carefully and fully.

Focusing the Issue

With these three attitudes in place, the more formal aspects of the communal discernment process begin. The first of these is focusing the issue, formulating the question to be considered in a simple manner. This step of the process demands study, research, evaluation and working to get to the facts. It also demands reviewing the feelings and values of the group toward the issue at hand. In this step the group strives to move toward the clarities of the moment while sorting through the struggles within the group. This step is the beginning of learning to live with the discernment process as a whole as well as learning to live with its outcome. The results of this step should be a simple, declarative statement.

Separating the Issues into Cons, then Pros

Separating the issues into cons first, and then pros, is the next step of the process. Within this step, the members of the group need to work at being willing to look at both sides of the issue. Cons are done first because they tend to disappear when they are done secondly. The process of separating the issues requires that, going around again and again in a circle, each member of the group offers a con. This continues until all, in their turn, have spoken all of the cons they think relevant. The same is then done for the pros. Equal time is given to both cons and pros. The purpose of this step is to uncover all of the reasons, and the real reasons, for the decision that needs to be made.

Seeking Areas of Common Agreement

The next step of the process is seeking areas of agreement. Sometimes the group may not agree on the whole of a particular course of action, but the articulation of their agreement on certain elements of the issue may help them to see more clearly the direction their consensus might take.

Reflection and Prayer

The process might also include setting time aside for quiet reflection and prayer if consensus is not readily achievable or if a stalemate seems to develop. If consensus is not achieved, the process may need to start again from the beginning. Perhaps the consensus might be that consensus is not possible surrounding this issue. In such a case, the group might focus on their agreement and reach consensus about how to handle the issue for further consideration. The group might also decide to drop the issue altogether. In any case, the purpose of this step is to achieve consensus.

Exterior and Interior Confirmation

Finally, after a decision is reached it needs to be monitored over the next days, weeks and perhaps months for the sake of its confirmation. If the decision is what God wants, then the group should experience harmony in the results of the decision both interiorly and exteriorly. Interior confirmation is the experience of peace and joy in the Holy Spirit after the decision is made. The decision is experienced as congruent, and those who decided are able to remain appropriately detached from the decision. Exterior confirmation is simply the reality check of the decision's working over time. This reality check includes the acceptance of the decision by the community and by the legitimate authority.

When to Use the Process

Typically, consensus is readily achievable without the use of this process. Most of the issues considered by most groups do not have the moment, or sufficient controversy, to warrant so structured a process.

As a rule of thumb, the full process needs to be used only with those issues which concern the very identity of the community or a particular ministry within it, or those issues in the community or a particular ministry which might be volatile. Ordinarily, it would be unnecessary to use the process in full. The elements of the process that need to be kept in mind in discernment are the attitudes of faith, prayer and freedom that always need to ground consensus decision-making. A most useful element of the process is the separating of the issue into cons first, then pros.

If all else breaks down and unanimous consensus is seemingly impossible to achieve, would it make sense to take a vote? Those who have experienced such circumstances have found that the shift to voting, while terribly painful, has ultimately worked out. It worked out because of the monitoring step, which requires the decision-making body to return again to the basic decision. Typically, if a decision is right for a community, even those who have held back from agreeing with the original decision will likely come to agreement eventually.