



*Prayer - Planning - Possibilities*

# **The Facilitator's Guide to Parish Pastoral Planning**

*Diocese of Erie*

Thursday, May 2, 2019

*"Providing the best possible care for souls"*



# The Facilitator's Guide to Parish Pastoral Planning

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## **Pastoral Planning Prayer**

*Diocese of Erie*

Loving God, author of creation,  
your spirit pervades and enriches our world.  
Through your Son, who shares our humanity,  
you have called us to participate in your divine creativity  
and to build the kingdom of God here on earth.  
Form us, we pray, as one community  
under the leadership of our bishop  
to serve all the people of this region in your name.

Inspire us to discover new ways  
and structures to spread your Gospel.  
Open our eyes to see Christ in others,  
especially the poor, the sick and the marginalized.  
Empower us to be the hands and feet of Christ  
in our parishes and communities.  
Help us to welcome all into His embrace.

Guide us in our discernment,  
as we pray with Pope Francis  
for the vision to see new paths of possibility;  
for a spirit of mission that invigorates our every effort;  
and for the strength to be unafraid of what is new.  
We ask this through Christ, our Lord. Amen.



## Introduction and overview

Much has happened since Bishop Persico implemented pastoral planning in July, 2014.

All of the five initiatives have been implemented in varying stages, beginning with strengthening our Catholic education system, long a treasured part of our heritage here in the Diocese of Erie. The second initiative witnessed strengthening our parishes – where the faith is lived out - through partnering and merging. Fostering vocations to the priesthood, the third initiative, is beginning to bear fruit. Vocations are on the increase.

The fourth initiative, focusing on life-long formation, was recently launched with the introduction of a welcoming and belonging program. The fifth and final initiative involving re-aligning the organization structure to better serve the other four initiatives has seen marked changes as well.

Pastoral planning, however, is not a one-time effort. It is ongoing, having no end. That is the nature of effective planning. It becomes a mindset; a part of the ongoing way we do ministry and engage in other efforts to become better proclaimers of the Gospel.

Much of the foregoing effort has taken place at the diocesan level. Now we come to that phase in pastoral planning which involves the parishes.

Quoting from the USCCB's document, *Communities of Salt and Light: Reflections on the Social Mission of the Parish*, "The parish is where the Church lives. Parishes are communities of faith, of action, and of hope. They are where the gospel is proclaimed and celebrated, where believers are formed and sent to renew the earth. Parishes are the home of the Christian community; they are the heart of our Church. Parishes are the place where God's people meet Jesus in word and sacrament and come in touch with the source of the Church's life."

From the inception of the Diocese of Erie's pastoral planning process it was recognized that parishes are central to the pastoral planning's overarching objective of "providing the best possible pastoral care for souls". Hence, the focus now centers on pastoral planning at the parish level.

This effort is in keeping with our philosophy that parish planning best takes place on the parish level as opposed to having parishes follow a diocesan mandated plan.

It is understood that no two parishes are alike. Thus, each parish will be encouraged to develop a plan that best serves its needs and helps to assure its successful, faith-filled future.

## The role of the facilitator

Helping the parish stakeholders to work together towards the development of a plan to guide the parish – the “community of faith, action and hope” - into a vibrant and spiritually enriching is the key role of the facilitator.

With this thought in mind, then, let us briefly outline the assets that an effective facilitator brings to the group process.

- **Maintaining objectivity** is the key asset. An effective facilitator places aside all personal judgements of individual task force members and their ideas. He<sup>1</sup> is completely open to all ideas.
- **Actively listening** – An effective facilitator listens with his “inner ear”. He listens to not only what is being said but how it is being said. Emotional content yields much about an idea as well as the task force member’s conviction behind the idea. Also, he listens to what is not being said; perhaps an idea or subject that is being avoided.
- **Stimulating group participation** – an effective facilitator makes certain that all task force members not only have an opportunity to participate, but in fact have a willingness to do so. These are two separate issues. Every instrument in a philharmonic orchestra counts. The same holds true with respect to each member of the parish planning task force.
- **Keeping everyone’s eye on the big picture** – An effective facilitator clearly understands the reason for parish pastoral planning which is to produce a plan to guide the parish into a vibrant future. This is the end result of the planning process and the sole purpose for which the task force exists.

### facilitator noun

fa·cil-i-ta·tor | \ fə- 'si-lə- ,tā-tər \

### Definition of *facilitator*

someone or something that facilitates something

*especially:* someone who helps to bring about an outcome (such as learning, productivity, or communication) by providing indirect or unobtrusive assistance, guidance, or supervision

//the workshop's *facilitator* kept discussion flowing

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<sup>1</sup> “he” is used for literary convenience. It is to be understood that the role of a facilitator can – and should – be filled by competent people of either sex.

Much has been – and continues to be – written about the role of the facilitator. In our effort, however, to keep the parish pastoral planning process uncomplicated and highly focused, the foregoing will serve to make the point.

## **The pastor's role**

The pastor's role in the parish pastoral planning process is a delicate one. On one hand he is the individual who is ultimately responsible for the parish that has been entrusted to his care. This includes both the development of a pastoral plan as well as its successful implementation.

On the other hand, he will be expected to participate in the group process, but he must exercise care to not unduly influence the free flow of ideas and discussion. In this regard, this exchange of ideas and discussion can be a rich learning experience for him.

One of the key roles of the pastor is to be the keeper of the vision for the parish.<sup>2</sup> In this role, he both helps to develop the vision in cooperation with the parishioners as well as assures its survival. The parish pastoral planning process is fundamentally all about vision for the future.

His role in this regard cannot be assumed by or relegated to anyone else. He is the parish's leader.

Having stated this, it is to be recognized that not all pastors have the same talents, skill sets, or interests. As with the leaders in any organization some will be more adept at their role than will be others.

Understanding this, the facilitator may have to adjust accordingly in assuring a successful outcome of the task force's endeavors.

## **The parish pastoral planning three-phase process**

The three-phase process follows a logical sequence. That is to say, addressing the first component paves the way for the second component; and the second component paves the way for the third. The sequence helps to increase one's understanding of the relevancy of each component. It also enhances the chances of each component being successfully implemented.

Here, then, are the three phases comprising this process.

### **Phase one: Determining the parish's future direction and growth**

If our "product" is the proclamation of the Gospel of Jesus Christ, then our main delivery system is through parish faith communities. Hence, our concern is how to best help them to become more vibrant "proclaimers of the Gospel".

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<sup>2</sup> Tim Nichols. The Pastor's Role in Vision-Base Leadership. *The Journal of Applied Christian Leadership*. Vol. 2, No. 1, pp20-31. Andrews University: Berrian Springs, Michigan 49104.

This concern was identified early on in the pastoral planning process. It led to the development of the document, *Key Indicators for a Vibrant Parish in the Diocese of Erie* (Reference the first attached addendum). The document's value to parishes is two-fold. First, it serves as an assessment tool for parishes to gauge how vibrant they presently are. Second, it functions as a roadmap for parishes to follow in developing plans to increase their vibrancy.

Planning is critical to each parish's future. Increased vibrancy and growth do not occur without planning. The thrust of this first component, then, is where does the parish visualize itself five years from now? How does it thoughtfully develop plans to achieve this vision?

Focusing on the future helps the parish to think proactively, positively and creatively about its future and thus avoid being restricted by its focus on logistical issues such as what to do with aging or unused buildings.

Parish planning is most effective, however, when it takes place at the parish level as opposed to having parishes simply implement a diocesan-mandated plan. Who best knows the local situation than the pastor and his parishioners?

Also, planning at the parish level increases buy-in and support from the parishioners.

The thrust of this first phase, then, is to help parishes begin their planning process.

Fundamental questions raised by this phase include:

- ✓ Where does the parish visualize itself five years from now?
- ✓ What are the steps it must take to realize this vision?
- ✓ What are the major obstacles the parish faces in achieving this vision?
- ✓ What are the major decisions required to remove these obstacles?
- ✓ What current aspects of parish life serve it well?
- ✓ How do we build upon those aspects of parish life to increase parish vibrancy and growth?
- ✓ What hinders the parish's growth?
- ✓ How do we remove/correct/ resolve those hindrances?
- ✓ What opportunities is the parish missing in its focus on the present?
- ✓ How do we attract new parishioners especially among the youth, young adults and disenfranchised audiences?

To be sure, there are additional questions to be asked. The foregoing questions, however, illustrate the focus and type of questions involved in this first phase of the planning process.

## **Phase two: Implementing faith formation initiatives to support the spiritual growth and proclamation of the Gospel**

The Pastoral Plan's fourth initiative deals with "*Proclaiming the Gospel through lifelong learning and living.*"

Currently, the first effort of this initiative is being introduced throughout the diocese, led by Deacon Steve Washek, Executive Director of the Faith Formation Office. This initiative deals with welcoming and belonging. But a plan is in place for other faith formation efforts to follow.

What better way to have parishioners understand this faith formation initiative's relevancy and importance than by positioning this first effort within the larger context of proclaiming the Gospel and planning for the parish's vibrant future?

Planning, then, creates an ongoing mechanism/process to help implement additional faith formation initiatives in an orderly and productive manner. It calls for a new mindset and change in the parish culture; the way it thinks about itself.

## **Phase three: Assessing the role of the physical plant in the parish's plan**

The beginning point is to help the parish develop a master site plan.

Many parish buildings throughout the diocese were constructed for a church that, in many respects, no longer exists. As an example, large rectories were built to accommodate four and sometimes more priests. Now most rectories house only one priest, and many convents are unoccupied.

Whether rectory, convent, school or social center, these buildings were constructed at a time when energy costs were low. Their windows and heating systems are inefficient, and many older buildings contain outdated wiring and plumbing. Some have the added burden of asbestos, which is costly to remove.

So, there is much to consider in developing a master site plan: buildings' condition; their age; ease of being repurposed or disposed of and so on.

The master site plan should encompass identifying what the space needs are currently as well as projected into the future. Space follows functions. Typical needs/functions within the parish setting are for 1) worship space, 2) fellowship space (for church dinners and large gatherings), 3) meeting space, and 4) office space. Housing can be provided in the rectory or elsewhere should a better option be available.

With respect to the disposal of buildings through demolition or sale, there are a number of considerations.



- ✓ It is recommended to use the services of a commercial realtor. Their market perspective is broader than that of a residential realtor. In addition, commercial realtors are aware of prospective buyers who may be interested in repurposing buildings for creative uses such as restaurants or unique apartments or office space.
- ✓ If a building is deteriorated to such a point that its renovation would exceed the value of the investment, then demolition becomes a consideration.
- ✓ As to a building that has asbestos (costly to remove) and is no longer needed, it might be more advantageous to donate the building for a dollar rather than attempt to sell it.
- ✓ With respect to churches the primary target in urban areas is other denominations who are looking for a worship space. They may be willing to purchase the entire site.
- ✓ Realtors, however, see little value in church buildings in urban areas because they are costly to repurpose. So, the objective may be more one of disposing of the church rather than making money.
- ✓ The market for church buildings in rural areas, however, is different. There are individuals who are interested in converting churches into homes, antique shops, and art galleries. The purchase prices in rural areas are considerably less because real estate, in general, is lower priced and individuals have less capital typically than religious organizations or businesses.

The bottom line is to determine what buildings help the parish to achieve its plan? What buildings hinder? What buildings are no longer needed?

Another major decision is to determine whether the parish has the financial resources for their upkeep and maintenance? If it currently does, then how likely is it that the resources will continue well into the future? And is it a wise return on investment?

Does their upkeep and maintenance sap the parish's limited resources?

The sale of unneeded facilities can financially enrich the parish, thus providing it with a one-time source of new revenue. Such monies may be used to increase financial reserves or to update, renovate or construct the kind of space which is needed to effectively carry out mission. As an added plus, the renovated buildings become more energy efficient, more accessible, and more welcoming.

These are but a few of the questions to be addressed during the parish planning process relative to the parish's physical plant.

The underlying principle is that buildings should support, rather than hinder, the parish's mission and plan.

As an end note, the best strategists for the evaluation of parish buildings are often the parishioners sitting in the pews. Most parishes have realtors, experts in the building trades, and experienced business people. Hence, they are able and often willing to figure out the best courses of action for their parishes.

Lastly, parishes would be wise to consider keeping their best locations and not sell off their most marketable properties that may be needed for future expansion/use. This pertains specially to parking lots.

The foregoing provides a general template within which to flesh out any additional issues that are specific to each parish's situation.

## Getting started

Here are some suggested steps to help the facilitator enter into the parish setting:

✓ **Step one: Become acquainted with the pastor.** This is the starting point. By canon 519 of The Code of Canon Law, the parish has been entrusted to his care.<sup>3</sup> In essence he is the parish's CEO. Meet with him in a confidential setting. Explain your role as an objective, outside the parish source of assistance in the pastoral planning process.

You will be working closely with him. So, it is important to develop a friendly and effective working relationship with him based upon mutual trust. Learn his strengths and how to utilize them in the planning process.

Outline your role as facilitator as an objective outside party whose sole role is to help the pastor and his task force develop a pastoral plan for the parish. Eliminate any undue expectations of your role.

Offer help to the pastor in considering parishioners to serve on the task force by reviewing with him the document entitled, "Thoughts on establishing a parish pastoral planning task force", in particular the section dealing with the task force's composition.

✓ **Step two: Gather financial and demographic data about the parish (i.e. Baptism counts, October Mass counts, funerals, etc.)** All data tells a story, quite often with considerable clarity, force and direction. Study the data. What does it say about the story

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<sup>3</sup> Coriden, J. A., Green, T. J., Heintschel, D. E., Canon Law Society of America., & Catholic Church. (1985). *The Code of Canon Law: A text and commentary*. New York: Paulist Press.

of this particular parish: where it once was, is now, and likely headed within the near future?

Work with the pastor to obtain the services of a qualified financial professional to thoroughly evaluate the financial data. How solvent is the parish, especially as it faces the challenges of the future?

- ✓ **Step three: Meet individually with those parish leaders identified by the pastor:** Explain your role. Invite them to share their perspectives with you about the parish including, but not limited to, what they see as the parish's assets, things it does well, where the potential difficulties might be in it facing the future. These individuals may be among those selected by the pastor to serve on the parish pastoral planning task force.

Meet also with the Pastoral Council and the Finance Council to gain their perspectives as well.

- ✓ **Step four: Working with the pastor, survey the parishioners to gain their views.** Many of the parishioners are long-term members. A goodly number may be second generation. All have strong emotional attachments and a shared concern about the parish's future. Listen to their input. Value it. These are the people who will be called upon to usher the parish into the future.

The surveys may be done through group session(s) or through a paper questioner, or a combination of both.

- ✓ **Step five: Work with the pastor in the selection of a qualified contractor to do a thorough study of the parish's building, mechanical equipment and other sundry structures.** While parishes are fundamentally faith communities, they function within a campus comprised of several buildings ranging from a church to a social hall along with other buildings such as a rectory and facilities such as parking lots. Quite often these facilities are old with the attending problems of the aging process.

Review the report(s) completed by the contractor's inspection. What does the information say about the parish's needed use of the buildings and equipment as well as its ability to maintain them in the future.

- ✓ **Step six: Help the pastor to form a parish pastoral planning task force.** Forming a task force of key parishioners to help in the parish pastoral planning is the outgrowth of the thoughtful and thorough completion of the above five steps. As such it is a step not to be rushed into or prematurely started. Only after sufficient data has been gathered and

evaluated, and relationships formed with key parishioners, is it time to help the pastor form a task force.

An underlying principle of the pastoral planning process is that parish planning is most effective when it takes place at the parish level as opposed to having parishes simply implement a diocesan-mandated plan. This principle is based upon the wisdom that the pastor and his parishioners best know the local situation and locale in which the parish operates.

By the same token, no two parishes are alike. Planning at the parish level – as opposed to following a diocesan-mandated plan – allows the uniqueness of each parish to be reflected in its own pastoral plan.

Granted that by Canon Law the pastor is the one to whom the parish has been entrusted. The parish, however, is first and foremost a community of believers. As such, parishes and parish life are a joint venture involving all the members.

So, it logically falls that planning for the parish’s future is likewise a joint venture. For this reason, a task force is formed. Working with the pastor, and guided by a facilitator, together they craft a pastoral plan to guide the parish – their faith community – into a future that has as its focus spiritual enrichment and growth.

## **The roles of the pastor and the parish task force in the pastoral planning process**

As a starting point, the task force works collaboratively with the pastor.

His overarching role in the parish is defined by canon 519 of the Code of Canon Law. This canon states, “The pastor (*parochus*) is the proper pastor (*pastor*) of the parish entrusted to him, exercising the pastoral care of the community committed to him under the authority of the diocesan bishop in whose ministry of Christ he has been called to share, so that for that same community he carries out the functions of teaching, sanctifying, and governing, also with the cooperation of other presbyters or deacons and with the assistance of lay members of the Christian faithful, according to the norm of law.”

Let’s now address the composition of the parish task force.

## **The task force’s composition**

Quoting from the Vatican II document, *The Dogmatic Constitution on the Church*, “It is not only through the sacraments and the ministries of the Church that the Holy Spirit sanctifies and leads the people of God and enriches it with virtues, but allotting his gifts to everyone according as He wills, (114) He distributes special graces among the faithful of every rank. By these gifts He makes them fit and ready to undertake the various tasks and offices which contribute

toward the renewal and building up of the Church, according to the words of the Apostle: ‘The manifestation of the Spirit is given to everyone for profit’.(115) These charisms, whether they be the more outstanding or the more simple and widely diffused, are to be received with thanksgiving and consolation for they are perfectly suited to and useful for the needs of the Church.”<sup>4</sup>

Staffing the task force with parishioners who bring with them the necessary gifts required to successfully fulfill their role, then, is crucial to the parish planning process.

Suggested required gifts (skills and experiences) include:

- ✓ Decision-making skills from managing a successful business organization
- ✓ Financial experience accrued from banking, CPA or related endeavors
- ✓ Building construction/maintenance experience
- ✓ Legal experience
- ✓ Parish ministry experience
- ✓ Advertising/marketing experience
- ✓ Fundraising experience

The temptation followed all too frequently by many organizations is to choose people on the basis of their availability and willingness. Doing so, however, is akin to attempting to construct a building with people who have limited or no knowledge of the building trades. The end result is a frustrating process that leads to questionable results.

Hence, the starting point in choosing members for the task force is to understand and clearly determine what skills and experiences are required for the task force to produce a successful result which, of course, is a parish pastoral plan to guide the parish into a vibrant future.

The role of the pastor in choosing task force members is critical. Recognizing this, the first involvement of the facilitator is to familiarize the pastor with the importance of choosing members who have the required skills and experiences and to act as a sounding board for his selections.

The required skills and experiences exist in both male and female, young and old, lay and clergy and professed religious. In this regard, care should be taken to embrace the diversity that comprises parish membership.

Experience has shown that numbers are important as well. The task force should have a minimum of eight members to assure a healthy blend of experience and exchange of ideas, but no

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<sup>4</sup> *Dogmatic Constitution on the Church*, Chapter II, On the People of God, section 12, second paragraph

more than twelve so as to avoid the process from becoming cumbersome and the task force breaking down into sub task forces.<sup>5</sup>

### **Likely sources of members**

Most parishes abound with groups. They may be formal such as the Finance Council, Pastoral Council, and Liturgy Committee to cite but a few. Informal groups exist as well including, but not limited to, grounds committee, and building and maintenance committee.

Then, too, pastors often have gathered around them parishioners whose particular counsel and experience they value.

All of the sources, and more, provide the pastor with a rich and diverse selection of proven experience and skills.

### **The role of the *Parish Pastoral Planning Three-phase process***

The role of the three-phased process is to provide an easy-to-follow roadmap designed to help parishes successfully produce a pastoral plan.

### **The role of the facilitator**

The role of the facilitator, as outlined above, is to help both the pastor and the parish task force to collaboratively and effectively work together in producing the parish pastoral plan.

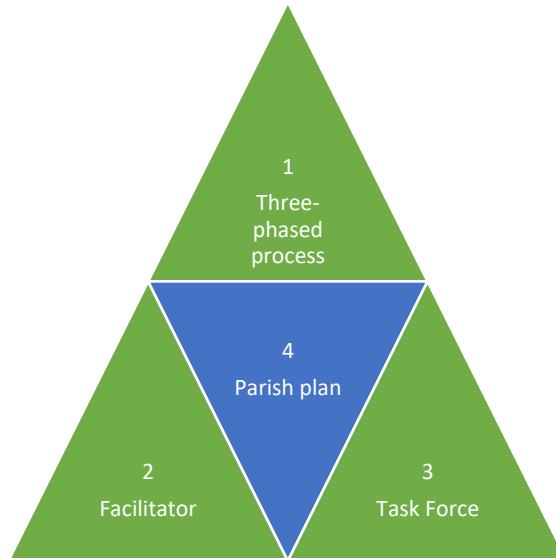
The facilitator will be provided from outside the parish so as to assure objectivity in his/her role.

### **How the three roles work together**

The three roles – namely that of pastor and his parish task force; that of the template; and that of the facilitator – form the three ingredients for successful pastoral planning at the parish level. The harmonious interaction of these three roles is illustrated below.

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<sup>5</sup> Is Your Team Too Big? Too Small? What's the Right Number? Wharton School of Finance: University of Pennsylvania, January 14, 2006 *Knowledge at Wharton* newsletter.



**Three-phased process + Facilitator + Task Force = Parish plan**

- ✓ **Step seven: Develop a plan to guide the parish into the future.** Care should be taken to make the plan realistic and accomplishable. The plan, in itself, is not the end objective. Rather it is the means to the end. The end, of course, is the successful future of the parish.

There is no such thing as a perfect plan. Plans always involve a bit of trial and error. So, don't be afraid of making some mistake or "missteps" at first. Success always grows from stumbling at first.

And remember, in the final analysis, this is Christ's church. He always has – and always will – guide it through the Holy Spirit. So, trust in the Holy Spirit.

**A brief word about group process**

It is commonly understood that people act differently in one-on-one relationships than they do in groups. Different contexts bring about different behaviors.

The purpose of this document is to not give a tutorial on group process, but rather to offer the facilitator some fundamental understandings of what to expect.

In 1965 Bruce Wayne Tuckman, professor of educational psychology at The Ohio State University, published one of his theories arising from his extensive research into how groups function. His theory became known as the "Tuckman theory of group development" and has since become widely recognized and used throughout many organizations.<sup>6</sup>

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<sup>6</sup> Tuckman, Bruce W. (1965) 'Developmental sequence in small groups', Psychological Bulletin, 63, 384-399. The article was reprinted in Group Facilitation: A Research and Applications Journal, Number 3, Spring 2001 and is available as a Word document: [Accessed January 14, 2005](#)

The theory outlines six stages that individuals grow through in becoming effective and productive members of a group. These stages include *Forming*, *Storming*, *Norming*, *Performing*, followed by *Warming* and *Adjourning* after the group has completed its task.

While the iconic film, *Twelve Angry Men*, directed by Sidney Lumet based upon a teleplay by Reginald Rose, was produced in 1957, it has become widely regarded as an excellent example of how groups move through Tuckman's six stages.<sup>7</sup>

It is highly unlikely that the individuals comprising a parish pastoral planning task force will move through all of the aforementioned stages. After all, most, if not all, of the members have familiarity with each other. But there is a high probability that not all of them will have functioned within a group setting . . . at least not together as one group as is now the case of the task force.

An effective facilitator will not take group process for granted. Rather he must be attentive in helping the individual members to grow into the process of operating as a group with a clear mission (to develop a parish plan) in mind.

Here, then are some helpful tips to the facilitator:

- The beginning point is to **clearly state the purpose of the task force**, namely to produce a plan to guide the parish into a vibrant future.
- **Explain the role of facilitator** in guiding the group process.
- **Get to know the individuals** comprising the task force; how they work; their strengths; and how they process information and ideas.
- **Outline how the objective will be approached** through everyone's involvement in discussion and in agreement on what direction the group is taking and why.
- **Set a time frame** for the group to produce the plan. This is not to say that an ironclad time frame must be set, but do give the task force a reasonable expectation of how long they will be involved.

## Diocesan administrative assistance available

The bishop and his staff realize that implementing pastoral planning at the parish level is a considerable undertaking for many parishes. It is for this reason that a facilitator will be made available to assist in the planning process.

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<sup>7</sup> [12 Angry Men Movie Reviews, Pictures](#)". *Chicago Sun-Times*. Archived from the original on September 13, 2010. Retrieved August 17, 2010.



There are likely to arise occasions, however, whereby specialized assistance may be needed. In this regard diocesan administrative assistance is readily available simply upon request. The following are some types of assistance that have been identified as being helpful to the parish pastoral planning process.

## Communications

Planning involves dealing with the uncertainties of the future. Planning also involves identifying areas that require change. Together – uncertainties of the future and change – can create anxiety among parishioners. This is only natural.

Keeping the parishioners informed, therefore, as the parish pastoral planning unfolds is essential. It has often been said that we can never communicate too much or too often. This time-worn wisdom can be most helpful throughout the planning process.

Our diocese is fortunate to have seasoned experts in communication. Their expertise was most helpful throughout the diocesan pastoral planning process since its inception in 2014. And the communications staff is ready and willing to assist parishes in devising ways to keep its parishioners informed.

Here are some of the ways:

- A message from Bishop Persico that reiterates his commitment to ongoing planning, underscores the need for planning to be initiated and shaped by parishes, and offers an overview of what it means for a parish to have a vision.
- A message from the pastor. This will need to be personalized, and ~~I am~~ the Communications Office is happy to work one-on-one with pastors and facilitators to help set the tone in an initial message. It can build on the bishop's message, and lay out the process that will happen in the parish in broad strokes. Where appropriate, it can introduce task force members.
- A document introducing the facilitator. It will also detail the facilitator's role and discuss why the bishop has asked for and arranged for outside facilitators.
- If appropriate and helpful, a message from the facilitator can be developed at any point in the process.
- A general document about the process (that can be tailored to each parish) touching on:
  - the need for healthy discussion led by an outside facilitator
  - the role of the task force

- opportunities for parishioners to weigh in — perhaps by listening sessions, perhaps through surveys.
- Some sense of timeline.
- The likely development of a preliminary plan
- Opportunities for feedback from parishioners
- Ultimate goals for presenting the final plan.

This document can reiterate and flesh out the points made by the bishop and the pastor in their messages.

Some messages can be mailed, some can be used in the parish bulletin and all should be on a parish website, so everyone involved can point parishioners to the resources that have been made available. The diocese has offered to create a free, easy-to-use, website for each parish. About one-third of parishes are on board; this may be a good opportunity to bring others along.

Anne-Marie Welsh, director of the Office of Communications, is open to additional thoughts and publications as facilitators begin planning their work and/or interacting with parishes. Her contact information is:

Anne-Marie Welsh  
 Director, Office of Communications - Diocese of Erie  
 Office phone: 814/824.1167  
 Cell phone: 814/746.6889

## **Disposal of church buildings**

We think of parishes as spiritual places where we live our faith and have it nourished as well. In this regard, parishes are truly our “spiritual homes”.

Of course, there is also a “brick and mortar” element to our spiritual homes. Many of our parish buildings – church, convent, rectory, school, social halls – were built years ago. As they age, they require increased expenditures to keep them well-maintained.

Then, too, some parish buildings are no longer utilized while others may be underutilized. A major consideration of the parish pastoral planning process, therefore, centers on what to do with buildings no longer needed. In some instances, the building may be the church itself which is no longer used as a result of mergers.

The diocese offers two types of assistance in dealing with buildings. If the building is a church, the Code of Canon Law outlines the process for what is termed in Canon 1222 as relegating it to “profane but not sordid use.” Only the bishop has authority to do this. Hence, should there

be consideration of disposing a church building, the bishop should be notified early in the discussion.

As to the disposal of all other buildings, they can be handled in the usual and customary manner.

For counsel on disposing a church building the diocesan contact is:  
Rev. Msgr. Edward M. Lohse, J.C.D.  
Vicar General / Moderator of the Curia  
Administration

Office phone: (814) 824-1130  
Fax: (814) 824-1124

For counsel on disposing all other buildings and properties the diocesan contact is:  
Russell A. Rydzewski  
Director  
Facilities & Risk Management  
Financial Services  
Office phone: (814) 824-1112  
Fax: (814) 824-1128

## Financial

Much of the parish financial data comes, of course, from the parish. There may be occasions, however, when it may be more expedient to request data from the diocesan financial office.

Types of data available include the following:

- Parish income & expense data – both by the current year or historical/trending
- Parish census data – both by the current year or historical/trending

As with the other diocesan administrative staff, the finance office is ready and willing to Assist in whatever way it can.

The contact is:

Thomas E. Burik, CPA  
Director  
Parish Financial Services  
Financial Services

Office phone: (814) 824-1185  
Fax: (814) 824-1181

## Resources helpful in the disposal of church items

Should the occasion arise in the parish pastoral planning process whereby the proposal is made to seek permission from the bishop to close a church, the following websites are offered. These companies acquire and then offers for sale materials from closed churches.

- Used Church Items in a vendor near Pittsburgh who acquires and sells materials from closed churches. Their email address is [Warehouse@usedchurchitems.com](mailto:Warehouse@usedchurchitems.com).
- A. T. Merhaut, Inc is located at 4864 William Flynn Highway, Allison Park, Pennsylvania. Their website is [www.merhaut.com](http://www.merhaut.com). A number of the pastors already know and work with Adam Miller who is a sales consultant from Merhaut.

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## Addendum



## *Key Indicators for a Vibrant Parish in the Diocese of Erie*

February 10, 2015

### **Definition of a parish for use in pastoral planning**

A parish is a certain community of the Catholic faithful stably established in a specific geographic area and entrusted to the care of a pastor. The parish is the presence of Christ and the church in a given territory, an environment for hearing God's word, for growth in the Christian life, for dialogue, proclamation, charitable outreach, worship and celebration.

The parish is the extension of the diocesan bishop's ministry in a specific place.

At the direction of the pastor, and by means of its own human and material resources, the parish is to see that the Word of God is proclaimed in its entirety and that the Eucharist is the center of its life. The pastor, in collaboration with the faithful of the parish, is to provide for: the dignified celebration of the Liturgy, the sacraments, pastoral care and evangelization to those in his territory, in accord with universal church and diocesan laws.

In all its activities the parish encourages and trains its members to be evangelizers. It is a community of communities, a sanctuary where the thirsty come to drink in the midst of their journey and a center of constant missionary outreach. As an extension of the bishop's ministry – and therefore an extension of Jesus' own ministry – the parish must continue to be the church living in the midst of the homes of her sons and daughters.

It is to be an environment of living communion and participation, a place of welcome and patient nurturing. The parish must be a community capable of self-renewal and constant adaptivity.

Ultimately, the parish is an institution completely oriented to the mission and words of Jesus to “go therefore and make disciples of all nations, baptizing them in the name of the Father, and of the Son, and of the Holy Spirit, teaching them to observe all that I have commanded you. And behold, I am with you always, until the end of the age.” (Matthew 28:19-20)

The parish is not an outdated institution; precisely because it possesses great flexibility, it can assume quite different contours depending on the openness and missionary creativity of the pastor and the community. While certainly not the only institution which evangelizes, if the parish proves capable of self-renewal and constant adaptivity, it continues to be “the Church living the midst of the homes of her sons and daughters”. This presumes that it really is in contact with the homes and the lives of its people, and does not become a useless structure out of touch with people or a self-absorbed group made up of a chosen few. The parish is the presence of the church in a given territory, an environment for hearing God's word, for growth in the Christian life, for dialogue, proclamation, charitable outreach, worship and celebration. In all its activities the parish encourages and trains its members to be evangelizers. It is a community of communities, a sanctuary where the thirsty come to drink in the midst of their journey, and a center of constant missionary outreach.<sup>8</sup>

## Key Indicators

### A. Vision and Leadership

1. The parish follows and promotes the Gospel of Jesus Christ and understands its relationship to the diocese and universal church.
2. The parish develops a local vision for pastoral activity in the coming years which is rooted in the Gospel of Jesus Christ.

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<sup>8</sup> Cf. Apostolic Exhortation *EVANGELII GAUDIUM* of the Holy Father FRANCIS. 24 November 2013.

3. The parish is staffed by properly trained ministers or shares staff with other parishes to lead and direct all areas of the parish's mission.
4. The parish has a finance council and a pastoral council in place, which meet regularly to engage and involve the faithful to help carry out the pastoral activity of the parish.
5. The parish provides or makes available formation and training for pastoral staff and lay leadership.
6. The parish regularly reviews and evaluates its long-range plans in order to ensure that its human and financial resources are being used in the best way possible to carry out the mission of Christ, and to meet the needs of both its parishioners and the people who live in the area.

#### **B. Worship and the Sacraments**

7. Liturgical celebrations are properly and thoughtfully prepared and well attended with full, active and conscious participation.
8. Homilies are relevant, challenging and faithful to the Gospel and church teaching. Parishioners are taught how to grow, and are inspired to live as disciples of Jesus Christ.
9. Sacramental preparation is thoughtfully and properly planned and conducted in accord with approved guidelines and diocesan policies.
10. The prayer and devotional life of parishioners is supported and nourished beyond the Sunday liturgy and the sacraments.
11. Music as a part of worship is of high quality.
12. Worship space is aesthetically pleasing and appropriate. Liturgical environments are created in accord with the liturgical norms.
13. The RCIA is implemented and its rituals are celebrated at the proper times.

#### **C. Lifelong Faith Formation, Catholic Education and Evangelization**

14. The parish provides adult faith formation opportunities which include both study and spiritual formation in accord with diocesan policies.
15. The parish provides comprehensive faith formation for children in religious education programs in accord with diocesan policy.

16. The parish provides opportunities for learning, spiritual growth, participation in the sacramental life, service and community for its adolescents.
17. Parents are involved in the life of the parish and active in the faith development of their children.
18. The opportunity to attend a Catholic school is provided to parishioners including some financial support from the parish.
19. The parish is creating a culture of vocations that actively and prayerfully promotes vocations to the priesthood, diaconate and consecrated life.
20. Catechists, school teachers, and catechetical leaders are trained and competent in their ministries.
21. Parishioners are challenged to reach out to inactive Catholics, inquirers, the unchurched and all others.

#### **D. Service and Pastoral Care**

22. The parish is actively engaged in proclaiming the Gospel through service to people in need locally, in the wider community, and the world.
23. The parish collaborates with other churches and civic agencies to serve the wider community.
24. The parish provides ministry to the homebound and elderly parishioners and to those in hospitals, nursing homes, and other care facilities.
25. Ministry is offered to comfort and support to, including but not limited to, the grieving, the separated, and the divorced.

#### **E. Stewardship / Building Community**

26. The parish welcomes new parishioners and invites them to become involved in the parish mission.
27. Parishioners are invited and provided opportunities to better understand their gifts and talents and ways these can be used to minister to others.
28. Parishioners understand stewardship as a response to their discipleship and give of time, talent, and treasure to support the Church's mission.
29. The parish fosters opportunities for fellowship which provide a sense of community for parishioners.

30. A communication strategy is in place using all forms of media to be in regular contact with parishioners, promote events and encourage parish community.

## **F. Administrative Services**

31. The parish operates with a balanced budget and has sufficient operating funds for ministries, programs, facilities and staff in order to meet the needs of the community.
32. The parish has all necessary financial controls and operating procedures in place in accordance with diocesan policies.
33. Financial reporting is done in a timely manner and follows the accounting standards established by the diocese.
34. Parish facilities are well-maintained, attractive, and appropriate for parish ministries and programs. Facilities are handicap-accessible and inviting.
35. The parish has a master site plan for ongoing maintenance and development of its campus.
36. Personnel policies, job descriptions, hiring and interview practices, and salary scales are in place, communicated and followed.
37. Regular staff meetings are held. A performance review process is established for all staff.
38. A technology plan has been developed and is used to keep equipment current, provide training and support to staff, ensure proper security of data, and, most importantly, to support the ministries of the parish through many varied uses.

## **Closing reflection**

Pope Francis addresses the role of the Catholic Church with these words:

*“Being Church means being God’s people, in accordance with the great plan of his fatherly love. This means that we are to be God’s leaven in the midst of humanity. It means proclaiming and bringing God’s salvation into our world, which often goes astray and needs to be encouraged, given hope and strengthened on the way. The Church must be a place of mercy freely given, where everyone can feel welcomed, loved, forgiven and encouraged to live the good life of the Gospel.”<sup>9</sup>*

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<sup>9</sup> Apostolic Exhortation EVANGELII GAUDIUM of the Holy Father FRANCIS. 24 November 2013.



To be vibrant is to “show great life, activity and energy”<sup>10</sup>. How do we know if a parish is vibrant? A list of indicators has been created that, when taken together, describe vibrancy as it should be found in a Catholic community of God’s faithful people. The parish community may not exhibit all the indicators at a particular time; however, the hope and expectation are that parishes are able to exhibit these indicators either independently or in collaboration with other parishes.

Vibrant parishes should be able to secure the resources necessary to provide effective ministries and programs for the long term. Parishes, whether in urban or rural areas, should all be capable of being vibrant. Vibrancy is not to be understood to mean uniformity. Parishes will neither look alike nor conduct their ministries in exactly the same ways. A parish intent upon carrying out the mission of Jesus will do so in conformity with its unique character and circumstances.

The indicators should be adapted to each local situation and provide criteria from which local parishes will develop their own plans. Should parishes collectively or independently discover that they do not have the potential to actualize the key indicators, new structures for organizing parishes or leadership may need to be explored.

True to the Word of God and consistent with the teachings of the Catholic Church, the indicators are elements of parish life that are necessary and desired.

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<sup>10</sup> “vibrant.” *Meriam-Webster.com*. 2015. <http://www.merriam-webster.com> (19 January 201