Parish Planning for Beginners: New Pastors and Their Parishioners

“Communion gives rise to mission, and mission is accomplished in communion”

(Christifidelis Laici, 32)

Introduction

Father Johnson was appointed by his bishop to be pastor of St. Anne’s. It was his first pastorate. He arrived to find a warm welcome and a pastoral council ready and willing to work with him. The chair of the council told him, when asked, that the last pastoral plan for the parish was “around somewhere” and “somebody on the staff should know where it is kept.” When he asked at a staff meeting about it some gave a weary roll of the eyes, another said, “we spent hours on it, spent big money on a consultant, and we never did any of it,” and another offered that “It’s probably in your office somewhere.”

The sad reality is that what Father Johnson experienced in regard to parish pastoral plans is more common than one would expect, especially given the time, energy and often significant expense put into such plans. This is often the result of the planning process itself being a prolonged, tedious affair, of the plan being an expression of preference rather than based in reality, and of a failure to recognize that planning is essentially a covenant and a set of relationships built around developing communio and missio. Plans that do not enhance communio and focus on missio in their creation drain energy and resources from a parish and rarely get implemented.
Planning in a Catholic parish setting is all about *communio* and *missio*. Planning in a Catholic parish is about strengthening *communio* and aligning around a common purpose: *missio*. A parish plan is a covenant made by the parish and their pastor regarding how to go about *missio*; about deciding what is important to the parish at this time and place, when to do what for how long, and how to know when progress is being made. A parish plan is a description of a relationship between God and the parishioners and their pastor, between the parish and their bishop and the wider community. It places the various elements of parish life in relationship to one another. Understanding the parish plan as a set of relationships is vital to the way planning is done and to the value planning can bring to as parish.

Most planning is documented. It is mission driven, data informed and discernment derived. In a Catholic parish setting how planning happens should in itself enhance the experience of *communio* and highlight the focus on *missio*. Good parish planning is a very relational activity. How planning happens is key to its successful implementation.

Most new pastors can find a multitude of matters to distract them from their real role as pastor, and most of those distractions are good things to do. What a good planning process offers the new pastor is an opportunity to get to know the parish in a deep and engaging way. It offers the opportunity to maintain focus on the munera for which he is ordained. Planning is part of parish life that touches into all three of the munera of the role of pastor: governance, teaching and preaching, and sanctifying. It is helps create mission focus and alignment of structure from governance level through to operational
level within the parish. It is important to realize from the beginning that planning is not, in itself, “rocket science.” In fact, keeping in simple and straightforward is essential.

This chapter provides the new pastor of a Catholic parish and understanding of planning a key planning terms, a pragmatic step by step guide through the planning process and then gives some practical guidance on capital fundraising in parishes.

**Why Plan?**

Perhaps the most important outcome of planning is that it helps the new pastor distinguish between the urgent and the important. As the new pastor arrives in his new parish, he is often besieged upon by many who tell him that their particular need or agenda is the most urgent and most important. What planning does is establish for the pastor what is actually important. He can prioritize for the best use of his time and the resources of the parish. Not everything is as urgent as everybody says it is, and not everything that claims to be important is actually important.

A parish planning process has a clearly defined end. It gives a roadmap for the near and long term future. It tells the parish leadership and community what it needs to attend to in the next two to three years as well as helping them keep a longer term context in mind. The planning process teaches the community about the mission of the Church universal, of the diocese and the parish. It articulates a parish vision and near term priorities of the parish, offering a roadmap of what needs to be done in the next two to three years to bring the parish closer to making its mission and vision a reality. The plan itself gives the pastor, lay leadership, administrative structure and community of the
parish a basis for making decisions about how it organizes its resources. At its best the planning process strengthens the experience of communio and the focus on missio.

**Adaptive Versus Predictive Planning**

After World War II strategic planning was introduced to corporations and Churches through the experience of those who had been in the military. In the 1960s and 1970s strategic planning was seen as the “silver bullet” for success. In the 1980s there was disenchantment with strategic planning in parishes until it was realized that many of the attempts at strategic planning resulted in a document that sat gathering dust on a shelf (As was the experience of Father Johnson) because the basic premise of those planning efforts was that the conditions under which a plan was created are predictable and remained largely static. It was out of this experience that adaptive planning was born, an approach to planning that assumes both internal and external operating environments for a parish shift continuously and so any plan that would be useful would need to continuously adapt. Parish planning today, then, has gone beyond the static “five year plan” model to an adaptive and creative process that is integrated into the life of the parish. Adaptive planning recognizes that many of the factors that influence parish life such as demographic change, economic conditions in the local and wider community, changes to employment regulation, shifts in the expectations of donors and expectations about fiscal transparency and accountability are outside control of the parish and are becoming less than predictable. Adaptive planning allows the parish to more effectively live its mission within a changing internal and external environment.
Understanding the Broad Strokes of Parish Planning

The best planning processes are **mission driven, data informed, and discernment derived**. This means that good planning begins with education and formation of the community, especially leadership and those who will have a direct role in the planning process, about *mission*. In the past this meant just writing a mission statement. What is being suggested here is much deeper. It begins with education and formation about the mission of the Church universal. There are many Church documents and resources on this, so that will not, of itself be discussed here. What is important is that the dialogue between pastor and his parish, especially leadership, begins with the mission of the Church universal, moves to the mission of the diocese, and then moves to the mission of the parish. Deep dialogue, education and formation about mission in this order often makes the matter of a mission statement a very simple matter. Taking time to both educate and dialogue about the mission at the level of universal Church is well worth the effort. The purpose of the education, formation and dialogue about mission in the different levels of Church is to bring the parish to a deeper understanding, appreciation and experience of *communio*. A common understanding of the mission of the parish and its context also makes planning both easier and more formative of the community in itself. As an unnamed bishop once said to his planner: “It is more important that people have an understanding of the mission than that they have a mission statement to prove they understand it.”

*Data informed* planning means that it is based in reality. Good parish planning requires a shared understanding of the current reality in which the parish finds itself. There is the story of the parish pastoral council that described the parish to its new pastor
as a blue collar, middle class parish of families whose membership went back many
generations. The new pastor drove down the street and saw signs over stores in multiple
languages, and at Mass next Sunday looked out to a community gathered for Eucharist
that reflected the diversity he had seen in the street signs of the neighborhood. The
picture given by the parish council was not wrong, just incomplete. What was presented
as fact was actually a preference to have the parish remain as it always was. That new
pastor asked at the next parish council what was changing around the parish and they
began to tell the pastor in great detail how the area had changed, and that the parish
membership had changed. The new pastor then asked the planning office of his dioceee for
help with some demographic analysis, and began asking his pastoral council to look at
the data and discuss what it meant for the future of the parish. The best planning includes
both data and story. Both are necessary for understanding the current reality of a parish.

Discernment is a process well articulated by St. Ignatius of Loyola over 300 years
ago that is for anyone who genuinely seeks the will of God. There are plenty of resources
available on the discernment process. The emphasis for planning purposes here is on the
necessity of coming to planning with an open mind and singularity of purpose: the
mission of the Church. Approaching planning as a discernment process means that the
pastor is seeking the will of God for his parish (very different from any corporate
planning process). It means that discerning gifts of the parish community for the good of
the mission of the Church is core. It means that the planning process is prayerful,
reflective and sometimes even contemplative in nature. It also means that while it is good
to gather people who cover a wide cross section of the community, they do not represent
in the ‘civic representation’ sense. A parish council is not a city council or a public
school board, or any other civic body. Those who gather to do parish planning have only one purpose: to further the mission of the church. People experience stronger *communio* when they are focused on the mission of the Church, are prayerfully discerning the will of God and embracing gifts within the parish. Unlike other experiences of planning that parishioners may have, parish adaptive planning meetings are prayerful, reflective and contemplative at times, as well as times for lively interaction.

**Some Planning Terms**

Some common understanding among participants of key planning terms is often helpful to the pastor in leading a planning process. The pastor may find it helpful to discuss the terms listed below early in the planning process.

- **Mission Statement:** The one clear, compelling reason the parish exists in this place and this time, a statement explicitly aligned with and derived from the mission of the universal Church and the mission of the diocese. One or two sentences are plenty. The mission itself changes only in response to significant shifts in external and internal reality of the parish.

- **Scanning:** This is a process (described later) by which a parish comes to a shared understanding of the key features of its current reality that will inform planning decisions. It is a regular process often integrated into the work of the parish pastoral council.

- **Vision:** Between three and five (no more than seven) descriptors of what living out the mission and values of the parish will look like over the next two to three
years. Think of the vision as what an new parishioner would see as they join this parish.

- **Values**: These are qualities that should be expressed in everything the parish is and does. Many parishes describe values in terms of characteristics of behavior in the relationships within and beyond the parish.

- **Priorities**: The three to five (no more than seven) areas of focus for the next two to three years if the vision is to become reality. In the corporate world these are known as “Strategic Directions.” All parish liturgical, pastoral and administrative activity as well as human and other resource allocation needs to clearly align with and be justified according to these priorities over the next two to three years.

- **Key Steps**: Each priority needs to have the key steps for implementation named for the next two to three years. Key steps have timeframes for each step (that may need to change) These time frames are a means of measuring progress in each priority, thus building accountability for making progress into the plan. Times for regular review of progress are noted in the plan.

- **Consensus**: It is very common to have parish planning groups say that they use a consensus model of decision making. This is just fine, as long as there is a common understanding of what consensus means in a Catholic context. In civic realms it often refers to a group coming to agreement. In our Catholic context it refers to everybody knowing what options are viable and potentially represent the will of God rather than that everyone agrees on one recommendation being offered to the pastor. In the Church framework for consensus the political framework is less operative and the open mindedness required to begin
discernment is made possible. Self-will and imposing self-will on others can not be the center of consensus in the Catholic Church. This implies that members of planning groups are mature enough to move beyond self-will into focus on mission, and have the capacity to keep that mission in mind as they discern “practical conclusions” for the parish with their pastor.

- **Planning Boundaries**: Parish planning operates within some boundaries, some of which exist because of the teachings of the Church as well as being within the boundaries established by financial realities. For example the plan must keep the parish within a balanced budget and must be consistent with any priorities the bishop may have established. It must encourage inclusivity of any and all people who seek a relationship with God and the Church. An image that is useful is to think of those boundaries as the box within which planning is done. The four sides of the box are shown in *Figure 1*. The Base of the box is the mission of the Church.

![Figure 1: Boundaries within which Planning Operates](image-url)
Who Leads Planning?

The munera of the role of pastor includes governance of the parish. The pastor is the leader, therefore, of parish planning. He does not, however, do that alone. It is very common for the parish pastoral council to lead the planning process with their pastor. It is also common to engage a special planning task force whose mandate from the pastor is to lead the process, often as a group that reports to him through the pastoral council. A group of no less than seven and no more than about twelve people is the usual size of a parish planning group.

Gathering the right people to lead the process is perhaps the most important decision to make as planning begins. What is important is to have people around the planning table who are in full communion with the Church and who are not carrying a particular divisive role or cause in the parish. There are specific skill sets that may be useful: Some may be facilitators of open parish meetings, some may help with data collection or data analysis, and some may be creative in developing options.

The Steps of Parish Planning

The canonist Father Robert Kennedy (1980) outlines five steps in the decision making process of a parish whenever there are significant decisions to be made and these form the basis for the steps of adaptive parish planning.

1. Competent gathering and analyzing the right information
2. Developing and weighing options
3. Asking decision makers to prayerfully consider and choose among the options
4. Implementation of decisions
5. Refining the decisions
The steps of adaptive planning outlined below in *Figure 2* were developed from the work of Father Kennedy (1980) by Dennis Cheesebrow and Jim Lundholm-Eades (2005). They may seem complex at first, but in practice they are relatively simple in concept.

1. **Clarity of Mission and Boundaries:** This is an opportunity for the pastor (sometimes a pastor enlists the help of an outside resource for all or part of this) to teach his people. What is important is that those directly involved in the planning process and the parish as a whole have the opportunity to come to deeper and shared understanding of the mission of the Church universal, the diocese, and the parish. The boundaries of any planning process are set by the pastor before it begins. It is common, for example, for a pastor to
set a boundaries such regarding how long the planning process will take. A well
disciplined adaptive planning process should be done using one ninety minute meeting
for each step, with meeting preparation done between meetings. For example, a small
group collects data for the scan of reality and prepares a report for a meeting. The data is
not collected during a meeting. It is discussed and its meaning is reflected upon at a
meeting, but it is not produced at a meeting. This means that the first four steps are
completed between four and six meetings, depending upon local circumstance.

2a. Scan the Current Reality: A simple beginning to this can be to ask groups of
parishioners to name what is changing in and around the parish in terms of three
questions:
   1. What is emerging new?
   2. What is peaking right now?
   3. What is declining or has disappeared from view in recent years?
Data can be collected by a group that focuses on key trends and influences by looking for
   1. Demographic trends for within the current parish community and the community
      within which the parish exists
   2. Parish member needs surveys
   3. Parish financial, giving and membership trends
Some other good questions for a data group to address include:
   1. Who is or is not being served, regardless of intentionality around this?
   2. What do you regard as high quality or good practice in parish ministry?
   3. What influences access to high quality ministry in the parish?
   4. What would need to leave this parish or could have to let go of for the good of the
      mission?
   5. What stories are told within the parish that tell us who we are and to what degree
      are they still true?
Not all data are useful, and in fact too much can be confusing. Part of good planning is to collect and analyze useful data, thus avoiding “analysis paralysis. The list of useful data nearly always includes three to five year trend analysis of giving history, membership, sacramental reception, program participation, worship attendance as well as fixed cost trends and staff cost trends. Among the useful demographic data (which is often readily available through government agencies such as city or county offices, or which can be purchased from market analysis companies) is disposable income (the amount each household has left over from sustaining itself and so can afford to give to stewardship campaigns, school tuition of capital campaigns), ethnicity, age profiles and growth or decline in the population. Measures of religious affiliation are also important, but are also notoriously inaccurate. Collecting, assembling, synthesizing and analyzing data can be a good use of the gifts of parishioners, many of whom may not be on a committee, but would be willing to serve on a special “data task force” that does its job with the data and then ceases to exist. This step engages many parishioners giving input. Trends are probably more important than snapshots of the present in terms of parish membership, participation in parish liturgies and ministries and financial performance. Sometimes, especially when a parish is looking at significant changes, professional help with data is needed and that may be available for the diocese or from consultants. Check with the diocese first because, among other things, they are cheaper!

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

2b. Developing a Shared Understanding of the Current Reality of the Parish: This consists of the planning group reducing the vast amount of information collected and analyzed to the seven to twelve key descriptors of the current reality, and putting it into a format that is easy to communicate to the parish community. One useful way of thinking about this is to imagine a car dashboard and the gauges on it that give limited but valuable information. Often information prepared for the parish at this point is in the form of just a couple of pages formatted using graphics and bullet points. Further details are also made available for those who ask for them. Many parishes distribute this material at a parish meeting led by those who created it, and ask for feedback as to whether it accurately reflects people’s experience, surprises anyone, or what particularly grabs attention. It is also common to ask if the picture presented changes the image people have of the parish, particularly when a parish has seen significant demographic change. Sometimes this kind of meeting leads to review and changes to the material used by the planning group. What is important is that there is a significant level of shared understanding that the information presented is an accurate picture of the current reality.

4. Develop and evaluate viable options for parish priorities over the next 2-3 years: This is the creative and, dare it be said, fun part of planning. It is where the planning group and the pastor develop potential priorities for the next two to three years, keeping in mind the reality in which the parish finds itself. Many priorities are created, but few can be
chosen. All those that are viable must fit the current reality of the parish, including the financial reality. The potential short list of priorities is taken to the parish community for them to comment on the strengths, weaknesses, opportunities and challenges of each of the proposed priorities. Sometimes new options emerge from that process. Some parishes repeat this evaluative process with the parish more than once to make sure that all who want to get engaged and own the outcome.

6. **Choose 3-7 Priorities for the Next 2-3 Years:** Based on the feedback from the parish the pastor, in consultation with his leadership prayerfully considers the options and finalizes the priorities for the next two to three years. A really high functioning parish can handle seven key priorities. That is the high end. Most parishes can handle around four priorities at any one time.

7. **Create key steps and benchmarks for progress for the Next 2-3 Years:** This is where the planning group, often with staff assistance at this point, examines the priorities and makes a list under each one of the major means for making them happen over the next two to three years, adding a time frame for achieving getting those benchmark actions in place. This way the pastor and the parish pastoral council can measure progress in the plan.

8. **Resources:** The elements of the plan need resources. This may include human resources, finances and facilities. The parish finance council is often consulted at this point. If the plan is already aligned with current reality the basic financial and other resource considerations are already in place. Sometimes a plan may need to be adapted because of resources even at this point. This may mean, for example, a priority may need to go “in the parking lot” for a time (not forgotten – it was important enough to be chosen
as a parish priority so it should not be forgotten) until resources can be found for that priority. A parish budget is basically the pastoral plan of the parish aligned with the resources of the parish. The budget should thus be closely aligned with the plan.

9. **Implement the plan:** It may seem strange to those not used to planning, but part of planning is to see that the plan is actually implemented. A plan is not done until it is acted upon. Otherwise, what use is a plan? This means attaching a “who is taking responsibility for what, when” at least to he initial steps of the plan and seeing that the first steps are in motion.

10. **Evaluation and Sustaining:** No plan is perfect, and in implementation it is often in need of ongoing refinement. This is often done with staff and the parish pastoral council in a monitoring role on behalf of and reporting regularly to the pastor. The regular evaluation is necessary for the plan to remain fresh and operable. This is very important for sustaining the plan through to it becoming a lived reality for the parish.

**Integrating Planning into the Life of the Parish**

Planning in the adaptive mode does not occur as an isolated event. It is part of what the pastor and his leadership groups integrate into their annual agenda cycle. The initial planning process is described above. On an annual basis the parish pastoral council engages in a scanning process asking the appropriate questions to determine if the internal or external conditions under which the parish is operating have changed significantly enough to warrant adapting the plan for the parish to the new circumstances. This is the “adaptive” of adaptive planning. Perhaps a new priority is warranted. Perhaps a particular strategy is not working for one of the priorities. Perhaps there has been a
sudden decline or increase in membership, and so the pastor and parish lay leadership ask themselves why this has happened and how this impacts plan. Perhaps the cultural diversity of the parish has changed and attention needs to be given to liturgies that are culturally appropriate. The need to do a major planning process is minimized by the ongoing adaptive work done by the pastor and his parish leadership. There will come eventually a time for many parishes when the conditions for the parish change so significantly that a whole new planning process is warranted, but this is not too often if the adaptive work has been ongoing.

**Documenting a Parish Plan**

A parish plan is documented so that it can outlive its creators. It becomes a reference guide for the parish council when progress is measured. It is used to focus staff on the mission. It is used whenever major financial decisions are made. Major decisions are held accountable to the plan developed and owned by the parish. When documenting a parish plan the adage “less is better” applies in general. The first three elements of the plan, Mission, Vision and Priorities can all be documented on one sheet of paper. The key steps their time frames are listed on another page under headings made up of the Priorities. This makes up a valuable reference document for the pastor, parish council and staff, and is manageable in terms of publishing to the parish. A more detailed version that includes the key descriptions of the reality that informed the development of the plan is also documented in terms of a one or two page synthesis. That again makes it easy to publish to the community. A more detailed version is made available as needed. What is important is that while a highly detailed plan may be useful for some purposes, those
purposes are actually very limited. Experience shows that a document of more than two or three pages is all that is needed to be useful, and in many cases is actually much more useful than a very detailed document.

A Word on Planning Consultants

“Not all consultants are created equal,” one experienced pastor once said. There are firms that can offer a full services of sophisticated demographic and parish census analysis, facilitation of planning processes and ongoing coaching and monitoring of implementation of a parish plan. Others offer parts of the planning process. Experienced pastors will call other pastors and ask for referrals before they engage outside consultants in planning. They will also ask the diocese to make recommendations. Always ask for examples of parish experience before engaging a planning consultant.

Capital Fund Drives

Sometimes a new pastor will find that there are projects that can not be financed by ordinary operational budgets. Capital fund raising is a term used for providing funds for projects that are not part of the normal operations of parishes. Examples are fixing the church roof, putting up a new building, replacing a boiler or renovating a facility for a new or expanded ministry. In most diocese there are approval processes for engaging in capital fund raising and the local diocesan office can offer guidelines for that approval. There is some general advice to new pastors that many have found helpful.
• Remember that capital fund drives are based on relationships. A pastor who is new to a parish probably does not yet have the relationships to undertake such a program.

• Committing to a capital fund drive when the operational budget is under funded is a significant risk to a parish. It often means that the operational deficits should be addressed first, or that at least a very concrete, viable plan is created for addressing them before making capital fund drive commitments.

• A capital fund drive is one aspect of parish life that should be very data informed and mission driven. Get very good outside advice on the feasibility of fund drive goals. Such advice is sometimes available through diocesan offices and is certainly available through a wide variety of consulting services.

• The identified purpose of a capital fund drive must be directly related to the mission and must be such a compelling project that donors can say yes to it without hesitation. If the argument for going forward is not that compelling, then caution is advised. It is often a good idea to ask the leadership of the parish to articulate not the project itself, but the impact of the project on the mission of the parish. If they can’t do that without significant hesitation, then it probably needs further discussion before going ahead.

• Be aware that the generation of those who gave to the Church out of obligation is fast dying out. Donors are now much more critical and philanthropic, asking for accountability and for articulation of the impact of their donation in considerable detail. Your parish infrastructure should be capable of offering clear, accurate
reporting on its activities and use of money. A capital find drive without this capacity for transparency could even create legal risk

- Fund raising consultants are often helpful, but do extensive homework before signing a contract. A good fundraising consultant has a track record for achieving goals. Do not just ask about averages of dollars raised per engagement. Ask for the exact dollars raised and the goal for every one of their last ten engagements. Ask for the adaptations in strategy the consultant has used in their last four or five engagements. A consultant who has not offered clients a variety of strategies probably is only giving a “cookie-cutter” process to all clients. Call a list of previous clients and ask not only about the actual dollars raised, but also about how the parishes experienced the campaign consultant. Some consultants have been known to raise the required dollars but at heavy cost to the spirit of the community.

- The feasibility of raising a certain amount for a project is always a concern, and the methodology for determining how much a parish can raise has changed over time. For example, one diocese had a formula it used for many years of 1.5 times the plate and envelope collection. There is no evidence that this kind of simple formula is valid. The analysis needed to determine the feasibility of a capital fund drive is quite complex. Beware of consultants who can not articulate how they create the potential number they might give you. It should demonstrate statistical sophistication and many parishes and diocese have parishioners or staff who can assess the validity of a statistical process being used.

Some Conclusions
As a new pastor everyone you meet will have an opinion about almost everything you do. Good planning is a reflective, prayerful and engaging process that offers hope of furthering the mission of the Church. A good planning process has the intrinsic value of bringing participants and the whole of the community closer to fully experiencing both communio and missio. Seeking the will of God is always an ongoing journey, and that, when it is done well, is the deepest rationale for choosing adaptive rather than linear planning processes. It allows the people of God to continuously be on the journey, not standing still, and that is reason enough to make planning integral to the life of the parish.

The real purpose of planning, then, is best expressed by the Second Vatican Council in *Lumen Gentium.*

> This messianic people …. It is established by Christ as a communion of life, of love and of truth; it is also used by him as an instrument for the redemption of all, and is sent out into the whole world as the light of the world and the salt of the earth.”

*(LG, Ch. 9)*

**Some Handy Resources**

- CPPCD - Conference for Pastoral Planning and Council Development at [www.cppcd.org](http://www.cppcd.org)
- Emerging Models of Pastoral Leadership at [http://www.emergingmodels.org](http://www.emergingmodels.org)
- National Leadership Roundtable on Church Management at [http://www.nlrcm.org](http://www.nlrcm.org)
- National Leadership Roundtable on Church Management Churchepedia web site [http://www.churchepedia.org](http://www.churchepedia.org)
• Teamworks International (One of the few consulting and analytics companies that really understands Church) at http://www.teamworksintl.net

Some Thought Provoking Readings

• Euart, Sharon. Structures for Participation in the Church, Origins, May 2005 Vol. 35, Number 2.


