

# Pastoral Planning for a New Millennium

## Five -Year Strategic Plan

### Eastern Greece/Charlotte Monroe-Northwest Region



#### **Members:**

**Holy Cross**

**Holy Name**

**Mother of Sorrows**

**Our Lady of Mercy**

**St. Charles Borromeo**

**St. John the Evangelist**

**Co-chairs: Mary Ann Fackelman and Jack Howell**

#### **Approvals:**

Parish Group Leadership Team (PGLT):

Date: \_\_\_\_\_

Parishioners:

Date: \_\_\_\_\_

Parish Council(s):

Date: \_\_\_\_\_

Bishop:

Date: \_\_\_\_\_

## **Planning Group Leadership Team Members**

### **Holy Cross**

Mr. Joseph Coon (4)  
Ms. Karen Henrichs (1)  
Sr. Kathleen O'Connell (3)  
Mr. Joseph Sturnick (2)  
Rev. Thomas H. Wheeland (4)

### **Holy Name**

Mr. Kenneth Harrison (4)  
Mr. John Howell (Co-Chair)  
Ms. Bernadine Weeg (1)  
Ms. Joann White (3)  
Rev. Charles Manning (2)

### **Our Lady of Mercy**

Mrs. Roni Antenucci (3)  
Mr. Joseph Buscemi (4)  
Rev. Stanley Kacprzak (2)  
Mrs. Maureen Redmond (1)

### **Our Mother of Sorrows**

Mrs. Claudia Adams (1)  
Mr. Robert Bell (4)  
Rev. Thomas R. Statt (2)  
Mr. Robert Weigel (3)

### **St. Charles Borromeo**

Ms. Mary Ann Fackelman (Co-Chair)  
Rev. Edward L. Palumbos (2)  
Mr. David Plankenhorn (4)  
Ms. Patricia Scouten (3)  
Pat and Sandy Tydings (1)

### **St. John the Evangelist**

Mr. Dan Consilio (1)  
Rev. Joseph F. D'Aurizio (2)  
Mr. Gus Holderer (3)

### **PGLT Sub-Teams:**

(The numbers in ( ) after the names in the above parish list indicates which sub-team the member participated in):

1. Communications
2. Configuration
3. Collaboration
4. Finance & Facilities

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# **I. Summary**

## **A. Introduction**

In response to the challenges of the new millennium, the Rochester Diocese organized in 1997, a multi-stage planning process. All of the almost 200 parishes and faith communities of the Diocese were assigned to one of 35 planning groups to assess their individual and group vitality and to develop responses to identified needs.

The parishes of Holy Cross, Holy Name, Mother of Sorrows, Our Lady of Mercy, St. Charles Borromeo, and St. John the Evangelist comprise the planning team designated as the EASTERN GREECE/CHARLOTTE Planning Group LEADERSHIP TEAM (PGLT).

The planning process is based on the pastoral priorities of the Diocese which were determined through the Diocesan Synod. The Synod identified four pastoral goals:

- to form Catholics in beliefs, Catholic morality and spirituality throughout life
- to advocate for a Consistent Life Ethic
- to recognize and value the dignity of women in Church and society, and
- to promote the formation and growth of Small Christian Communities.

Our planning cycle began with each of the six communities undergoing a parish assessment process in the spring of 1998. Parishioners evaluated individual parish strengths and challenges, as well as progress made toward the four Synod goals. Through various forms of parish feedback, each parish determined their highest priority issues.

In a second phase, representatives from each of the six parishes worked as a team to: review priorities identified by the Diocese and the individual parishes to determine areas of common need, assess where collaborative efforts would be appropriate, to develop joint recommendations for our parishes' common future, and draft our first five-year strategic plan.

Parish concerns targeted for review by the joint planning group included:

- OUTREACH TO YOUNG ADULTS (AGES 20 -45)
- OUTREACH TO SINGLE, DIVORCED, SEPARATED, BEREAVED, SINGLE PARENTS, OLDER ADULTS & YOUTH
- EVANGELIZATION OF THE UNCHURCHED
- INCREASING THE NUMBER OF VOLUNTEERS
- INCREASED FINANCIAL DIALOGUE (TWO WAY) WITH THE DIOCESE

Diocesan concerns reviewed by the joint planning group included:

- THE NEED FOR MORE COLLABORATION AMONG THE PARISHES TO ACHIEVE SYNOD GOALS
- STAFFING, ESPECIALLY THE NUMBER OF PRIESTS AVAILABLE OVER THE FIVE YEAR PLANNING CYCLE TO SERVE THE SIX PARISHES.

Because of the number and scope of collaborative planning issues, the Planning Group opted not to approve finalized plans for implementation of each of them. We have, instead, provided for the formation of a continuing Steering Committee that will oversee the development of teams/focus groups of interested parishioners to address particular concerns. Working papers dealing with each issue have been prepared by the Planning Group and will be provided to the Steering Committee and its focus teams for development into finalized plans.

## **B. Issues and Themes**

### **Summary**

**Overall, no crisis level problems were identified for the group or any individual parish.**

- Given the Diocesan commitment to 9 (versus today's 11) priests through the current planning cycle 1998-2003, we will be able to keep all six parishes.
- Financially, parish revenue trends are favorable. All six parishes maintain current budgets and operate under fiscally responsible policies.
- The increasing financial support required for Catholic education programs and other Diocesan components of the parish budgets, however, is a major concern. The Diocese must do a better job of forecasting the Diocesan component and understanding its impact on parish ministries.
- Although some parishes are involved in various stages of renovation and capital projects, funding issues are manageable. No group capital needs are foreseen for the next 5 years.
- All of the parishes in our Planning Group already have some programs underway to address outreach, evangelization and volunteer needs. While good work is being done, there is an opportunity to work together to improve our ministries.

Our Plan is a reasonable first step to put in place the organization and resources for our parishes to deal with current and future challenges. The key elements of the plan are:

1. The immediate formation of THE EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE that will shape and plan collaborative programs for our six parishes over the next four years.
2. The subsequent formation of Steering Committee focus-teams to address particular issues such as finances, outreach to young adults (ages 20-45), outreach to singles, divorced, separated, bereaved, single parents, older adults and youth, outreach to the unchurched and volunteers.

## **Key Assumptions**

- The parishes want to continue to collaborate and will generate the human and financial resources needed to do this in a quality manner.

## **II. Configuration**

### **A. Background**

Over the next 5 years, the 11 priests allotted to the Eastern Greece/Charlotte region, will be reduced to 9. When this reduction occurs, the recommendation is to maintain two priests at the larger parishes (as determined by registered families) and one priest at each of the smaller parishes.

### **B. Recommendations**

**Given the size of the parishes in our planning group, our preference is not to reduce the number of priests serving our community.** It is the consensus of the Planning Group that if a reduction is required, our nine priests be assigned as follows:

- Holy Cross will have a pastor.
- Holy Name will have a pastor.
- Mother of Sorrows will have a pastor and a Parochial Vicar.
- Our Lady of Mercy will have a pastor.
- St. Charles Borromeo will have a pastor and a Parochial Vicar.
- St. John the Evangelist will have a pastor and a Parochial Vicar.

Beyond Mass schedules, there will be the added challenge of prioritizing a priest's time against parish demands. This will require a change in ministry expectations as to who presides at weddings and funerals, who visits the sick in the hospital, and other aspects of parish life.

We (the planning group and each parish) need to begin talking about the challenges in front of us, define what the future environment will look like, and condition our parishes for change.

## **III. Facilities and Finance**

### **A. Present Circumstances**

In reviewing our financial situation, we found that all parishes were meeting their budgeted operations. While the increasing financial support required for Catholic education programs and other Diocesan components of the parish budgets is a growing concern, present financial trends are favorable.

All six of the parishes maintain current budgets and fiscally responsible policies and have active Parish Pastoral Councils along with some form of Facilities and Finance Councils/Committees.

Although some parishes are involved in various stages of renovation and capital projects, we foresee no group capital needs over the next 5 years.

## **B. Recommendations**

1. It is the consensus of the Eastern Greece/Charlotte Planning Group that each parish bear the expenses of upkeep, utilities, and repairs of all the buildings and grounds that currently comprise each of the parishes.
2. Each parish will be asked to provide \$500 in initial seed money for the THE EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE. Expenditures beyond the initial "seeding," will require Parish Council authorization.
3. Individual parishes may save money by combining purchasing power for certain products or services (e.g., building and grounds maintenance, office supplies and equipment, and printing are natural areas for consideration).
4. The Finance focus-team is tasked with the development of a program to increase parish incomes via Wills and Bequeaths (working with the Diocesan Development Office).
5. The Finance focus-team is tasked to improve and leverage financial communications between the six parishes and the Diocese. Initial focus will be on allocation forecasts and the impact of any changes on parish ministries.

## **IV. Communication**

### **A. Present Circumstances**

Collaboration requires communication to be an important early step. Many of us already have formed some means of inter-parish communicating, but inter-parish information is sporadic and limited to occasional bulletin submissions. No overall method of communication exists for the six parishes.

There is a need for parishioners at all six communities to step up the level of communication and information sharing in order to begin to feel that they are part of a larger community.

### **B. Recommendations**

1. A formal process/mechanism should be put in place to share parish calendars and bulletins, to advise parishioners of the social and other activities available at Eastern

Greece/Charlotte parishes, and to enable people from all six parishes to get to know one another better.

2. Staffs at each of the parishes are expected to open and maintain regular lines of communication.
3. This plan proposes an eventual collaboration on a Newsletter or other form of Eastern Greece/Charlotte communication.

## V. Collaborative Programming

### A. Need for Continued Collaboration

Collaboration is not a one-time event or a Diocesan mandate. It is a stage in our transformation from six parishes existing independently to six parishes working together.

Our Plan envisions and establishes an evolutionary process whereby each of the parishes is committed to carefully exploring and developing appropriate future collaborations.

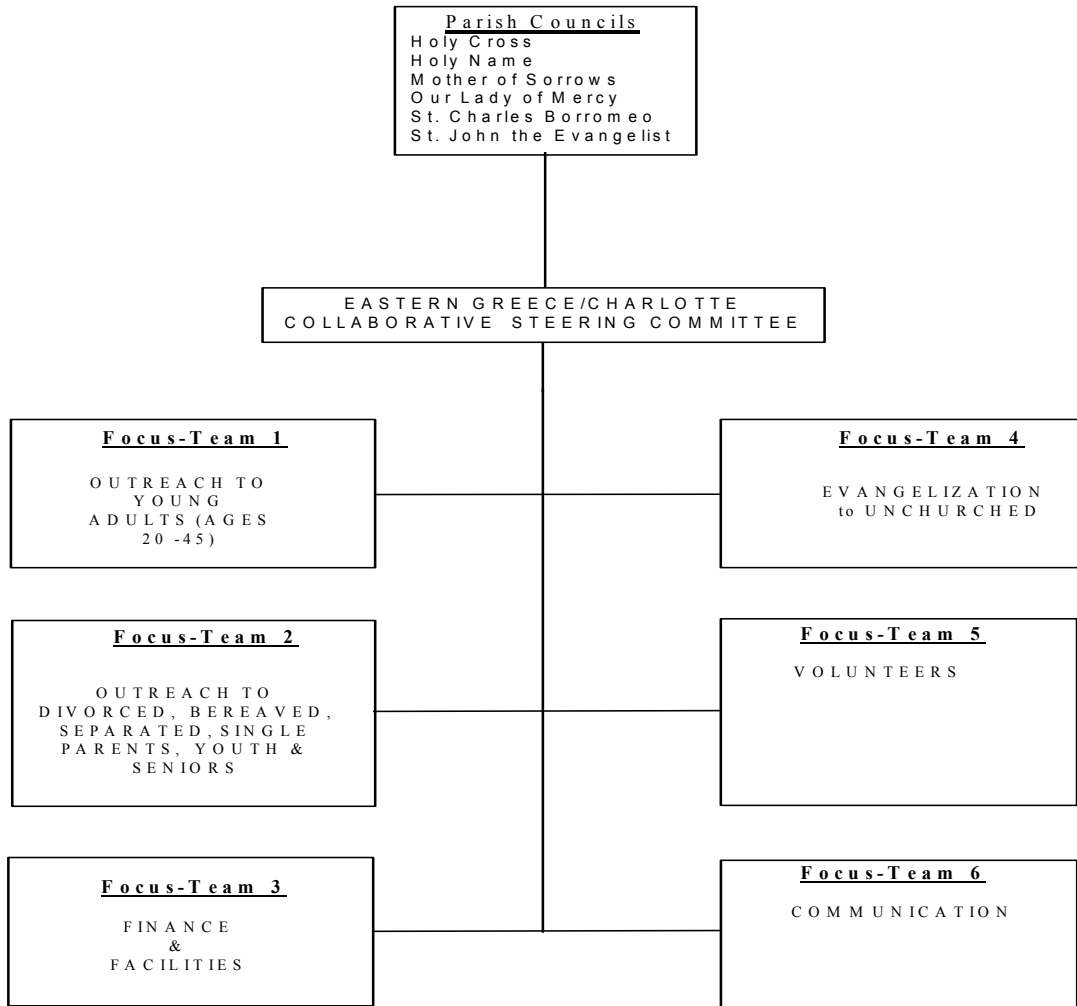
The Plan recommends the establishment of the The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE (EGC<sup>2</sup> Steering Committee) and the subsequent formation of a number of working groups, to continue the work of the PGLT. The Working Groups will not necessarily be new committees, and may not meet often, but rather may be collaborative groupings of teams already in place in our parishes.

### B. Creation of Steering Committee

**Organization:** The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE (EGC<sup>2</sup> Steering Committee) will be comprised of three representatives from each Parish. Those representatives will include the Pastor, a parish staff member, and a parish council member. The EGC<sup>2</sup> Steering Committee will meet at least quarterly to plan and direct collaborative efforts of the focus-teams. Responsibility for facilitating and hosting the meetings would rotate among the six parishes.

**Purpose:** The Steering Committee is intended as a vehicle for collaborative planning, information exchange and the implementation of programs that will better serve the needs of our immediate parishes, the Eastern Greece/Charlotte population and beyond. The implementation of joint projects will be subject to prior approval by those parishes which may wish to participate in any such project. It is understood that all parishes may not want to participate in all projects.

**EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE**



**Tasks of the EGC<sup>2</sup> Steering Committee:** The primary tasks of the Committee are listed below (see appendix B for full detail):

Function as a successor to the PGLT (Planning Group Leadership Team).

Establish focus-teams to address the priorities established by PGLT and review other major issues for any further initiatives or recommendations that should be considered.

Moderate any issues or concerns across the parish/faith communities; suggest resolutions for parish issues that affect the region.

Initially the Committee would meet quarterly. Action items on the Committee's agenda will be made known well in advance of its meetings so that individual Parish Councils can give input to their representatives who will act on their behalf. Decisions will be made via consensus.

**Roles and Responsibilities:** The primary roles and responsibilities of the Committee are listed below (see appendix B for full detail):

The EGC<sup>2</sup> STEERING COMMITTEE representatives will report to their respective Parish Councils.

The EGC<sup>2</sup> STEERING COMMITTEE will not have decision-making power regarding individual parish/faith communities. Any ideas generated by the STEERING COMMITTEE affecting an individual faith community will be presented to the respective Parish Councils for further consideration and/or implementation.

The Parish Councils will evaluate periodically the effectiveness of the EGC<sup>2</sup> STEERING COMMITTEE for any actions required.

Funding for the EGC<sup>2</sup> STEERING COMMITTEE will come from each parish.

## **Initial Actions**

The steps we are recommending now are small ones. We realize that outreach programs are critical to our collective future. Our intention is to revitalize our efforts in two key areas.... to reach those who have left our churches or whose faith is challenged, and address the needs of parishioners who have special needs.

Six focus-teams, reporting through the new Steering Committee, are contemplated to develop specific recommendations and action plans to meet the Plan's goals. The teams are:

- *Outreach to Young Adults (Ages 20-45)*
- *Outreach to Single, Divorced, Separated, Bereaved, Older Adults, Single Parents, & Youth*
- *Evangelization of the Unchurched*
- *Volunteers*
- *Communications*
- *Finance & Facilities*

We have carefully selected the words "focus-team" and avoided "committee." The word "committee" embodies the notion of formal structure and extended involvement. We envision small groups of interested parishioners (every parish does not have to participate on every focus-team or send an equal number of representatives) meeting on an as-needed basis.

We recognize that an effective launch will require the use of outside resources for training and support. We will work with the Diocesan Office to develop training programs in these areas.

**Need for an early success.** To get things started "on the right foot," it is essential that the first project undertaken by the focus-teams be manageable, visible and successful. Expanding our collaborative youth activities may be a prime opportunity.

To be successful, the Committee must be flexible and not limit itself to the items listed here. As parish priorities change and new challenges surface during the year, adjustments could be made.

## VI. Timeline

The following time frame for the implementation of the Pastoral Plan for the Roman Catholic Community of Eastern Greece/Charlotte is proposed:

### Timeline:

<u>DATE</u>	<u>ACTION</u>	<u>WHO</u>
<b>1999-2000</b>	Steering Committee established Committee plan of action established Initial focus-teams formed Communications plan in place At least one focus-team idea implemented	Parishes Steering Committee Steering Committee Steering Committee Steering Committee
<b>2000-2001</b>	Finance sub-team savings opportunities identified Group communication mechanism recommended Priest availability for next 24 months assessed	Finance team Focus-team Steering Committee
<b>2001-2002</b>		
<b>2002-2003</b>		
<b>2003-2004</b>		

## VII. Resource Requirements

### A. Financial Requirements:

Each parish is being asked to provide \$500 in “seed money” for the Steering Committee. Future funding will be based upon Steering Committee recommendations approved by the six Parish Councils.

### B. Staffing/People Requirements:

Each parish is being asked to commit time of the pastor, a staff member, one Parish Council member to the Steering Committee. Focus-team membership will vary by parish. Pastors and staff members are not expected to lead the Steering Committee. Leadership will come from the Parish Council member and focus-team volunteers.

## VIII. Vitality Indicators

Measuring the success of this plan will be difficult because there are many intangibles, but there are indicators that will give us an indication of our progress. These factors would include:

1. The level of participation by parishes (pastors, leaders, staff, volunteers) in follow-on collaborative efforts is sufficient to sustain momentum.
2. "Significant" results concerning identified priorities are being achieved and are visible in the parishes.
3. There is an increased level of communication amongst parishes; joint communication mechanism; improved use of communication technology.
4. Collaboration and cooperation amongst staff and volunteers has increased.
5. Sufficient funding for programs, training/education is in place.
6. This Plan is reviewed and adjusted on a regular basis.

## IX. Advantages and Disadvantages of Plan

### Advantages

1. All six parishes (all of considerable size and complexity) remain intact and maintain their unique identities.
2. Possible financial advantages of combined purchases of office supplies, hymnals, and services such as bulletins, banking, speakers, etc.

### Disadvantages

1. Size is also a disadvantage since it means collaboration among six large and complex parishes will be more difficult.
2. Natural resistance to changes in traditional ways of accomplishing purposes

## **X. Conclusion**

With the publication of this report, the Planning Team has completed the initial work of our Pastoral Plan for our "Eastern Greece/Charlotte Region". Based on the teamwork and cooperation experienced doing this work, we expect to increase the collaboration on the common projects we've outlined above. We're encouraged by the good work and vitality demonstrated by each of our six parishes and we see opportunities to learn from and share with one other. We trust in the guidance of the Holy Spirit... that by working together we will create a stronger local church in our communities. Through the work initiated by our planning team, we believe we are fulfilling the Vision of our Diocese, which is:

*"We, the Catholic Church of the Diocese of Rochester, joyfully embrace our baptismal call to worship God, to preach the good news of Christ, to build up the community of faith and hope in the Holy Spirit, and to serve those in need.*

*As pilgrims nourished by the Eucharist for our journey of faith, we work with other churches and with all who seek harmony within the human family to advance the reign of God."*

## **Appendices**

### **A. Working Papers**

### **B. Follow-on Planning Group Organization**

## **A. Working Papers**

### ***Collaboration Sub-Team***

#### **Collaboration Action Item #1**

### **Blueprint For Continued Collaboration**

**EASTERN GREECE/CHARLOTTE PLANNING GROUP**

#### **A. Description of Issue**

The planning process has given all a broader view of our parishes and the need to network with one another. In this process, a deeper trust and a better understanding of one another has developed, realizing the uniqueness of each parish and the special work they do.

We need a follow-on plan/process to sustain our momentum. The process should enable us to move in an evolutionary and deliberative way to explore and develop appropriate (collaboration does not mean that all parishes must participate in every identified collaborative opportunity) future collaborations.

This action item creates that framework

#### **B. Proposed Responses**

We believe the follow-on process should:

- Include staff, pastors and parish leaders.
- Identify win-win opportunities. A first project should be within our scope of control, display an immediacy of need, affect a number of people in each parish, and be achievable with current resources
- Not assume bigger/Planning Group is always better. There needs to be both a parish and Planning Group element in any path forward.
- Build upon current staff collaborations

- Include education (and perhaps some initial external support) in collaboration. Build an ongoing "give and take" relationship which builds trust and a confidence in working together.
- Build upon experiences gained from Planning Groups further along in their implementation planning.

### **C. Resource Implications**

Human Resources:	Pastors, staff and key parish leaders would have to agree to continue collaboration at a level required to produce meaningful results.
Facilities:	Meetings could continue to rotate among parishes.
Finances:	Some "seed money" will be required. Estimated (rough guess) at \$500 per Parish. Would be utilized primarily for administrative expenses and one or two group training activities .. e.g., collaboration skills.

### **D. Advantages**

A well planned transition process will:

- Help parishes move toward working together as a Planning Group while still maintaining their parish faith community identity.
- Give parishes a deeper confidence in working together... positioning us to creatively deal with bigger issues coming in the near future.
- Gives a greater sense of ownership by all the parishes in developing the future of the Charlotte/Greece Planning Group.
- Continue to utilize small groups to work efficiently

### **E. Disadvantages/Concerns/Issues/Obstacles**

- Parishes have not provided funding in current fiscal year for collaborative efforts. For 1999, this will be treated as an unplanned expense.

- We will have to push ourselves to keep the process going or risk losing momentum (as has happened in the past when efforts were made to address these issues).
- Collaborative planning could be viewed as a loss of parish identity/autonomy.
- Parish staff and lay leaders already have a significant workload. To succeed, this effort will need prioritization. Cannot be “another” project for current parish staff. Staff may be asked for suggestions or help occasionally, but this would be minimal.
- Leadership and staffing must come from people in this age group. Staff may be asked for suggestions or help occasionally, but this would be minimal.

### **Vitality Indicators**

A follow-on Planning Group is implemented

The parishes generate the human and financial resources needed to progress in a quality manner.

Improved communication among staffs, with our parishioners, and between the parishes/faith communities in our Planning Group and with the Diocese...sharing calendars, success stories, etc.

## Collaboration Action Item #2

# OUTREACH TO YOUNG ADULTS (AGES 20-45)

## EASTERN GREECE/CHARLOTTE PLANNING GROUP

### **A. Description of Issue**

All of us are aware of the detachment of young adults from our faith communities.

We see a special need to focus on efforts to reach out to the young adults in our communities. We wish to retain and hopefully increase their participation .... even if only in a limited way to start. We want to let them know that faith doesn't end with high-school graduation or is limited only to "life events" Baptisms, Marriages, Funerals.

Existing programs in the Diocese and parishes have not had the impact we all desire. A different, collaborative approach is needed to reach this diverse group whose faith is "in-process" and who do not see themselves tied to parish boundaries.

Anything we do must be "young-adult friendly," and accommodate their busy life styles. Programs must be implemented in a way that recognizes their desires and provides flexibility and room for individual customization.

### **B. Proposed Responses**

- ***Current efforts at parish level to reach and retain this group include:***

- Welcome new parishioner programs, coffee socials, etc.
- Picnics.
- Sending parish newsletters to all families
- Monthly religious education for families
- Diocesan Programs
- Flexible programming ... adjust meeting times to young adult lifestyles
- Annual parish newspaper
- New parishioner registration packets/booklets
- Parish Web site
- Appeals to participate from pulpit
- Young adult representatives on Parish Councils
- Maintain contact with college students via e-mail

### ***Options***

- 1). Continue with individual parish programs with minimal information & resource sharing

- 2). While maintaining local parish identities, undertake collaborative programs to share talents and resources where appropriate

## **Recommendation**

### ***Option #2. We need to try new (or new to us) ideas:***

#### Areas of opportunity include:

1. Priority #1 ... Engage a group of young adults ( two per parish to start) to establish a planning group to explore, develop and implement joint programs to meet their diverse needs. 20-45 is a broad age range. Multiple initiatives may need to be resourced.
2. Begin by breaking down age group range into more actionable components.
3. Exchange information on how each parish is seeking to achieve its goals in this area. Share current plans/calendars and past experiences. Possibly prepare a Planning Group calendar which includes all major spiritual and social functions of the communities. Include representative from Diocese.
3. Advertise different parishes programs in each others bulletins.
4. Experiment. Try a young adult supper club ... or Mystery Dinner- a meal laden with clues to help you solve the mystery, Who Done It? Consider setting up Planning Group Adult Discussion groups using materials already provided by the Diocese. Entertainment outreach (maybe concerts, plays, etc....)

## **C. Resource Implications**

Human Resources:	Cannot be “another” project for current parish staff. Leadership and staffing must come from people in this age group. Staff may be asked for suggestions or help occasionally, but this would be minimal.  Contact Director of Evangelization and Catachesis about this and other evangelization issues to assess availability of other resources.
Facilities:	Parish facilities will utilized. Rotating similar to PGLT.
Finances:	Advertising costs such as newspaper ads, flyers, or bulletin inserts. Cost of any related training. Funded through parish “seed money” via Finance sub-committee.

## **D. Advantages**

- A small group of young adults is more likely to succeed. They know real and common needs of the people to be served.
- More opportunities for adults to be involved in their faith and faith formation. Will create community spirit, which will result in increased participation in activities, and, in turn, grow spirit.
- Parish geographic barriers will begin to dissolve. A Planning Group focus will facilitate collaboration, trust, and change.
- Collaboration will increase programs and ministry options, and avoid unnecessary duplication of costs and prep time for programs, speakers, classes, training sessions, etc.
- Opportunity for this segment to contribute in meaningful way.

## **E. Disadvantages/Concerns/Issues/Obstacles**

- Young adults are busy building their lives (families, careers, etc.). Finding a significant block of time for this effort could be a problem.
- Will need some scarce parish staff resources to organize and actively facilitate. Prioritization will be an issue.
- New committee may be hard to staff from existing parish volunteers. May need to pay for a temporary resource to assist in jump-starting the process.
- Group might propose what to some might be “unconventional” or “not what we traditionally do” programs. Parishes would need to trust and show some flexibility.

## **Vitality Indicators**

1. Openness and information sharing The recommendation envisions an evolutionary process whereby each of the parishes is committed to carefully exploring and developing appropriate future collaborations. As a result, continued openness and information sharing among the parishes is required in order for the parishes to develop the most appropriate collaborations
2. An increasing number of people will be participating in parish and Planning Group activities.
3. The Planning Group will generate the human and financial resources needed to achieve its goals in a quality manner.
4. Improved communication among staffs, with our parishioners, and between the parishes in our Planning Group.

## Collaboration Action Item #3

# OUTREACH TO SINGLE, DIVORCED, SEPARATED, BEREAVED, SINGLE PARENTS, OLDER ADULTS & YOUTH

## EASTERN GREECE/CHARLOTTE PLANNING GROUP

### **A. Description of Issue**

All of the parishes in our Planning Group already have some outreach programs underway to address the concerns of single, divorced, separated, bereaved, seniors and youth. (We separated this group from the “young adults ages 20-45) in Action Item #2 because they tend to be more visible and involved in parish activities. At the same time, because they are not in a family situation, they tend to feel less “connected” to the parish).

While good work is being done in individual parishes, we all recognize that there is an opportunity to improve our ministries to these diverse communities. We want to work together to make our outreach ministries more available and comprehensive.

Our parishes must be places where all are welcome and where spiritual growth is a primary goal. The challenge is to recognize the varieties of life situations present in this demographic group. Our people need opportunities to gather in small groups to share their faith journey as well as come to see themselves as parts of a larger, Planning Group community.

Enhanced communication and collaboration among the parishes will be essential to meeting the group’s needs. We must expand current collaboration in parishes so that members of all of our communities will feel more informed about events within their communities, as well as what is happening in other areas around them.

### **B. Proposed Responses**

A primary concern is to become more aware of existing programs to identify unnecessary duplication, thereby saving money and staff time. As a first step, the collaboration team will exchange information on how each faith community is seeking to achieve its goals in this area. See attached summary.

Second, a second sub-team will be formed (initially may include staff representatives of each parish) to analyze the list of programs and to share successful ideas/programs. Where practical, opportunities to develop, resource and implement joint programs will be proposed.

#### Areas of opportunity include:

1. Older Adult programs and Caregiver Programs

2. Look for ways to combine and strengthen programs such as: Youth Ministry, Religious Education, Parental Meetings for our Sacraments, Young Adult Programs, Adult Education, Bible Study, and retreats.
3. Possible recruitment of college students for service or credit earning (Social Service Internship) opportunities.
4. Better use of email and faxes to collaborate on programming (virtual meetings).
5. Provide opportunity for people from different parishes to meet and get to know each other, e.g., bereavement groups. Look for ways to reduce duplication of effort, conserve resources, and make efficient use of volunteers. Possibly offer educational sessions rotating throughout the communities of the Planning Group, e.g., lector training.
6. Organize and maintain a Planning Group calendar which includes all major spiritual and social functions of the parishes. Some of the ideas to consider are a Planning Group web-site, and listings in local papers and on local television. Our collective Mass schedules would be circulated to local newspapers, motels and hotels.
7. Take advantage of available training for people supporting these ministries.

### **C. Resource Implications**

Human Resources: Parish staff in best position to start project. While they would not necessarily drive the effort, their involvement is critical to the sub-teams success.

Participation will need to be prioritized along with other parish needs. Agreements need to be formalized and reflect shared planning group priorities.

Facilities: Parish facilities will utilized. Rotating similar to PGLT.

Finances: Funded through parish "seed money" via Finance sub-committee.

### **D. Advantages**

- A special sub-team focus will facilitate collaboration, trust, and change, and provide a vehicle to deal with future issues as they arise.
- Sharing will increase programs and ministry options, and avoid unnecessary duplication. No cost duplication when speakers and trainers are hired for the Planning Group.
- Enhanced outreach will engage more parishioners to live their Faith more fully.

- Individual parishes will learn from one another.

### **E. Disadvantages/Concerns/Issues/Obstacles**

- Difficult to plan and coordinate across six independent parishes.
- Finding people to supplement staff to serve on this sub-team for a sustained period.
- Participation could cost parishes (some) more money.

### **Vitality Indicators**

- Parishes agree to provide “seed money” for 1999 and incorporate future collaboration into future budgets.

## Collaboration Action Item #4

# EVANGELIZATION of the UNCHURCHED

## EASTERN GREECE/CHARLOTTE PLANNING GROUP

### **A. Description of Issue**

Evangelization is critical to our continued existence and the vitality of the parishes of Greece/Charlotte Planning Group.

There is a recognized need for improved evangelization within our communities with special attention to re-connecting and re-activating our unchurched, alienated and inactive members. Our goal is to make evangelization a natural and normal part of parish life so that we can invite all people in the Planning Group to hear the message of salvation and join us in the fullness of our Catholic faith.

### **B. Proposed Responses**

An Evangelization committee composed of members of each parish will be formed to develop a Planning Group strategy and plan. Working together, they will bring the necessary tools and support to the Planning Group parishes in order for us all to carry out meaningful and effective evangelization while allowing each parish retain its individual identity.

*Possible areas of opportunity might include:*

- Explore using outside resources (including but not limited to Renew, Franciscan University at Steubenville, Isaiah Ministries, or Catholic Answers, Inc.) to help us plan a successful evangelization program, and for training and support.
- Annually Planning Group social events.
- Investigate and institute programs already developed by the Pastoral Office to provide hospitality, outreach and education to alienated and/or apathetic members.
- Provide brochures about our communities and/or ads in Pennysavers for delivery to new residents.
- "Come Home for Christmas" program
- Send out Planning Group/parish newsletter on a monthly or bimonthly basis to help remind lapsed Catholics of their heritage and let them know what is going on in their church.

### **C. Resource Implications**

Human Resources: Parish staff in best position to start project. While they would not necessarily drive the effort, their involvement is critical to the sub-teams success.

Participation will need to be prioritized along with other parish needs. Agreements need to be formalized and reflect shared planning group priorities.

Facilities: Parish facilities will utilized. Rotating similar to PGLT.

Finances: Funded through parish “seed money” via Finance sub-committee.

### **D. Advantages**

### **E. Disadvantages/Concerns/Issues/Obstacles**

- How to construct a Planning Group program that allows each parish retain its individual identity
- Activity will have to be prioritized into current parish staff workloads. Cannot be another “add-on.”

### **Vitality Indicators**

- Increased participation by unchurched.

## Collaboration Action Item #5

# VOLUNTEERS

## EASTERN GREECE/CHARLOTTE PLANNING GROUP

### **A. Description of Issue**

The growth and vitality of parish life and the success of the new Steering Committee is highly dependent upon the stewardship of the parish community – time, talent, and treasure.

Each of the parishes in our planning Planning Group attempts to capture these resources in different ways. There are two realities common to all of our parishes: (1) *we never have enough volunteers*, and (2) *there is a small core of volunteers (same faces) at the heart of each parish*. Some of the specific challenges around recruitment and retention of volunteers include the following:

- The growing number of volunteers in the 45 years and up category.
- Volunteers are often involved in multiple committees and as they grow tired and resign, parishes struggle to recruit new members with *new* ideas and new energy
- Adults with children living at home are less willing to make commitments of this nature.

Staffing the new Steering Committee and the development of a strong parish volunteer programs requires many skill sets. The burden is less when the burden is shared.

### **B. Proposed Responses**

A Volunteer Sub-Committee composed of members of each parish will be formed to develop an action plan to address both the immediate need to staff the 5 Steering Committee sub-teams and the larger issue of how to attract more volunteers in the individual parishes.

*Possible next steps might include:*

1. Parish representatives and staff liaisons meeting with the support of a professional facilitator with expertise in volunteer administration. The facilitator will lead a focus group to identify the problems with volunteer recruitment and retention at each parish.
2. Analysis of current trends in volunteerism and volunteer administration to provide suggestions for rebuilding our volunteer base:

### **C. Resource Implications**

Human Resources: Parish staff in best position to start project. While they would not necessarily drive the effort, their involvement is critical to the sub-teams success.

Participation will need to be prioritized along with other parish needs. Agreements need to be formalized and reflect shared planning group priorities.

Facilities: Parish facilities will utilized. Rotating similar to PGLT.

Finances: Training class on current trends in attracting and retaining volunteers may be required. No dollar amount estimated.

#### **D. Advantages**

- Enables a greater expansion of current ministries, programs, Planning Group training and education.

#### **E. Disadvantages/Concerns/Issues/Obstacles**

- Short-term, may have to draw from current staff and volunteer pool (the same faces).
- Staff workload prioritization
- If we are not successful in adding to the existing volunteer pool, we risk burnout of current contributors.

#### **Vitality Indicators**

An increase in the volunteers who step forward to serve the individual parishes and the broader collaborative ministries of our parishes.

## ***Finance and Facilities Sub-Team***

<b>Finance/Facility Action Item #1</b>
<b>Diocese</b>
<b>EASTERN GREECE/CHARLOTTE PLANNING GROUP</b>

### **A. Description of Issue**

There is a critical need for advanced information and long term information on school tuition, Diocesan Programs and Assessment, and all Operational Expenses. Local Parish Finance Committees also need information to effectively plan Parish budgets, sources of funding, etc. Parishes need to understand the level of annual increases they can expect in order to feel secure in their ability to commit to Catholic education and Catholic Schools. Expectations of dramatic increases, or worse, fear of the unknown, is a deterrent and has caused both defections from Catholic Schools and decisions not to even start.

### **B. Proposed Responses**

The Diocese does have planning information so this may largely be a matter of communications. The Diocesan School office and / or each School office should provide to school parents and to the Parish community at large (including non - school parishes), a specific annual tuition schedule for each current year and an estimated level of increase for the following 3 - 5 years. This can be qualified with information about the Parish subsidy and the risk / opportunity that exists as the plate collections go up or down. Each annual communication should be accompanied by a reference to the prior year's estimate and the cause for any variance.

Similarly, the Diocese must provide long term planning estimates to each Parish Finance Committee on the assessment for Catholic Schools/tuition, Thanksgiving Appeal, and any other existing or new assessments. Again, when estimates change substantially, provide information about why.

The timing of these communications is also very important. The more advanced notice / communication, the better. The more consistent with the schedules of the Parish Finance Committees, the better.

As part of the new Steering Committee, a Finance sub-committee will be formed to foster improved communication among quadrant parishes and act as a liaison between the six parishes and the Diocese. Acting as a single voice will bring greater leverage and focus to Steering Committee issues.

### **C. Resource Implications**

Human Resources: 1. Human Resources of the Parish Community - None  
2. Staff - minor, annual requirement to facilitate communications

Facilities: N/A

Finances: N/A.

### **D. Advantages**

1. Enables parents to make a long term commitment to Catholic education and specific Catholic Schools. May lead to increased enrollment and decreased departures.
2. Enables Parishes to better plan sources and uses of funds.

### **E. Disadvantages/Concerns/Issues/Obstacles**

- None

### **Vitality Indicators**

1. Positive trend in sources of income.
2. Improvement in enrollment / reduction in "drop out" rate.

## Finance/Facility Action Item #2

### Parish

#### EASTERN GREECE/CHARLOTTE PLANNING GROUP

#### **A. Description of Issue**

Facts :

- Each parish has indicated that their capital requirements are within their own funding capabilities.
- General Expense -
  - Salary expenses will increase as more and more activities are performed by lay people.
  - The Diocese controls priests and religious salaries.
  - 70 - 80% of Parish budgets may be outside of their control.

#### **B. Proposed Responses**

- *Parishes* need to ensure they understand their current position with respect to Diocesan salary scales; recognize the additional cost of using lay people and plan for any increases.
- *Parishes* should also strive to develop an "emergency reserve fund, no matter how small - a start is important.
- *Parishes* need to take the initiative to communicate to their Parish communities, levels of increased expenses and explanations of what is driving the changes.
- *The Diocese* needs to evaluate the overall effort to create the summary financial information used in the PPNM process as it is significantly inaccurate and could be misleading.
- *The Diocese* needs to provide advanced planning information to the parishes with regard to tuition and assessments (see Diocesan Issues).

- *The Planning Group Collaboration Sub - Team* is asked to evaluate a joint program for Wills, Bequeaths, or Deferred Giving as a means of additional income. This can be integrated with that team's action #1 on continued collaboration

### **C. Resource Implications**

Human Resources: 1. Human Resources of the Parish Community - None  
2. Staff - minor, annual requirement to facilitate communications

Facilities: N/A

Finances: N/A.

### **D. Advantages**

1. Will eliminate / minimize surprises adversely affecting expenses.
2. Will provide some preparation for unexpected expenses.

### **E. Disadvantages/Concerns/Issues/Obstacles**

- None

### **Vitality Indicators**

1. Positive trend in sources of income.

Positive trend in budget effectiveness

## Configuration Sub-Team

<b>Configuration</b>
<b>Reduction of Priests</b>
<b>EASTERN GREECE/CHARLOTTE PLANNING GROUP</b>

### A. Description of Issue

Reduction of priests from 11 to 9.

### B. Proposed Responses

**Reduce TWO Parochial Vicars**, one from each of two different parishes \*, which presently have at least one parochial vicar. This would result in having two priests at each of the three larger (as determined by registered families) parishes (i.e., St. John's, M.O.S. and St. Charles) and one priest each at the three smaller parishes (i.e., Holy Cross, Holy Name and Mercy)

The breakdown would be as follows:

• Holy Cross	1*
• Holy Name	1
• Mother of Sorrows	2
• Our Lady of Mercy	1
• St. Charles Borromeo	2*
• St. John the Evangelist	<u>2</u>
<b>TOTAL</b>	<b>9</b>

### C. Resource Implications

Human Resources: 1. Human Resources of the Parish Community -

- Increase in workload for remaining priests (meetings, administration, etc.)
- Decreased ratio of priests:families (approx: Holy Cross- 1:2100, St. Charles Borromeo - 1:1250)
- St. Charles' Prayer Center's duties will need to be studied and adjusted as determined by the prayer center

2. Staff -

- Others may need to be hired to take on some duties (previously done by priest) from priests. (Eg. Planning for Funerals, Weddings ...)

Facilities: St. Charles & Holy Cross have indicated that if the # of Masses needed to be decreased their current facilities would be adequate for increased Mass attendance.

Finances: Financial impact would be borne by St. Charles & Holy Cross should additional staff hiring become necessary.

#### **D. Advantages**

1. Has the least negative impact on the people in the parishes throughout the Planning Group.
2. This solution reflects a reality which parishioners have been prepared for in light of the priest shortage.
3. In many cases where there has been a decrease in the # of ordained ministers it has occasioned a greater level of participation and shared response among of staff & parishioners.
4. Maintains Parish integrity.

#### **E. Disadvantages/Concerns/Issues/Obstacles**

1. Inconvenience to parishioners due to possible reduction in Masses.
2. Challenge of meeting the expectations of parishioners for the presence of a priest presiding at liturgical celebrations.
3. Priests struggling with the tension of not meeting (their and parishioner) expectations to preside at various functions and liturgical celebrations.
4. Decreased ratio of priests:people could lead to decreased attention to parishioner needs. This could result in reducing the priests' role to that of sacramental functionary.
5. Priest focus on sacramental, spiritual and administrative duties will be challenged due to increased workload.

## **Vitality Indicators**

1. Impact on priest's workload
2. Impact on parishioners
3. Short- or long-term solution
4. How final/reversible is the action
5. How radical/realistic is the action
6. Extent of financial impact.

## **B. Follow-on Planning Group Organization**

### **EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE**

#### **A. Membership:**

Holy Cross  
Holy Name  
Mother of Sorrows  
Our Lady of Mercy  
St. Charles Borromeo  
St. John the Evangelist

#### **B. Purpose:**

To provide for collaborative

- planning
- information exchange
- program implementation which will better serve the needs of our immediate parishes as well as the entire Eastern Greece/Charlotte population and beyond.

#### **C Organization:**

Three representatives (Pastor, one member of parish staff, and one parish council member) of each parish will constitute the initial EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE which will meet at least quarterly to plan and direct collaborative efforts to the Eastern Greece/Charlotte communities. Six sub-teams will be formed to implement joint projects, which will be subject to prior approval by each parish which may wish to participate in any such project. (It is understood that all parishes may not want to participate in all projects).

#### **D. Tasks of the EGC<sup>2</sup> Steering Committee:**

1. Function as a successor to the PGLT.
2. Measure the success of the plan by using the vitality indicators outlined in the Final Plan
3. Review other major issues for any further initiatives or recommendations that should be considered.
4. Communicate individual parish/faith programs, ideas and concerns so that they can be addressed regionally.
5. Moderate any issues or concerns across the parish/faith communities; suggest resolutions for parish issues that affect the region.
6. Communicate regional concerns and programs back to each parish and act as a focal point to coordinate the regional issues with the Rochester Diocese.
7. Initially the Committee would meet quarterly, with an eventual meeting schedule determined to suit the needs of the group. Quarterly meetings will also include a representative from each focus-team. Responsibility for facilitating and hosting the meetings of the Committee would rotate among the six parishes.

8. Action items on the Committee's agenda will be made known well in advance of its meetings so that individual Parish Councils can give input to their representatives who will act on their behalf. Decisions will be made via consensus. Formal minutes will be written and distributed to the communities.

#### **E. Roles and Responsibilities:**

1. EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE will consist of three representatives from each parish.
2. All pastors will be members of the Council. The two other representatives will include one staff member and one parish council member.
3. The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE representatives will report to their respective Parish Councils and Diocese PGLT.
4. Each Parish Council will identify the needs of its own parish/faith community. This assessment will be brought to the EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE by the faith community representatives to encourage collaboration in filling the needs.
5. The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE will not have decision-making power regarding individual parish/faith communities. Any ideas generated by the EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE affecting an individual faith community will be presented to the respective Parish Councils for further consideration and/or implementation.
6. The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE and the individual Parish Councils will determine how to measure the success of the STEERING COMMITTEE.
7. The EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE will gather measurement data and report this information to the Parish Councils.
8. The Parish Councils will evaluate periodically the effectiveness of the EASTERN GREECE/CHARLOTTE PASTORAL COUNCIL for any actions required.
9. Funding for the EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE will come from each parish. As part of the approval process for this five year plan, each parish is being asked to allocate \$500 in seed money to launch the Steering Committee. As the sub-committees develop their specific actions and funding needs, the Finance sub-committee is expected to develop a proposal for on-going funding, e.g., based upon parish income.

#### **F. Initial Focus-Teams:**

1. OUTREACH TO YOUNG ADULTS (AGES 20 -45)
2. OUTREACH TO SINGLE, DIVORCED, SEPARATED, BEREAVED, SINGLE PARENTS, SENIORS & YOUTH
3. FINANCE AND FACILITIES
4. EVANGELIZATION TO UNCHURCHED
5. VOLUNTEERS
6. COMMUNICATION

**G. Duration:**

The Steering Committee will last for the remainder of the planning cycle through 2002.

**H. Role Relative to the Parishes:**

The committee will be an advisory and planning group not intended to usurp parish authority.

**I. Finances:**

To be administered on an as-needed basis and shared among the participating parishes subject to their approval.

**J. Communication/Public Relations:**

The committee will have a communication focus-team for parish awareness, education, and to publicize committee activities.

**K. Organization Chart:**

See next page.

**EASTERN GREECE/CHARLOTTE COLLABORATIVE STEERING COMMITTEE**

