

Suggested Timeline for Pastoral Planning

Pastoral Planning has a long history in the Diocese of Rochester, with the necessary processes changing and adapting to new needs and challenges. Through all the historic methods of Pastoral Planning, one consistent is its purpose: that the Mission of the Church may be more effectively implemented. Pastoral Planning may be necessary for a number of reasons:

1. Financial challenges (i.e., immediate or near-term financial insolvency, regular use of patrimony to fund operating deficits, expenses pending financial concerns such as projections of serious financial loss in the coming 5 years).
2. Infrastructure needs (i.e., anticipated campaign pending infrastructure needs or significant capital expenses in the next 5 years, sudden infrastructure needs or crises, large-scale repairs or proposed renovations)
3. Appointment changes (i.e., anticipated move of a pastoral leader due to senior status, end of term, or end of transitional leadership due to sudden illness or death of a pastoral leader)
4. Changing demographics in a region of the Diocese

Step One – Week 1 and 2

The Bishop will appoint a Delegate to lead and coordinate planning efforts. The Bishop selects the Delegate freely. Suitable candidates could be a Pastor, the Dean, a local Priest or Deacon, a Regional Finance Director, a current or former Pastoral Council Chair, or a Lay Trustee. After consultation with the Delegate, a Planning Facilitator may be named. The Bishop's letter of appointment will describe the presenting problem (financial issues, decline in numbers, infrastructure needs, etc.) timeline, and preferred outcomes.

The Delegate gathers the relevant data, including:

- Potentially impacted ministries (types of ministries, number of volunteers who assist, number of people served, frequency of use)
- Types of Staffing (full time, part time, ministerial, administrative)
- Buildings assessments (anticipated capital expenses, handicap accessibility, parking, technology, available rooms, etc.)
- Financial figures
- Demographics and weekly attendance numbers

Step One Communication (via bulletin announcement, parish website, parish email distribution lists, and pulpit announcement): The Delegate and/or the Pastor(s) should notify the impacted communities that planning is underway. The Bishop's letter may be shared. The presenting problem, name of the Delegate, general description of the process and timeline should be communicated.

Step Two – Weeks 3- 4

The Delegate with Pastor(s) gathers a team with representation from each impacted community (parishes, schools, campus ministry, etc.) and first meeting set. If a Planning Facilitator is named, he/she coordinates and facilitates the meetings. The role of the team is to provide consultation to the Pastor(s), and this role should be explained in any communication to the communities. The team is not meant to provide “vote” for the preferred way forward. The role of the team is to assist in assessing the benefits and drawbacks of potential paths forward, which will provide a rationale for a final recommendation to the Bishop.

Step Two Communication (via bulletin announcement, parish website, parish email distribution lists, and pulpit announcement): : Announcement of the name of the teams and sharing of the data which will serve as the basis of the consultation.

Step Three – Weeks 5 - 10

Viable options for continuing the Mission of the Church, stabilization, and long-term growth are determined. The Delegate is responsible for utilizing diocesan resources as appropriate (i.e., the Chancellor’s office, Human Resources, Finance, Pastoral Planning, Catholic Schools, Evangelization and Catechesis, etc.) The Bishop may designate a fiscal or buildings diocesan staff point person to assist the Delegate in navigating options, particularly if those options involve the sale of a Church building.

All options under consideration must comply with relevant Diocesan Policies and Procedures, including the following:

- Procedure for Relegation of a Church
- Procedure for Closing/Vacating, Leasing, Selling or Demolishing of Parish Buildings
- Transactions of greater importance (Found in Parish Finance Council Guidelines)
- Clustering Councils Guidance (Found in Pastoral Council and Parish Finance Council Guidelines)

Step Three Communication (via bulletin announcement, parish website, parish email distribution lists, and pulpit announcement): Establish the dates and means for feedback and communicate to the parishioners. There should be multiple methods of gathering feedback: town hall (in person or virtual), survey on the website or through email, drop off boxes, etc. It should be clear that this is not a voting process, but a request for feedback and input.

Step Four – Week 11

Present viable options to the impacted communities, including why they are needed, how they support the Mission of the Church moving forward, benefits of these options over other possibilities, and a request for feedback.

Step Four Communications Presentations should be available in multiple ways: on the website, in a mailing, through email distribution lists, etc.

Step Five – Weeks 12 - 16

Team assesses feedback and comes to a recommendation, which the Delegate/Pastor(s) communicate to the impacted communities and Diocesan Bishop. The Bishop, in consultation with appropriate executive staff and Consultative bodies accepts, modifies, or rejects recommendations. This decision is communicated to Delegate, Pastor(s) and Team. The Pastor(s) communicate the decision to the communities.

Final Step

Implementation of the plan begins.