



*We will do all that is possible to strengthen
the vibrant parish life to which Jesus calls us.*

Cluster Planning and Coordination Handbook

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Future Appendix items will be developed to address a range of emerging questions and planning issues and presented on the diocesan website at <http://www.dioceseofcleveland.org/vibrantparishlife>.

22 May 2007

Dear Pastors, Administrators, Parish Life Coordinators and Parish Leaders,

Following extensive work and deliberation, I am pleased to present this Cluster Planning and Coordination Handbook. The Diocesan *Vibrant Parish Life – Phase II* Committee and its Cluster Resources Subcommittee has worked diligently on this handbook over the past year. It has been developed to support the work of our newly formed Cluster Planning and Coordination Teams (CPC Teams).

Earlier drafts of this handbook were presented to the Diocesan Pastoral Council, District Chairpersons, and the Presbyteral Council for consultation and feedback in February of 2007. Refinements in this final version have resulted from the collective wisdom which they shared.

Cluster planning is intended to enhance the vibrancy of parishes and to strengthen the mission, ministry and pastoral care of the Church in an equitable manner throughout the eight county Diocese of Cleveland.

As we face growing challenges with regard to changing demographics, finances and fewer priests, we need to take the necessary steps now that will enable us to provide a strong and lasting Catholic presence in every area of our diocese. We need to be good and faithful stewards of the resources which God has given to us.

I ask that you and your parish leaders approach this work in a spirit of prayer and discernment. I hope that we can all be open to the best possible insights for strengthening pastoral care within each cluster area. I realize that this can be challenging work. It will be very important to look to the greater good of our diocesan Church.

Please know that I remain very grateful for your cooperation as we work to fulfill the Mission of Christ in every area of our diocese.

Sincerely yours in Christ,

A handwritten signature in black ink that reads "Richard Lennon". The signature is written in a cursive, flowing style.

Bishop of Cleveland

OVERVIEW OF THIS HANDBOOK

This handbook is divided into five sections:

- **Introductory Context** – This section contextualizes the work of cluster planning and coordination in the larger context of the Vibrant Parish Life initiative, from its inception to the present time. It also outlines the roles and responsibilities of the diocese, the parish and the Cluster Planning and Coordination Team in this phase of the process.
- **Outline and Description of Steps** – This section provides an overview of the cluster planning process, first in outline form and then in greater detail. Included here are “how to” steps related to updating the results of Vibrant Parish Life – Phase I; forming the CPC Team; discerning priority issues for the cluster based upon the significant issues and challenges presented by Bishop Lennon and the CPC Team’s further study of cluster realities and pastoral needs; discerning cluster directions and goals to address the priority issues; soliciting feedback from the parish level; refining a cluster plan and submitting it to Bishop Lennon for approval.
- **Key Roles Involved** – Cluster planning is a collaborative process requiring the combined effort of persons at the parish, cluster, district and diocesan levels. This section outlines key roles involved at various stages in cluster planning.
- **Example Areas of Planning** – This section provides examples of areas for planning and pastoral care which a cluster might consider as part of its cluster pastoral plan.
- **Appendices – Supplementary Resources** – While the cluster planning steps are spelled out in detail in the body of this handbook, not all planning processes will be identical. Some cluster realities will necessitate the consolidation of parishes to strengthen the long term mission and ministry of the Church in the cluster area. Others may need assistance in building relationships among Team members, or learning how to discern as a group. Still others may need help in forming a work plan or conveying the reality of cluster planning to their parishioners. This section provides additional resources to assist CPC Teams in various aspects of their important work.

The members of the *Vibrant Parish Life – Phase II* Committee and its Cluster Resources Subcommittee will keep you in prayer as you begin the next phase of this initiative. The Committee members represent a broad cross-section of our diocese, with representatives of each district, major consultative group and area of diocesan administration. The Committee wants to be of support to you as you proceed and encourages you to call with any questions, comments or concerns. You may either call one of the members listed on the following page or the general number for the Committee staff at the Pastoral Planning Office: 216-696-6525 or 800-869-6525, ext. 4210.

May God’s blessings and guidance be ever with you!

**VIBRANT PARISH LIFE – PHASE II COMMITTEE
MEMBERS AND AREAS OF REPRESENTATION
2006-2007**



District Representatives:

Central East	Pam Petty, <i>St. Philip Neri</i>
Central West	Fr. Tony Schuerger, <i>St. Malachi</i>
Northwest	Dick Beercheck, <i>St. Patrick, West Park</i>
Southeast	Diana Lipfird, <i>Our Lady of Lourdes</i>
Suburban East	Fr. Jim Caddy, <i>St. Francis of Assisi</i>
Suburban Southeast	Fr. Charlie Diedrick, <i>St. Barnabas</i>
Lake/Geauga	Fr. John Betters, <i>St. John Vianney</i>
Suburban West	Fr. John Chlebo, <i>St. Christopher</i>
Suburban Southwest	Lisa Radey, <i>St. Matthias</i>
Lorain	Rita Bowen, <i>St. Agnes, Elyria</i>
Summit North	Fr. Paul Rosing, <i>Holy Family, Stow</i>
Summit South	Melissa Keegan, <i>Immaculate Conception, Akron</i>
Ashland/Wayne/Medina	Mary Fran Ehlinger, <i>Holy Martyrs</i>

Other: Nationality Parishes (European)

Fr. Joe Boznar, *St. Vitus, Cleveland*

Consultative Groups:

Diocesan Pastoral Council	Frances Condora, Sr. Irene Charette, OSU
Presbyteral Council	Fr. Paul Rosing
Conference of Religious Leadership	Sr. Rochelle Guertal, OSST
Finance Council	Peter A. Carfagna
Catholic Diocese of Cleveland Foundation	Donna Rego

Diocesan Staff:

Auxiliary Bishop	Bishop Roger Gries, OSB
Parish Life	Sr. Rita Mary Harwood, SND
Clergy & Religious	Fr. Larry Jurcak
Clergy Personnel	Fr. Don Oleksiak
Catechetical Services	Joyce Kelleher
Catholic Schools	Margaret Lyons
Catholic Charities Parish Services	Terry Flanagan
Finance	John Maimone
Communications	Bob Tayek
Hispanic Office	Misael Mayorga
Pastoral Planning	Rick Krivanka, David DeLambo

Cluster Resources Subcommittee:

Gerald Arnold, <i>Finance Office</i>	Rick Krivanka, <i>Pastoral Planning</i>
Frances Condora, <i>Diocesan Pastoral Council</i>	Fr. John McNulty, <i>Holy Cross, Euclid</i>
David DeLambo, <i>Pastoral Planning</i>	Fr. Paul Rosing, <i>Holy Family, Stow</i>
Sr. Rita Mary Harwood, SND, <i>Parish Life</i>	Bob Tayek, <i>Communications Department</i>
Carolyn Jablonski, <i>St. Gabriel, Concord</i>	

SECTION 1:

**Introductory
Context**

INTRODUCTION

Cluster planning within the context of the *Vibrant Parish Life* initiative

In 2001, *Vibrant Parish Life* began as a major diocesan initiative that continues to serve as the framework for an evolving “pastoral plan” for our diocese. The heart of this message is grounded in the hope that we will do all that is possible to strengthen the vibrant parish life to which Jesus calls all of us – for parishioners, priests and parish ministers.

The implementation of the first phase of *Vibrant Parish Life* included training parish leaders, educating parishioners, conducting parish self-studies, and networking among parishes to explore further opportunities for collaboration around common interests.

Phase I of *Vibrant Parish Life* created a context for planning and served to strengthen the life and ministry of our diocesan Church. It built upon the work of *The Church in the City* initiative and parish partnerships, school planning, and other diocesan efforts. In light of these initiatives, many of our parishes have used their self-study findings to renew parish life, develop ministries to better serve people, and strengthen collaborative initiatives with other parishes. There is a growing mentality of cooperation and collaboration in the diocese. In discussions within and among parishes, people ask: “How can we do this collaboratively?”

Phase II builds on the collaboration begun in Phase I. It recognizes that we are being called to live the mission of the Church in new ways so that every area in the Diocese of Cleveland has the opportunity to further develop vibrant Catholic communities and ministries. This phase centers more intentionally on education, planning, and collaboration in clustering, reconfiguring and effectively staffing parishes. This phase is needed to address the changing diocesan realities related to demographics, finances, and the number of priests available, and the implications of these realities for the presence and ministry of the Church.

Purpose of cluster planning and coordination

The use of clusters of parishes is a means to assure that every area in our Diocese has a strong lasting Catholic presence with a vibrant sacramental and pastoral ministry, life-long faith formation, evangelization and outreach to the wider community, and a healthy ministerial situation for priests and ministers.

The purpose of cluster pastoral planning and coordination is to reflect prayerfully and evaluate the vitality of the Church in each cluster area, and to plan ways to strengthen the presence and pastoral care of the Church in an equitable manner throughout our diocese.

The cluster planning for each group of parishes will be facilitated by the work of the Cluster Planning and Coordination Team (hereafter referred to as the CPC Team). This CPC Team, composed of representatives from each parish in the cluster, will reflect prayerfully and dialogue about the vitality of the Church in the cluster area. It will engage in a collaborative process to address the directions set forth by Bishop Lennon in order to meet pastoral needs for the coming years. In some cases, these collaborative efforts will lead to parish consolidation by merging or closing parishes to strengthen the long term mission and ministry of the Diocese of Cleveland.

Through its parish representatives, the Cluster Planning and Coordination Team will need to encourage an ongoing cooperative relationship among the Parish Pastoral Councils, Finance Councils, parish staffs, and parishioners of all the parishes as proposals and plans are developed. Pastors, in consultation with their councils and staff, will have the opportunity to review all proposals and plans developed by the CPC Team prior to their submittal by the CPC Team to the District Delegate to forward to Bishop Lennon.

Cluster Planning and Coordination Team – Parish Representatives

Each parish is represented by its Pastor, Administrator, or Parish Life Coordinator and 4 other parish representatives:

- 1 parishioner currently serving on Parish Pastoral Council
- 1 parishioner currently serving on Finance Council
- 1 staff member if available or a parishioner
- 1 other parishioner (possibly from the current or past PPC, FC, or at-large)

Representatives are appointed by the pastor after consultation with the Parish Pastoral Council, Parish Staff, and Finance Council. These persons are to be identified in time to attend the training sessions in May and June. These representatives are responsible to serve as linking persons with their Parish Pastoral Council, Finance Council, parish staff, and parishioners in the ongoing work of the CPC Team through regular reports and timely consultation.

Terms of service will be no longer than 3 years to cover the initial period of planning and implementation. Any vacancy resulting from the loss of a parish representative will be filled by person appointed by the pastor for the designated area of representation after appropriate consultation. It is important for each parish to have its full representation on the CPC Team.

Qualities to consider in discerning persons to serve on the Cluster Planning and Coordination Team:

- Committed to the teachings of the Catholic Church and willing to learn more about what it means to be Church in the 21st century.
- In full communion with the Church.
- Committed to work collaboratively for the mission of the Church and its continuing presence and pastoral care in the cluster area.
- Supportive of the process and able to ‘see the big picture’ – looking beyond seeing themselves as ‘representatives’ of special interest groups.
- Able to suspend personal investment in particular directions, programs, or causes and work for a group consensus.
- Knowledgeable about and able to reflect his or her parish’s life and ministry.
- Open to creativity, a fresh view, and a new vision for doing things.
- Able to make a commitment to this work and give the time needed for the planning process and follow-up. This will typically involve participation at monthly meetings with related preparation, in addition to the initial diocesan training meeting.

Values to guide the work of the CPC Team:

- The commitment to seek the guidance of the Holy Spirit.
- The conviction that all of this work be centered in prayer and discernment.
- The importance of reading the signs of the times and responding to the circumstances of today.
- The recognition that the challenges facing the Church require all Catholics to live their Baptismal call more fully, and to assume leadership and responsibility for the mission and ministry of the Church according to their state.
- The call to be good stewards of the gifts and resources which God gives to us.
- The desire to educate and empower people to responsible leadership according to their state.
- The hope for a conversion of heart leading to a profound respect and appreciation for the unique history, gifts, and differences of each parish.

ROLES OF THE DIOCESE, THE PARISH, AND THE CLUSTER PLANNING AND COORDINATION TEAM (CPC TEAM)

Role of the diocese:

- Provide flexible resources and training to guide cluster planning work (beginning in May/June 2007 with ongoing support).
- Bishop Lennon to present cluster-specific issues and challenges to strengthen the presence and pastoral care of the Church for each cluster to address.
- Provide resources and models (e.g. finances, personnel, demographics, ministries, administration, buildings etc.) that can better serve pastoral needs (ongoing).
- Review and approval of all cluster plans by Bishop Lennon.
- Use cluster pastoral plans as a resource in creating an overall diocesan plan.

Role of each parish (Parish Pastoral Council, Finance Council, parish pastoral staff and parishioners):

- Update the Vibrant Parish Life Phase I self-study materials (i.e., Composite Summary, Staffing Assessment, Ministry Assessment, and Financial Assessment).
- Engage in and support the planning work throughout the process through the parish representatives on the CPC Team, receiving regular reports, discussing timely issues and proposals, and attending parish meetings.
- The Pastor, Parish Pastoral Council and Finance Council will have the opportunity to review all proposals and plans developed by the CPC Team prior to their submittal by the CPC Team to the District Delegate for Clusters and Bishop Lennon.

Role of the Cluster Planning and Coordination Team (CPC Team):

- Build a mutually supportive and trusting relationship among the CPC Team members and with each of the cluster parishes.
- Gather relevant information from each parish.
- Facilitate the development of cluster plans to address priorities that are discerned based upon the significant issues and challenges presented by Bishop Lennon
- Encourage an ongoing cooperative relationship among the Parish Pastoral Councils, Finance Councils, parish staffs, and parishioners of all the parishes as proposals and plans are developed.
- Involve parish leaders and parishioners in the planning process in appropriate ways and maintain regular communications with parishes about the work underway.
- Seek input from the pastors, Parish Pastoral Councils and Finance Councils, and the support of parishioners in the cluster parishes for proposals and plans developed by the CPC Team.
- Provide needed coordination to support parish leaders in implementing the cluster plans.
 - Cluster plans will be submitted to Bishop Lennon through the District Delegates by the following dates designated for each district:
 - September 15, 2008: Suburban East, Suburban Southeast, Lake/Geauga
 - October 15, 2008: Suburban West, Suburban Southwest, Lorain
 - November 15, 2008: Central East, Central West, Northwest, Southeast
 - December 15, 2008: Summit North, Summit South, Ashland/Wayne/Medina
 - A diocesan review of all cluster plans will be done with subsequent approval by Bishop Lennon to be announced in early 2009.
 - As appropriate, following approval of the submitted plans, the CPC Team will need to coordinate implementation steps with pastors and parish leadership groups to sustain continuity and follow-up.

OVERVIEW OF CLUSTER PLANNING

The proposed Cluster Plan developed by each CPC Team will identify the best way for parishes to respond to the significant issues and challenges presented by Bishop Lennon, and strengthen the presence and pastoral care of the Church in an equitable manner within the cluster area.

Cluster planning begins with taking an honest look at the realities that need to be faced in planning for the continuing mission of the Church in the cluster area. It is necessary to name the significant trends and challenges that relate to the people, ministries, finances and facilities of the cluster parishes, as well as the reasons they need to be addressed. There needs to be an appreciation for the gifts and capabilities of each parish, and for what exists in each parish that gives life to people and activates their competencies and energies. Cluster planning also values the future possibilities of “what could be.” It recognizes that existing organizational structures and parish practices are capable of becoming more effective when people from different parishes work together in a spirit of cooperation and mutual support.

The 10 steps leading to the creation of a Cluster Plan are outlined on the following pages. While they provide various suggestions and examples, the primary intent is to foster ‘holy conversations’ centered in prayer and discernment. People need to be able to talk openly and honestly, and to move forward in discerning a consensus regarding substantive directions and plans that will lead to a better, stronger and lasting Church presence in the cluster area.

The outline of the Cluster Planning steps indicates that the plan may be completed in approximately 12 meetings. If Teams meet on a monthly basis, the planning process is anticipated to take approximately one year. Each district is assigned a specific due date for their cluster plans by Bishop Lennon between September 15 and December 15 of 2008. In some cases, this schedule may need to be accelerated due to the critical nature of financial or building needs. In other cases, the schedule may need to be adjusted because of the complexity of the planning issues involved. Any changes to the anticipated schedule need to be made with the permission of Bishop Lennon.

The CPC Team will be asked to provide quarterly reports of progress to the District Delegate for Clusters who is responsible to monitor and oversee cluster planning work and to report to Bishop Lennon (See *Section 3 – Key Roles Involved* for further details).

SECTION 2:

**Outline and
Description
of Steps**

OUTLINE OF STEPS

I. PARISH PREPARATION: PRIOR TO FIRST CPC TEAM MEETING (April – June)

STEP 1: Select CPC Team representatives

STEP 2: Update results of VPL – Phase I Parish Self-Study

STEP 3: CPC Team members attend one of the Diocesan training sessions in May or June of 2007

II. FORMING THE CPC TEAM AND GETTING ORGANIZED: MEETINGS 1 – 2

STEP 4: Convene and form the CPC Team

STEP 5: Select CPC Team Leaders

III. NAMING THE REALITY: MEETINGS 3 – 4

STEP 6: Review key information – discern strengths, needs and priority issues

IV. DISCERNING CLUSTER DIRECTIONS AND GOALS: MEETINGS 5 – 8

STEP 7: Discern specific cluster plans: directions and goals to address the 3-5 priority issues

V. CONSULTATION – REVIEW AND REVISION OF CLUSTER PLANS: MEETINGS 9 – 12

STEP 8 Share preliminary cluster plans with Parish Pastoral Councils, Finance Councils, parish staffs and parishioners for reaction

STEP 9: Refine cluster plans in response to consultation and share again with parishes

STEP 10: Develop and submit a Cluster Plan to the Diocese for review and approval by Bishop Lennon

VI. DIOCESAN REVIEW AND APPROVAL BY BISHOP LENNON

VII. IMPLEMENTATION PHASE

DESCRIPTION OF STEPS

I. PARISH PREPARATION: PRIOR TO FIRST CPC TEAM MEETING

Each parish will need to do preparation steps 1 – 3 prior to the initial meeting of the CPC Team.

STEP 1: Select CPC Team representatives – see page 9 for description and qualifications

- The parish representatives on the CPC Team will need to meet and coordinate their response to specific tasks and issues at appropriate times outside of CPC Team meetings.
- CPC Teams will typically range in size from 10-30 people.

STEP 2: Update results of VPL – Phase I Parish Self-Studies

Each parish was asked in Bishop Lennon's March letter to update information from the VPL – Phase I Parish Self-Study during April to June. This should be a collaborative effort of the pastor, parish staff, parish pastoral council and finance council, though specific groups will take the lead on certain aspects. The following groups have the primary responsibility for updating the noted aspects of the Parish Self Study:

- Pastor and staff: the Ministry Assessment and Staffing Assessment
- Finance Council: a 5 year financial trend report (form provided by Finance Office).
- Parish Pastoral Council: the Composite Summary (updated from the 2003 version in light of the above new information provided by the Staff and Finance Council).

STEP 3: CPC Team members attend one of the Diocesan orientation and training sessions in May and June of 2007 (ideally the same session)

For the following steps, a basic meeting format is offered, realizing that an individual cluster may need more than one meeting for some steps, and may seek to combine agenda items for other meetings. It will be important to allocate a specific amount of time for each agenda item in planning individual meetings.

II. FORMING THE CPC TEAM AND GETTING ORGANIZED: MEETINGS 1 – 2

STEP 4: Convene and form the CPC Team

FIRST MEETING OF CPC TEAM

Purpose:

- Create a climate of prayer and discernment.
- Get to know one another better and build trust
- Review purpose of being a cluster and steps in the process
- Schedule future meetings

Agenda

1. Welcome
2. Opening Prayer (use “No Longer Strangers”)
 - includes time to get to know one another and share feelings, concerns and hopes about the cluster work with people from other cluster parishes (see “addendum” to opening prayer)
3. Review expectations and timeline for CPC Team
 - Video with Bishop Lennon to set a tone and review expectations for this work, and share reflections from pastors and parish leaders.
 - Discussion of reactions to video and insights that people find most helpful.
4. Review and discuss significant issues and challenges identified by Bishop Lennon in his May letter.
5. Establish a meeting schedule based on the steps in the process.
 - Each meeting would typically be about 2 hours.
 - Plan a general timeline for each major step (e.g. Step 5: August; Step 6: September – November; ...)
 - Rotate meeting sites among parishes. Consider sharing meals and social time.
 - Discuss option for a retreat focused on prayer and relationship building. (See Appendix A: *Prayer in Times of Transition*, and Appendix I: *St. Joseph Christian Life Center Mini-Retreats for CPC Teams*)

Preparation for Next Meeting

- Plan for discernment of a Chairperson, Vice-Chairperson, Secretary and Communications Liaison Person (See *Section 3 – Key Roles Involved*)
 - See discernment process in Appendix B adapted from use with Parish Pastoral Councils.

STEP 5 Select CPC Team Leaders

SECOND MEETING OF CPC TEAM

Purpose:

- Discern a Chairperson and Vice-Chairperson, Secretary and Communications Liaison Person (See *Roles Involved in Cluster Planning and Coordination* - Page 20)
- Determine whether a facilitator will be needed (if not already assigned)
- Decide upon a plan to deal with incidental costs in supporting the work of the team

Agenda

1. Welcome
2. Conduct prayer and discernment process for each position named above. (See Appendix for prayer/discernment process adapted from that used with Parish Pastoral Councils)
 - Consider having people in these leadership roles from different parishes in the cluster so that one parish does not appear to dominate discussions and decisions over the course of time. This could be more of an issue when a stronger or larger parish is linked with several smaller parishes in a cluster.
3. Determine whether a facilitator will be needed at this time.
 - Major responsibilities of the cluster facilitator include:
 - Assist CPC Team leaders in designing meeting agendas and processes.
 - Provide facilitation for insuring the smooth and effective running of meetings and communications.
 - In some clusters, a facilitator will be assigned by Bishop Lennon and will be available in a continuing manner beginning with the first meeting (e.g. if 5 or more parishes, or if parish consolidation needs to be addressed). In these situations, the cost of the facilitator will be covered by the diocese.
 - In other cases, facilitators will be available from the diocese upon request by the cluster, or when needed at specific times. In these situations, compensation for the facilitator will be covered by the parishes in the cluster.
 - The diocese will provide assistance in obtaining a facilitator as needed. All facilitators will go through a diocesan orientation and training session.
 - The facilitator is not a member of a CPC Team.
4. Decide upon a plan to deal with incidental costs in supporting the work of the team, and to compensate a facilitator if selected.

Preparation for Next Meeting

- Review key information which leaders from each parish should have available to share at the next meeting(s).

III. NAMING THE REALITY: MEETINGS 3 – 4

STEP 6: Review key information – discern strengths, needs and priority issues

THIRD – FOURTH MEETING OF CPC TEAM

Purpose:

- Carefully review key background information.
- Recognize key assets and past collaboration to build upon.
- Discern the implications of the shared background information for cluster planning.
- Discern the 3-5 priority issues which cluster parishes need to address in responding to Bishop Lennon's significant issues and challenges in order to strengthen the presence, ministry and pastoral care of the Catholic Church in the cluster area

Agenda (Items 2 – 5 may be spread over 2 separate meetings.)

1. Welcome and prayer.
2. Review Bishop Lennon's letter (significant issues and challenges) as a context for the following steps.
3. Review information provided by the diocese.
Commit to openly and freely discuss the honesty and accuracy of all information.
Discern overall implications for cluster planning from each of the following:
 - 10 year parish / cluster trends
 - Area demographics from Claritas
4. Go around and share summary pages from updated results of each of the following VPL – Phase I Parish Self-Study reports:
 - Ministry Assessment Summary
 - Staffing Assessment Summary
 - Composite Summary.*Discern overall implications for cluster planning.*
Given these studies:
 - What are parishes able to do?
 - What are parishes not able to do?
 - What do parishes really want to be able to do?
5. Go around and share the 5-Year Parish Financial Trends Report, updated with 2007 data when available. *Discern overall implications for cluster planning.*
6. Identify areas of key parish strengths and existing collaboration to build upon.
Discern the strengths and qualities we most value and want to strengthen.
7. **Discern the 3-5 priority issues which the cluster parishes most need to address in responding to Bishop Lennon's significant issues and challenges in order to strengthen the presence, ministry and pastoral care of the Catholic Church in the cluster area**
8. Plan summary report with key information to share with each parish (councils, staff, parishioners).

Preparation for Next Meeting

- Plan report of parish responses to the key information shared in each parish councils, staff, and parishioners).

IV. DISCERNING CLUSTER DIRECTIONS AND GOALS: MEETINGS 5 – 8

STEP 7: Discern specific cluster plans: directions and goals to address the 3-5 priority issues

FIFTH – EIGHTH MEETING OF CPC TEAM

Purpose:

- For each priority issue, explore and develop a positive vision and possible directions that can best address this issue and strengthen the mission of the Church in the cluster areas
- Consider planning events that bring parish groups (pastoral staffs, PPC, FC, other groups) and parishioners from different parishes together in a cluster and create a positive experience of being together (e.g. missions, retreats, celebrations, meals, special liturgies, events, shared teams, ...). A subcommittee can be formed for this purpose.

Agenda (Items may be spread over 2-4 separate meetings.)

1. Welcome and prayer
2. For each priority issue:
 - Discern a specific goal with a positive vision and the best direction for addressing each issue.
 - Emphasize an open, creative, ‘think-out-of-the box’ approach.
 - ❖ Optional resource for beginning this step: review the Joel Barker video on the *Power of Positive Vision* (call Pastoral Planning Office)
 - Brainstorm possible goals* that could best serve the given priority issue.
 - ❖ Discuss the advantages and disadvantages of each possible goal.
 - ❖ Discern the goal that would best address the given priority issue.
 - For each selected goal:
 - ❖ Discern key resources and structures to support this goal.
 - ❖ Identify a basic timeline and 1st year action steps for implementation.
 - Review and prepare to use the format for a cluster plan found in the Appendices.
3. Consider the need to form a subcommittee to further address a particular priority issue: (e.g. PSR, youth ministry...). This subcommittee can include persons outside of the CPC Team such as parish staff, leaders and parishioners with needed experience and expertise.

Preparation for Next Meeting

- Plan priority issues to address at subsequent meetings.

*** The goals can address some of these *Example Areas of Planning* described in Section 4:**

- | | |
|--|---|
| - Evangelization and re-evangelization | - Buildings |
| - Improving attendance at the Sunday Eucharist | - Finances |
| - Mass schedules and sites | - Changing neighborhood and cultural needs |
| - Staffing and administration | - Proposed consolidation: mergers and closings, noting sites and other considerations |
| - Ministries/services to the parish & neighborhood | - Methods of sharing leadership, costs and communications |
| - Catholic schools | |
| - Institutional ministries | |

**V. CONSULTATION – REVIEW AND REVISION OF CLUSTER PLANS:
MEETINGS 9 – 12**

STEP 8 Share preliminary cluster plans with Parish Pastoral Councils, Finance Councils, parish staffs and parishioners for reaction

- Identify areas of support as well as concerns, questions and proposed changes which will need to be addressed

NINTH – TWELFTH MEETING OF CPC TEAM

Purpose:

- Plan presentation and consultation of preliminary cluster plans with parish leadership groups and parishioners

Agenda (Items may be spread over 2-4 separate meetings.)

1. Welcome and prayer
2. Decide on a common document, response form and timeline to use in presenting the preliminary cluster plans
 - Consider common team of presenters with CPC Team chairperson
3. Plan individual or joint meetings of the Parish Pastoral Councils, Finance Councils, parish staffs and parishioners.
 - Consider options to host joint meetings in different parishes at different times
4. Following the consultation meetings, identify areas of support as well as concerns, questions and proposed changes which will need to be addressed

STEP 9: Refine cluster plans in response to consultation and share again with parishes (as noted in Step 7)

STEP 10: Develop and submit a Cluster Plan to Bishop Lennon for review and approval

- The plan will be accompanied by a statement of comment relative to the cluster plan signed by each pastor, Parish Pastoral Council chairperson and Finance Council chairperson.
- Submit plan through District Delegate

VI. DIOCESAN REVIEW AND APPROVAL BY BISHOP LENNON

Further details on the review process will be presented by Bishop Lennon at a later date.

VII. IMPLEMENTATION PHASE

Further questions and steps will need to be addressed at a future time regarding:

- How the cluster parishes will sustain a continuing relationship to facilitate ongoing cooperation, coordinate shared activities, and do further planning to address changing realities, pastoral needs and parish staffing with fewer priests.
- Keeping parishioners informed and engaged in implementing plans.
- The desired interrelationship among parish leadership groups in the cluster (parish staff, Parish Pastoral Council, Finance Council, ministry teams). This can be done in a manner selected by parish leaders with meetings as needed in one of the following structures:
 - joint meetings of pastors and parish staffs;
 - joint meetings of Parish Pastoral Councils and Finance Councils;
 - opportunities at District meetings;
 - other new forms of cluster models yet to be determined.

SECTION 3:

Key Roles Involved

ROLES INVOLVED IN CLUSTER PLANNING & COORDINATION

Cluster planning is a collaborative process requiring the combined effort of persons at the parish, cluster, district and diocesan level. The following text outlines key roles involved at various stages in cluster planning:

District Delegate for Clusters :

The District Delegate is a priest (pastor, parochial vicar, retired priest or a priest in a special ministry) from the district appointed by Bishop Lennon and responsible to monitor the work of the CPC Teams in their area and assure that each Team is moving forward.

Responsibilities of the District Delegate include:

- Appoint a convener (pastor) in each cluster to convene and lead the first two meetings
 - At the second meeting, the convener would lead a discernment process to select a Chairperson, Vice-Chairperson, Secretary and Communications Liaison Person for the CPC Team.
 - In some clusters, the first two meetings will be led by a designated facilitator working with the convener, and continuing in this facilitator role at future meetings working with the Chairperson.
- Monitor and encourage the work of the CPC Team:
 - Receive and review minutes and the attendance list for each assigned cluster.
- Report to Bishop Lennon on the work and progress underway every 3 months.

Cluster Chairperson

A member of the CPC Team selected from among its members from the various cluster parishes.

Responsibilities include:

- Conduct the ordinary business of the CPC Team
- Facilitate the meetings if an outside facilitator is not used.
- Serve on the Agenda Subcommittee with the Vice-Chair, Secretary, Communication Liaison Person, and the outside facilitator (if present).
- Represent the cluster and its work to the District Delegate.
- Submit cluster plans to the diocese with statements of support signed by each pastor, Parish Pastoral Council chairperson and Finance Council chairperson.

Cluster Vice Chairperson

A member of the CPC Team selected from among its members from the various cluster parishes.

Responsibilities include:

- Perform the responsibilities of the Cluster Chairperson in his/her absence.
- Serve on the Agenda Subcommittee with the Chair, Secretary, Communication Liaison Person, and the outside facilitator (if present).
- Assist in the smooth running of the meeting and in other ways.

Cluster Secretary

A member of the CPC Team selected from among its members from the various cluster parishes.

Responsibilities include:

- Take summary minutes of each Team meeting.
- Serve on the Agenda Subcommittee with the Chair, Vice Chair, Communication Liaison Person, and the outside facilitator (if present).
- Send meeting schedule and meeting notes to the District Delegate.

Communication Liaison Person

A member of the CPC Team selected from among its members from the various cluster parishes.

Responsibilities include:

- Draft regular communications (based on the meeting notes and reports of the CPC Team) for the Parish Pastoral Councils of the cluster and, through the councils, the parishioners.
- Create timely bulletin inserts for use by all parishes on the same weekend.
- Serve on the Agenda Subcommittee with the Chair, Vice-Chair, Secretary, and the outside facilitator (if present).

Parish Representatives:

Members of the CPC Team are charged with the responsibilities given on page 8.

Cluster Agenda Subcommittee:

Comprised of the Chair, Vice-Chair, Secretary, Communication Liaison Person, and the outside facilitator (if present). Responsibilities include:

- Create and distribute the CPC Team agenda, handouts and other resource materials to CPC Team members prior to the CPC Team meetings.
- Seek input regarding the next agenda from CPC Team members after each meeting

Outside Facilitator:

Major responsibilities of the cluster facilitator include:

- Assist CPC Team leaders in designing meeting agendas and processes.
- Provide facilitation for insuring the smooth and effective running of meetings and communications.
- Provide updates on work underway to the Pastoral Planning Office

In some clusters, a facilitator will be assigned by Bishop Lennon and will be available in a continuing manner beginning with the first meeting (e.g. if 5 or more parishes, or if parish consolidation needs to be addressed). In these situations, the cost of the facilitator will be covered by the diocese.

In other cases, facilitators will be available from the diocese upon request by the cluster, or when needed at specific times. In these situations, compensation for the facilitator will be covered by the parishes in the cluster.

The diocese will provide assistance in obtaining a facilitator as needed. All facilitators will go through a diocesan orientation and training session.

The facilitator is not a member of a CPC Team.

Diocesan Staff Support :

Members of the diocesan staff (Bishop's Cabinet, Pastoral Planning Office) will coordinate efforts in doing the following for each district.

- Provide information and/or referrals regarding specific resources, considerations and models to CPC Teams
- Coordinate the training and support of cluster facilitators
- Provide assistance to CPC Team leaders in the areas of meeting planning and process methods.
- Provide assistance in generating or interpreting demographic, sacramental and financial trends data
- Provide assistance in assessing building conditions and capital needs

SECTION 4:

Example Areas of Planning

EXAMPLE AREAS OF PLANNING TO STRENGTHEN PASTORAL CARE AND ADDRESS NEEDED CONSOLIDATION

These are examples of areas for planning and pastoral care by a cluster, based upon documents already presented as part of *Vibrant Parish Life – Phase II*. Each cluster will need to discern specific priorities based on any significant issues and challenges presented by Bishop Lennon, and the CPC Team’s study of cluster realities and pastoral needs.

- **Evangelization and re-evangelization**
 - Engage all of the parishes in bringing the Good News of Jesus into every human situation and helping all people to come to an encounter with the living Christ. This means connecting the Gospel message by word and the testimony of life with the culture of our time and engaging the lives of people who are practicing Catholics, no longer active Christians, and to those who have never been Christian. Evangelization is the Church’s essential mission.
- **Improve attendance and participation at the Sunday Eucharist**
 - Address ways to promote the foundational importance of the Sunday Eucharist in Catholic life and to increase attendance by people of all ages
- **Coordinate Mass schedules (daily, weekend, holyday, times of special need)**
 - Address the number of Sunday/Vigil Masses needed in the area given attendance at each Mass and church capacity as well as the Code of Canon Law (Ideally, no priest will be expected to regularly say more than three Masses of Sunday obligation, including Saturday Vigil Masses, each weekend.)
- **Coordinate the preparation and celebration of Sacramental ministries**
 - Plan ways to strengthen the preparation and celebration of the Sacraments and to coordinate inter-parish support for Sacramental ministry.
- **Share parish ministries and administration (faith formation and religious education, youth/young adults, seniors, RCIA, marriage enrichment, technology and administrative support, special maintenance services, etc.)**
 - Plan(s) for staffing that might include sharing certain roles or ministries among parishes, jointly hiring needed staff, and models adapted from other dioceses.
 - ❖ Utilize diocesan resources and ‘best practices’ regarding hiring, contracts, personnel practices and ongoing support.
 - New forms of inter-parish structures, cooperation and relationship building
 - ❖ Socials – getting to know each other better
 - ❖ Joint meetings of specific groups/councils/ministries
- **Share parish services related to community outreach, serving neighborhood needs and working for social justice**
 - Plan(s) for staffing that might include sharing certain roles or ministries among parishes, jointly hiring needed staff, and models adapted from other dioceses.
- **Strengthen the presence of a Catholic School**
 - Plan to support the availability of a Catholic school in the cluster using resources available from and current initiatives of the Office of Catholic Education

- **Develop new staffing configurations that involve priests, deacons, lay ecclesial ministers, business managers, lay leaders**
- **Coordinate institutional ministries (hospitals, nursing homes, prisons)**
 - Identify specific institutions and their locations, name the respective ministry responsibilities within each facility, and plan who will be responsible.
- **Address unique or changing population, language and cultural needs**
- **Promote life-giving ministry and living situations that foster priestly fellowship, mutual support**
- **Make wise use of facilities and buildings**
 - Obtain a professional assessment of the parish buildings in the cluster, address the ability to maintain buildings in a safe, sound condition, and determine which buildings will be needed and/or shared for the future ministry of parishes in the cluster.
 - ❖ Contact the Catholic Charities Facilities Corporation for assistance. They can provide a detailed analysis of capital needs and related budgets over a five year period.
 - Review new parish plans for major renovations or new construction with regard to both parish needs and the overall needs of the cluster.
 - Identify parish buildings that would no longer be used or able to be maintained.
 - ❖ Offer any suggestions for the future use of these buildings.
- **Assure sound finances**
 - Each parish is responsible for the administration of its own finances.
 - Address the ability of the parishes in the cluster to:
 - ❖ Provide for the full and accurate disclosure of financial information by each parish as needed by members of the CPC Team to accomplish their work
 - ❖ Cooperate in fairly sharing the payment of just salaries for shared staff persons and ministries proposed by the cluster, which would include benefit packages and pension obligations
 - ❖ Provide for overall building needs and related costs for utilities, daily and long-term maintenance of all buildings, property and liability insurance; property taxes; and diocesan assessments
 - Contact the Finance Office for assistance.
 - Create specific proposal(s) for how the parishes in the cluster would cooperate to strengthen financial stability as they look to the future.
- **Plan needed reconfiguration / consolidation of parish structures and ministries to address these needs**
 - Plans for specific changes and proposed new developments regarding Sacramental and other parish ministries, community outreach, parish administration and staffing, Catholic schools, institutional ministries, facilities and finances.
 - Plans for parishes that can no longer be sustained and the proposed consolidation through mergers or closings with a basic details and a time-line for implementation.
 - Proposal for a new parish to be established in the cluster with basic details and a time-line for implementation.

SECTION 5:

Appendices – Supplemental Resources