NAVIGATING THE POLITICAL WATERS OF DIOCESAN CHANGE
Archdiocese of Baltimore

Dennis Cheesebrow, Founder and Principal

An innovative collaboration to serve the Catholic Church between

TeamWorks International
Catholic Finance Corporation
Financial Advisor to Catholic Institutions
NAVIGATING DIOCESAN CHANGE

A. Focusing on the Mission Delivery Point

B. Exploring the Basics of Systemic Change

C. Seeing Change Readiness versus Change Management
   • A Tool for Assessment of Change Readiness

D. Discussing Opportunities and Contradictions
MISSION DELIVERY POINT

Parishioner

Pastor

Staff
BASICS OF SYSTEMIC CHANGE

- Responsibilities of a Bishop and pastor differ
- Change is possible when relationships are strong, respectful, and collaborative
- Change is hard when relationships are weak, disrespectful, and isolated.
- The key local change leader is the pastor
- A role of those at the Mission Delivery Point is to responsibly resist all change ... and self / local interests trump diocesan interests
BASICS OF SYSTEMIC CHANGE

• Data and analysis
• Vision (narrative and numbers), hope, and prayer
• Sound process and consultation
• Transparency and accountability
• Change readiness capacities and skills
DATA AND ANALYSIS

Parish Planning Data - Executive Summary

Registered Families

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2015</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>2,467</td>
<td>2,416</td>
<td>-2%</td>
</tr>
<tr>
<td>Harford Region</td>
<td>17,085</td>
<td>18,257</td>
<td>+7%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>100,580</td>
<td>102,916</td>
<td>+2%</td>
</tr>
</tbody>
</table>

Over the past 9 years, the number of registered families has changed by -51 families (-2%). This compares to a change of +4% in Harford Region and a change of -2% throughout the Archdiocese over the same time period.

Mass Attendance

<table>
<thead>
<tr>
<th></th>
<th>2009</th>
<th>2015</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>1,838</td>
<td>1,422</td>
<td>-23%</td>
</tr>
<tr>
<td>Harford Region</td>
<td>10,050</td>
<td>12,000</td>
<td>+19%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>124,997</td>
<td>122,201</td>
<td>-2%</td>
</tr>
</tbody>
</table>

Over the past 5 years, the overall mass attendance has changed by -101 parishes (-13%). This compares to a change of -22% in Harford Region and a change of -13% throughout the Archdiocese over the same time period.

Mass Attendance - Hispanic

<table>
<thead>
<tr>
<th></th>
<th>2000</th>
<th>2015</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>248</td>
<td>300</td>
<td>+24%</td>
</tr>
<tr>
<td>Harford Region</td>
<td>252</td>
<td>500</td>
<td>+98%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>5,190</td>
<td>10,575</td>
<td>+100%</td>
</tr>
</tbody>
</table>

Over the past 9 years, the Hispanic mass attendance has changed by 447 parishes (+25%). This compares to a change of +44% in Harford Region and a change of +100% throughout the Archdiocese over the same time period.

Families in Harford Region:

- Church of the Holy Spirit (Abingdon)
- St. Francis de Sales (Abingdon)
- St. Ignatius (Linthicum)
- St. John the Evangelist (Long Grove Valley)
- St. John Neumann (Baltimore)
- St. John the Evangelist (Linthicum)
- St. John the Evangelist (Owings Mills)
- St. John the Evangelist (Baltimore)
- St. John the Evangelist (Baltimore)
- St. John the Evangelist (Baltimore)

Based on data provided by parishes in the Annual Consolidated Report (ACR), approved by the Pastor, last completed for FY 2015, on Sept 30, 2015.

Report Generated on April 8, 2018

Archdiocese of Baltimore
Office of Pastoral Planning
Parish Planning Data - Executive Summary

St. Francis de Sales (Arlington) - 2007

Mass Attendance by Age (percent)

- 2004:
  - Age 70+: 22%
  - Age 60-69: 12%
  - Age 55-59: 11%
  - Age 50-54: 11%
  - Age 40-49: 14%
  - Age 35-39: 15%
  - Age 30-34: 15%
  - Age 25-29: 15%
  - Age 20-24: 14%
  - Age 15-19: 12%
  - Age 10-14: 11%
  - Age 0-9: 10%
  - Age 0-9: 10%

- 2015:
  - Age 70+: 16%
  - Age 60-69: 12%
  - Age 55-59: 11%
  - Age 50-54: 11%
  - Age 40-49: 14%
  - Age 35-39: 15%
  - Age 30-34: 15%
  - Age 25-29: 15%
  - Age 20-24: 14%
  - Age 15-19: 12%
  - Age 10-14: 11%
  - Age 0-9: 10%
  - Age 0-9: 10%

These two figures show the age distribution of Mass attendees comparing 2010 to 2005. (Numbers may not add up to 100% due to rounding)

Mass Attendance by Age (head count)

- 2006:
  - Age 70+: 205
  - Age 60-69: 196
  - Age 55-59: 175
  - Age 50-54: 176
  - Age 40-49: 172
  - Age 35-39: 178
  - Age 30-34: 192
  - Age 25-29: 201
  - Age 20-24: 305
  - Age 15-19: 59
  - Age 10-14: 58
  - Age 0-9: 59

- 2015:
  - Age 70+: 205
  - Age 60-69: 196
  - Age 55-59: 175
  - Age 50-54: 176
  - Age 40-49: 172
  - Age 35-39: 178
  - Age 30-34: 192
  - Age 25-29: 201
  - Age 20-24: 305
  - Age 15-19: 59
  - Age 10-14: 58
  - Age 0-9: 59

These two figures show the number of Mass attendees by age group comparing 2010 to 2005.

Mass Attendance by Ethnicity

- 2006:
  - Caucasian: 22%
  - Hispanic: 11%
  - African Am: 15%
  - Asian: 3%
  - Native: 2%
  - Other: 3%
  - Unknown: 11%

- 2015:
  - Caucasian: 22%
  - Hispanic: 11%
  - African Am: 15%
  - Asian: 3%
  - Native: 2%
  - Other: 3%
  - Unknown: 11%

These two figures show the number of Mass attendees by age group comparing 2015 to 2006.

Mass Attendance by Gender

- 2006:
  - Female: 57%
  - Male: 43%

- 2015:
  - Female: 55%
  - Male: 45%

These two figures show the number of Mass attendees by age group comparing 2015 to 2006.
Parish Planning Data - Executive Summary

St. Francis de Sales (Abingdon) - 2017

<table>
<thead>
<tr>
<th>Capacity Utilization</th>
<th>Seating Capacity (Reg)</th>
<th>Num. of Weekends Masses</th>
<th>Average Attendance Per Mass</th>
<th>% Utilization</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>600</td>
<td>5</td>
<td>284</td>
<td>47%</td>
</tr>
<tr>
<td>Hartford Region</td>
<td>405</td>
<td>52</td>
<td>250</td>
<td>63%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>555</td>
<td>546</td>
<td>223</td>
<td>42%</td>
</tr>
</tbody>
</table>

In 2016, a total of 1,422 persons attended 5 weekend Masses, for an average of 284 persons per Mass. The average weekend Mass used 47% of the 600 seats available. This compares to average utilization of 50% in Hartford Region and 42% throughout the Archdiocese.

Comparative Mass Attendance

<table>
<thead>
<tr>
<th></th>
<th>Registered Persons</th>
<th>Christmas</th>
<th>% Easter</th>
<th>% Weekend</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>7,065</td>
<td>2,378</td>
<td>34%</td>
<td>1,001</td>
<td>27%</td>
</tr>
<tr>
<td>Hartford Region</td>
<td>47,751</td>
<td>25,512</td>
<td>53%</td>
<td>21,868</td>
<td>46%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>433,814</td>
<td>168,743</td>
<td>46%</td>
<td>180,933</td>
<td>42%</td>
</tr>
</tbody>
</table>

In 2015, the equivalent of 20% of registered persons attended weekend Mass, compared to 27% for Hartford Region and 28% throughout the Archdiocese. Christmas Mass attendance in 2015 was 54% and 27% of registered persons, respectively.

Baptisms & Funerals

<table>
<thead>
<tr>
<th>Baptisms &amp; Funerals</th>
<th>2015-2016 Baptisms</th>
<th>2015-2016 Funerals</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>247</td>
<td>107</td>
<td>2.31</td>
</tr>
<tr>
<td>Hartford Region</td>
<td>1,753</td>
<td>1,140</td>
<td>1.54</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>18,615</td>
<td>12,177</td>
<td>1.56</td>
</tr>
</tbody>
</table>

Averaged over the past three years, there have been 2.31 baptisms per each funeral. This compares to 1.54 for Hartford Region and 1.30 throughout the Archdiocese.

Outreach Ratio

<table>
<thead>
<tr>
<th>Outreach Ratio</th>
<th>2015 Poor Box + Charitable Donations</th>
<th>2015 Offertory</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>St. Francis de Sales (Abingdon)</td>
<td>$111,165</td>
<td>$928,086</td>
<td>14%</td>
</tr>
<tr>
<td>Hartford Region</td>
<td>$809,738</td>
<td>$10,037,957</td>
<td>6%</td>
</tr>
<tr>
<td>Archdiocese</td>
<td>$6,052,267</td>
<td>$584,198,937</td>
<td>0%</td>
</tr>
</tbody>
</table>

Funds devoted to Outreach and Charity were 14% of the offertory. This compares to 6% for Hartford Region and 6% throughout the Archdiocese.

Report Generated on Apr 6, 2019
Archdiocese of Baltimore
Office of Pastoral Planning
Parish Planning Data - Executive Summary
St. Francis de Sales (Abingdon) - 2017

In 2015, Facilities Expense comprised 17% of Total Operating Expense, compared to 10% for Hartford Region and 16% for the Archdiocese. Labor & Benefit Expenses comprised 52% of Total Operating Expenses, compared to 49% for Hartford Region and 48% for the Archdiocese.

Over the past 9 years, the parishes have changed by 8%. This compares to a change of 17% in Hartford Region and a change of 8% throughout the Archdiocese over the same time period.

In 2015, Facilities, Admin., Work/Living, Catechesis, Programs, School/Parish Support, Labor & Benefits.

Operating Financials
3-year Avg Operating Surplus as % of Offertory

In 2015, the operating surplus/deficit was ($51,177). Over the three-year period of 2013-2015, the average operating surplus/deficit was ($40,027), or -4.0% of the 2015 Offertory.
DATA AND ANALYSIS
A Light Brightly Visible
LIGHTING THE PATH TO MISSIONARY DISCIPLESHIP

A Practical Laser on Evangelization-Based Parish Planning

VISION, HOPE, AND PRAYER
“THE WHAT”
A. Healthy and vibrant diocese
   • Growing Catholicity across the diocese
   • Increasing clarity of Catholic identity and beliefs
   • Increasing enrollment in the Catholic Schools
   • Financial stability and growth
   • Increasing vocations to priesthood and diaconate
   • Ministry 2025 Diocesan Pastoral Plan with a 10 Year Comprehensive Financial Model
“THE WHAT”

B. Healthy and vibrant parishes and schools

- Increasing registered households
- > than 60 % of HH attending Sunday Liturgy
- > than 70 % of HH engaging in all forms of stewardship
- Robust and energized evangelization
- Robust and vibrant parish ministry
- Financial and facilities health and stability
- 3 Year Parish Cluster Pastoral Plans within a 10 Year Comprehensive Financial Model
- 5 Year Catholic School Strategic Plans within a 10 Year Comprehensive Financial Model
“THE WHAT”

C. Healthy and vibrant priests and deacons

- Moderate to high level of match of sacramental and pastoral loading to priest strengths
- Average work week of 55 hours with delegation of management responsibilities
- Engaged in daily prayer, reflection, and spiritual health and development
- Annual professional growth in capacities and skills
SOUND PROCESS AND CONSULTATION

Shared Reality

Creating Options

Choice Making

Implementation

Refinement

Decision Making

Part of the FrameWorks™ Series Used For:
- Choice Making
- Managing Participant's

Clergy, Parish Leaders, Staff, Parishioner Consultation

Design Team

Bishop and Cabinet

Pastor, Staff and Lay Leadership

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The language and systems thinking of the Awareness to Action are based largely on the theory and written works of Barry Osny, Ph.D. of Power+Systems, Inc. and Seeing Systems, Seeing System II, and the Organizational Workshop.
Unhealthy Conditions at the Corners

Zone of the 4 Ps Balance and Health
# Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

## Role of the Integrators of Pastor, Parish Directors, School Principal, and Finance Council

### The Free Agency Zone

<table>
<thead>
<tr>
<th>High Preference for Laity Culture</th>
<th>Low Preference for Ordained Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pastors, principals and directors do not effectively and efficiently manage their core processes, ministries, programs and services with growth of activities with little alignment to Catholic teaching.</td>
<td></td>
</tr>
<tr>
<td>Individualism, confusion, groups and people vying for power and privileges in the local parish and school</td>
<td></td>
</tr>
<tr>
<td>Experience of staff and parishioners of being left directionless, with little focus on mission, ministry, quality and performance</td>
<td></td>
</tr>
<tr>
<td>Catholic teaching with little substance or challenge</td>
<td></td>
</tr>
<tr>
<td>High levels of frustration with little focus on mission or ministry and little sense of communio</td>
<td></td>
</tr>
<tr>
<td>Growing financial instability and decreasing registered households, stewardship and/or enrollment</td>
<td></td>
</tr>
</tbody>
</table>

### The Political Zone

<table>
<thead>
<tr>
<th>High Preference for both Ordained and Laity Culture</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open conflict and disagreement between councils, pastor, staff, and/or parishioners with local dissonance and noise a predictable and influencing factor</td>
</tr>
<tr>
<td>Self-interests overrun roles, responsibilities and relationships</td>
</tr>
<tr>
<td>Unity, performance and quality takes back seat to the “show”</td>
</tr>
</tbody>
</table>

### The Leaderless and Lifeless Zone

<table>
<thead>
<tr>
<th>Low Preference for both Ordained and Laity Culture</th>
</tr>
</thead>
</table>

### Balance Zone

**Pastors and parish leaders recognize the legitimate need for balance between the ordained and the lay authorities, roles, responsibilities, cultures, and gifts.**

**Differences are not treated as threats, and the local focus is the building of a vibrant Catholic parish and sacramental life, as well as Catholic education at the parish and/or local area.**

### Resentment and Passive Aggression Zone

<table>
<thead>
<tr>
<th>Low Preference for Laity Culture</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>High Preference for Ordained Culture</th>
</tr>
</thead>
</table>

| Departments and Catholic school operate in hard silos with little communication, collaboration or innovation |
| Resources are hoarded for local benefit, and truthfulness is lessened |

| Pastors and/or directors maximize “telling” and “controlling” and minimize excellence in staff and parishioner consultation |

<table>
<thead>
<tr>
<th>TeamWorks International, Inc.</th>
<th>©2014 All Rights Reserved</th>
</tr>
</thead>
</table>
Role of the Integrators of Pastor, Parish Directors, School Principal, and Finance Council

The Free Agency Zone
- High Preference for Lay Culture
- Low Preference for Ordained Culture

- Directors do not effectively and efficiently manage systems, programs and services with growth of faith formation.
- Individualism, confusion, groups and people vying for power and privileges in the local parish and school.
- Experience of staff and parishioners of being left directionless, with little focus on mission, ministry, quality, and performance.
- Catholic teaching with little substance or challenge.
- High levels of frustration with little focus on mission or ministry and little sense of communio.
- Growing financial instability and decreasing registered households, stewardship and / or enrollment.

The Political Zone
- High Preference for both Ordained and Lay Culture

- Open conflict and disagreement between councils, pastor, staff, and /or parishioners with local dissonance and noise a predictable and influencing factor.
- Self-interests overrun roles, responsibilities and relationships.
- Unity, performance and quality takes back seat to the "show".

Balance Zone
- Pastors and parish leaders recognize the legitimate need for balance between the ordained and the lay authorities, roles, responsibilities, cultures, and gifts.
- Differences are not treated as threats, and the local focus is the building of a vibrant Catholic parish and sacramental life, as well as Catholic education at the parish and /or local area.

Pastor
- Low Preference for both Ordained and Lay Culture
- The Leaderless and Lifeless Zone

Parish Director
- Low Preference for Lay Culture
- High Preference for Ordained Culture

Resentment and Passive Aggression Zone
Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

Role of the Shapers of Office of the Bishop, Chancery and Key Consultants

**The Free Agency Zone**

High Preference for Bottom-Up

Low Preference for Top-Down

Bishop and diocesan officials abdicate to employees, pastors, and large funders the important choices and transitions.

Free agency at office and parish levels create confusion and misuse of resources, with examples of increasing fraud.

**The Political Zone**

High Preference for both Top-Down and Bottom-Up

Open conflict and disagreement between levels of the diocese with private and public dissonance, disclosures, and noise.

Self-interests overruns roles, responsibilities and relationships.

Direction, performance and quality take back seat to the “show”

**Balance Zone**

Bishop, Cabinet, and Consultants recognize the legitimate need for balance between leading from the Top-Down with leading from the Bottom-Up.

Partnership across those who operate with canonical and civic authorities in governance and management, is informed by, and balanced with, intentional and structured consultation from priests, deacons, parish leaders, consultants, resource partners, foundations and laity as appropriate on key governance and management planning, prioritization of resources, and decisions.

**The Leaderless and Lifeless Zone**

Low Preference for both Top-Down and Bottom-Up

**Resentment and Passive Aggression Zone**

Low Preference for Bottom-Up

High Preference for Top-Down

Bishop and diocesan officials maximize the use of their organizational, institutional and cultural authority and minimize consultation both internally and externally.

Private privilege, secrecy, and narrow ecclesiology is preferred over equity, transparency, accountability, and broad ecclesiology.
## Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

### Role of the Producers of Employees and Parishioner Volunteers

<table>
<thead>
<tr>
<th>The Free Agency Zone</th>
<th>The Political Zone</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Preference for Ownership</td>
<td>High Preference for both Ownership and Compliance</td>
</tr>
<tr>
<td>Low Preference for Compliance</td>
<td>Open conflict and disagreement between groups of employees with local dissonance and noise a predictable and influencing factor on decisions.</td>
</tr>
<tr>
<td>Employees believe that voice and participation in meetings and process equates to</td>
<td>Self-interests overrun roles, responsibilities and relationships.</td>
</tr>
<tr>
<td>Pastor and diocesan choice making</td>
<td>Unity, performance and quality takes back seat to the “show”</td>
</tr>
<tr>
<td>Relationships, performance and accountability is framed in language of mistrust,</td>
<td></td>
</tr>
<tr>
<td>over-managing, and not respecting</td>
<td></td>
</tr>
<tr>
<td>Employees organize to do the minimally acceptable, and/or protect the status quo</td>
<td>Pastors utilize church teaching, diocesan policy and interpretation of canon law to limit engagement, dialogue and dissent</td>
</tr>
<tr>
<td>Improvement in quality and performance is not structured nor engaged, as personal</td>
<td>Unity of staff and department voice and action are preferred over quality of ministry, programming, or services.</td>
</tr>
<tr>
<td>time and interests are more important</td>
<td>Low Preference for Ownership</td>
</tr>
<tr>
<td>Low Preference for both Ownership and Compliance</td>
<td>High Preference for Compliance</td>
</tr>
</tbody>
</table>

### Balance Zone

Employees and pastors recognize the legitimate need for balance between individuality, freedom, and privilege with parish and diocesan need for alignment, consistency and quality. Employees and pastors provide “voice” to their interests and needs to strengthen the parish, school, and diocesan governance and management choices.
Awareness to Action System Tool: Catholic Diocese, Parish and School Setting

Role of the Customers of Parishioners, Parents, and Families

**The Free Agency Zone**

**High Preference for High Quality**
Low Preference for Access to ministries and services

Parishioners and staff organize tightly around a few and cherished ministries and programs with assumptions of funding, usually using language in terms of social justice and faith.

Quality, performance, and accountability is not a focus, and pushed against as "corporate" and not for "Church".

**The Political Zone**

**High Preference for both Quality and Access to ministries and services**

Open conflict and disagreement as parishioners and leaders grapple with the basic inability for high access and high quality at the same time, and "losers" and "winners" emerge in parish and school budget and choices.

Self-interests overrun roles, responsibilities and relationships.

Unity, performance and quality takes back seat to the "show".

**Balance Zone**

Parishioners and Catholic School parents recognize the legitimate need for balance between self-interest and parish/diocesan/Church interests.

Parishioners provide "voice" to their interests and needs to strengthen the parish and school governance and management choices.

**The Leaderless and Lifeless Zone**

Low Preference for both High Quality and Access to ministries and services

Parishioners and leaders are disengaged in both planning and excellence in consultation.

Staff and administrators protest and preserve the status quo.

Councils and commissions’ focus is on minutia, balancing the budget, the inconsequential and away from ministry, mission and communicio.

Low Preference for High Quality and Access to ministries and services

Resentment and Passive Aggression Zone

Parents operate out of strong self-interest for specialized programming and allocation of parish and school resources for their children’s needs, while parishioners and parents demand specialized ministries.

Parish staff, Finance Council, and Pastoral Council members are pressured to align to such interests and move away from excellence in governance.

Low Preference for Access to ministries and services
PASTOR CHANGE MANAGEMENT WORK

Adapted by The Collabrium from William Bridges’ book “Managing Transitions”

Bridges’ Three Phases of Transition:
1. Endings
2. Neutral Zone
3. New Beginnings

Loss of identity
Loss of control
Loss of meaning
Loss of belonging
Loss of future

Temporary support and structure
Tap into creativity

New identity
Clearer vision
Opportunities

• Systemic change through relationships and process versus compliance and power
• Data, analysis, vision, and consultation to balance self and local interests
• Diocesan time and resources in change readiness vs. change management
• Mission Delivery Point and pastor capacity development

Contradictions

• History and capacity for consultation is generally undeveloped in dioceses
• Bishop – Ordained relationships
• Low level of understanding of authority, decision making, and consultation
• Social and public media carries no accountability
REFLECTIONS AND FEEDBACK

• What words, images, practices caught your attention or interest?

• What questions of clarification do you have?

• What issues or opportunities have interest for you to discuss deeper?
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Archdiocese of Baltimore

Dennis Cheesebrow, Founder and Principal

An innovative collaboration to serve the Catholic Church between