

**ARCHDIOCESE OF INDIANAPOLIS**

***CONNECTED IN THE SPIRIT***

**GENERAL ORGANIZATIONAL RESOURCES FOR ONGOING IMPLEMENTATION  
AND PROGRESS REPORTS**

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**MISSION, VALUES, VISION, GOALS, OBJECTIVES, ACTION PLANS  
(PROCESSES AND SAMPLES)**

**WHERE DO WE BEGIN?**

Implementation plans need to be grounded in values and visions. They flow from a sense of mission. Who are we? Where are we going? What are our values or operating principles? What is our vision? These materials were created to help you design and implement your Annual Cohort Implementation Plan.

**MISSION STATEMENTS**

Most parishes have mission statements. We encourage you to share them as you begin to plan for implementing the Archbishop's Goals. Note what is similar, what is different in each statement. Discuss the scope of the goals. You may wish to create a common mission statement for your collaborative efforts. Mission statements are brief (not more than 30 words). They answer the question "who are we?" and "what is our purpose?" "what makes us unique?" "why do we exist?" "how are we distinctive?"

Whether you decide to do a common mission statement or not, it is strongly suggested that you as a cohort do take the time to develop value statements and a vision statement. These will root your action steps in a common set of beliefs and a common vision. Having these will help you make decisions about the resources you will use to create goals, objectives and action plans for the future.

**CATHOLIC VALUE STATEMENTS**

These statements reflect the core values or operating principles of the parish community. They are often implicit within organizations but are most helpful when made explicit. Values provide guiding principles of conduct and are important for a planning process because they help measure the correctness of a given plan. Will living out these values help us live our mission and vision? How can the values implied in Archbishop Tobin's goals for *Connected in the Spirit* be incorporated in your value statements?

Begin to discern your values by asking: What are our core beliefs? What do we stand for?

**SAMPLE 1**

**Our cohort of \_\_\_\_ (name parishes) \_\_\_\_ values:**

- Worshipping God through Liturgy, the Sacraments, Prayer and living out our Catholic faith;
- Being an accepting, welcoming and evangelizing community in our actions and attitudes toward all;
- Having unique ways to involve youth and young adults in our parish;
- Being a learning community committed to lifelong Catholic faith formation and to passing on the faith to the next generation;
- Respecting the life and dignity of all and working for justice in the world;

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- Serving the spiritual, emotional and physical needs of others through reaching out to those in need;
- Having high quality human, financial and facility resources to serve the parish and community;
- Being good stewards of God’s gifts and proud to be a vital part of the larger universal Catholic Church.

We do all this with faith, hope and love, compassion and gratitude.

#### SAMPLE 2

**Our cohort of \_\_\_(name parishes) \_\_\_cherishes and values:**

- Living the Gospel message;
- Faithfulness to our Catholic tradition;
- Vocational discernment for all;
- Stewardship of our time, talent and treasure;
- Full, active and conscious participation in liturgical celebrations;
- Compassionate outreach;
- Life-long faith formation for all;
- Exemplary Catholic education for all our children;
- Fiscal responsibility;
- Respect for all people and all of creation.

#### VISION

“What will our cohort look like once its mission is fully realized?” This is a longer statement (100-200 words), usually more poetic, and written in the present tense as if the vision has been accomplished. This statement expresses the hoped for results of living out the Parish’s Mission and Values. A Vision usually represents the achievement of multiple goals, while goals are typically stepping stones toward a vision. A vision statement is also a “seeing statement,” in that you can see the results of living out the mission and values.

#### MORE ON VISION

Vision without action is just a dream. Action without vision merely passes the time. Vision with action can change the world. (*Futurist Joel Barker*)

Vision is the end result of what your cohort/partnership/linkage will do, the preferred future. It is the result of dreams in action.

The purpose of a future vision is to get comfortable in an imagined future.

The four elements to a compelling vision statement according to Laurie Beth Jones are:

- It is written down.
- It is written in the present tense.
- It covers a variety of activities and time frames.
- It is filled with descriptive details.

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At its simplest level, a shared vision is the answer to the question, “What does our cohort want to create together?” As you work on your vision for the future, review Archbishop Tobin’s goals for ***Connected in the Spirit***. How can these help you plan for the future?

**Suggested process options**

- Option One: Imagining the Future

Use the following questions to stimulate the group’s imaginations. Have each person answer these alone and then share in groups of two or three. After 5 minutes have them share in another group of two or three. Depending upon number of participants, share a third time, always in different groups of two or three. Encourage participants to “steal” good ideas from each other and incorporate them into their own ideas. As people begin the exercise promote the idea of using visual imagery in their thinking. Images like bridges, lights and hubs of activity are often found in energizing vision statements. After all have had an opportunity to share, facilitate a discussion to pull the ideas together. Look for similarities, unique images which capture an array of ideas and the “prophetic” element. Once the major ideas and images are agreed to, ask for two volunteers to write the first draft of a vision statement for consideration of the group at a future meeting. It may take several drafts before there is a vision statement that all can support.

**Starter questions:**

Imagine it is five years from now...

1. What are the best things which have happened in your cohort?
2. Describe how the young people are being energized to believe and serve.
3. What are people saying about your cohort?
4. How is a living faith manifested in the cohort?
5. How are parishioners acting differently?
6. How is the world a better place to live because of your cohort?
7. Which of Archbishop Tobin’s goals have you been able to realize as a cohort?

- Option Two: “Magic Carpet” trip

Have soft music playing in the background. Quiet yourselves. Imagine you are on a magic carpet trip and have special sensory skills to see and hear through walls, to listen to conversations and see from various heights. Close your eyes. Focus your imagination on what you might be seeing 5-10 years from now. The following questions are meant to be adapted to your own situation. Pause after each statement. At the end of the 20 minutes or so, gently end the magic carpet trip and give participants quiet time to jot down memories and ideas they do not want to forget.

**At 500 feet:**

What are the young people doing?

Where in the neighborhood are they congregating?

What are they talking about?

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Who is using the various parishes' facilities? Who is in the gym? The multi-purpose room? The computer lab? What are they talking about?

The common parish council is meeting. What are their concerns? There is a wake taking place. Who is leading the prayer service and working with the family?

The St. Vincent de Paul society is working hard to gather food. For whom are they packaging groceries?

Families seem to be gathered for a catechetical program. What is happening? What are they doing?

You can hear the conversation over supper of several families what are they discussing?

**Move up to 1,000 feet**

What are you seeing in the region? The state? You see young adults from your cohort. What are they doing? Where are they working? You hear them talking about a significant activity that they participated in as high school kids. What is that? What made such an impression on them?

You notice parishioners at the capitol talking to legislators. What are they advocating for?

You notice alums from the collaborative school have joined together for breakfast. What are they discussing?

Develop other appropriate questions which help people to imagine a preferred future.

**Move up to 50,000 feet and beyond**

The magic carpet can see the United States and beyond and rides over various parts of the world.

What do you see? What are the issues people are dealing with? What environmental concerns do you note? What kind of cooperation do you see between nations? Where do you see the influence of your cohort or partnership or linkage?

What is your cohort/partnership or linkage doing to make a difference in the world? Where do you see alums of your school? Where do you see former parishioners making a difference?

Gently and slowly end your "magic carpet" trip. Give participants quiet time to jot down impressions. In small groups have them list the images, ideas, etc. which they would like to see in a vision statement. Share these in a large group. Invite a group of about three people to take the ideas generated from the "magic carpet" trip and do a first draft of a vision statement before the next meeting. Share this at the next meeting and make any needed edits so that there is consensus among the members of the Implementation Team

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that this is the vision that will energize the work of the Team. It may take two or three versions before you get one that all can support.

**Sample 1 Vision Statement**

Our cohort made up of \_\_\_ (name parishes)\_\_\_ is growing in faith and developing a deeper relationship with God by worshipping with a profound sense of gratitude, joy and praise. We are a beacon of light to those who seek meaning and purpose in life. We reflect God’s presence by serving others in our larger community and beyond. We are bridging gaps between generations as we come together to be formed by the Word of God and the teachings of the Church. We are on a journey as disciples of Christ spreading the Good News that all people are loved by God and can be saved by the Risen Christ.

Our cohort is vibrant, active and having fun. We celebrate diversity of gifts, talents and heritage. Stewardship is a way of life for our cohort as we connect with all our families to create a more just and peaceful world.

**Sample 2 Vision Statement**

The parish cohort made up of \_\_\_\_\_(name parishes)\_\_\_\_\_ is striving to become a community made up of many small welcoming communities of people who are learning together to live vibrant faith-filled lives. The Catholic learning community thrives on its sacramental life centered in the Eucharist, the other life-giving prayer experiences and various forms of devotion.

The cohort is a beacon of light and hope to the local community and beyond, evangelizing all and providing for nourishment of body, mind and spirit. Its outreach to those in need and its acts of social concern, charity and evangelization are changing the world to be more peaceful and more just.

Adults are engaged in lifelong faith formation in Catholic Christian life. Parishioners of all ages are involved in various forms of leadership development as they become disciples of Christ in the world. They are energized to witness to the Gospel, be good stewards of the earth’s resources and work together to create a better world.

Parents are actively involved in the formal faith formation of their children and youth. All family members participate in catechetical programs both in the parishes and through the school. The cohort is working to continually support its sister parish in Columbia as well as do local outreach to those in need.

The parish is building bridges with non-Catholic congregations to unite all those who are seeking and helping to build the kingdom of God on earth through good stewardship of time, talent and financial resources.

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**SAMPLE OBJECTIVES FOR IMPLEMENTATION PROCESS**

**GOALS AND OBJECTIVES**

Goal statements are specific points that the cohort seeks to attain. A vision usually represents the achievement of multiple goals, while goals are typically stepping stones toward a vision. Goals are long term in nature and do not usually change. Objectives detail what has to be done to accomplish the goals.

Examples of Objectives that may be appropriate for consideration by your cohort, depending upon which of the Archbishop’s Goals you are implementing:

GOAL: To celebrate our faith in word, sacrament and prayer.

Objectives:

1. To provide high quality liturgical celebrations with full participation of the community;
2. To promote a variety of personal, devotional and communal prayer opportunities;
3. To provide multiple opportunities for our cohort to be ***“Connected in the Spirit.”***

GOAL: To create a cohort that empowers individuals to recognize and use their gifts.

Objectives:

1. To offer opportunities for all parishioners to discern and use their gifts;
2. To be an evangelizing cohort;
3. To foster the growth of disciples;
4. To pray for an increase of vocations to the priesthood.

GOAL: To ensure active involvement of the youth and young adults in parish life.

Objectives:

1. To create a welcoming environment in the cohort of parishes for teens;
2. To strengthen the youth programs;
3. To empower parents to be more involved in their young people’s faith formation.

GOAL: To advocate for justice and the sanctification of human life.

Objectives:

1. To educate about social justice needs;
2. To provide opportunities to serve local, national and international needs;
3. To build respect for all life;
4. To provide a welcome and opportunities for people with disabilities to be involved in the parish.

GOAL: To promote lifelong faith formation.

Objectives:

1. To strengthen faith formation opportunities for all generations;
2. To enhance school and child catechetical programs;
3. To expand small group faith formation opportunities;
4. To promote a missionary spirit.

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GOAL: To promote a culture for vocation awareness.

Objectives:

1. To promote prayer for vocations to Priesthood, Diaconate, Vowed Religious Life and Lay Ministry;
2. To educate and promote the awareness of vocations;
3. To provide opportunities to learn about various vocations.

GOAL: To promote parish as a school of holiness and prayer.

Objectives:

1. To acquaint parishioners with various forms of prayer and devotion;
2. To provide opportunities for prayer and devotion;
3. To plan prayer for all parish meetings.

GOAL: To promote communication in the parish and pastoral region.

Objectives:

1. To develop parish bulletins and newsletters to express the Catholic identity and mission of the parish;
2. To develop a website to provide information about the parish, cohort, deanery or region.

GOAL: To promote stewardship.

Objectives:

1. To educate and form parishioners as stewards, sharing their gifts for the mission of the Church, Archdiocese and Parish;
2. To help parishioners understand stewardship as a way of life.

GOAL: To promote an understanding of marriage and family life.

Objectives:

1. To teach the theology of the body to parishioners;
2. To promote awareness of family values;
3. To provide opportunities for family activities.

**ACTION PLANS**

Action Plans go to a new level of specificity. They need to be **SMART**:

- **Specific;**
- **Measurable;**
- **Achievable;**
- **Responsibilities Identified;**
- **Time-bound.**



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**SCHEDULING, PLANNING FOR THE YEAR AND BEYOND**

As you are beginning to plan for implementation of the Archbishop’s Goals, it is important to look at the whole year and beyond as part of your planning efforts.

Meeting at the same time of month, same night, same hour, can help standardize your meetings and help people to know when to expect them.

Planning ahead also helps you know what to plan for at a specific time of year. For instance, if you begin a budget process in January, then you will need to be aware of projected revenues and expenses as part of that process. If you are planning parish activities you will want to know when the liturgical seasons begin and end.

Maintenance cycles need to be planned over a three year period. Cleaning, repairing, replacing are all part of important events for both planning and calendaring. Youth activities often call for annually or semi-annual planning. Mission trips need to be scheduled far in advance. All cohort activities depend upon calendaring and “merging” calendars can be challenging.

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**WORKING WITH CHANGE**

Our lives are full of transitions. Some are anticipated with joy; others with great sorrow and loss. In parish planning processes, there are positive signs of new life as well as negative experiences of sorrow. It is all about change. Some people thrive on change and embrace it with a lot of enthusiasm; others cringe at the thought of it and try to avoid it at all costs. Most of us fall within a spectrum between thriving on change and running from it.

Change is a process. It happens on three levels: the personal, the interpersonal and the structural. Change involves endings and new beginnings. In between there is a wilderness zone. In the wilderness there is a lot of uncertainty. The map is not charted. Dangers and loss are seen lurking around every corner. Insecurity pervades the environment. New possibilities exist, though realizing them requires a great deal of important work.

When parishes are asked to go through radical change in their structures they are vulnerable to the experiences of the wilderness zone. They often experience significant uncertainty, permeated by ambiguity, doubt and hesitation. People struggle individually and as a community when parishes are asked to merge or consolidate. There are losses, hurts and scars. In one sense the community suffers a death. It no longer will be what it has been. Faith can help the community manage the change process and see it in terms of the life-death-resurrection mystery of Christ. We were baptized into that mystery, but when the “death” moments come, they are most difficult and the struggles are great.

Research shows that resistance to change is rooted in five sources:

1. A desire not to lose something or someone that is cherished;
2. Misunderstanding about the reason for the change;
3. A belief that the proposed change does not make sense. (There is no reason for it. No one has explained it);
4. A low tolerance for change;
5. A limited trust in those leading change.

Leaders during times of change need to be people of prayer, who see themselves on a faith journey and try to do what they can to help others cope with the loss and grief that often come with the need to change, e.g. to consolidate parishes. Such leaders need to be imbued with the “Three A’s: Acceptance, Anticipation and the ability to Act.”

- Accept what cannot be changed;
- Anticipate the expressions of loss and grief as well as the new possibilities which are normal during such circumstances; and
- Act in a way that acknowledges the grief and loss and helps ritualize it and celebrate the good things of the past as a foundation for the present and future.

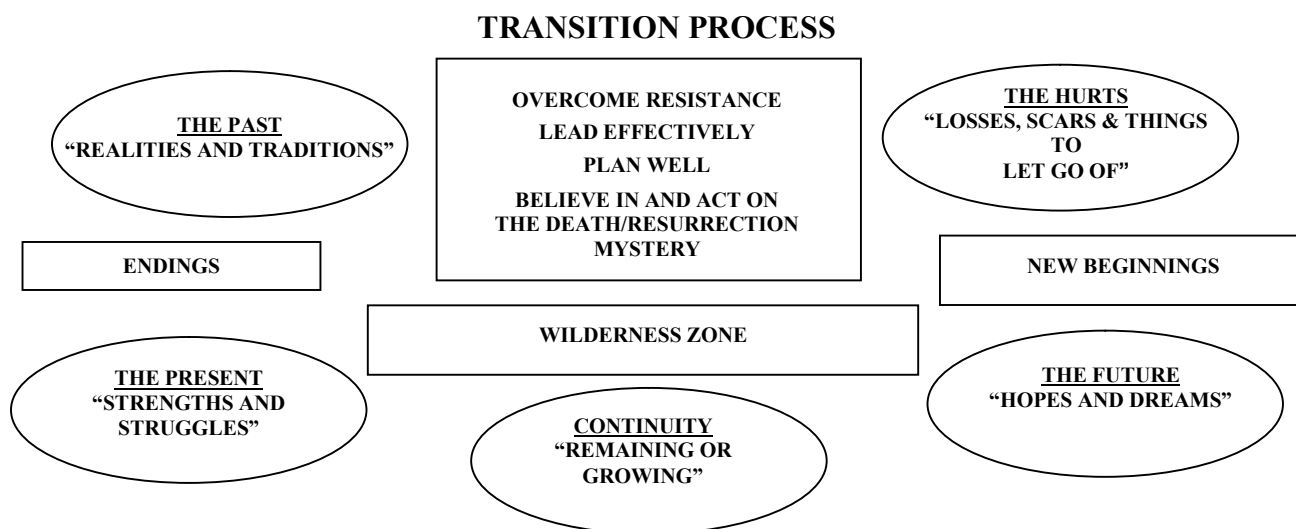
In order to be effective in leading change people need to be in touch with their spiritual roots, know who they are and who God has called them to be.

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Specific skills leaders of change need include: the ability to communicate effectively and to stay approachable; the skill to provide opportunities for participation and teamwork; the courage to take clear and appropriate action; and the strength to keep positive and optimistic, while at the same time being realistic.

Understanding the transition process gives strength and insight to deal with change. The following chart visualizes the change process.



Note the three rectangles: endings, the wilderness zone and new beginnings. These summarize the basic movement of the change or transition process. In the upper left hand corner of the chart we are reminded of the past, the realities of parish life, the traditions and all that was good. Below we acknowledge our present strengths and struggles. The circle in the upper right corner reminds us of the hurts, the losses, and all that we are letting go of: our securities, our comfort ability, our passions for what was. The circle under the wilderness zone recalls what is remaining the same or growing. Our Catholic faith is what is not changing and hopefully it is growing and leading us to articulate our hopes and dreams for the future. It is upon these that we can build our new parish communities.

As change managers we are called to know our strengths and weaknesses; develop plans of action; manage personal stress and believe in and act on the Paschal Mystery.

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**PASCHAL MYSTERY REFLECTION PROCESS  
CHANGE AND SPIRITUALITY**

**REFLECTION SHEET**

***Amen, Amen, I say to you, unless a grain of wheat falls to the ground and dies, it remains just a grain of wheat; but if it dies, it produces much fruit.” John 12:24***

1. Read the first two paragraphs from “Working with Change”. Take a few quiet moments and reflect on an example of personal change, interpersonal change and/or when your encountered structural change.
  - What was involved in the change?
  - How did you feel during the change process?
  - What was lost in the change? What remained the same?
  - What was different because of the change?
  - Were their good things that happened because of the change?
  - How long did it take them to surface?
  - In what way was your experience of change like a “grain dying” to produce fruit?
2. In twos or threes invite sharing based on the reflection. As you listen to each other look for common elements that you experienced in dealing with change?
  - What were common feelings?
  - How did you each experience the “disorientation,” the “wilderness” of the change process? What stayed the same?
3. ***“Are you not aware that we who were baptized into Christ Jesus were baptized into his death? Through baptism into his death we were buried with him, so that, just as Christ was raised from the dead by the glory of the Father, we too might live a new life. If we have been united with him through likeness to his death, so shall we be united with him in the resurrection,” Romans 6: 3-5***

Reflect on the third paragraph found in “Working with Change,” and the Transition process Chart found on page 2 as well as the Scripture passage from Romans noted above.

- From your experience working as a leader how do you see Core Groups and Cohort Groups dealing with change?
  - What traditions are ending for them?
  - What are their struggles?
  - What is remaining the same?
  - In what ways is the change a new and profound experience of the “Life-Death-Resurrection Mystery of Jesus Christ?
4. In groups of twos or threes share your reflections
    - Endings, Wilderness Zone and New Beginnings summarize the basic moments of change. In what ways do they relate to what the parishes are going through now?

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- How can we help parishes focus on “what is staying the same” amidst the chaos of change?
  - How can we assist parishes to see the sense of loss as part of the life-death-resurrection mystery?
5. Recall the meaning of your baptism and the blessing of baptismal water which happens each year at the Easter Vigil: ***“We ask you, Father, with your Son to send the Holy Spirit upon the waters of this font. May all who are buried with Christ in the death of baptism rise also with him to newness of life.”***

Note the last paragraph on the first page of “Working with Change” beginning with “Leaders during change...” and the paragraphs at the top of the second page, as well as the prayer for the blessing of the baptismal water. Think about them in terms of your own leadership in ***Connected in the Spirit.***

- How are the “Three A’s: Acceptance, Anticipation and the ability to Act” related to the life-death-resurrection mystery?
  - How has your work as a leader enhanced your skills in dealing with change yourself and helping others deal with it?
  - In what ways has the experience rooted you more deeply in “Paschal Mystery” spirituality?
6. As you think about “the big picture” and what is not changing, use the Blessing of Water Prayer (abridged) from the Easter Vigil to connect the pain and loss and “deaths” of the present moment with the mystery of God’s presence in the world from the beginning of time and most especially focused on the life-death-resurrection of Jesus Christ.

***Father, you give us grace through sacramental signs, which tell us of the wonders of your unseen power.***

***In baptism we use your gift of water, which you have made a rich symbol of the grace you give us in this sacrament.***

***At the fiery dawn of creation your Spirit breathed on the waters, making them the wellspring of all holiness.***

***The waters of the great flood you made a sign of the waters of baptism, that made an end of sin and a new beginning of goodness.***

***Through the waters of the Red Sea you led Israel out of slavery to be an image of God’s holy people set free from sin by baptism.***

***Your Son willed that water and blood should flow from his side as he hung upon the cross. After his resurrection he told his disciples: “Go out and teach all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit.”***

***Father, look now with love upon your Church and unseal for her the fountain of baptism. Shower your graces upon your Church in the Archdiocese of Indianapolis. We ask this in the name of Jesus your Son and our brother, through the power of the Holy Spirit.***

***Amen***

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**WHAT DOES A WELL-RUN MEETING LOOK LIKE?**

Well-run meetings are the result of good preparation, effective facilitation and reliable records of thought-through decisions and next action steps. When there is lack of clarity about the purpose of the meeting, when the agenda is vague and there are no time limits on items, when there is poor facilitation and lack of closure, when a few people dominate the discussion and there is no evaluation at the end of the meeting, people get frustrated, attendance diminishes and precious energy is lost. Nothing inhibits collaboration more than poorly run meetings. The materials which follow are provided as resources to help collaborative groups work well together and accomplish goals.

**Meeting Preparation**

Preparation is key to successful meetings. There are four general things to consider when planning a meeting: participants, purposes, physical environment and social tone. Who are the participants? Do they know each other? What are the goals of the meeting? What is the optimal physical environment for the meeting? How can we create a positive up-lifting environment?

The following is a basic check list to use in preparing for a meeting.

1. \_\_\_ What are the purposes of the meeting? What does it hope to accomplish?
2. \_\_\_ What materials are needed for the meeting? Minutes? Reports? Prayers?
3. \_\_\_ How is the room set up? Can all see and hear? If it is a small group that is meeting, are the tables and chairs set up to create a warm and friendly space? If there are to be observers at the meeting, can they see and hear all that is going on? Can observers participate? When? How? Is the space conducive to observer participation?
4. \_\_\_ Are there refreshments prepared for a break or before or after the meeting?
5. \_\_\_ Is the environment conducive to prayer? Is there a Crucifix, Bible and Candle in the prayer environment?

The following is a basic check list for preparing an agenda. (See the template which follows.)

1. \_\_\_ Be clear about the purposes of the meeting. (See sample in template.)
2. \_\_\_ Structure the meeting so that it begins and ends on time. (Two hours is usually the maximum amount of time that a meeting can be effective.)
3. \_\_\_ Invite a brief “check in” time at the beginning of each meeting. This allows people to say how they are coming into the meeting or share anything of significance which they want to share. (See questions in the template.)
4. \_\_\_ Include conversations about faith in the prayer service. (See sample in template.)
5. \_\_\_ Consider basing your prayer on a part of the readings from the Liturgy of the Word the Sunday before the meeting or the Sunday after the meeting.
6. \_\_\_ Depending upon the number of people in your meeting group, allow at least 15 minutes for prayer and faith sharing.
7. \_\_\_ After check-in and prayer begin with acknowledging the previous minutes which should have been distributed before the meeting, and asking if there are any corrections.

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8. \_\_\_ Carefully time your agenda. Note for the Updates section on the Template Agenda that these should be brief. Invite questions for clarification, not discussion. If needed discussion is anticipated have a brief report in the update section and note there will be time for discussion later on in the agenda.
9. \_\_\_ Be sure, if decisions are to be made at the meeting, that all the needed information is available and the participants had that information before the meeting.
10. \_\_\_ Consider using the Meeting Agenda Template and adapting it to your needs.
11. \_\_\_ Have someone prepared to lead prayer before the meeting.
12. \_\_\_ Be sure to include on the agenda a brief time at the end of the meeting to evaluate it and/or have people say a phrase about how they are feeling leaving the meeting.
13. \_\_\_ Send out the agenda and needed materials a week before the meeting.
14. \_\_\_ Ask to be notified ahead of time if an expected participant is unable to attend.

**Sample: Norms for Effective Meetings**

These are examples of suggested norms for effective meetings to be considered by all meeting participants. They need to be adapted to your own situation and embraced by those with whom you are meeting.

1. Begin and end meetings on time.
2. Come prepared for the meeting, having read needed materials ahead of time.
3. Be a good listener, standing in the shoes of whoever is speaking, trying to understand things from him or her perspective.
4. Be open to new ideas and new ways of seeing things.
5. Respectfully respond, using “I” messages (I am puzzled; I am confused; I am disappointed; etc.) instead of “you” messages (You have changed what we agreed to...; you are ignoring a whole segment of the parish...; you are only concerned about.... etc.)
6. Keep confidentiality.
7. If you have an issue with someone or something, go directly to the person involved to discuss the concern, as opposed to talking to others about it.
8. Build on what others have said, when making your remarks.
9. Contribute in positive ways to the conversation and the group efforts.
10. Be sensitive to those who have not had a chance to speak before talking multiple times.
11. Deal with conflict respectfully focusing on the issues, not on the persons. Note steps in conflict resolution:
  - Define the problem
  - Brainstorm possible solutions
  - Evaluate possible solutions
  - Come to consensus on the best solution
  - Implement the decision
  - Evaluate the decisionNote conflicts may not be resolved in one meeting. However, conversations using the steps defined above, may lead to an effective resolution of the conflict over time.
12. Celebrate accomplishments regularly.

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**Facilitating Effective Meetings**

The following are tips for facilitating effective meetings:

1. Be familiar with the agenda and the time allotted for each item. (See Agenda Template)
2. If it is a new group, have name tags the first couple of times the group meets or permanent name place cards, so people can easily refer to each other by name.
3. If this is the first time a group has met, allow sufficient time for introductions. Ask for specific information to be shared depending on the purpose of the group, etc. Examples: Please tell us your name, what parish you are from, something about your family and/or work. You may add a humorous request also, to break the ice, such as “What is your favorite food?”
4. Use a check-in question and ask for a brief response as part of orientation to the meeting such as:  
Coming to this meeting I am feeling...  
The best thing that happened to me last week was...  
The good news that I want to share is...  
The funniest thing I have heard recently is...  
You may also add and ask for a response to: “This meeting will be worthwhile for me if...”
5. Ask someone at least a week before the meeting to prepare the prayer. (Be sure there is time for reflecting and sharing insights as part of the prayer.)
6. Ratify the agenda. Ask if there are other things to be added.
7. Review the purposes or goals of the agenda and process the meeting will follow: (See Agenda Template.)
8. Be sure everyone is invited to participate. Avoid letting anyone dominate the meeting.
9. At appropriate times ask for a moment of silence before beginning a discussion to give the introverts in the group a chance to think and feel comfortable speaking.
10. If there is conflict between participants, respectfully acknowledge it, consider using the conflict resolution steps noted in “Norms” or other methods. Sometimes “tabling” the issue and asking for more information is a helpful strategy. Discounting or ignoring conflict is not advantageous, as it creeps up on subtle negative ways and contributes to the dysfunction of a group.
11. If it looks like there is need for the group to spend more time on an issue than allotted on the agenda, ask the group if it wants to continue for a specific amount of time, like 10 minute, or table the rest of the discussion until the next meeting.
12. Keep the group on track so that they can accomplish their goals.
13. Encourage honesty by valuing all input.
14. Use “round robins” (going around the circle) to get input. Remind all that they can “pass” when it is their turn.
15. When appropriate rephrase or reframe a response or a question to bring greater clarity to the issue.
16. Discourage “side-bar” conversations which distract the group from the agenda.



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17. If the agenda gets “bogged down,” despite your best efforts to keep it on track, ask the group to prioritize what remains, so that essentials get accomplished.
18. Ensure that minutes are taken at all meetings. (See Template for Minutes)
19. Ask for agenda items for the next meeting.
20. Be sure to have an evaluation, even if it is brief, at the end of each meeting to assess if the group feels the goals were accomplished and to discuss anything that could have made the meeting more successful.

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**SAMPLE AGENDA**

**COHORT MEETING BETWEEN  
St. Mary, St. Joseph and St. Ann Implementation Team  
DATE:**

**PURPOSES:**

1. To begin to form a cohort implementation team
2. To get to know one another and discover our mutual interests
3. To study the Archbishop's Goals for our Cohort
4. To study the General Goals
5. To develop the next ten steps toward accomplishing the Cohort Goals

**AGENDA**

**1. Introductions and Prayer (15-20 Minutes)**

- Tell us your name, parish, one thing about your family and one reason you said “yes” to being on this cohort implementation team
- This meeting will be successful for me if...
- A separate prayer sheet can be provided for each meeting. Prayer based on one of the Sunday readings is enriching.

**2. Study and Discuss Archbishop Tobin's Goals for this Cohort (25 Minutes)**

- What will change when we implement these Goals?
- What will remain the same?
- What are some of the advantages of implementing the Goals?
- What is the foundation upon which we have to build?
- Which of these Goals are we already doing, or close to doing?

**3. Review Cohort Data Developed during the *Connected in the Spirit* Planning Process (20 Minutes)**

- Distribute the data and divide the group into smaller groups assigning a segment of the data to each smaller group and ask them to discuss: What is significant in this data that we need to remember and build the future upon? Use newsprint to record the significant data.
- Have a brief large group discussion looking for common insights.

**4. Next Five Steps (10 minutes)**

- Envisioning the Future
- Establishing Goals
- Establishing Timelines
- Establishing Objectives
- Establishing Action Plans

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**5. Next Agenda (5 minutes)**

- Visioning
- Review of current demographics
- Plan to use subcommittees
- Next prayer leader \_\_\_\_\_

**6. Review of any Decisions Made at the Meeting (5 minutes)**

- **Who? What? By when?**

**7. Meeting Evaluation (5 minutes)**

- Examine the purposes of the meeting. How well did we do on each? Ways to improve our meetings
- At the end of this meeting I am feeling...

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**Template for Meeting Agenda**

**COHORT PARISHES**

**DATE**

**PURPOSES:**

**AGENDA**

- 1. Check-in and Prayer**
- 2. Up-dates/Reports (Written reports should be prepared ahead of time and distributed. Clarification questions should be entertained at the meeting.)**
- 3.**
- 4.**
- 5.**
- 6. Other**
- 7. Next Five Steps**
- 8. Next Agenda**
- 9. Review of Decisions Made**
- 10. Meeting Evaluation**

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**ROLE OF THE SECRETARY**

The secretary is responsible for maintaining accurate minutes and records of the proceedings of the Implementation Team. This includes but is not limited to the following:

- Recording the names of who was present at the meeting
- Keeping rosters of email addresses, home addresses and phone numbers of all participants and distributing them as appropriate
- Taking notes at the meetings relative to:
  - Important discussion items (Not verbatims of all discussions.)
  - All decisions made
- Keeping a record and copy of all reports distributed at the meetings
- Being aware of dates when materials are due to the Parish Pastoral Council or Implementation Commission, etc. and communicating this to the chair and the group

**Template for Minutes**

**Cohort Parishes:**

**Date:**

**Those present:**

**Reports:** (Name and summarize. Keep original written reports on file after they have been discussed at the meeting.)

**Important Discussion Items** (Succinctly summarize significant discussion items)

**Decisions Made**

**Next Five Steps**

**Next Agenda**

**Meeting Evaluation**