

Welcoming the Spirit

**Christina
Kheng**

**A Communal Discernment Approach
to Pastoral Planning**



**OFFICE FOR DISCERNMENT AND APOSTOLIC PLANNING
SOCIETY OF JESUS**

Welcoming the Spirit

A Communal Discernment Approach to Pastoral Planning

Christina Kheng

Office for Discernment and Apostolic Planning
Society of Jesus
2023

Office for Discernment and Apostolic Planning, Society of Jesus
Borgo S. Spirito, 4 - 00193 – Rome, Italy.
Website: www.discernmentandplanning.org

Copyright © 2023 Christina Kheng

Cover and Graphic Design by Michał Grochoła, HumanStories.studio

ISBN 9798398429336

All rights reserved.

Contents

Foreword	5
Preface	7
Introduction	9
Part I: Theological Foundations	13
Divine love for all creation	14
Humanity's vocation and communal nature	20
Universal flourishing	25
Pilgrim journey	29
The Who-What-How of a Pastoral Plan	34
Part II: Pastoral Planning Process	37
To plan or not to plan?	38
Preparation	41
Steps of Pastoral Planning	45
1. Realizing Our Current Situation	46
2. Recollecting Our Graced History	55
3. Rediscovering Our Identity and Mission	61
4. Reflecting on the Signs of the Times	66
5. Recognizing God's Call for the Present Time	76
6. Responding in Concrete Action	85
7. Reviewing Our Progress	91
Appendices	97
Appendix 1: Sample schedule for pastoral planning	98
Appendix 2: A Sample Handout on Spiritual Conversation	99
Appendix 2a: A Template to Report on the Fruits of the Spiritual Conversation	102
Appendix 3: Relevant Sections of Canon Law and Catholic Church Magisterial Texts	103
About the author	104

Foreword

We live in a time of change that is filled with challenges and opportunities. The Spirit of God is always calling us to listen, to contemplate and to see with new eyes how God is laboring in our current context and calling forth our collaboration.

Pastoral planning is an undertaking that helps us enter into this deep listening, so as to emerge more fruitful, renewed, and committed in our life and mission. A communal discernment approach is indispensable because we are in mission not as individuals but as a community, and we need to discern together how God's Spirit is moving. This calls for the participation of everyone, and is an opportunity to exercise synodality, mutual listening, and building communion amidst diversity. To this end, this book has integrated both planning and communal discernment together in a meaningful and practical way.

The 36th General Congregation of the Society of Jesus and the Universal Apostolic Preferences call for a deepening in the spiritual tradition of the Society, as well as a greater sharing of this tradition with others in their personal and communal journeys. This book draws upon the Ignatian tradition, which has much to contribute regarding discerning the spirits and the signs of the times, making decisions in resonance with the loving will of God, and incarnating this through our concrete plans and actions. At the same time, the Ignatian and Catholic worldview are brought to bear so that the processes and aims of planning are based upon a holistic vision of human persons, creation, and human enterprise.

Since the beginning of my term as Superior General, I have been emphasizing the importance of planning through communal discernment by all units in the Society of Jesus so as to better fulfil our role in the *Missio Dei*. I am grateful to the many Jesuits and mission partners, including the author of this book, who have worked together to provide formation, accompaniment, and resources to this end. They have facilitated the practical means through which some of the points I have made in my earlier letters on communal discernment and planning can be implemented on the ground.

I am especially struck that this book is written by a lay person who has worked closely with the Society of Jesus and who has also been a professional in the organizational field. This is perhaps a sign that our charism and spirituality are taking root beyond traditional boundaries and brought into fruitful dialogue with contemporary disciplines so as to better serve the world today. I am sure this book will be a valuable resource for the Society as well as for other religious congregations and ecclesial bodies seeking a meaningful renewal.

May you find in the following pages the inspiration of God's Spirit for your organization in its journey ahead.

*Rev Fr Arturo Sosa SJ
Superior General
Society of Jesus*

Preface

Many people approach pastoral planning as something to be completed as quickly as possible so as to get on with the “real” work of implementation. This book is an invitation to think differently. It highlights how pastoral planning can be an integral part of the journey to become a more open, synodal, effective, united, and discerning community. It presents planning to be as much an interior, reflective, spiritual, and communal process as it is an exterior, intellectual, and personal one. The main message of this book is that life and mission in community requires time and space for God to walk gently and lovingly with the people together, so that the community experiences a transformation and renewed vitality.

This book serves as a guide for communities and organizations in the Catholic faith tradition and beyond. It has been written with a broad-based audience in mind. This is because pastoral planning frequently involves a wide and diverse range of persons, and rightly so. For instance, participants in planning might include community members, staff, volunteers, board members, network partners, and other stakeholders. They might comprise clergy, religious, and laity, and might include Catholics as well as people who belong to various faith and spiritual traditions or have no religious affiliation at all. The explanations and planning tools provided in this book employ terms that are familiar to Catholics as well as terms that are more universal.

Additionally, this book draws from Ignatian Spirituality because this tradition offers many principles and practices that can aid pastoral planning. In fact, its underlying orien-

tation provides an important lens and way of proceeding in planning. People working in institutions based on the Ignatian tradition would resonate with the references to this tradition and its resources. Others might find in these references new insights and helpful perspectives.

Part I of the book outlines the theological foundations for planning. This is an important orientation and enables readers to understand why planning is needed and what kind of process is more consistent with a faith-based perspective. It aims to foster an appropriate disposition towards planning and help participants go through the process in a mindful and meaningful way. Some of the text can be adapted as material for preparatory reading by participants before planning begins or even for a planning retreat. To this end, a variety of quotations from various sources are included so as to foster reflection and meditation.

Part II provides a suggested process for planning and serves as a general framework which each particular organization or community can adapt according to its own contexts and needs. All steps in this framework include templates and worksheets that can be used in the process. As mentioned above, some of the proposed exercises are adapted from methodologies that have been developed in the Ignatian tradition, such as Spiritual Conversation and the History Line. Much is owed to the Jesuits and mission partners who have played significant roles in elaborating upon these methodologies over the years. Additionally, the Office for Discernment and Apostolic Planning at the Jesuit Curia has brought new momentum to their practice. I am especially grateful to Rev Fr John Dardis SJ, General Counsellor for Discernment and Apostolic Planning, and Mr Germán Muñoz Díaz, Project Manager, for our teamwork in several formation activities.

Overall, the readings, reflections and activities recommended in this book promote deeper living of communal life and mission. Hence they can also be used for purposes beyond pastoral planning. For instance, orientation programs, year-end reviews, community gatherings, and on-going formation sessions might be well-served by some of the material here. It is hoped that this book will aid many communities and organizations to experience an invigorating renewal of their identity, charism, and vocation.

Christina Kheng



Introduction

We are all wayfarers

Who am I? Where am I going? What is life all about? These questions seem to be etched deeply in the human heart. They come to the surface whenever a person faces a turning point or a crisis in life with no clear road ahead. They also arise when a person resolves to live more authentically. During each season of life, these same questions resurface to await new answers.

For a community or organization, such questions are relevant too: Who are we as a group? What is our purpose? Why do we stay together? What defines us? Where shall we go? What must we do? Just as for an individual,



these questions arise for a group whenever there is a crisis, or when the group finds itself at a crossroads, with new possibilities that call for a re-evaluation of its identity, direction, service, and common life.

Confronting these questions is not easy because it entails acknowledging the tensions that are present in the situation, letting go of what has been familiar, accepting uncertainty, and feeling vulnerable. However, this is the path that potentially leads to greater fullness of life. Conversely, avoiding the struggle or pain of dealing with these questions often causes a group to drift apart and eventually languish in desolation and despair.

Intentional and authentic living as a community entails journeying through these questions on a regular basis, and carrying out their implications faithfully, evaluating along the way. It is a process that engages the whole community in heart, mind, and soul. As a result, the community can grow fruitfully in its identity, values, life, and mission. A corresponding integration at the personal level often happens among its individual members as well.

In this sense, we are all wayfarers seeking out paths that lead to greater fullness of life. The Spiritual Exercises of St Ignatius of Loyola has been a helpful means of accompanying persons on this journey.¹ Its underlying dynamics and principles can also help a group to re-discover its identity, values, and vocation in the world, and to make fundamental choices for the road ahead.

At the crossroads

Sometimes a community or organization might find that it no longer seems to be growing fruitfully, nor are its activities and structures relevant to the present times. Other groups might find that they are preoccupied and busy with many things, but seem to lack a clear impact. There are also groups who have become aware that they might have diverted from their core mission and values, and group members are increasingly divided.

Just as individual persons benefit from undertaking the Spiritual Exercises regularly in one form or other, communities and organizations also

benefit from undergoing the Exercises regularly as a group. The underlying movement of the Exercises over its constituent “four weeks”, when adapted for a group, can lead the group to become more aware of its present lights and shadows, realize its need for conversion, deepen its connection with the Ultimate Principle and Foundation of life, and become more aware about its surrounding context. It also leads the group to rediscover its identity and mission, make specific choices for the road ahead, and pursue them faithfully despite the anticipated trials, with confidence in the ultimate triumph of good.

What is pastoral planning?

In the Christian faith tradition, pastoral planning is undertaken by an increasing number of church communities such as parishes, dioceses, religious congregations, lay ministries, Catholic schools and charities, and other ecclesial organizations. Tools from strategic planning taken from the secular management field are quite often used. From this secular perspective, pastoral planning is commonly regarded as the task of mapping out a church organization’s direction, objectives, key services, programs, and activities, and the consequent personnel and resource allocations for a defined period ahead.

Although this is not an unhelpful definition, pastoral planning can be more holistically viewed in the light of a religious tradition such as the Catholic faith. It can be regarded as

¹ For a brief introduction, see <https://www.ignatianspirituality.com/ignatian-prayer/the-spiritual-exercises/>. References to the Spiritual Exercises shall be abbreviated as (Spex).

a process of communal discernment in which members of a community come together to listen deeply to one another and to those who are connected with them, to reflect on the signs of the times and on their faith tradition, and to understand these realities in new light so as to discover and walk the path which God's Spirit is revealing to them. It is most fruitful as a prayer-centered process that promotes a community's intentional and authentic living through:

- an inward journey of confrontation with foundational questions about identity, faith, values, and purpose;
- a lateral journey of solidarity and reconciliation with one another;
- and an outward journey of living the implications in each contextual reality so as to bring about universal flourishing in the world.

The late Rev Fr Adolfo Nicholas SJ, former Superior General of the Society of Jesus, said that:

What I consider most important is that each Conference, Province and Region initiate or continue a process of discerning how or to what extent its institutions are related to its Apostolic Plan, a plan that identifies the goals, priorities and resources for service that a Province or Region contributes to the *Missio Dei*.

Each Province or Region concretizes the mission of the universal Society through an Apostolic Plan by means of a careful discernment process. In this way the Province or Region shapes its identity, its dreams and hopes, its objectives and priorities in order to help Jesuits and their collaborators—as well as the apostolic institutions themselves—to continually renew themselves and progress decisively on the path toward greater service by putting into practice, with both realism and hope, the guidelines of the recent General Congregations.²

These dynamics of apostolic planning can apply to all institutions. The heart of the process is an intimate and life-giving encounter with self, with one's companions, with others in the cosmos especially at the peripheries, and with God the Universal Life force and ultimate source of love and goodness. Such a process enables a group to be touched by profound mystery, grace, and truth once again so as to regain their innermost “dreams and hopes”, and emerge

with renewed clarity, unity, and energy. Thus pastoral planning can be embarked on “with great courage and generosity” (Spex 5).

Before undertaking pastoral planning, it is useful to consider its theological underpinnings in greater depth so as to embark on planning with the appropriate dispositions and carry it out with the right methodologies. The next section presents some theological points for reflection.



² Fr Adolfo Nicholas SJ, *Apostolic Institutions at the Service of Mission*, 2014/OI.

Part I

Theological

Foundations



Pillars of Creation (NIRCam Image), NASA, ESA, CSA, STScI

Divine love for all creation

God creates and animates all creation towards fullness of life, which is union with God for all eternity.

Christians believe that the universe is created and constantly transformed towards its good end by a loving God who desires that all become one in intimate, divine union. In particular, the Catholic faith tradition highlights that God labors actively in the world for its fullness of life.

These beliefs might find some echoes beyond the Catholic community. For instance, people of other religious traditions would resonate and relate



with a divine reality and believe in its benevolent creation and sustenance of the world. Even those do not profess any formal religion might also have experienced or perceived a positive and prevalent life-giving force in the universe, such as when they contemplate the beauty of nature, the goodness of certain people, or the resilience of communities despite suffering, pain, and loss. Even more so, they might have had a personal encounter with this heal-

ing and transformative force in their own lives.

As a result of the divine loving initiative, human beings are innately oriented towards greater fullness of life—or in Catholic terms, union with God who is infinite—and this manifests itself in human beings' apparently unlimited thirst for fulfillment and love. It also manifests itself in humans' ability to recognize genuine value, goodness, and truth when they search deeply and authentically with their hearts. Indeed our purest and deepest desires bring us home to ourselves, to one another, and ultimately to God.

This orientation towards and union with God or the Universal Life-force is not static and passive but active and participative. It animates our free, creative, and self-transcending collaboration in the divine enterprise. Even so, Catholics believe that it is God's Spirit who actively energizes, inspires, and guides humankind's positive actions.

In the Judeo-Christian Scriptures, the Book of Genesis conveys these beliefs through a symbolic story of creation in Genesis 1-2. Elaborating on the meaning of this story, the Catechism of the Catholic Church (CCC) highlights that:

”

God, infinitely perfect and blessed in God's self, in a plan of sheer goodness freely created humans to make them share in God's own blessed life. For this reason, at every time and in every place, God draws close to humans. God calls them to seek God, to know God, to love God with all their strength (CCC 1).³

The truth that God is at work in all the actions of God's creatures is inseparable from faith in God the Creator. God is the first cause who operates in and through secondary causes: "For God is at work in you, both to will and to work for God's good pleasure" [Phil 2:13]. (CCC 308)

Ignatian Spirituality underscores these two equally important aspects of divine primacy: God as the beginning and end of all things, and God's active, loving presence with humankind in history. This is especially conveyed in the Spiritual Ex-

ercises through the "First Principle and Foundation" (Spiritual Exercises, Spex 23) and the "Contemplation to Attain the Love of God" (Spex 230-237), which are like two bookends of the whole text. Ignatius writes that:

Humans are created to praise, reverence, and serve God our Lord, and by this means to save their soul. The other

3 *Catechism of the Catholic Church* (Vatican City: Vatican Press, 2003), para. 1.



things on the face of the earth are created for humans to help them in attaining the end for which they are created (Spex 23).⁴

God dwells in creatures: in the elements giving them existence, in the plants giving them life, in the animals conferring upon them sensation, in man bestowing understanding. So He dwells in me and gives me being, life, sensation, intelligence; and makes a temple of me, since I am created in the likeness and image of the Divine Majesty ... God works and labors for me in all creatures upon the face of the earth, that is, He conducts Himself as one who labors. Thus, in the heavens, the elements, the plants, the fruits, the cattle, etc., He gives being, conserves them, confers life and sensation, etc (Spex 235-236).

As mentioned above, those who do not subscribe to any formal theistic faith tradition might still be able to relate to the above points in terms of a universal driving force of goodness in the world. For instance, Eckhart Tolle, the prominent advocate of mindfulness, holds that through interior consciousness, human persons can become aware of “an eternal, ever-present One Life beyond the myriad forms of life.”⁵ Similarly, in expounding on Theory U, organizational expert C. Otto Scharmer points out the existence of an “originating source” of insight, inspiration, self, and will, in the depths of human interiority.⁶ Sociologist Charles Taylor describes the profound sense of “fullness” experienced by some people such as when they contemplate the beauty of nature.⁷

For pastoral planning, the fundamental principle of divine prima-

cy reminds us to avoid the pitfalls of secularism, Pelagian humanism, and even deism or agnosticism. We cannot plan as if God does not exist, or as if God does not have any active involvement or interest in our plans, or even as if God’s guidance is beyond human reception. However, this is easier said than done. Faith-based organizations, especially those operating and embedded deeply within certain sectors of society such as basic and higher education, social development, healthcare, civil movements, and livelihood or economic development can sometimes find themselves pulled along by the dominant cultures and operating principles in those sectors. For instance, they might start to prioritize measures of success that are more typical of secular institutions. Although some of these measures of success are unavoidable or even helpful, the problem is that sometimes

4 Louis J. Puhl, *The Spiritual Exercises of St. Ignatius: Based on Studies in the Language of the Autograph* (Chicago: Loyola Press, 1951).

5 Eckhart Tolle, *Practicing the Power of Now* (Novato, CA: New World Library, 1999), 2.

6 C. Otto Scharmer, *Theory U: Leading From the Future as it Emerges* (San Francisco: Berrett-Koehler, 2009), 10.

7 Charles Taylor, *A Secular Age* (Cambridge: Belknap, Harvard University Press, 2007), 5-6.

they become ends in themselves. In pastoral planning, such mindsets can lead to the neglect or marginalization of more holistic goals that resonate with the divine vision for creation.

These latter goals typically promote flourishing in all dimensions of life including the physical, social, cultural, moral, and spiritual. As Pope John Paul II has stressed:

”

a pastoral plan is not a matter of inventing a ‘new programme’. The programme already exists, it is the plan found in the gospel and in the living tradition, it is the same as ever. Ultimately it has its centre in Christ himself, who is to be known, loved and imitated, so that in him we may live the life of the Trinity and with him we may transform history until fulfilment.⁸

Among some faith-based organizations, there is also a tendency to adopt secular business-like practices due to a misconception about what it means to be professional or up-to-date with modern times. Though much can be learnt from contemporary secular disciplines such as organizational leadership and management, there is

a need to ensure that the approaches and practices that are ultimately adopted are consonant with the way of the Gospel. For instance, in contrast to the emphasis on measurable results in secular approaches to management, Pope Francis has remarked regarding the fruits of Christian mission that:

”

this fruitfulness is often invisible, elusive and unquantifiable ... Sometimes it seems that our work is fruitless, but mission is not like a business transaction or investment, or even a humanitarian activity. It is not a show where we count how many people come as a result of our publicity; it is something much deeper, which escapes all measurement. It may be that the Lord uses our sacrifices to shower blessings in another part of the world which we will never visit. The Holy Spirit works as he wills, when he wills and where he wills; we entrust ourselves without pretending to see striking results. We know only that our commitment is necessary. Let us learn to rest in the tenderness of the arms of the Father amid our creative and generous commitment. Let us keep marching forward; let us give him everything, allowing him to make our efforts bear fruit in his good time.⁹

8 Pope John Paul II, *Novo Millennio Ineunte* (Vatican City: Vatican Press, 2001), para. 29.

9 Pope Francis, *Apostolic Exhortation on the Proclamation of the Gospel in Today's World, Evangelii Gaudium* (hereafter EG) (Vatican City: Vatican Press, 2013), para. 279.

Sometimes faith-based organizations, in their zeal to 'save the world', can also get carried away with self-re-

liant, Pelagian tendencies and forget their dependence on God. Pope Francis cautions that:

”

though it is true that this mission demands great generosity on our part, it would be wrong to see it as a heroic individual undertaking, for it is first and foremost the Lord's work, surpassing anything which we can see and understand ... the primacy always belongs to God, who has called us to cooperate with him and who leads us on by the power of his Spirit ... The life of the Church should always reveal clearly that God takes the initiative, that "he has loved us first" (1 Jn 4:19) and that he alone "gives the growth" (1 Cor 3:7). This conviction enables us to maintain a spirit of joy in the midst of a task so demanding and challenging that it engages our entire life. God asks everything of us, yet at the same time he offers everything to us (EG 12).

Echoing this, Rev Fr Arturo Sosa SJ, Superior General of the Society of Jesus has pointed out that:

Discernment in common is the prior condition for apostolic planning at all levels of the Society's organizational structure. Thus, discernment in common and apostolic planning work in tandem to ensure that decisions are made in the light of the experience of God, and that these decisions are put into practice in such a way that they realize the will of God with evangelical effectiveness. Apostolic planning born of discernment in common becomes an instrument of our apostolic effectiveness, and we avoid the dangers of a trendy type of planning that makes use of only the techniques of corporate development.¹⁰

All this calls for humility and reverence for God in pastoral planning. At the same time, in contrast with a deist or agnostic view of a distant, disinterested, and uninvolved divine creator, pastoral planning based on the above principles entails constant and confident attentiveness to God's

ever-present, pro-active and loving guidance and inspiration in every step of the pastoral planning process. It is also undergirded by ultimate confidence in the saving grace of God.

How can we better align ourselves with the divine purpose, cultivate an attitude of trust, confidence, and hu-

¹⁰ Rev. Fr. Arturo Sosa SJ, *Letter to the Whole Society On Discernment in Common*, 2017/II.

mility, and be more sensitive to the inspiration of God's Spirit? Ignatian Spirituality highlights the way of spiritual discernment, which is about attending consciously to how positive and negative spirits are affecting us, and distinguishing between the two. We will then be able to



recognize God's Spirit better and respond accordingly. Spiritual discernment is crucial throughout pastoral planning and implementation. The Spiritual Exercises and the Ignatian tradition offer various means to grow in this capacity.

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....



Photo by Hannah Busing on Unsplash

Humanity's vocation and communal nature

All human persons are called to collaborate in God's life-giving work. This collaboration is communal in nature, and manifests the primary reality of humanity and the cosmos as an organic unified body developing towards fruition with a rich diversity of charisms.

God calls each and every human person, without exception, to collaborate in the divine life-giving enterprise. This does not take away our



free will but, rather, we collaborate as intentional and responsible agents who can make a difference in the world. As declared by the CCC,



God is the sovereign master of God's plan. But to carry it out God also makes use of humans' co-operation... For God grants God's creatures not only their existence, but also the dignity of acting on their own, of being causes and principles for each other, and thus of co-operating in the accomplishment of God's plan (CCC 306).

This statement highlights the dignity, responsibility, vocation, and freedom of every human person and the significance of human agency within the horizon of God's primacy. Hence the Church exhorts all people to "render mutual service according to the different gifts bestowed on each"¹¹ and stresses that "each person finds his or her good by adherence to God's plan for him or her, in order to realize it fully: in this plan, he/she finds his/her truth, and through adherence to this truth he/she becomes free."¹² In other words, everyone is endowed with particular charisms to collaborate in the divine enterprise, and such charisms resonate with one's truest self, thus leading to fruitfulness and fullness of life.

Ignatian Spirituality highlights these foundational teachings of the Church. In particular, the Spiritual Exercises point out the reality of the human vocation vividly through meditations such as "The Call of an Earthly King" (Spex 91-98). In fact, the whole orientation of the Exercises is to help people discern God's call for them and to better align their lives with their vocation. The underlying worldview of the Exercises emphasizes the importance of the human vocation as well as human freedom, inten-

tionality, charism, and responsibility. It also regards the process of human knowing as one which fruitfully engages all faculties of the human person, covering all dimensions of reality including the physical and empirical, affectivity and feelings, artistic sensibilities, cognition and meanings, intuition, moral consciousness, and spiritual sensibilities. This is well-illustrated in the various methods for prayer, reflection, and deliberation, which involve the five senses (Spex 66-67, 121-125), body posture (Spex 76), imagination (Spex 47), feelings (Spex 6, 48, 60), sound reasoning (Spex 178-188), memory (Spex 56), will (Spex 50), and interior affective movements or "spiritual consolations and desolations" (Spex 313-336). Such a holistic view of human epistemology coheres with the Church's teaching.

Along with the dignity of human persons, Catholic anthropology and theology also emphasize the intrinsic social nature of human persons, and the communal nature of participation in the life and mission of the trinitarian God. In fact, the communal solidarity that is often built or strengthened in the process of such participation is itself the very goal and mission of the divine enterprise. It evidences the successful flourishing of life even if

11 Vatican II Council, *The Church and the Modern World, Gaudium et Spes* (Vatican City: Vatican Press, 1965) (hereafter GS), para. 32.

12 Pope Benedict, *Caritas in Veritate* (Vatican City: Vatican Press, 2009), I.

planned activities seem to have not borne external fruit or have encountered unanticipated setbacks.

Countering the individualistic culture of contemporary times, the Second Vatican Council highlighted that “God did not create men and women as solitary beings” but “by their innermost nature men and women are

social beings; and if they do not enter into relationships with others they can neither live nor develop their gifts” (GS 12). Human beings are thus created and meant to grow in ontological oneness such that each person’s identity is derived not in isolation but within an ordered and organic whole. The Council further stressed that:

”

from the beginning of salvation history, God has chosen people not just as individuals but as members of a certain community. Revealing God’s mind to them, God called these chosen ones “God’s people” (Ex. 3:7-12), and even made a covenant with them on Sinai. This communitarian character is developed and consummated in the work of Jesus Christ (GS 32).

Hence humankind is created as a community, called as a community, and saved as a community. An important implication is that knowledge of truth and reception of revelation is communal as well. A community receives God’s communication as a single organic body and grows in its wisdom tradition. Truth and divine revelation come through the *sensus fidei fidelium* - a communal, inclusive, and spiritual epistemology of the faithful as One Body. This is an epistemology that acknowledges the voice of the Holy Spirit in every person, especially those on the peripheries, and upholds each one’s co-responsibility for discernment and developing the mission. Given the Church’s efforts to renew her synodal nature, this way of proceeding is crucial. It helps avoid the top-down approach of a leader imposing or trying to convince members towards his or her pastoral plan, or always having the pastoral plan drafted by the same inner circle.

Fr Arturo Sosa SJ points out to the Society of Jesus that “the Society must encourage the participation of the whole apostolic body, which is called to elect the best possible ways to contribute to the proclamation of the Good News and the transformation of the world, in this epoch of swift and profound changes.” He further adds that “there are many cases where persons who do not share our Christian faith collaborate in works of the Society or join with us in providing services to persons in need. Finding respectful and genuine ways to making them participants in the process of discernment in common is a challenge to our creativity and our freedom as sons and daughters of God.”¹³

Ignatius and the first companions experienced, first-hand, the reality of their call to be one apostolic body. This call resonated with their deepest desire despite the many external and internal challenges. In more recent years, the Society of Jesus has given

¹³ Rev. Fr. Arturo Sosa SJ, *On Discernment in Common*, 2017/11.

renewed emphasis to the communal nature of its life and mission. This is particularly highlighted in General Congregations 35 and 36, though the theme is not entirely absent from earlier congregations. An increasingly globalized world has further called attention to the universal nature of such communion, even as the need to enhance the quality of local community life and local collaboration in mission is recognized. Hence the renewal of community, synodality, and communal discernment as a way of life and mission, along with relevant practices such as the Spiritual Conversation, is now seeing a revitalization in the Society of Jesus.

Just as individuals have personal charisms, every community or organization has certain core qualities which uniquely express God's gift to the world. These include its most essential self-identity before God's eyes, its purpose, core values, gifts, and spirituality. They could be considered the germinating seeds of the Divine Logos. An organization's charism is its truest wellspring of life, meaning, energy, direction, motivation, and fruitfulness. Any misalignment would tend to lead to eventual stagnation or decline in life and mission. For this reason, though charism is enduring and unchangeable in essence, it can be re-discovered, re-understood, or re-claimed in new contexts and times. This is a crucial part of pastoral planning.

On a related note, upholding the communal nature of pastoral planning has a historical, diachronic dimension too. In addition to involving the present circles of community members and stakeholders, planning

must take into account the historical development of the community and its evolving tradition. For church organizations in particular, Pope Francis has highlighted that "Christianity is not only a doctrine, but a history that leads to this doctrine." He cautions against being "ideological Christians" who take up positions based on personal preferences and "lack the memory of belonging to a people"—the People of God with a particular history of salvation and revelation that must be taken into account.¹⁴ Thus the journey that the community has traveled since its beginning, and its historical heritage, are part of the totality of the community today.

Beyond the Christian tradition, the above principles on humanity's vocation and communal nature are also germane to other major religions. Most faith traditions view human life as having an ultimate purpose, and believe that humans are called to strive towards greater flourishing of the whole universe. Many major religions also espouse a view of creation as intimately inter-connected and communal. Indigenous traditions, in particular, emphasize the fundamental oneness of the whole cosmos, with each part profoundly affecting every other.

People who do not profess any religious belief might nevertheless subscribe to the view that humans find ultimate fulfilment in something larger than the self, and that the purpose and meaning of life is often realized through striving for the greater good. In addition, the intrinsic social and communal nature of humans is found in many schools of thought in the human sciences.

¹⁴ Pope Francis, *Homily at Casa Santa Marta*, May 7, 2020.

For pastoral planning, these principles imply that community building is as much a desired goal in the pastoral planning process, and often emerges along the way if a good process is followed. Participants might notice that the transfor-

mation they seek in terms of communal healing or reconciliation might already be happening even before completing the plan. It is for this reason that pastoral planning needs time and space, and faithful attention to the Holy Spirit.





Universal flourishing

The whole universe is a sacred place in which God's saving work is already occurring. The flourishing of the world embraces everything and all aspects of life, including the physical, social, cultural, moral, and spiritual.

The Catholic faith tradition sees the world as a place which is not 'unholy' and to be avoided but as the very context in which God's work of salvation is already occurring. The universe is thus a sacred place. As *Laudato Si'* proclaims, "the entire material universe speaks of God's love, God's boundless affection for us."¹⁵



Likewise, GS 36 highlights God's revelation even in the development of secular disciplines, acknowledging that "the humble and persevering investigators of the secrets of reality are being led, as it were, by the hand of God, even unawares, for it is God, the conservator of all things, who made them what they are."

¹⁵ Pope Francis, *Laudato Si'* (Vatican City: Vatican Press, 2015) (hereafter LS), para. 84.

Highlighting that religion is not to be an escape from the world, the Second Vatican Council stressed that:

”

they are mistaken who, knowing that we have here no abiding city but seek one which is to come, think that they may therefore shirk their earthly responsibilities. For they are forgetting that by the faith itself they are more obliged than ever to measure up to these duties, each according to his proper vocation ... Christians should rather rejoice that, following the example of Christ Who worked as an artisan, they are free to give proper exercise to all their earthly activities and to their humane, domestic, professional, social and technical enterprises by gathering them into one vital synthesis with religious values, under whose supreme direction all things are harmonized unto God's glory (GS 43).

Reiterating this, Pope Francis points out that:

To be holy does not require being a bishop, a priest or a religious. We are frequently tempted to think that holiness is only for those who can withdraw from ordinary affairs to spend much time in prayer. That is not the case. We are all called to be holy by living our lives with love and by bearing witness in everything we do, wherever we find ourselves (GE 14).¹⁶

Hence the Christian mission—and consequently pastoral planning—does not leave out any realm of the temporal world and is in fact attentive to the possibility of divine communication in every aspect of it.

The Ignatian tradition provides much flesh to these tenets. In the Spiritual Exercises, the meditations on “The Call of the Earthly King” (Spex 91-100) and “The Incarnation” (Spex 101-109) are especially poignant in highlighting that the drama of salvation occurs on the very stage of the earthly temporal realm, and embraces all persons and all spheres of life. Finding God in all things is a cen-

tral principle in Ignatian Spirituality. Ignatius highlights that “God dwells in creatures: in the elements giving them existence, in the plants giving them life, in the animals conferring upon them sensation, in man bestowing understanding. So He dwells in me and gives me being, life, sensation, intelligence” (Spex 235). Hence the need to attend and adapt to the present realities of persons and contexts is evident throughout the Exercises, especially in the introductory guidelines on how these Exercises should be approached (Spex 4-20). Ignatius also stresses that “love ought to manifest itself in deeds rather than in words”

¹⁶ Pope Francis, *Gaudete Exsultate* (Vatican City: Vatican Press, 2018), para. 14.

(Spex 230). This is resonated in Pope Francis' remark that "realities are more important than ideas" (EG 231). A meditation on "The Three Classes of Men" (Spex 149-157) highlights the importance of concretely manifesting one's interior freedom for God's will by seeking to do the one thing necessary.

In line with the importance accorded to earthly history, the Catholic faith tradition elaborates on a holistic vision of the universe's flourishing that comprises both the spiritual and material. The *Compendium of the Social Doctrine of the Catholic Church* points out that fullness of life comprises the "personal and social, spiritual and corporeal, historical and transcendent."¹⁷ Likewise, *Gaudium et Spes* highlights the "common good" (GS 26) which upholds "people's material needs and the requirements of their intellectual, moral, spiritual, and religious life" (GS 64). The universal good thus includes the physical well-being of the whole cosmos, especially the most vulnerable, as well as 'goods' that encompass more than just the material, such as social solidarity, justice, equality, and peace. Cultural flourishing, including the development of humankind in a diversity of intellectual and wisdom traditions as well as in the arts and aesthetics, is also an integral facet as highlighted especially in *Gaudium et Spes*. Just as important is the growth of each person in authenticity, freedom, responsibility, morality, vocation, and participation. All these desirable ends are in turn directed towards the ultimate goal of union with God.

In other religious traditions as well as in secular society, similar values can be observed. For instance, almost all religions emphasize the promotion of the common good, with a similarly multi-dimensional view of the 'good', encompassing both the material and non-material. Global conventions such as the United Nations Declaration of Human Rights and the United Nations Sustainable Development Goals also espouse a holistic view of universal values and desired ends, paying attention especially to the most vulnerable.

For pastoral planning, the importance of the earthly temporal realm imply that due attention must be given to contextual realities, which include those realities within the community or organization, and in the surrounding local and global contexts. Communal discernment for pastoral planning entails listening attentively to the signs of the times, especially to the voices of people including the marginalized, seeking relevant information about the context, and even going out to the peripheries while also not ignoring the realities that are right before one's eyes. Discernment is thus not a task that is carried out in a vacuum or from an ivory tower, nor limited to only 'other-worldly' and 'spiritual' matters. Moreover, it calls for attentiveness to potential blind-spots, prejudices, and unverified assumptions. Just as important, it must eventually translate into concrete action.

The holistic vision of universal flourishing as described above can serve as a teleological compass by

¹⁷ Pontifical Council for Justice and Peace, *Compendium of the Social Doctrine of the Church* (Washington DC: USCCB Publishing, 2005), para. 38.

which persons, communities, and organizations in Church and society can evaluate the signs of the times, develop shared values and goals, and discern specific calls and contributions. Just as important, this teleological vision requires that



the planning process itself abides by the same ideals; that is, it upholds the well-being of those involved and promotes communion, meaningful participation, personal authenticity, and growth in values, freedom, and spirituality.



Pilgrim journey

Earthly history is a pilgrim journey in which we are called to grow continually in our life and vocation amidst ups and downs, challenges and uncertainties, good and evil.

The Catholic tradition espouses a theology of change which sees the world as constantly evolving and developing. The CCC highlights that:

“

creation has its own goodness and proper perfection, but it did not spring forth complete from the hands of the Creator. The universe was created in a state of journeying toward an ultimate perfection yet to be attained, to which God has destined it (CCC 302). In God's plan this process of becoming involves the appearance of certain beings and the disappearance of others, the existence of the more perfect alongside the less perfect, both construc-

tive and destructive forces of nature. With physical good there exists also physical evil as long as creation has not reached perfection (CCC 310).

This applies to the Church as well. Vatican II points out that the Church is “on earth, the initial budding forth of that kingdom. While it slowly grows, the Church strains toward the completed Kingdom” and that it “will attain its full perfection only in the glory of heaven.”¹⁸ In the meantime, the Church “needs the maturing influence of centuries of past experience” and thus its members are exhorted to ceaseless “purification and renewal” (GS 43). The motif of a pilgrimage is often used to describe the world as well as the Church. Most importantly, Christians believe in the abiding presence of God’s grace which animates human persons towards the good. God’s promise that love and life will triumph ultimately over evil gives Christians the hope and confidence to persevere in their journey.

Ignatian Spirituality emphasizes this pilgrim character of human life, and highlights the polarity of human inclinations towards good and evil. The Spiritual Exercises acknowledge the existence of sin and its effects, especially in the meditations of the First Week. The descriptions of “The Three Types of Persons” as well as “The Three Kinds of Humility” (Spex 165-168) in the Second Week also recognize the varying degrees in which human persons commit to the good. The Rules for the Discernment of Spirits (Spex 313-336) are particularly illumi-



native in highlighting the opposing directions to which human beings can be drawn, and the active influence of both the good and evil spirits. The Rules point out how a person can strive more deliberately to follow the promptings of the good spirit. In the Third and Fourth Weeks of the Exercises, meditations on Christ’s suffering, death, and resurrection are a reminder of God’s self-giving love and ultimate victory, even as the pain of the Cross is an inevitable part of the journey.

These notions of the clash between good and evil, along with the failings and triumphs of human persons, are common themes in many religious traditions. Most people would also acknowledge the developmental nature of human beings and of the world, and the dynamic realities of progress and decline. Hence the theological ideas described above would likely resonate with a broad audience.

An important implication is the need for all persons, communities, and organizations to regularly examine themselves, take stock of their journey, make mid-course adjustments where necessary, find ways to be strengthened, or even be open to radical change. Just as how a regular spiritual retreat might help sustain individuals in their life and vocation, or even promote a turnaround if they have been straying from their true calling and values, pastoral planning

¹⁸ Vatican II Council, *Dogmatic Constitution on the Church, Lumen Gentium* (Vatican City: Vatican Press, 1965) (hereafter LG), para. 5, 48.

by a community is akin to taking a step back from daily routines so as to become more aware of what's happening in the journey, to gain a fresh perspective, to become more centered or even reconciled with one another and with the Divine Presence, and to choose the path that is more life-giving.

From the Christian perspective, creation's yet-to-be-complete and ever-developing nature also implies that there is always room for further growth and progress. Hence a community or organization is constantly called towards a deepening, discovery, and development of its life and mission. It is sometimes tempting to rest on the laurels of past glories, or on the successes that have been achieved, and assume that the task for the present day is to simply keep things as they are. However, Pope Francis has rightly warned that "mere administration can no longer be enough. Throughout the world, let us be permanently in a state of mission" (EG 25). Ignatian Spirituality uses the term *magis* as an exhortation to seek the greater glory of God. Thus regular pastoral planning can help a commu-

nity or organization to avoid complacency or become self-referential and entrenched in its comfort zone.

Some groups might feel that their internal or external contexts are so volatile and unpredictable that it would be impossible to plan ahead. Indeed, the word "plan" shares the same root meaning with words like "plane" and "planar", connoting flatness, levelness, and even predictability. Real life is, of course, much the opposite. In fact, it is now common to regard disruption and unpredictability as the new normal. Even if the context of a community or organization is relatively more stable, some people might be of the view that the very act of planning is based on a false assumption that human beings have substantial control and mastery over history. After all, Psalm 33:10 in the Bible says that "the Lord foils the plans of the nations; he thwarts the purposes of the peoples." Similarly, in Psalm 2, the psalmist wonders: „Why do the nations conspire, and the peoples plan in vain? He who sits in the heavens laughs; the Lord has them in derision" (Ps 2:1, 4). Pope Francis points out that:

”

there is no greater freedom than that of allowing oneself to be guided by the Holy Spirit, renouncing the attempt to plan and control everything to the last detail, and instead letting him enlighten, guide and direct us, leading us wherever he wills. The Holy Spirit knows well what is needed in every time and place. This is what it means to be mysteriously fruitful! (EG 280)

However, in the same document, he also says:

I dream of a 'missionary option', that is, a missionary impulse capable of transforming everything, so that the Church's customs, ways of doing things, times and schedules, language and structures can be suitably channeled

for the evangelization of today's world rather than for her self-preservation. The renewal of structures demanded by pastoral conversion can only be understood in this light: as part of an effort to make them more mission-oriented, to make ordinary pastoral activity on every level more inclusive and open, to inspire in pastoral workers a constant desire to go forth and in this way to elicit a positive response from all those whom Jesus summons to friendship with himself. (EG 27)

What this implies is that no doubt the future and even the present are uncertain, and humans should not presume to be in full control of them. However, this all the more calls for a turning towards God and for a communal resolve to proceed in better alignment with the Divine Presence. This is what pastoral planning is all about. In this light, we might heed God's assurance in Scripture: "For I know the plans I have for you," declares the Lord, "plans to prosper you and not to harm you, plans to give you hope and a future" (Jeremiah 29:11).

Consequently, we could view planning as "leveling" the road of our heart and mind, so as to "prepare the way for the LORD; make straight in the desert a highway for our God. Every valley shall be raised up, every mountain and hill made low; the rough ground shall become level, the rugged places a plain" (Isaiah 40:3-4). In pastoral planning, the community offers an open, unobstructed path for God's spirit so that God's promise can be fulfilled: "I will bring you back to your own land" (Ezekiel 36:24). Indeed, pastoral planning is a pilgrimage journey of coming home to our true identity and vocation before God. It is a communal rediscovery of a group's charism and core values, a spiritual discernment of the divine plan and of the group's role in it, and a re-dedica-

tion to carry out the necessary actions for the road ahead.

This holds true regardless of how predictable or not the future might be for a community or organization. Moreover, whilst the overall directions and priorities in the pastoral plan serve as a compass, specific targets, and action steps can be revised in response to new developments and unexpected events.

Whatever the context, pastoral planning requires a disposition of humility, openness, and faithfulness rather than rigidity, over-confidence, and close-mindedness. In practice, pastoral plans are seldom drawn up in a perfect way with a complete list of objectives, targets, and actions mapped out neatly for several years ahead. Rather, most plans contain elements of uncertainty and even ambiguity, and this is in fact to be welcomed. It is a reminder that certain things take time. This invites the group to remain disposed to listening, dialoging, discerning, welcoming unexpected opportunities, and seeking the guiding hand of God.

Finally, the imperfect nature of temporal life calls for realistic expectations in setting targets and evaluating progress. Setbacks and failures are an inevitable part of the journey. Painful or disappointing though they might be, they present valuable learning and

lights “contemplation in action” and offers the Examen as a helpful tool towards this end.¹⁹

¹⁹ See “The Daily Examen,” <https://www.ignatianspirituality.com/ignatian-prayer/the-examen/>.

The Who-What-How of a Pastoral Plan

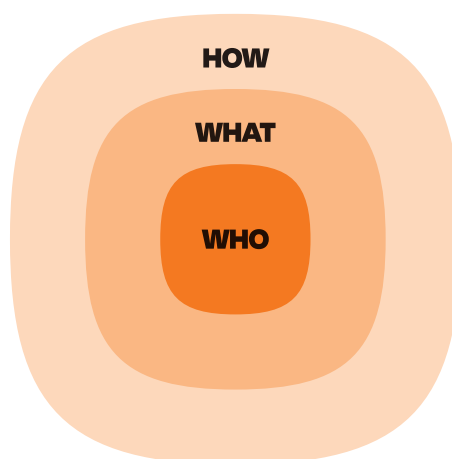
The theological foundations of pastoral planning imply that when a community or organization embarks on a pastoral planning process, it undergoes a journey in which it re-discovers the life-giving roots of its core foundations, strengthens the bonds of solidarity among its members and with others, and renews its mission in the present realities of the world. In these inward, lateral, and



outward movements, the members encounter God, one another, and those whom they serve.

Consequently, a pastoral plan consists of three levels in dynamic interaction:

- The enduring values, identity, charisma, and purpose of the group;
- Its direction and priorities for the medium term; and
- Its specific goals and actions.



These three levels can be viewed as the Who-What-How of a pastoral plan; that is, Who the community or organization essentially is; What it is called to do in the present context; and How it will go about doing it. Whilst the level of “How” is more fluid and adaptable to changing contexts and unexpected events, the level of “What” serves as a more stable compass of

direction and priorities for the medium-term. The level of “Who” provides the ultimate reference point of identity, purpose, and values.

As highlighted in the theological reflection, Ignatian Spirituality emphasizes the “Principle and Foundation” of life which is union with God (Spex 23). This invites an organization to go back to its foundational charisma, its

“Who”, and to seek nothing other than its true identity-before-God. Similarly, the Ignatian tradition also calls attention to the world’s realities and the fundamental vocational choices to be made in view of the organization’s charism; that is, the “What”, and to commit to it with conviction.



Finally, concrete action is indispensable; that is, the “How”, and these must be astutely adapted to contexts and circumstances. Hence the dynamic and mutual interaction of the three levels enable an organization to be true to its vocation and relevant to the times.

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

Part II

Pastoral

Planning

Process

To plan or not to plan?

Discerning a time to plan



For a start, the leaders of a community or organization can discern whether it is timely to embark on the process of pastoral planning. Many groups find it fruitful to do so every 5-10 years. This is because some realize that the path they have previously charted is no longer relevant nor effective in a changing context. Others find that they have outgrown the goals that were previously set, and are experiencing stagnation or a plateau in their development. Group members seem to be getting increasingly restless or even unmotivated. Certain groups become entrenched in maintaining existing works or existing structures and routines without questioning their relevance, and are unwilling to leave their comfort zones.

Some groups may have never had a well-discerned direction, and are consequently grappling with lack of focus and unity, with each member pursuing his or her own interests and goals. Yet other groups may find themselves doing so much work that their members are getting burnt out and ineffective. Finally, it is not uncommon to find a group straying from its purpose or not living out its core values and spirituality, due either to neglect and complacency, increasing distractions, or undue influences from external parties.

If left unaddressed, all these situations can further alienate the group from its true identity and vocation, and eventually lead members into desolation, withdrawal, and further division. Indeed Fr Adolfo Nicolás SJ has cautioned that:

”

Institutions carry with them potential risks. They can become outmoded and irrelevant, lose their religious and Jesuit identity, consume a large number of personnel and financial resources, and thus become obstacles to apostolic mobility, overlooking other creative apostolic initiatives ... It is not enough that the enterprise functions well, offers good service, enjoys prestige and is a place much sought out by people. It is an issue of knowing how or whether our institutions continue to be primarily apostolic instruments, clear about their primary aim of serving the mission of the Church and of the Society.²⁰

²⁰ Fr Adolfo Nicolás, *Apostolic Institutions at the Service of Mission*, 2014/OI.

These words provide helpful points for self-examination by a group. Sometimes the need for change goes unnoticed or is repeatedly dismissed either by a group's leaders or its members. However, as evident throughout Scripture and the history of the Church, the abiding grace of God is ever-present to provoke awareness and receptivity of conversion and to provide support for taking the first steps. At a personal level, most people might recall times in their life history when they experienced "divine intervention" either through events or the advice of others. For a group, this requires enough members to be open to God's promptings in their present situation.

A time not to plan

There are certain circumstances in which a group should not embark on the pastoral planning process as yet. The most obvious is when the group's attention has to be focused on coping with an emergency situation such as a natural disaster or a social crisis. Emergency situations can also be internal or institutional in nature, such as a public scandal, a sudden departure of key members, an acute communal conflict, a major threat to the group's continuity or legitimacy, or any other situation that causes significant insecurity, instability, and anxiety. In such situations, the group needs to focus on responding directly to the crisis for as long as needed, and hopefully reach a time of relative stability. Only after that would it be appropriate to consider pastoral planning.

Another circumstance is when the group's leader or leadership team is

relatively new. This initial period of leadership is often best spent listening, learning, and establishing relationships of mutual trust and understanding. This applies even if the new leaders have been selected from among existing members of the group. Assuming leadership roles often changes the dynamics between people, and also entails seeing from new perspectives. Sufficient time is required for a new equilibrium to be reached.

Yet another situation is one in which leadership credibility has been somewhat eroded. Among other reasons, this sometimes happens when previous pastoral plans were not done effectively or meaningfully, were not implemented, or were made in a top-down way without any genuine consultation or consensus. There are communities and organizations in which there is much disillusionment, cynicism, and even aversion to pastoral planning, usually for these reasons. In such situations, the group first needs to work on improving synodality in leadership, collaboration, organizational effectiveness, and even culture and attitudes, so that members' confidence, commitment, and mutual trust can be gradually restored.

Finally, in situations in which many people in the group are new, or when the group itself is newly-formed, the pastoral planning process would be best put on hold until adequate learning and relationship-building has occurred. This will enable everyone to participate more meaningfully, and lay the ground for union of minds and hearts, which is what communal discernment entails. Likewise, when the general level of members' interest, motivation, or morale is relatively low due to particular reasons, these un-

derlying factors need to be addressed first before embarking on pastoral planning.

Planning amidst volatility

As mentioned in the theological reflection, pastoral planning is not irrelevant when volatility is a constant in the group’s environment. In fact, this makes it all the more necessary to reflect on, discern, and clarify a group’s core identity, values, mission, and fundamental directions. Otherwise the group may be simply swept along by external events, popular movements, or by the agenda of dominant parties, and find itself in paths that are no longer resonant with its true charism and mission. A clarification of such foundations through a communal discernment approach in pastoral planning, along with the strengthening of unity and commitment, can help a group



to navigate through uncertain or tumultuous times, and even find their most important calling in these circumstances. To take account of the uncertainty, the pastoral planning can be adapted such that whilst the overall directions and priorities can be agreed upon, specific targets and actions can be more flexibly formulated and adapted to the changing situation on the ground.

Overall, the time and conditions suitable for pastoral planning is similar to that for making a major decision through communal discernment as taught in the Ignatian tradition: there must be a reasonable degree of interior freedom, openness to and acceptance of one another in the group, ability to give wholehearted attention to the process, sufficient information and understanding of the matters at hand, and basic skills in spiritual discernment. The period of time to be covered by the pastoral plan, usually in terms of years, should also be established. For most organizations, this is typically 5-10 years.

.....

.....

.....

.....

.....

.....

.....

.....

.....

Preparation

1. Setting up the planning team

Once a decision is taken to embark on pastoral planning, it is helpful to form a planning team of about 3-4 persons to steer and organize the process. This team would report to the leaders of the community or organization. Their role would be to recommend the methodology, design the detailed steps, handle general communications, organize the relevant activities such as retreats and meetings, manage the consultations, collate inputs, document deliberations and decisions, and make the transition to implementation. Members of such a planning team should be persons who are able to maintain a bird's eye view of the process, understand its underlying principles and dynamics, be sensitive to members' and stakeholders' engagement, and make adjustments to the process in a discerning way. They should be persons who are trusted by the community members and known to be relatively neutral in the process, without significant attachments to certain agendas. Planning team members would be expected to dedicate adequate time and attention to the pastoral planning process amidst their other organizational responsibilities, which in fact would be best kept to a minimum during this time. The appointment of the planning team is for a specified time corresponding to the duration of the pastoral planning process, including the preparation and follow-up. This appointment is then communicated to everyone in the organization.

2. Clarifying participation and decision-making levels

An important step in the preparation is to decide about who the participants would be, how decisions would be made, and who would finally confirm the plan. Generally, all members of a community or organization should be engaged in the whole process since it is a renewal of the life and mission of the whole group. The steps outlined in the next section will elaborate on how to deal with large numbers, geographical dispersion, language diversity, and other challenges of meeting together.

Certain stakeholders such as external partners, collaborators, beneficiaries, funders, and other persons in church and society might also be involved in some parts of the planning process. To this end, it is helpful to note that there can be several levels of participation. Whilst some people might take part in all steps of the planning including the reflections, deliberations, and decision-making, others might be consulted mainly for their feedback, viewpoints, and suggestions. As noted in the theological reflection, every community or organization is an integral part of a larger, inter-related whole, and pastoral planning is not something carried out by a group in isolation. Indeed, the scope of participation is itself a question that needs to be well-discerned by the leaders and the planning team

because it is often a significant determinant of the quality of the process and the outcomes. More often than not, the planning is affected adversely when there is a lack of inclusion of some voices and perspectives.

If there are participants of other religious faiths and spiritualities, it might be helpful for the planning team to consult them about particular adaptations of the process if needed, or to encourage their suggestions and respond to their queries.

Clarity about decision-making also needs to be established beforehand. Typically, the final decision about priorities, specific goals, and allocation of resources rests with those who have formal governing authority and are officially held accountable as stated in the organizational statutes or in Canon Law. There might also be intermediate levels of decision-making such as those pertaining to detailed program targets and timelines. These might fall within the responsibility of intermediate team leaders. However, the underlying principle of communal discernment is that the conclusions reached by the whole discerning body, provided a good process was genuinely experienced, should be the key basis upon which final decisions are made. For large communities or organizations with many members, such as a diocese, an educational institution, or a multi-national religious congregation, the final deliberation can be undertaken by a representative group that includes the community leaders and other representative members. Even so, this is done only after all members have had a chance to reflect, pray, deliberate, and share their feedback.

For most organizations, certain rules about decision-making are stip-

ulated in their official statutes and in the relevant laws governing the organization, whether ecclesial or civil. Some faith-based organizations have additional norms or practices to abide by regarding decision-making. If these do not exist or are deemed to be unsuitable for the pastoral planning, then a decision-making structure for the planning needs to be designed and agreed upon prior to the process. Thus all participants are informed so that they come with the right expectations.

3. Establishing the steps and schedule

Once the scope of participation is clarified, the pastoral planning process can be designed with the appropriate steps and with a schedule that takes into account the nature and situation of the group, the capacity and availability of people, the length of time needed for each activity to be undertaken fruitfully, and the events or existing platforms such as annual assemblies which the pastoral planning can be integrated with if appropriate. As a general guide, a total time of about 1 to 1½ years could be set aside. (See sample schedule in Appendix 1.) The length of time cannot be too short as this might not foster the communal transformational experience that pastoral planning is meant to be. After all, honest reflection, depth of prayer, genuine conversion, authentic conversation, communal consensus and reconciliation require adequate time and space. On the other hand, if the process takes too long, the group's motivation and attention would likely dissipate. Some variables in the planning inputs might also have changed.

During the process, there could be times when a discernment is needed on whether or not to abide by the original schedule or make adjustments in response to unanticipated events or perceived changes in the groups' energies and sentiments. This requires the planning team, together with the leaders, to make a good evaluation and discernment about the process and the pace.

4. Allocating resources for the process

The required resources for the whole process need to be anticipated and obtained. Such resources typically include facilities, accommodation, transportation, utilities, food, administrative support, and materials required for meetings and related activities. Stipends for external facilitators and other persons might be needed as well. All these items would comprise the planning budget and the source of funds would have to be identified.

5. Communication

When a decision is made to embark on the pastoral planning process, or even while such decision is being considered, communication is an important factor to be mindful of. First, members of the community or organization should be informed in a timely and sensitive manner.

Typically, news spreads about a possible pastoral planning process even before official announcements are made! Such news is typically met with a variety of reactions, ranging from gladness, hope, and optimism

to hesitation, reservation, and even anxiety arising from fear of possible change. This is especially so for people whose jobs or livelihoods are at stake. There might also be cynicism, fatigue, and disinterest. At the same time, a range of expectations and desires about both the outcome and the process would come to the fore, and these are often influenced by individual preferences and interests. Hence it is important that leaders communicate clearly and with pastoral sensitivity to the whole community, providing adequate information ahead of time and having empathy for members' point of view. Channels of communication should also be kept open, so that members are able to convey their feedback, raise questions, and express their hopes and concerns, if any. Otherwise, if these are suppressed or not sufficiently addressed, they would affect the freedom, trust, participation, and openness needed for communal discernment. Most importantly, the leaders can dedicate more attention and personal care to those members who anticipate (whether reasonably or not) potential losses or unwelcomed change as a result of a new pastoral plan.

In communication, all relevant persons should be helped to understand the reasons for embarking on the planning process, what it would entail, what outcomes are desired, and how they would be involved. The overall objectives of the pastoral planning should be reiterated, along with its underlying approach as a spiritual communal discernment rather than a business-like strategic planning process. If there is a dominant issue or concern that is clearly uppermost on everyone's minds, such as a particular work or ministry which faces an un-

certain future or even a potential closure, then the present status of this issue and how it would be treated in the planning should be agreed upon and made clear to all. This will promote transparency, participation, and credibility in the planning.

Communications need to be made with other stakeholders such as those receiving services, key organizational partners and other collaborators, and where appropriate, those in authority such as governing bodies or relevant ecclesial and civil leaders. Communicating with these stakeholders can include sharing with them the objectives and timeline of the planning, inviting them to give inputs and feedback, encouraging them to journey with the group in prayer, and where relevant, requesting their participation in some if not all parts of the process. It is helpful to bear in mind that some stakeholders would also feel anxiety about change, especially those who receive services from the organization. Communication with these groups would thus need to be handled with additional care.

6. Basic orientation

It is often necessary to provide a basic orientation for certain members of the group, such as those who are relatively new, or for partners and external stakeholders who are participating in the process. Such an orientation might include pertinent background information about the group such as its mission, charism, spirituality, core

values, brief history, key activities, personnel, and organizational structure. It might also include a list of terminologies that are relatively unique and often used among group members. Most important of all, some formation is usually needed to enable all participants to know about communal discernment and to acquire the basic dispositions and skills to practice it, including dialogue methods such as the Spiritual Conversation (see Appendix 2 and 2a).

7. Communal prayer

Finally, it is helpful to integrate the pastoral planning into the on-going liturgical life of the community. A special prayer can be composed and used throughout the planning process. The graces to seek might include sincerity to engage in communal discernment, desire for God's will, interior freedom, courage, generosity, openness to the Holy Spirit and to one another, and fruitfulness in mission. External parties can also be invited to join in these prayers as a way of accompanying the group in its journey. Participants or external stakeholders who do not profess the Christian faith can be invited to make similar offerings of hope and desire according to their personal traditions. At each stage of the planning, participants can be encouraged to offer prayers of gratitude or petition at community liturgies, in accordance with what has emerged during that stage.

Steps of Pastoral Planning



Realizing Our Current Situation



**A closer look at what this step is all about
and why it's important ...**

Discernment begins with seeing our reality in an honest way, though not with a harsh and judgmental eye but with an open and receptive heart. In the Ignatian tradition, this is sometimes described as “taking a long, loving look at the real.”

Strategic planning in secular corporations tends to begin with lengthy

reports of statistical data, showing where the organization has performed well and where it has fallen short. While measurable data is indeed necessary, beginning with such data not only tends to make people come to the planning with an overly-rationalist and even self-defensive stance but is also a somewhat reduc-

tionist and distorted way of presenting the organization's complex reality.

A community or organization's whole reality is much more than its measurable data. There are people, relationships, morale, motivations, dreams, joys, sorrows, spiritual movements, intuitions, and a host of intangible impacts in society. Communal discernment begins with listening attentively to each person's reality and discerning as a group how God's Spirit has been present and moving in the community or organization. In this first step, participants are invited to look within themselves because all the important cues about the organization's current reality are

often already there. What have been their experiences in the community or organization recently? What feelings have these experiences aroused, whether positive or negative? What have been the sources of consolation and desolation? Where do people feel a genuine sense of gratitude and joy? Personal and communal experiences, affectivities, and interior sentiments are legitimate and potentially insightful signposts of the group's current realities, including those underlying realities that might have gone unnoticed in the statistical data. These sentiments are quite often an indication of what the group needs to attend to.

Fr A. Sosa SJ rightly points out that:

”

the positive tension between discernment in common and apostolic planning requires, according to the Ignatian vision, a spiritual examen of what we have experienced, so that we continually grow in fidelity to the will of God. Therefore, a systematic evaluation of our apostolates is not sufficient. We must supplement that systematic evaluation with the spiritual perspective of the examen, a practice by which Ignatius invites us to recognize the action of God in history, to be grateful for his gifts, to beg pardon for our failure to measure up, and to ask for the grace to be ever better collaborators in God's work in the world.²¹

There is an additional advantage in enabling participants to get in touch with and express their personal sentiments about the group early on in the pastoral planning process. This opportunity to recognize, name, and

express current sentiments, especially strong ones, helps to prevent these sentiments from being too pent up and thus hampering participants' interior freedom and ability to be open and attentive to other issues.

²¹ Fr Arturo Sosa SJ, *On Discernment in Common*, 2017/II.



How to do it ...

1

Participants are given a set of questions with which they are invited to set aside time for personal prayer and reflection. The questions can include the following:

- How is the community (or organization) now? What images would I use to describe its current state?
- How do I feel about the planning? Why? What are my hopes and anxieties?
- What consolations and desolations have I experienced recently in our community (or organization)? Where do I find life? What has not been so life-giving?
- What graces do we rejoice in? What are some points for gratitude? What conversions do we need? What has been my own part in these lights and shadows?
- What is God wanting us to see about our current reality?

A common handout for prayer and reflection, incorporating the questions above, can be prepared and given to everyone. An example is provided in Sample 1.1 below, which can be adapted to suit each organization. If needed, additional materials such as suggested ways of praying with Scripture or additional texts for prayer can be given as supplements. All these should be distributed in a timely way so that participants have ample time to carry out and complete this personal activity.

2

The participants are then organized into small groups where they can share the main points (or “fruits”) arising from their prayer and reflection. It is often best to ensure diversity in the group so that each one listens to people who might have different experiences of the organization. For the listening and sharing to be of sufficient depth, the optimum group size is about 5-7 persons. A method of dialogue that suits communal discernment such as the 3-step Spiritual Conversation method can be used. (See Appendix 2) As highlighted earlier, sufficient training on this method needs to be done during the preparatory phase if necessary. In keeping with the essence of communal discernment and the Spiritual Conversation method, the groups should meet physically in person as far as possible rather than online. An ideal place to meet would be one that is outside the usual work setting and conducive for contemplative dialogue. If the group is large or geographically dispersed, the planning team can coordinate with intermediate leaders to organize this activity at the sub-group or local levels, and a common deadline should be set for its completion.

3

Each small group prepares a brief report on the outcome of their conversation and forwards it to the planning team. It is helpful to have a common template for reporting (see Appendix 2a) so that the small

groups know what they should highlight, in line with how communal discernment and the Spiritual Conversation works. The main points arising from the group reports are then synthesized and documented by the planning team. Such documentation serves as a collection of key issues that would likely require more attention in the pastoral planning, and will be referred to later in the process. If participants are gathered together at an assembly, the small groups can also share the main fruits of their conversations with the whole assembly, and everyone listens and reflects on what is emerging.

4

If there are many small groups (such as in a diocese or international religious congregation), the planning team could create intermediate bodies (such as parish-level teams or country teams) to do a preliminary synthesis of the small group reports. These are then forwarded to the planning team for overall synthesis. Sometimes it is helpful to have a separate group of persons to work with the planning team in doing the synthesis so as to bring a variety of perspectives to this task and to involve more people in the process. It is helpful to bear in mind that the synthesis of the group reports is not just a textual summary but a prayerful process of reading and listening deeply with both head and heart, attending to the voices of the participants and to the presence of God's Spirit.

5

A copy of the synthesis can be circulated to all participants thereafter so that they can reflect and pray over it more deeply. They can also carry out a prayerful review of the experience, in similar fashion to the Ignatian examen. This can include recalling what happened during the individual and communal activity, how one was moved, how the group was moved, what significant points emerged, what seems to have been missing, and what God might be saying or doing through the experience. Such reviews can often lead to greater clarity and new insights, as well as a greater desire for God's will.



Good to know ...

Certain communities and organizations such as parishes, dioceses, and large institutions might find it difficult to persuade everyone to participate in the process, especially those who do not feel a strong sense of interest or belonging in the organization. In such cases, additional outreach efforts often pay off. For instance, visi-

tation teams can be organized to reach people who are often less connected with the center. Leaders of the organization can also make a special effort to meet with various groups of people. Additionally, new events or activities that are relevant to their interests can be organized, and the planning activities can be integrated within.

Another challenge is that this could be the first time for many participants to reflect and dialogue about the community or organization in such a manner as described above. Many people are not used to such sharing. Those working in religious organizations are often more familiar with either of two types of dialogue: faith-sharing on spiritual and doctrinal matters; or discussing about organizational and pastoral issues in a functional and task-oriented way. In contrast, this step in the pastoral planning requires participants to consider the community or organization as an integrated whole, without separating the spiritual and temporal aspects. Such separation is a false dichotomy in the first place. In this step, participants share about the totality of their experiences in the organization, including formal and informal activities, events, feelings, relationships, and spiritual movements. This itself can be a new, formative, and enriching experience. Indeed many people have found it refreshing and more authentic to share in this way, and that in carrying out this step, the group begins to see with

new eyes and gain precious perspectives about the organization.

Yet another challenge is that some participants may be more used to focusing only on their own responsibilities rather than on the group as a whole. Or there may be some strong tensions between different persons or units. Indeed, diverse opinions and even conflict might be encountered during the group dialogue especially when participants have contrary experiences, perspectives, and agendas. However, such differences are not barriers to discernment but are in fact valuable opportunities to deepen understanding and cultivate a greater sense of community. Everyone's experiences, whether positive or negative, are legitimate parts of the whole. When accepted and acknowledged, they enrich the overall view. In turn, members themselves will feel more accepted by each other. All this leads to better insight, solidarity, and union of minds and hearts.

Pope Francis's advice about discernment amidst conflict is worth recalling:

”

So we have two temptations: on the one hand, to wrap ourselves in the banner of one side or the other, exacerbating the conflict; on the other, to avoid engaging in conflict altogether, denying the tension involved and washing our hands of it. The task of the reconciler is instead to “endure” the conflict, facing it head-on, and by discerning see beyond the surface reasons for disagreement, opening those involved to the possibility of a new synthesis, one that does not destroy either pole, but preserves what is good and valid in both in a new perspective. This breakthrough comes about as a gift in dialogue, when people trust each other and humbly seek the good together, and are willing to learn from each other in a mutual exchange of gifts. At such moments, the solution to an intractable problem comes in ways that are unexpected and unfore-

”

seen, the result of a new and greater creativity released, as it were, from the outside. This is what I mean by “overflow” because it breaks the banks that confined our thinking, and causes to pour forth, as if from an overflowing fountain, the answers that formerly the contraposition didn’t let us see. We recognize this process as a gift from God because it is the same action of the Spirit described in Scripture and evident in history.²²

One of the signs of an authentic conversation is that differences of opinions, feelings, perspectives and experiences are able to surface. Each is welcomed and received with attentiveness, empathy, and openness to learning and change. This tills the

soil of our hearts to receive what God might be prompting us to see about our communal reality. As the International Theological Commission says when explaining about communal discernment:

”

Synodal dialogue depends on courage both in speaking and in listening. It is not about engaging in a debate where one speaker tries to get the better of the others or counters their positions with brusque arguments, but about expressing whatever seems to have been suggested by the Holy Spirit as useful for communal discernment, at the same time being open to accepting whatever has been suggested by the same Spirit in other people’s positions, for the general good.²³

Thus in entering the process of pastoral planning, one of the graces which participants can be encouraged to seek and pray for is that of willingness and ability to transcend their immediate concerns or interests, to have

interior freedom, to welcome others’ perspectives, to empathize with their concerns, to understand their point of view, and to discern for the group as a whole. This applies to everyone, as highlighted by Fr Arturo Sosa SJ:

”

It is possible and necessary also for those who share in our mission but not in our Christian faith to acquire that interior freedom which enables them to divest themselves of self-love, self-will, and self-interests. This inte-

²² Pope Francis, *Let Us Dream* (London: Simon & Schuster: 2020), 80.

²³ International Theological Commission (ITC), *Synodality in the Life and Mission of the Church* (Vatican City, Vatican Press: 2018), para. III.

rior freedom is the human possibility to grow as persons in gratuitous relationship with others, seeking the greater good of all, even when such a pursuit involves as a consequence personal renunciation and sacrifice.²⁴

As mentioned earlier, the reflection, prayer, and group dialogue, if carried out well, can already engender the beginnings of greater unity, communion, and solidarity even during the first step. This is provided that a proper method is used especially in the group dialogue to help participants share more sincerely and listen more deeply to each other, remaining mindful of the loving presence of God's Spirit.

Nevertheless, communal discernment in pastoral planning is often not perfect, especially at this early stage. Discerning personally and communally is something that takes time to cultivate, and is part of a person's and group's journey towards

wholeness and union with God. Pastoral planning can be a good opportunity to cultivate the relevant dispositions and capacities. Apart from pastoral planning, the reflection and dialogue questions in this step can be used more frequently at other platforms such as year-end recollections or community gatherings so that they help habituate the communal discernment way of proceeding. The gradual transformation engendered by this exercise comes through cultivating the attitude of openness that is required in the mutual listening, welcoming, learning, and discerning. Over time, these conversations can lead to deeper awareness and sense of solidarity as a group.

²⁴ Fr Arturo Sosa SJ, *On Discernment in Common*, 2017/II.



Sample 1.1 **A guide for Personal Prayer and Reflection**

The objective of this exercise is to help you as a participant to become more fully present to the pastoral planning process and to the current realities by attending to yourself, your community, and the organization.

The recommended length of time for this exercise is about 1 hour. Find a suitable period of the day and a quiet place where you can be in silence and contemplation. If it helps, you can take a few minutes to quieten your mind, notice your breathing, become more present to God, or become aware of a universal energy of life that is flowing through you and your surroundings.

When you feel ready, you can begin by asking for the grace of inner peace, openness, and insight. Then start by praying with a Scripture passage such as Luke 24:13-35. Or if you prefer, you can use something from your own faith tradition or even a poem about taking stock, reviewing the present, listening to the heart, and seeing with new eyes.

Next, read the following questions and notice your reactions - What comes to mind? How do you feel? What are your immediate responses? How would you answer these questions if you pondered them for a while longer?

- How would I describe my experiences recently in this community (or organization)? What have I been feeling in it? Why?
- How are we now? What images do I feel best describe our current situation?
- How do I feel about the planning? Why? What are my hopes or anxieties?
- What have been the consolations and desolations in our community? Where do we find life? What has not been so life-giving?

Alternatively

- *What has been receiving much of our attention has a group? What are some noteworthy events or happenings in recent times? What are some significant feelings or sentiments?*
- *What current developments or realities about the group excite us? What worries or disappoints us?*
- What graces do we rejoice in? What might be some causes for celebration or gratitude? What conversions do we need?

Alternatively

- *In what ways has the group been faithful to its core values, charism, and mission? In what ways has it been lacking in fidelity?*

- *What has been my own part in these lights and shadows? How have I affected the group, and how has it affected me?*

- What is God revealing to us about our current reality?

It is also possible to carry out this reflection over more than one session. When you have finished, review what happened during your prayer and reflection periods, how you were moved, and what significant points arose. Write these down and think about what you feel moved to share with the group. Conclude with a prayer of thanksgiving and bring to your thoughts all the other persons in your community, appreciating each one as a gift.



.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....





Recollecting Our Graced History



A closer look at what this step is all about and why it's important ...

Before we plan for the future, we need to appreciate the past. Doing so reminds us of where we have travelled, how it has shaped us, who we have become, what we have received, and why we would choose a certain path ahead. In the words of Pope Francis:

”

Christianity is not only a doctrine, but a history that leads to this doctrine ... always be aware of being part of a people, to transmit the history of our salvation, to preserve

the memory of the people of God. ... 'Remember your ancestors,' says the author of the Letter to the Hebrews. The most dangerous deviation of Christians is lack of memory of belonging to a people; this is where dogmatism, moralism, elitist movements come from.²⁵

In pastoral planning, it is often not uncommon to hear remarks like “it must be done this way”, “it has always been this way”, “this new idea will never work”, “we have tried this in the past but it failed”, or “it was great in the good old days but now...”

We need to learn from history so as to recognize what is most valuable in our tradition but also to avoid being imprisoned by the past. In this step, participants look back at the journey of the community or organization starting either from its beginnings or from a more recent point in history. Much can potentially be learnt from such a recollection, including fresh perspectives on the group's identity and vocation, as well as its relationship with God. The reflection helps group members regain a sense of the organization's roots and its enduring values and charism. It also engenders a sense of gratitude for all the gifts and accomplishments of the organ-

ization, and helps particular members feel that their contributions and sacrifices are acknowledged and appreciated. This is especially important when change is imminent, with the possibility that certain members might have to let go of the work or institutions which they had been deeply invested in.

Tracing the past journey helps members realize that change has been a reality, and that the organization has gone through various turning points and stages of development. Most of all, the group members can become more aware of the gifts that the Divine Goodness has poured upon the organization, thus engendering deep gratitude as well as confidence in God's faithful accompaniment. This can help members move courageously into the future with greater freedom, especially when the road ahead is not so clear or is fraught with potential difficulties.



How to do it ...

1

The process can be similar to Step 1 in which participants are given guiding points for personal prayer and reflection (see Sample 2.1), and thereafter gather in small groups for sharing. Reports are then forwarded to the planning team.

²⁵ Pope Francis, *Homily at Santa Martha Mass*, May 2020.

2

Alternatively, an assembly can be organized for all members. This would potentially be a very enriching exercise with the whole group recollecting their history together.

3

The exercise should be done in a reflective and prayerful atmosphere. In recollecting the past journey of the organization, participants can focus on significant milestones, events, and developments. The 'ups and downs' of the group's history can be recalled. A particular focus can be given to defining moments; i.e. those times, occasions or experiences that have been etched strongly in the communal memory, and which have an impact on the groups' identity, values, and sense of purpose. Sometimes the memory of a specific defining moment emerges on its own during the conversation and invites more attention. Just as important, participants can reflect on how they felt at these events and developments if they were present then, and how they feel now as they look back. They should also reflect on the meaning of each of these events and developments for them.

4

The main points raised can be expressed visually in images. Ample space is usually required in the room for this. When they have completed the exercise, everyone can then take a step back and view in reflective silence, the journey which they have just recalled and sketched out, and then gradually become more aware of how God had been present in the journey. They can take note of whether there has been an emerging pattern of God's interventions, and what the Divine Love might have been communicating. Again, participants with other religious or philosophical leanings might approach this step in more general terms, such as by noting the movements of healing, restoration and wholeness, the times of stagnation, decline, fragmentation, or polarization, the times of great energy, and the ways in which a transcendent life-giving force seemed to have acted in the organization's history.

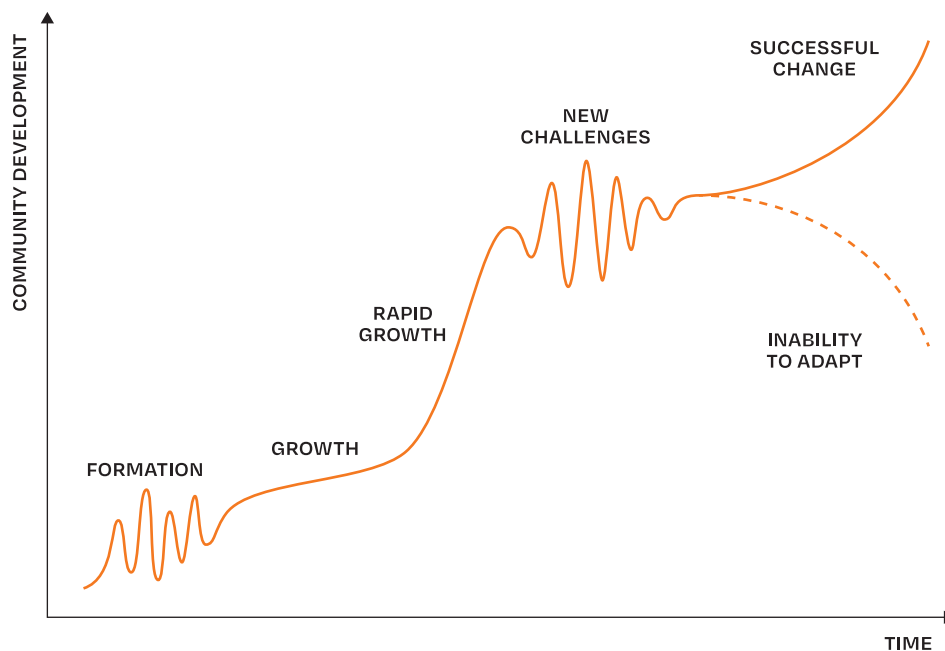
5

The main points of this exercise should be documented by the planning team.



Good to know ...

Communities and organizations often go through life cycles such as one depicted by the diagram on the next page.



The initial formative or “start-up” phase is usually less structured, with organizational life proceeding in a more spontaneous, unpredictable, trial-and-error way. This is often followed by a time of institutionalization where systems, rules, and structures are put in place, leading possibly to greater stability and growth. Some organizations might even grow rapidly during this period as their programs and services gain greater traction and interest, and their proficiency increases. However in time, new challenges inevitably arise, whether from the external context or from within the organization as a result of rapid change. This often leads to a period of instability, tension, or even turmoil. Organizations that are able to accept the new realities and confront their challenges can often find a path forward for further progress. Those who

are unable to deal with the change would likely remain stagnant and eventually decline. For the former group, critical times of change are likely to arise again in future and this calls for adaptation once again.

Being aware of this cycle can help participants in the pastoral planning become more conscious of the fact that they are on an evolving journey, and that times of turbulence are often a natural part of such a journey, and can even be a window for change. It is often helpful to ask participants to share their views about where they think the organization currently is in the above cycle and why. This helps them to see the bigger picture and perhaps gain some perspectives to the consolations or desolations that might have been prevalent in the organization, and what responses would be most appropriate.



Sample 2.1

Recollection of Our Graced History: Instructions for Group Exercise

"I will remember the deeds of the Lord" (Psalm 77:11)

"Thus says the Lord: Stop at the crossroads and look around you. Ask for the ancient paths, where the good way is, and walk in it. You will find rest for your souls." (Jeremiah 6:16)

1. Begin with a prayer for openness, enlightenment, and unity.
2. Draw a history line in the form of a long road or a footpath, large enough for all participants to see, and answer the following questions:
 - a. What were the main stages or 'chapters' in the story of your group's journey? (Mark these on the road.) In each of these stages, what was the main direction or focus of the group? Or, what title would you give to each 'chapter'?
 - b. What have been the significant milestones, events, or developments? (List only those that evoke relatively greater meaning and feeling.) What were the significant ups and downs, the joys and sorrows, the graces and challenges? Write each event above the road, and the corresponding meaning or feeling below the road. For a large group, this step can be done by getting participants, either individually or in smaller sub-groups, to write each point on a post-it paper and paste it on the road.
 - c. What were the ways in which you have changed? Were there any crucial moments or turning points? (Mark these on the road)
3. When it is finished, everyone spends some time in silence to look at the whole history line. Note your feelings, interior movements, or any points which strike you. Particular attention can be paid to the things which you feel grateful for. Reflect quietly on the following:
 - a. Which moments were most life-giving and meaningful? What factors in the group led to their fruitfulness; i.e. what were the group's actions, dispositions, priorities, values, or characteristics? Which moments were more stagnant or created much negativity? What were the behaviors or characteristics of the group in those times? Review the list of positive qualities and their opposites.

Does any fresh insight emerge about the group's charism, values, and mission? Were there "defining" times in this history that played a major role in shaping your organization's identity?

b. Become aware of how God was present in the journey, and what God might be communicating. What insights do you gain about your mission, charism, values, and identity before God?

4. In plenary or small groups, share the fruits of your reflection.



.....

.....

.....

.....

.....

.....

.....

.....

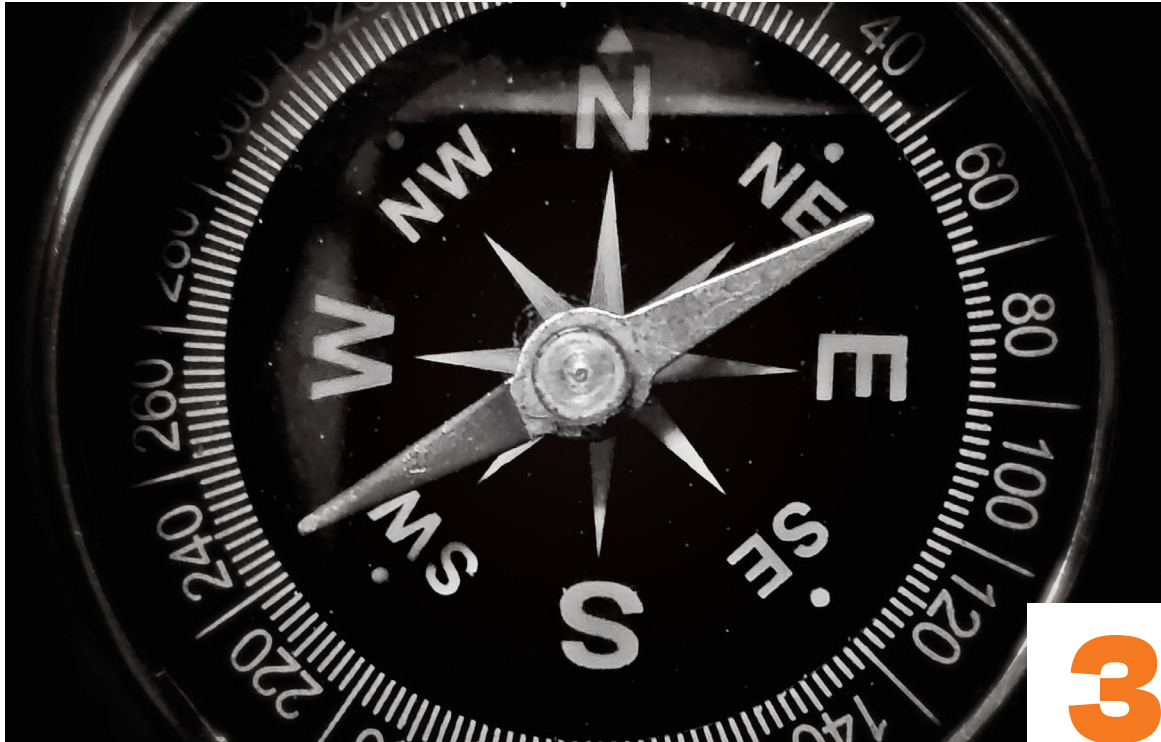
.....

.....

.....

.....





3

Rediscovering Our Identity and Mission



**A closer look at what this step is all about
and why it's important ...**

With lessons learnt from the past, participants can then take a fresh look at the group's identity and mission in order to renew and deepen their understanding of them. Inspired by what might have emerged from the previous steps, they can describe in their own words what the group's identity and mission are. This includes their

charism, their core values, the purpose of their existence, and the most special or essential gift that it has which is to be offered to the world.

Why not just refer to the existing mission statement if one exists? Indeed such formal statements are important, but a group's mission is more than a written statement; it is some-

thing that resides in the members' hearts. For instance, the statement may say one thing but a group member's heart may be directed at other things. Or the group might feel collectively that it is somehow carrying a bigger mission beyond what was written in the past.

Identity and mission are living traditions, ever evolving, yet ever the same. The process of rediscovering them in new light can give a group a newfound sense of purpose and meaning, and bind members more closely together. It can also deepen their interior freedom so that they would be more willing to let go of all else so as to pursue "the one thing necessary". As with the other steps, rediscovering identity and mission can be a very graced moment for the group. It is particularly special because group members can potentially feel touched and reinvigorated by God's Spirit, confirming them in the Name-of-Grace by which they are called.

Identity and mission can be rediscovered through "ressourcement" – going back to the sources, to the roots of the tradition. This complements the insights derived from the History Line activity in Step 2. Foundational reference materials can be used, such as Scripture, magisterial texts from the church, a religious congregation's founding documents, key writings, and other significant sources. Appendix 3 provides suggestions of Catholic magisterial texts that can be used by

dioceses and parishes. All these are material to be contemplated prayerfully and deeply in heart and mind, rather than just read superficially or intellectually. The prayer method of *Lectio Divina* can even be used because foundational writings tend to evoke a profound sense of meaning and spiritual re-awakening.

Additionally, an organization is part of a larger whole and is interconnected with others. Hence its identity and mission are not to be considered in isolation but in dialogue with wider realities such as the mission of the universal Church, the mission of the diocese in which the group resides, and the mission of other related entities. The group must also take into account the unique purpose and role expected of the type of organization that it is, be it a school, parish, or religious congregation. For example, religious congregations are fundamentally characterized by the evangelical vows. This has distinct implications on the nature and emphases of their mission, in contrast with secular organizations doing the same work. Some groups also exist as sub-units within larger entities which have an over-arching mission. Taking all these realities into account helps the group ensure that the discernment about its specific identity and mission does not divert from but is consistent with the on-going saving plan of God, manifested through a fabric of universal and local entities in mutual collaboration.



How to do it ...

1

The planning team can prepare excerpts of key texts for reflection on the organization's identity and mission. These should not be too lengthy or too brief so that the exercise will be fruitful in engendering new insights.

2

The excerpts can be circulated to all participants together with a guide for prayer and reflection. (See Sample 3.1) Creative means can be used for this step, such as inviting participants to spontaneously list key words and ideas that convey the organization's identity and mission most meaningfully for them. They can also draw images, use symbols, compose songs, narratives, and role-play.

3

Insights from the documents can also be complemented with more contextual reflections. For instance, participants could be asked to consider how the most important stakeholders, especially those whom the group seeks to serve, and those at the margins, would re-write or update the group's mission statement. Alternatively, they could come up with a list of ranked criteria with which they might evaluate competing priorities or allocate resources. They can also think of visible signs that would indicate fruitfulness in the group's mission in the present context. Additionally, personal experiences can be tapped upon. For example, participants could be asked to share about an incident or personal experience which made them see the identity and mission of the organization with whole new eyes or feel it burning anew in their hearts. Were there occasions when they said "it made me realize who we are and what we're all about"?

4

The processes for personal reflection, small group conversation, plenary activities and synthesis as outlined in Step 1 can be followed.



Good to know ...

Pastoral planning often comes with many "temptations". These might include:

SWOTING: Identifying and responding to strengths, weaknesses, opportunities, and threats without any reference to the organization's identity and mission.

TRENDING: Choosing priorities based on whatever is trendy or popular.

LOBBYING: Each person advocating for his/her favorite projects.

ROUTINING: Doing simply more of the same without considering the need for change.

ANCHORING: Being attached to the flagship programs of a grand past heritage.

HERO-ING: Meeting the greatest needs and demands without taking into account charism, capabilities or resources.

INFLUENCER-FOLLOWING: Doing whatever funders and authorities want the organization to do.

These temptations underscore the importance of having clarity and conviction about the organization's identity and mission. This then serves as a compass for the discernment of priorities, goals, programs, and resource allocation amidst a multitude of beneficiary needs, stakeholder requests, funder preferences, societal trends, and members' own attachments to routines and specific projects.



Sample 3.1 **Identity and Mission:** **Guidelines for Prayer and Reflection**

The objective of this exercise is to listen anew to the founding traditions of this organization and gain new insight on its identity and mission before the eyes of God in the present context.

The recommended length of time for this exercise is about 1 hour. Find a suitable space and time in which you can do this exercise attentively and contemplatively.

Ask for the grace of wisdom, humility, new insight and personal conviction about the organization's identity and mission.

Begin by praying with a Scripture passage such as Luke 4:16-21 or the meditation on the Call of the Eternal King (no. 91-100) in the Spiritual Exercises; or if you prefer, something from your own faith tradition or even a poem about mission, calling, and vocation.

In your prayer or meditation, you might ponder on the following questions:

- The Bible tells us that Jesus came to proclaim the "Kingdom of God". What is the Kingdom of God? How would the world be like when the Kingdom of God is fully present? Or, what does universal flourishing consist of? What is fullness of life?
- God, the Universal Life force, labors actively and lovingly through every entity in creation for the flourishing of the world. What is the unique way in which the Divine Mission of love is expressed through your organization? Or, what do you think is your organization's particular role in the Kingdom of God, or in the flourishing of the universe?

Now take up the texts about your organization's identity and mission that were given with this handout. Read these texts in a contemplative way, stopping to reflect on any word or sentence that strikes you.

Gathering up your thoughts, how would you describe your organization's identity and mission in your own words? You can also use drawings, symbols, stories, or even songs. There is no one right answer. Everyone has valuable and unique perspectives to share.

Next, reflect on some of the following questions. Choose only those which seem to move you more deeply:

- What would be the 3 most important indicators you would use to evaluate whether or not your organization is truly living its identity and mission?
- What would be the 3 top criteria you would use to decide which programs, services, priorities, or goals are most important for your organization to undertake? Why?
- Imagine yourself in the place of the most vulnerable or marginalized person in your organization's services or contexts. How would you want to re-write the organization's mission statement?
- Imagine yourself at a time in future when your organization has to cease operations. What would be the one thing that you most hope to see the organization accomplish?
- Recall a personal experience which made you see the organization's identity and mission in a whole new way, or made you embrace it with a newfound conviction. What insights did you gain?
- Examine yourself: To what extent do you personally resonate with the organization's identity and mission? Does it make your heart leap with joy and love? Or do you feel disinterest or even tension? Would you say that it currently helps you live your personal identity and mission most fully?

It is also possible to carry out this reflection over more than one session. When you have finished, review what happened during your prayer and reflection period, how you were moved, and what significant points arose. Write these down and think about what you feel moved to share with the group, including images or other things you came up with. Conclude with a prayer of thanksgiving.



.....

.....

.....

.....





Reflecting on the Signs of the Times



A closer look at what this step is all about and why it's important ...

Discernment is based on concrete realities about what is really happening around us and within us, and on not abstract idealizations or unverified assumptions. As the International Theological Commission has highlighted:



Communal discernment allows us to discover God's call in a particular historical situation ... It is a matter of the Church, by means of the theological interpretation of the signs of the times under the guidance of the Holy Spirit,

travelling the path that is to be followed in service of God's plan brought to eschatological fulfilment in Christ, which also has to be fulfilled in every kairós throughout history.²⁶

“Signs of the times” include realities within the organization as well as in its surrounding environment. Internal realities would pertain to the organization's programs and services, its effectiveness, its community life, spiritual life, culture, relationships, leadership, networks, partnerships, personnel, capabilities, resources, structures, systems, administration and all other aspects of its corporate reality. External signs of the times would include current and emerging trends in society and church, encompassing the social, economic, cultural, political, religious, ecological, and technological. Both local and global trends are often in mutual interaction.

In gathering information on these internal and external realities, attention can now be paid to empirical data, including relevant statistical reports and other information. The categories and scope of data to be deemed relevant and thus to be sought would depend on the identity and mission of the organization. This once again underscores the importance of clarifying identity and mission first. Otherwise, participants in the planning might be overwhelmed with too much data, or be unduly influenced by headline-grabbing trends in the media instead of attending to other trends that are less visible but more deeply significant for the organization.

”

Just as important, reading the signs of the times also include listening directly to the voices of people, especially those at the peripheries. This means that in this step, participants do not just analyze statistical reports. They also consult a wide variety of people and listen to them directly. Indeed a significant part of discernment occurs “out there” when we leave our desks to go where people are, walking with them in their contexts, and allowing their untold stories to emerge. As Pope Francis notes, “how could we speak about the family without engaging families themselves, listening to their joys and their hopes, their sorrows and their anguish?”²⁷

Additionally, pastoral planning entails a deeper awareness about signs of the times in a way that is not only intellectual but also affective. Our hearts need to be open and attentive to God's Spirit which is always mov-

ing us, perhaps even causing a “burning within us” (Luke 24:32) through the signs of the times. Once again, as the International Theological Commission points out:

²⁶ ITC, *Synodality*, para. 113.

²⁷ Pope Francis, *Address at the Ceremony Commemorating The 50th Anniversary Of The Institution Of The Synod Of Bishops* (Vatican City: Vatican Press, 2015).



Communal discernment implies carefully and courageously listening to “the groans” of the Spirit (cf. Romans 8:26) which emerge through the explicit or sometimes silent cry that goes up from the People of God: to listen to God, so that with Him we may hear the cry of His People; to listen to His People until we are in harmony with the will to which God calls us.²⁸

Planning participants need to be aware of their existing biases, prejudices, or pre-conceived ideas about the context, and endeavor to transcend them with a disposition of openness and interior freedom. They can then be more receptive of new, unexpected, or even surprising insights that the Spirit might be waiting to reveal. In turn, listening sincerely to the signs of the times engenders further openness to change.

Finally, listening must be accompanied by reflection. This includes ana-

lyzing the information intelligently with the help of some critical thinking tools or analytical frameworks from relevant disciplines. Concurrently, reflection includes attending to feelings and interior movements which arise from listening and analysis. Thus both intellect and affectivity, faith and reason, head and heart, are integrated in discernment. Just as important, the listening and reflection are done as a community.



How to do it ...

1

The planning team can draw up a list of information to be gathered, as well as a list of people to be consulted. For instance:

- a) Data on the internal context can include statistical profiles and other pertinent information about the organization’s programs, services, and other operations, as well as an overview of its financial and other resources, and its personnel situation. Information on partnerships and networks are also relevant. Both quantitative and qualitative data can be included.
- b) As for the external context, the relevant information might include trends in church and society, which can usually be found in brief essays, analyses or periodical reports on religious, social, political, economic, cultural, technological, ecological and other issues in the media. Needless to say, it is important to ensure that the sources give trustworthy, credible, and balanced points of view. Information on the activities of other relevant groups and the issues faced by them

²⁸ ITC, *Synodality*, para. 114.

are also pertinent. Other useful references might include the existing pastoral plans of dioceses, networks, and global associations to which the organization belongs.

- c) With regard to persons to be consulted, these might include beneficiaries, collaborators, partners, and various other groups, especially those in the peripheries who might not be currently served but whose voices are important and relevant. Other persons to consult might include experts, funders, and officials in relevant authority positions. Personnel who belong within the organization would have been consulted in the first step but it is also possible to include them once again in this step so as to tap their professional knowledge and viewpoints about particular aspects of the organization.

2

For 1(a) and 1(b), suitable persons can be assigned to obtain the relevant information and prepare a concise presentation of them.

3

For 1(c), the planning team could organize participants into “listening groups” so that they can listen to and interact directly with the various groups to be consulted. Some amount of coordination and communication will be needed to arrange meetings, visits, interviews, conversations, presentations, and other forms of consultation. Surveys could also be used though this should ideally not be the only form of consultation as it is less personal and interactive. What is most important is that participants get out of their usual ‘boxes’ or comfort zones, and seek new perspectives beyond their usual circles. This would not only enable them to see the context with new eyes but also help them to be more open to the Spirit and even be touched or transformed. As mentioned above, such listening is very integral to the communal discernment process. Concurrently, stakeholders who are approached for their viewpoints should be encouraged to speak candidly about their experiences of the organization, what they are most grateful for, what challenges they face, how the organization might change for the better, and what it should keep doing well. Sample 4.1 below provides some suggestions for these consultations.

4

Sufficient time should be given for the above activities, which can take 3-4 months or more. Each consultation session can be capped with a prayerful examen of the experience and the key points that arose, and these should be recorded.

5

When all the information-gathering and consultation activities are completed, the planning team can synthesize the reports and circulate a summary to all participants.

6

Reflection sessions can then be carried out by everyone, such as through small group dialogue using the Spiritual Conversation meth-

od, preceded by individual reading, prayer, and reflection. Sample 4.2 contains some guidelines for this activity. One key question in this part of the communal discernment is: What is the Holy Spirit saying to us through the voices of the people and the signs of the times? The main points arising from these prayer and reflection sessions are then forwarded to the planning team for collation and dissemination as in the previous steps.

7

Sometimes further data gathering might be required, especially when the reflections lead to new questions that were not raised before but are important. The planning team might need to coordinate the process iteratively, making sure that the research and reflection strikes a balance between being too excessive and too narrow.



Good to know ...

This step can sometimes bring out feelings of disturbance and disequilibrium, especially when participants realize hard truths about the internal and external realities. This need not cause alarm. In fact, if these tensions are absent altogether, then the information gathering and reflection might have been inadequate or too superficial. Tensions arising from an honest look at reality are often indicators of the issues we are called to address. They can be pathways to conversion and change for the better.

Overall, a disposition of pastoral love, generosity, openness, solidarity, trust, and prudence is called for when listening to and reflecting on the signs of the times. As mentioned above, this step needs to be carried out with adequate time and space for enquiry, reflection, prayer, dialogue, and struggling through the necessary tensions.



After the completion of this step and before moving on to the next one, it would be helpful for all participants to carry out an examen of the pasto-

ral planning so far. This involves recollecting what has happened since the beginning, what the whole group has gone through, what each participant has experienced at the personal level, whether there have been notable consolations and desolations, and how God has been present. Participants could share the fruits of this examen with one another, and evaluate the quality of the communal discernment and the pastoral planning thus far. A discernment can be made to either proceed to the next step or revisit some prior part of the process. Sometimes there are unresolved tensions that might greatly hinder the next steps, or perhaps some members of the organization and its stakeholders feel that the process has not involved adequate consultation, listening, and discernment. If so, then the underlying causes of these should be examined and addressed first.

Overall, if the steps so far have been carried out reasonably well, participants would typically already begin to experience joy, unity, a sense of renewal, and even some insight on God's

invitation to the group regarding its directions. The readiness for conversion and renewed mission would become palpable. Moreover, new members would have learnt much about the organization through participating in the prior steps. In this regard, pastoral planning can be a formative and transformative experience. It is often during the process itself that the desired change begins to happen.

For these reasons, it is important to take time for everyone to be engaged whole-heartedly and reflectively, instead of simply going through the mechanics of the process and rushing towards the end. Sometimes a mid-way revision of the planning schedule is needed in order to spend more time on certain steps or to improve the quality of the communal discernment.



Sample 4.1 **Suggestions for research on internal and external contexts**

I. Some data to obtain about the internal context of the organization

A. Statistical and other factual data:

1. Organizational profile and structure
2. Membership - Total number and relevant characteristics; eg. Age groups, gender, nationalities, location, socio-economic profile, etc. (Present data + 10-year trend if available)
3. Programs, services, and key activities – Description, location, outputs, people served, growth trends, etc.
4. Financial and other resources
5. Key partners and networks
6. Previous pastoral plan, if any, and what has been accomplished

B. Feedback and suggestions – Some questions to ask stakeholders:

1. What do you appreciate most about the organization? How has it made a difference for you? What would you miss most if the organization became inactive?
2. What do you think has been the organization's main impact in the church and in society? What more do you hope to see?
3. What do you think are its strengths and weaknesses in current reality, when compared with its identity and mission in theory? In what ways has it been fruitful in its mission? In what ways has it not been fruitful enough?

4. What do you think are the internal factors that enable the organization to be fruitful? What are the internal factors that limit its fruitfulness? Or, what do you think are the lights and shadows in the organization's present culture, community life, spirituality, working style, relations among members, staff and volunteer morale, and partnerships in church and society?

II. Some data to obtain about the external context of the organization

A. On church and society

1. Significant local and global trends that are relevant to the organization's mission, including the political, economic, social, cultural, religious, technological, ecological, and ecclesial. What are some possible scenarios that will impact the organization significantly, whether positively or negatively?
2. Opportunities and challenges in the fields related to the organization's mission.
3. Needs and gaps which are currently not addressed by anyone.
4. Potential networks and collaborations.
5. Significant developments faced by partners or those who are involved in similar activities as the organization. What are their future plans?
6. Current priorities of the diocese or international unit(s) that the organization belongs to, and the reasons for these priorities.
7. Emerging church teachings or trends which are relevant to the organization's mission.
8. Key advances or trends in the disciplines and fields of the organization's work

B. Questions to ask about the people, including those whom the organization serves as well as the wider community, taking note especially of the marginalized

1. What is happening in the lives of various groups of people? What are their joys and hopes, griefs and sorrows, anxieties and desires?
2. What currently gives them the greatest meaning and purpose?
3. What do they think about their present lives and about their future?

4. What trends are affecting them?
5. What changes in church and society do they hope to see?
6. What are their strengths? What gifts can we appreciate about them? What can we learn from them?
7. What currently impedes their ability to live fully?

Examples of simplified questions that can be posed directly to people at the grassroots:

- What do you appreciate about your life now? What makes you happy, or what is your greatest source of joy?
- Do you feel your life is meaningful? Why? What gives you a sense of purpose?
- What are your main difficulties and anxieties? What makes you disappointed or discouraged?
- How do you feel about the future for yourself, your family, and the local community?
- What do you appreciate most about the church in this place and about the society? What change do you hope for?
- What do you think are your best gifts and contributions?
- What do you think our organization can do to improve your family's life or the local society?

III. Some sources, tools, and methods for gathering information

1. Organizational annual reports
2. Media articles, periodical analyses, data from authoritative websites
3. Interviews and direct consultations
4. Social gatherings and informal chats
5. Focus group discussions
6. Surveys
7. Presentations or personal sharing by stakeholders
8. Talks by invited experts on relevant issues and trends

Note:

- It is important to be aware of the biases that might be inherent in some media sources. Ensuring a diverse range of sources could help mitigate this.
- When gathering people's viewpoints, the means employed should be most conducive for the persons to speak freely and to give honest, meaningful, and sincere feedback.

- When listening, the sensitivity of a pastoral heart is called for so that underlying meanings, concerns, desires, and even patterns can be perceived. The listener would perceive not only what is said but also what is not said. Active and attentive listening, especially to voices from the margins, entail listening with empathy, noting verbal and non-verbal cues, and endeavoring to see things from the other's perspective. Just as important, such listeners exercise a whole-hearted presence, neither rushing nor patronizing, and attending to their own interior movements, looking out for what God might be communicating through the encounter.



Sample 4.2 **Instructions for reflecting** **on the data gathered**

The objective of this exercise is to reflect on the signs of the times in the light of your organization's identity and mission in order to listen to what God's Spirit might be saying, especially with regard to how your organization is called to respond to the present contexts.

The recommended length of time for this exercise is about 1 hour. Find a suitable space and time in which you can do this exercise attentively and contemplatively.

Begin by praying with a Scripture passage such as Matthew 9:36 or the meditation on the Incarnation (no. 101-109) in the Spiritual Exercises; or if you prefer, something from your own faith tradition or even a poem about social realities. In your prayer, ask for the grace of openness, courage, generosity, and compassion.

Now read slowly the summary of the internal and external contexts that has been distributed to you together with this handout. Reflect on the following:

1. As I read the summary, what strikes me? Is there anything in particular that moves me or draws my attention?
2. Which points evoke feelings of joy, consolation, and excitement about the internal and external context? Why?
3. Which points evoke grief, anxiety, tension, or desolation? Why?
4. What is emerging as the main strengths and gifts of our organization? Which strengths seem to be developing well? Which ones seem to be diminishing?
5. What seems to be our organization's weaknesses or limitations?
6. What impact is our organization making in church and society?

- What is the impact on its own members, and on those at the peripheries? Who or what are we neglecting? Where are the gaps?
7. Which voices from the consultations strike me or move me most? Why?
 8. Which external trends do I feel are particularly important? Why?
 9. What opportunities and calls are emerging for our mission? What challenges are confronting us?
 10. Overall, what might the Holy Spirit be saying to us through the voices of the people and the signs of the times?

It is also possible to carry out this reflection over more than one session. When you have finished, review what happened during your prayer and reflection period, how you were moved, and what significant points arose. Write these down and think about what you feel moved to share with the group.

Conclude with a prayer for the people whom you read about in these reports.



.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....

.....





Recognizing God's Call for the Present Time



A closer look at what this step is all about and why it's important ...

The process has now reached the stage where decisions can begin to be formulated regarding the organization's direction and priorities for the coming years. This is provided that there is a reasonable level of consolation, peace and even enthusiasm from the prior steps thus far. Otherwise, some of the earlier activities and their

requisite dispositions may need to be attended to more closely.

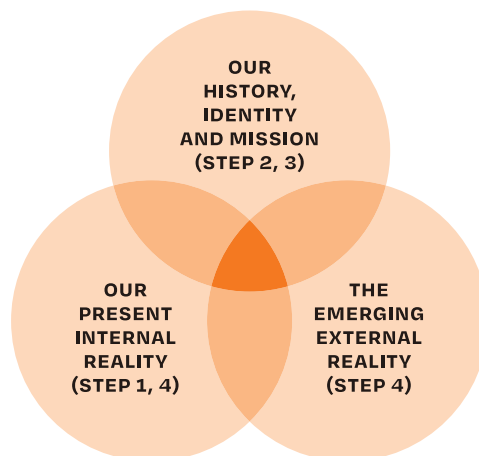
In this step, key points arising from the prior stages can be brought together through summary reports, including those pertaining to:

- The organization's identity, charisma, core values, and mission (from Steps 2-3)

- The internal context (from Steps 1 and 4)
- The external context (from Step 4).

God's call for a group in terms of its direction and priorities often lies at the intersection of these three realities.

A group's direction indicates what its overall focus should be over the determined period ahead. Once again, this is more than just a recap or re-crafting of its mission statement. Rather, in light of the renewed understanding of the group's charism and the current internal and external



contexts, there could be a particular aspect of its identity and mission, or a particular emphasis or way of living them which the group feels called to focus on for the period ahead. For instance, a group may discern that it is being called to make a fundamental shift in its mission towards certain neglected groups of people at the peripheries, thus requiring a change in members' attitudes as well as in the group's programs, activities, personnel, and resource allocation. Another group may discern a call to focus more on the work of peace-building and reconciliation amidst socio-political conflict. Yet another group may realize that their attention in the upcoming years should be on the members' deepening in the spirituality, charism, and communal life. Hence, just as how an individual might have a key focus

or direction in each stage of his or her life and vocation, a group might also be called to deepen, grow, or heal particular aspects of its life and mission, as part of its on-going journey in God.

Usually the discerned direction entails a change in not just external structures and activities but also in heart and mind. A conclusion reached through a good process of communal discernment would resonate deeply with participants, affirming their collective identity and giving them a profound and sustained sense of gratitude, joy, energy, enthusiasm, fellowship, and commitment.

This step is best carried out within an in-person assembly involving as many members of the organization as possible. In this regard, the International Theological Commission has highlighted that:



In various local Churches, to boost the implementation of the teaching of Vatican II, there are Assemblies which express and promote communion and co-responsibility and contribute to integrated pastoral planning and its evaluation. These Assemblies are of great significance in the ecclesial community's synodal journey, as the setting and ordinary preparation for enacting the diocesan Synod.²⁹

The same might be said for religious congregations and other ecclesial organizations as well. A meaningful gathering and time of fellowship involving as many participants as possible, with a well-organized process and a radical openness to God's Spirit, can bear fruit in many ways long after the event.

Along with a discernment of the organizational direction for the upcoming years, a list of priorities also needs to be drawn up in accord with the implications of the direction. Although many different terms are used in the strategic planning field such as "objectives", "goals", and "strategies", the word "priorities" here refers to the aspects of organizational life and mission that need to be emphasized, strengthened, changed, terminated, re-developed, or initiated during the period ahead. Priorities should also elucidate, where possible, the groups of people that will receive more attention by the organization, the types of services to enhance, and/or the issues and challenges that will be focused on, and the reasons for doing so. Some or-

ganizations have internal norms for prioritizing the choice of ministries and the allocation of personnel and resources.³⁰ These can further assist in the discernment.

Sometimes there needs to be a scaling down of efforts and resources in certain areas of work, and re-assigning of personnel accordingly. Priorities can also pertain to internal aspects of the organization that require change or improvement, such as personnel formation, organizational structure, skills, finances, systems and processes, community life and relationships, spirituality, governance, and personnel welfare. As with the overall direction, a well-discerned list of priorities would also engender strong and sustained commitment, joy, and new energy. Needless to say, priorities need to be realistic and limited in number, especially when they entail substantial effort and resources. For some examples of direction and priorities, see Sample 5.1.

Overall, it is helpful to recall Pope Francis's words that

²⁹ ITC, *Synodality*, para. 82.

³⁰ For instance, in the Society of Jesus, Decree 3 of General Congregation 34, no. 22 says that "the Provinces should evaluate their apostolic planning using the Ignatian criteria of the constitutions, read in the light of our mission today. Read in the light of the faith which seeks justice, the criterion of 'greater need' points towards places or situations of serious injustice, the criterion of 'more fruitful' toward where ministry can be more effective in creating communities of solidarity, the criterion of 'more universal good' toward action which contributes to structural change to create a society more based on solidarity."

”

Pastoral ministry in a missionary key seeks to abandon the complacent attitude that says: “We have always done it this way”. I invite everyone to be bold and creative in this task of rethinking the goals, structures, style and methods of evangelization in their respective communities (EG 33).



How to do it ...

1

The planning team can prepare summaries of all the insights gathered from the previous steps and circulate to participants for reflection and prayer, with suggested questions for reflection. (See sample 5.2) It would be best for the planning team to avoid coming up with a tentative list of proposed directions and priorities as this runs counter to the openness, engagement, and co-responsibility entailed in communal discernment.

2

After sufficient time for the above personal reflection, a plenary assembly can be organized, which should ideally be about 3-5 days. If not all participants can attend the assembly, some representatives can be chosen. The size of the assembly should be large enough to include representatives from all segments of the organization. In the case of a parish or diocesan assembly or an international organization, it is possible to have several hundreds of participants, provided that small groups are formed for conversation and that these submit their conclusions in writing, with a central process established to synthesize them.

3

For participants who are not included in the assembly, prior consultation can be done with them by gathering their views with the same set of reflection questions as above. Ideally, they should also have a chance to carry out small group conversations within their teams or localities, and submit their proposals to the planning team for consideration at the assembly.

4

At the plenary assembly, methods for dialogue such as Spiritual Conversation can be used. Liturgy is especially important so that the whole meeting is conducted in a prayerful atmosphere. Even those present who do not share the same religious belief can be encouraged to maintain a contemplative stance throughout the assembly.

5

It is often helpful to have an external facilitator so that all participants, including leaders of the organization and the planning team, can fully participate in the discernment. Needless to say, these external facilitators would need to be familiar with communal discernment methods. At the end of each day or half-day, the planning team, together with the

facilitators, can review the proceedings that have occurred and see how the group has been doing, what the spiritual movements were, whether there were any emerging energies and hindrances, and how the process could be improved at the next session. Such reviews can also be conducted in a spiritually discerning way.

6

Towards the end of the assembly, the conclusions can be stated explicitly and everyone can pray and reflect on them so as to fine-tune them.

7

Thereafter, the direction and priorities drafted at the plenary assembly could be circulated to those who did not attend, with accompanying explanatory notes as far as possible, and their further feedback can be sought. A timeframe of 1-2 months can be allocated for further fine-tuning and confirmation.

8

In some organizations, there is a formal governing body who gives final approval to the plan. In this case, members of such a body should be part of the plenary assembly so that they are involved in the listening, dialogue, and discernment. They would then avoid making their decision in isolation from the communal discernment of the assembly without any opportunity to listen or raise questions.



Good to know ...

As with the previous steps, discerning direction and priorities entails both critical reasoning and spiritual attunement. A disposition of interior freedom is especially crucial here because difficult choices often need to be made. The tendency of organizational members to be attached or anchored to existing works, structures, and ways of doing things can exert a particularly strong influence and hamper their freedom, creativity, and boldness in making radical change where needed.

Some organizations avoid the tension of choosing by including every objective and target group, leaving out nothing and no one. Unfortunately,

ly this prevents them from facing the reality of the group's limitations and the need to commit to what's most important whilst collaborating with others. It is especially hard to let go of areas of work which certain members had gotten used to doing even if the need has diminished. There are also certain works which had brought recognition for the organization in the past but which might not represent the best use of its present resources and future potential. Participants in the planning should thus seek the grace to desire and identify 'the one thing necessary' amidst competing demands and interests, in accordance with God's will.



Sample 5.1 Examples of direction and priorities

Example 1

A parish in a city with an increasingly multi-cultural population where inter-group tensions are beginning to be felt:

Direction:

For the next 5 years, we seek to become a parish known for promoting social harmony and solidarity in the church and society, thus witnessing to the unity of all human beings in God's love, amidst the fast-changing demographics of this city.

Priorities:

1. To reach out to new migrant communities, especially the most vulnerable; to engage them as fellow residents and partners, building relationships with them, learning from them, and supporting them.
2. To promote a culture of hospitality in the parish and surrounding neighborhoods, beginning with a change in mindset among parishioners, and to develop channels of dialogue to address emerging tensions.
3. To offer a greater variety of inculturated liturgies and activities, and promote the participation of all; to help existing and new parishioners deepen their faith and relationships through "Small Christian Communities" and prayer groups.

Example 2

A religious congregation whose traditional ministry is in education and is facing slower growth in membership:

Direction:

Over the next 10 years, we will consolidate our presence to the areas where there is greater need and where we are able to contribute best. At the same time, we will give high priority to cultivating and forming our lay staff and collaborators.

Priorities:

1. To systematically form our staff and volunteers in our charism and spirituality; and to pro-actively identify and form the next generation of leaders in our schools.
2. To hand over, re-locate, or merge some of our educational institu-

tions, keeping in mind the best interests of the students and the wider community.

3. To share our knowledge and develop new ministries focused on training and pastoral accompaniment of young teachers in other Catholic and non-Catholic schools.



Sample 5.2 **Guide for prayer and reflection** **on direction and priorities**

The objective of this exercise is to discover God's call for the organization particularly in terms of the direction and priorities it should pursue, in view of its identity and mission, its internal realities, and the external context.

The recommended length of time for this exercise is about 1 hour. Find a suitable space and time in which you can do this exercise attentively and contemplatively.

Begin by praying with a Scripture passage such as Mark 1:32-39 or the meditation on the Three kinds of persons (no. 149-157) in the Spiritual Exercises; or if you prefer, something from your own faith tradition or even a poem about vocation, choice, and new beginnings. In your prayer, ask for the grace to seek God's will.

Now read the summary of conclusions from all the prior steps of the pastoral planning and recall your own experiences in the planning thus far. Reflect on the following questions, maintaining a spirit of prayer:

1. What has stood out for me most in my experiences of the planning so far? Where have I felt God's grace moving us most strongly? Where do I feel lingering tension or unease, if any? What might God be saying through this?
2. What stands out from the summaries?
3. What do all these indicate about "the one thing necessary" that our organization should focus on in the upcoming years? How would I articulate this in 2-3 sentences? What would be the reason to pursue this direction?
4. What priorities would this direction imply in terms of how we should re-develop or improve our range of services, programs, institutions, as well as our own community and organization? Or, which groups of people need to receive relatively more emphasis in the upcoming years? What issues deserve our greater attention? What internal changes do we need to make?
5. Overall, where does God seem to be inviting us to go in the com-

ing years? How are we called to be, and what are we called to do? If I were to identify only 3 priorities, what would these be? (State what, who, where, how, why)

When you have finished, review what happened during your prayer and reflection period, how you were moved, and what significant points arose. Write these down and think about what you feel moved to share with the group.

Conclude with a prayer for the organization and its members so that a good communal discernment will be made.

Additional tips:

When writing a list of priorities, avoid the following tendencies:

- a. Focusing on specific projects or activities such as organizing an event rather than broader, strategic priorities.
- b. Stating the priorities too vaguely such as by simply listing some issues and institutions. A clear statement of priorities would elucidate:
 - The needs, concerns or problems you wish to respond to
 - The target group(s) (and relevant details such as their location or demographic profile if these are pertinent to your choice)
 - The desired outcomes or positive changes you hope to make
 - The main strategies or means of your response, in accordance with your organization's charism and strengths
- c. Having too many priorities, beyond your organization's capability and resources
- d. Reluctance to let go of past priorities that are no longer relevant or critical.

If several options are being considered and further discernment is required in order to narrow the list, the following method can be used:

1. First, list the criteria for choosing the top priorities. This should stem from the insights about identity, charism, and mission. Consider also the gaps and greatest needs in the internal and external context. Note the current priorities of networks, dioceses, or universal bodies which the organization belongs to, as well as internal norms about choosing works and allocating resources, where available.
2. Next, write each criterion clearly in a sentence and rank all the criteria in order of importance.

- Then using the table below, evaluate each option as objectively as possible according to the criteria by assigning an appropriate number of “ticks”.

	1 st criteria	2 nd criteria	3 rd criteria	etc.
Option A				
Option B				
Option C				
Option D				

- Once the table is completed, the options which have more “ticks” in the higher-ranked criteria can be identified as the final list of priorities.
- Note that this exercise needs to be accompanied by dialogue and spiritual discernment so as to share diverse perspectives and promote objectivity. In fact, the table can serve as material for conversation and discernment.







Responding in Concrete Action



A closer look at what this step is all about and why it's important ...

When the direction and priorities are confirmed, it is crucial to translate them into concrete goals with specific timelines. These goals can be in the form of desired milestones or significant targets relating to each priority, such as the creation of new ministries, specific improvements to be made to existing ones, or cessation and

any other transition of works. There might also be targets pertaining to desired changes in internal organizational structure, personnel, resources, processes, partnerships, and even culture, relationships, and community and spiritual life.

In this step, it is helpful to recall Pope Francis's remark that:

”

Realities are greater than ideas. This principle has to do with incarnation of the word and its being put into practice: “By this you know the Spirit of God: every spirit that confesses that Jesus Christ is come in the flesh is from God” (1 Jn 4:2). The principle of reality, of a word already made flesh and constantly striving to take flesh anew, is essential to evangelization. It helps us to see that the Church’s history is a history of salvation, to be mindful of those saints who inculturated the Gospel in the life of our peoples and to reap the fruits of the Church’s rich bimillennial tradition, without pretending to come up with a system of thought detached from this treasury, as if we wanted to reinvent the Gospel. At the same time, this principle impels us to put the word into practice, to perform works of justice and charity which make that word fruitful. Not to put the word into practice, not to make it reality, is to build on sand, to remain in the realm of pure ideas and to end up in a lifeless and unfruitful self-centredness and gnosticism (EG 233).

A common mistake in pastoral planning is to neglect this crucial step of setting concrete goals and developing action plans. Many groups end their planning process after identifying the priorities. Thereafter, they realize that nothing is being implemented even after a year or two, forgetting that they did not specify what exactly is to be implemented in the first place.

Targets can be both quantitative and qualitative. The important thing is that this exercise of setting specific targets helps to clarify the priorities more concretely and translate them into actionable implications. It also strengthens commitment towards the agreed direction, thus moving the pastoral plan closer to implementation. Without this step, the agreed direction and priorities would remain at the level of good intent and vague ideas. Targets, on the other hand, are about what exactly would be changed, strengthened, improved, started, increased, diminished, or ceased; as

well as when, and if relevant, where, for whom, by how much.

Action plans then need to be drawn out for each target, specifying the main tasks, timelines, resources, and persons responsible. Some examples of targets and action plans are provided in Sample 6.1.

The drafting of targets and action plans should primarily involve those who will be responsible for their implementation at the frontlines, in dialogue with the organizational leaders and stakeholders. There should be close inter-unit coordination and communication during this step.

As with the direction and priorities, the formulation of targets and action plans would engender enthusiasm and energy if done well. It should continue the dynamics of spiritual discernment so that these final and crucial aspects of the pastoral plan are put together under the guidance of God’s Spirit. In particular, participants need to be cautious about an “afterglow” effect similar to that

highlighted in the Spiritual Exercises (Spex 336). In the wake of the excitement and consolation from arriving at the direction and priorities, participants may become over-enthusiastic in formulating unrealistic goals and action plans, or rush to make these plans based on their old habitual ide-

as and ways of thinking. In contrast, the Spirit may sometimes lead the group to do things in a different way or to try a new course of action. Hence there is a need to remain spiritually discerning so that this step is carried out prudently, creatively, and in fidelity to God's will.



How to do it ...

1

The planning team can organize participants into work-teams based on their job roles and assign each priority to the relevant team to propose the specific targets and action plans. A common template should be given. (See sample 6.1)

2

The teams should be given adequate time for this exercise, such as 2-3 months. Their draft proposals can be forwarded to the planning team for collation.

3

Thereafter, a consolidation of all proposals should be forwarded to everyone to identify possible overlaps, gaps, and areas of co-operation especially between sub-units in the organization. Participants can also give feedback and share creative ideas on the proposals of each team, as well as share information about resources and networks where relevant.

4

With these revisions, the planning team can coordinate the fine-tuning of the plans among the responsible sub-units and finally with the leaders.

5

Sometimes certain stakeholders and funders are consulted before the plan is finalized. Various governing bodies, such as in an international religious organization, might also be involved in endorsing the plan.



Good to know ...

It is important to bear in mind that new priorities and goals sometimes do not fit with existing structures, systems, policies, cultures, and even attitudes. In this regard, the group needs to be careful about putting

“new wine into old wineskins”. New goals often require not only specific action plans to achieve them but also relevant adjustments to other aspects of the community or organization, such as structures, policies, process-

es, resources, relationships, and culture. These need to be incorporated in the action planning as well. As pointed out by Pope Francis, “a proposal of goals without an adequate communal search for the means of achieving them will inevitably prove illusory” (EG 33).

Another thing to note is that even though a well-defined and comprehensive list of targets and actions is most desirable, in practice, the final plan is usually more open-ended and may even look like a partially-completed document. This can be a grace in itself because it reminds the organizational members that they are

on an on-going journey and need to remain in an open and discerning stance, to listen to one another and to external realities, and to wait for certain things to ripen in their good time. God’s Spirit often reveals gradually, and it is not possible to map out a very detailed plan for the road ahead. As long as there is enough clarity about what actions are to be expected from each person and team within a certain timeline, and as long as there is a reasonable level of spiritual consolation and confirmation in the group’s conclusions, the pastoral plan can be considered adequate at this point in time.



Sample 6.1

A suggested process for setting targets and formulating action plans

This activity is best done in teams comprising persons who would be responsible for achieving the targets, including those persons whose direct collaboration is essential.

The first step is for each team to look at the agreed priorities that it would be responsible for. Team members can recap the considerations that underpinned each priority so as to understand it more holistically. Thereafter, some of the following questions can be pursued, in a spirit of communal discernment:

1. What are the key words or important factors in this priority?
2. When we recall why and how this priority emerged in the communal discernment, what were the key points? What were the consolations, and what were the tensions, if any?
3. What do we think are the non-negotiable elements in this priority?
4. How would we describe the desired outcome of this priority, with as much detail as possible? What are the false or superficial outcomes to avoid?
5. What would be some suitable targets to aim for in the next 5-10 years? (Besides those that immediately come to mind, spend some time to brainstorm on creative and radically new ideas. For instance, what targets would the most vulnerable beneficiaries set

for the organization? What targets would manifest the vision of the organizational founder?)

6. Which of these targets would be most important, urgent, impactful, resonant with our charism, and realistic to the capacity we have or are able to acquire in the next 5-10 years? (Bear in mind the total number of targets chosen must be within the total capacity of the organization)
7. What would be our best means of achieving each of these targets? What partnerships can we form? What steps need to be taken?
8. Who will be primarily responsible, and whose collaboration is needed?
9. What resources are required and how will they be made available?
10. What consequent organizational changes and conversions are implied by this target? (Eg. Structures, systems, personnel, rules, policies, cultures, mindsets, routines)
11. What difficulties might be encountered and what can be done about them?

The final list of targets can be written out, together with an action plan. All teams should also share their proposals with one another so as to make adjustments at the organizational level. Everyone should be involved in giving inputs and cultivating a sense of ownership, co-responsibility, and commitment towards all targets because they are a collective call for the organization as a whole.

Some examples of targets:

Priority:

To empower more under-privileged youth in the city through enhancing their vocational capacity.

Target 1: Expansion of our 2 existing vocational schools by 30% in 2 years' time.

Target 2: Provision of our expertise, resources, and training for vocational schools run by other church and secular organizations so as to increase their intake by about 20% in 3 years' time.

Target 3: At least 1 research project carried out within the next 18 months to evaluate the effectiveness of our vocational training programs.

Priority:

To re-discover and deepen in the charism and spirituality of our religious congregation at the personal and communal level

Target 1: All members undergo a renewal formation program in our spirituality over the next 5 years, with an estimate of about 40 persons per year.

Target 2: With immediate effect, all communities to put in place regular times during each month for communal prayer and reflection using the foundational texts on the spirituality of our congregation.

Target 3: Group retreats on the spirituality every 3 years.

Example of action plan:

Target: Expansion of our 2 existing vocational schools by 30% in 2 years' time

Person responsible: Head of vocational training program

Key steps	Who	When
1. Secure funding	Head of Development Office	Year 1 Jan-Jun
2. Recruit and orientate teachers	Principals	Year 1 Jan-Sep
3. Rent extra space	Principals	Year 1 Jul-Sep
4. Increase intake in batches	Principals	Year 1 Oct to Year 2 Dec





7

Reviewing Our Progress



A closer look at what this step is all about and why it's important ...

Implementation is often not an easy journey, and entails a disposition of on-going discernment. While there needs to be fidelity to the direction and priorities that have been communally discerned, there can be flexibility with regard to the specificity of targets and action plans. These latter often need to be adjusted in re-

sponse to dynamic or unforeseen developments, new information, or even further insights about what was discerned during the planning. Hence a few final things are necessary in order to ensure that the pastoral plan would be implemented as fruitfully as possible. These pertain to communication, monitoring, and evaluation.



How to do it ...

1

The plan needs to be well-communicated to all members of the organization, to partners, funders, and often to the general public as well. A document, video, or micro-website that provides an overview of the plan can be produced for this purpose. (See Sample 7.1 for a suggested template) What is key to note is that it is not only a matter of conveying the direction, priorities, targets, and actions. Just as important are the contextual considerations that underpin the plan, as well as the values, rationale, feelings, and intents or desired outcomes associated with each priority, and why they are important. It is also helpful to recap the planning process, including the extent of participation and the memorable moments of significant insight, struggle, consolation, or conversion in the communal discernment. All these can be elaborated so that all persons, whether internal or external, will find the plan meaningful, and will better able to understand the thinking and motivations behind the plan, to see how God has been present, and to implement it and/or engage with it appropriately. If necessary, different adaptations of the full plan can be made for different groups of stakeholders, depending on the level of detail needed. It is also useful to have additional forms of communication such as posters, leaflets, podcasts, or short videos of a more inspirational nature. Some platforms can be created for on-going feedback and queries about the plan.

2

The planning team's role ceases when all these steps are completed. Hence the means of monitoring and coordinating the implementation of the plan needs to be agreed upon. Usually this is assigned to a permanent central committee that either already exists in the organization or would be created in its new structure. It is often helpful to identify a specific person who would maintain regular contact with those responsible for implementing the priorities and targets of the plan. More proactive and frequent dialogue during the initial months can be initiated. Such dialogue can help to address gaps in information, unanticipated difficulties, or mismatch of expectations. Facilitating implementation would also include animating the relevant units and members to act on the plan, providing support, and helping to iron out teething problems.

3

Dialogue is especially needed with those facing challenges as a result of the new pastoral plan. This can include persons who are re-assigned to new areas of work or who have to forgo their long-held responsibilities. In this regard, the organization's leaders can direct more attention towards being with, supporting, and guiding such persons. On the whole, more inter-unit communication and coordination are required in the initial phase of implementation, especially when structures, systems, or even mindsets and cultures are undergoing a change.

4

The times for evaluating the plan can be made known to everyone. Evaluation is usually done more frequently during the initial phase. For instance, evaluation meetings can be held every 3 months for the first year, and thereafter every 6 months or once a year. Whilst these evaluation sessions can involve only the unit heads, it is important for all members of the organization to come together at certain times to review the general progress. Evaluation is a communal discernment. It is not just a matter of presenting formal reports and updates, though these can be included. What is more important is to take stock of whether the group has been genuinely moving in the direction that it had resolved to take, whether and how the group has grown as a community, and how God's Spirit has been present during the period under review. To this end, evaluation sessions can be done with methods such as the Ignatian Examen and Spiritual Conversation, with members reflecting on the consolations and desolations felt during the implementation. They can also take note of significant or unexpected developments, and apparent successes and failures. They can discern what God might be communicating through these experiences.

5

An effective evaluation would reveal the areas for affirmation, conversion, or even changes that might be needed in the pastoral plan, or simply those action items that call for on-going perseverance. With regard to the latter, sometimes the right course of action is to not be deterred or side-tracked by doubts, difficulties, or unanticipated events. Great care in discerning the influences of the spirits is required, especially when making decisions about staying the course or changing the plan. The group discernment can be accompanied with personal examen by each group member on the personal areas of gratitude and joy as well as tensions and conversions. Overall, these times of review are important moments of learning and growth towards fullness of life in God.

6

It is just as important to have moments of celebration whatever the progress seems to be. Celebration helps to engender gratitude and make people more thoughtful about the things that might have gone unnoticed but which can be explicitly appreciated and acknowledged. Celebration also brings people together and sustains attention to the plan. Just as important, leaders of the organization can make an extra effort to affirm and encourage everyone in the process.



Good to know ...

In pastoral planning, the journey matters as much if not even more than the final destination. As can be seen throughout this book, it is not

simply about coming up with a pastoral plan document. Rather, in the midst of communal discernment during the planning, the renewal of the

community often begins to become a reality; that is, it is through the process that people are gradually transformed. When group members sincerely walk with each other and with people in their context, they find that the communal transformation they seek is something that happens along

the way, through the gratuitous presence of God walking with them. For this reason, as mentioned in the beginning of this book, pastoral planning with a communal discernment approach is a journey that can be undertaken with hope, courage, and generosity.



Sample 7.1 **A suggested pastoral plan template**

(Name of organization) Pastoral Plan (Year X to Y)

Identity and Mission

State the most salient points that arose from Steps 2-3 of the planning process about the organization's identity in God's grace, its charism, values, and mission.

Context

In a few paragraphs, describe the external and internal contexts on which this plan is based. Most of the points pertain to Step 4 of the planning process. Doing a summary here would provide a valuable reference point when the priorities or targets need to be evaluated or fine-tuned, or when the plan needs to be reviewed.

Process

Briefly describe the process, participation, and key experiences that participants underwent in the planning. This serves as an important reminder of the communal discernment, including the significant consolations, turning points, tensions, and confirmations. Lingering ambiguities, uncertainties or unresolved questions can also be mentioned here.

Overall direction for Year X to Y

One or two sentences that summarize the organization's main call or focus during the period Year X to Y).

Key priorities

Describe each priority clearly and meaningfully over a few paragraphs, highlighting the aspect of the organization's life or mission that it focuses on, why this priority was chosen, what its main intents are, what

issues or challenges it addresses, which target group(s) it is aimed at if any, what types of interventions are envisaged, what changes or conversions it might entail, and what a good outcome might look like.

Specific targets

For each priority, list the specific targets; i.e. what exactly is to be put in place or enhanced, changed, terminated, initiated, etc, and by when. These might be either qualitative or quantitative.

Action plan

For each target:

	Main steps	Responsible persons (and collaborators)	Timeline
1.			
2.			
3.			



.....

.....

.....

.....

.....

.....

.....

.....



Appendices

Appendix 1

Sample schedule for pastoral planning

Period	Phases
1st - 3rd month	Preparation for pastoral planning
4th - 6th month	<p>Step 1</p> <p>For parishes or dioceses, this can be done through small neighborhood communities, parish or diocesan committees, ministry teams, prayer groups, etc. Everyone, including laity, religious, and clergy can participate. For religious congregations, lay associations or institutions, this can be done at local community or departmental level. As far as possible, each small group should have diverse members and people from different communities.</p> <p>Reports from the small groups are sent to the planning team for synthesis and re-dissemination.</p>
7th - 8th month	<p>Steps 2-3 (As above)</p>
9th - 12th month	Step 4
13th month	<p>Step 5</p> <p>This can be done at a parish assembly, diocesan synod, or religious congregation assembly, preceded by the discernment of the sub-units as above</p>
14th - 15th month	Steps 6-7

Appendix 2

A Sample Handout on Spiritual Conversation

Introduction

The term “Spiritual Conversation” is used here to refer specifically to a method of dialogue that has been developed in the Ignatian tradition. It involves three rounds of sharing and listening, with times of silence in between. Spiritual conversation is not a debate or discussion. It is not about trying to resolve a problem or advocating one’s own point of view. Rather, it is about listening attentively and deeply to oneself and to others with sensitivity towards the influences of the spirits, so as to recognize and follow how God’s Spirit might be moving in the whole group.

There is no “right” or “wrong” answer in the Spiritual Conversation. Each person’s sharing is welcomed and acknowledged. The whole group listens so as to hear what the Spirit is saying through each person. To this end, the prior time of personal prayer and reflection is crucial. Without it, there is no Spiritual Conversation.

Listening with the heart involves paying full attention to the speaker without thinking of what you are going to say and without making judgments about the speaker. It entails listening to both verbal and non-verbal communication, which includes not only what is said explicitly but also emotions, moods, body language, inner stirrings, and even what is not said. The aim is to empathize with the speaker and to sense what he or

she might be experiencing interiorly. All persons are ‘experts’ of their own personal experiences. Listening with the heart also means allowing oneself to be affected by the other, seeking to learn something new, and even being open to the possibility of being changed by what is heard. Listeners pay attention to how they themselves are moved interiorly by what they are hearing. Indeed this is a demanding task, but in the long run, it cultivates a disposition of loving attentiveness, inner stillness, appreciation of others, humility, and depth of living.

Speaking from the heart comes from being accepting of and welcoming towards oneself, along with all that one is experiencing. It requires a level of attentiveness and self-awareness, as well as honesty in facing and speaking the truth from one’s heart. Such self-acceptance and authenticity are often cultivated in prayer and reflection. Speaking from the heart also means taking responsibility for what one says, and expressing the interior movements that accompany it.

Instructions for participants

The size of each group should be about 5-7 persons. The time allotted for this exercise can be about 1½ hours. Choose a facilitator and a time-keeper. They should estimate and inform everyone how much time each one will have for sharing during the

first round. Keep to the allotted time so that everyone will have a chance to share. Ensure that the 3 rounds are completed, and that the review is done. Follow the processes described below as closely as possible because they are integral to the dynamics of the Spiritual Conversation.

First round

One at a time, each person shares the fruit of his/her personal prayer. The others listen, paying full attention to what is being said. Listen to each person with attention, love, and reverence. Welcome what is said with gratitude and interest, knowing that the Spirit speaks through every person. During this round there is no dialogue or interaction between participants, not even to ask questions or give answers. It is just a round of listening deeply to each one, with every person, regardless of rank or representation, given an equal amount of time to speak. As you listen, be aware of how you are moved; eg. when you feel harmony with what is being said, when you feel joy, tension, frustration, sadness, curiosity, etc. Pay attention also to the interior movements of the speaker and the underlying and shifting moods in the group as a whole. For the speaker, share what you feel moved to share, briefly and clearly. There is no 'right' or 'wrong' answer. Just share honestly from your prior prayer experience.

Silent reflection

(About 3 minutes after the first round is completed) Reflect on what has been shared, and how you felt as you listened. What stands out? What is emerging subtly?

Second round

Whoever wishes may start sharing the fruits of this moment of silent reflection. When everyone has finished sharing and there is still available time, there can be some dialogue on the movements, questions, and views raised in the group, or how another person's sharing has affected you or given you deeper insights or a new perspective. You might also be moved to share personal experiences that resonate with what was said. If there are contrary opinions, the group may wish to explore the strengths and limitations of each opinion, though this is best done in a separate Spiritual Conversation, with everyone considering the strengths together, followed by the limitations. During this round, the facilitator needs to ensure that the dialogue is not dominated by a few people and that the group keeps to the allotted time.

Silent reflection

(About 3 minutes) Reflect on what happened in the Second Round, how you were moved, and how the group was moved. Note any common themes or significant points that were emerging, as well as divergences of opinion or tensions or even new questions if any.

Third round

Each person shares the fruit of the time of silent reflection. This can include insights, significant points or movements. You may also pray aloud thanking God for graces received, or asking for a specific grace.

Review

(About 5 minutes) When the 3 rounds of Spiritual Conversation are completed, review and reflect on the experiences and feelings. This may lead to further enlightenment about how God's Spirit was moving.

Report

If the group is required to make a report, take a few minutes to agree on the main points emerging in the conversation and what the group wishes to report on. (See Appendix 2a for a suggested template) It is important that this is done by the whole group rather than by one or two assigned persons.

Appendix 2a

Template to Report on the Fruits of the Spiritual Conversation

(Optional) Names of participants in the group:

1. With reference to the questions or points for prayer and reflection for this conversation, what were the main points that seemed to gain increasing resonance in the group especially towards the third round?
2. What tensions or questions were acknowledged and remain open or unresolved?
3. What were the interior movements or notable feelings in the group? What points of view were associated with these movements?
4. What are the ways in which the group has noticed God's Spirit moving? What does the group sense the Holy Spirit saying through this conversation?
5. Does the group wish to raise any further points?

Note:

A report of the fruits of a Spiritual Conversation is not merely a summary of points raised by participants. Rather, it is a collective conclusion by the group, even if only a tentative one, borne out of an attentive spiritual discernment of how God was moving the group during the conversation. Not all questions need to be answered if the group has nothing to say on some of the above points. The fruits of a spiritual conversation are not just answers to the questions being discerned, but also include key movements, further questions, spiritual awakenings, sense of fellowship, and even tensions brought to the surface.

Appendix 3

Relevant Sections of Canon Law and Catholic Church Magisterial Texts

In a diocese, pastoral planning through diocesan pastoral councils and synods have been promoted since the Second Vatican Council as one of the key means through which co-responsibility by all the People of God for mission and ecclesial life can be exercised. The Code of Canon Law (1983) deals with pastoral councils in Can. 511 - 514 and with diocesan synods in Can. 460 - 468. Parish pastoral councils are mentioned in Can. 536.

The following are examples of texts that can be used to facilitate reflection on the nature and mission of parishes and dioceses:

- Congregation for the Clergy. *The Pastoral Conversion of the Parish Community in the Service of the Evangelising Mission of the Church*. Vatican City: Vatican Press, 2020.
- Pope John Paul II. *On The Vocation And The Mission Of The Lay Faithful In The Church And In The World, Christifideles Laici*. Vatican City: Vatican Press, 1988, paras. 26-27.
- Pope Francis. *Apostolic Exhortation on the Proclamation of the Gospel in Today's World, Evangelii Gaudium*. Vatican City: Vatican Press, 2013, paras. 27-30, 49.
- International Theological Commission. *Synodality in the Life and Mission of the Church*. Vatican City, Vatican Press: 2018, chap. 4.



Christina Kheng is from Singapore and teaches theology and pastoral leadership at various institutions including the East Asian Pastoral Institute, an on-going formation center run by the Jesuit Conference of Asia Pacific. She has provided pastoral planning, communal discernment, and leadership accompaniment for a wide range of organizations in the Ignatian tradition as well as for dioceses, parishes, religious congregations, lay associations, and Catholic international organizations. She has been a member of the Methodology Commission and various task forces of the General Secretariat of the Synod at the Vatican in respect of the Synod 2021-2024. Christina has a PhD in Theology from the Australian Catholic University and a Master of Public Administration from the John F. Kennedy School of Government, Harvard University. Her research focuses on theological foundations for inter-disciplinary methods in church-society dialogue.



We live in a time of change that is filled with challenges and opportunities. The Spirit of God is always calling us to listen, to contemplate and to see with new eyes how God is laboring in our current context and calling forth our collaboration.

Pastoral planning is an undertaking that helps us enter into this deep listening, so as to emerge more fruitful, renewed, and committed in our life and mission. A communal discernment approach is indispensable because we are in mission not as individuals but as a community, and we need to discern together how God's Spirit is moving. This calls for the participation of everyone, and is an opportunity to exercise synodality, mutual listening, and building communion amidst diversity. To this end, this book has integrated both planning and communal discernment together in a meaningful and practical way.