

THE CATHOLIC UNIVERSITY OF AMERICA

“Parish Leadership: A Shared Responsibility --
A Model of Collaborative Parish Leadership Formation,
Engaging Ordained and Lay Ecclesial Ministers
in the Los Angeles Archdiocese”

A DISSERTATION

Submitted to the Faculty of the
School of Theology and Religious Studies
Of The Catholic University of America
In Partial Fulfillment of the Requirements

For the Degree

Doctor of Ministry

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By

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Washington, D.C.

2011

“Parish Leadership: A Shared Responsibility --
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In 2003, Roger Cardinal Mahony concluded an Archdiocesan Synod that promulgated six Pastoral Initiatives governing the contemporary Church of Los Angeles with a pastoral letter, *Gathered and Sent*. The objectives of the Synodal Pastoral Initiatives were stated by Mahony as a continuation “. . . for greater collaboration and mutuality in the exercise of ministry in the Church.”¹

With the establishment of parish leadership teams, the local church of Los Angeles Archdiocese emphasized joint formation of ordained and lay ecclesial ministers (parish life directors, pastoral associates, directors of religious education, youth ministers) as a critical component of collaborative parish ministry. Interestingly, there is a scarcity of functioning models that foster joint formation. The contribution to ministry is evidenced by the Archdiocesan mandates for effective collaboration in parish leadership, equally important to the effective development and implementation of a joint formation model, is the strong leadership and support by the cardinal and the regional bishop that has already been demonstrated.

To support the Archdiocesan mandate for joint formation, a project was designed to pilot a formation workshop model with the primary objective of focusing on

¹ Roger Mahony, *Gathered and Sent: Documents of the Synod of the Archdiocese of Los Angeles 2003* (Chicago: Liturgy Training Publications, 2003), 3.

collaborative parish leadership engaging both priests and lay ecclesial ministers in joint decision making. The workshop was conducted in two sessions incorporating distinct methodologies. In 2009, a joint formation pilot entitled “Parish Leadership: A Shared Responsibility” consisted of a dialogue and development session including 160 parish leaders representing 27 parishes (more than 30% of the San Gabriel Pastoral Region). Elements that contribute to collaborative leadership were identified and implemented in the second session that engaged participants in a pastoral planning exercise, encouraging prayerful reflection, shared visioning, integration of gifts and collaborative decision making. Influence on leadership styles was evaluated with a Thomas-Kilmann tool measuring pre- and post workshop behaviors.

Effectiveness of the pilot formation sessions was indicated by the modification of participants’ leadership styles toward collaborative behaviors and recommendations by an Archdiocesan Pastoral Council document to implement the joint formation workshop model at several levels: In Archdiocesan Offices; the five Pastoral Regions governed by Auxiliary Bishops, the local seminary and universities.

This dissertation by Yolanda S. Brown fulfills the dissertation requirement for the doctoral degree in ministry approved by Donald Heet, OSFS, D.Min., as Director, and by John Beal, J.C.D., and Marti Jewell, D. Min., as Readers.

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INTRODUCTION:

Imperatives for Collaborative Parish Ministry and Leadership

Roger Cardinal Mahony's 2003 pastoral letter, *Gathered and Sent*, promulgated six Synodal Pastoral Initiatives governing the contemporary church of the Los Angeles Archdiocese. The purpose for convoking the Synod, as stated by Mahony in the pastoral letter, *As I Have Done For You*, was:

to develop a more collaborative and inclusive approach to ministry that the priests have called for, . . . one of the challenges that awaits us now is to gather together priests, deacons, religious and lay leaders to explore how we all might more effectively exercise our ministry as servants of Christ and His Church.²

Specifically, Pastoral Initiatives II and IV addressed accountability/participation and collaborative parish leadership, respectively. The issue of collaborative parish leadership becomes significantly prominent in an Archdiocese that ministers to five million Catholics with an extraordinary baptism growth of one-hundred thousand at year end 2008.

Collaborative Parish Leadership

Emerging models of parish leadership in the archdiocese have already been implemented since April 1999 in response to *As I Have Done for You*, a diocesan priests' convocation's pastoral letter that was co-authored by Cardinal Mahony. The document envisioned a model parish, St. Leo's, staffed with ordained and lay leaders, that called

² Roger Mahony, *As I Have Done for You* (Chicago: Liturgy Training Publications, 2000), 38.

forth gifts of the laity, as acknowledged and encouraged in various church documents since Vatican II's *Lumen Gentium*.³

Loughlan Sofield views the word collaboration as having as many meanings as there are people discussing it. An obstacle to collaborative ministry is the absence of a common understanding.⁴ A basic definition of collaboration is the manner in which people work together. It can also mean a calling forth of the best in others. This implies a recognition of the baptismal call of all parishioners and a calling for the gifts of the community. With the advent of parish leadership teams comprised of ordained and lay ecclesial ministers, Sofield states, "Collaboration occurs when all the different gifts are freely joined together in ministry for the common purpose of furthering the mission of Christ."⁵ This underscores Bishop of Albany Howard Hubbard's commentary in Sofield's book, "We have discovered and affirmed the gifts given to us for the sake of the mission (of Christ). And we are learning that only when we are open to collaboration and interdependence will we really build the reign of God."⁶

While collaboration is a word that may be overused, the ability to actually do it has become a necessity. Pastoral theologian Norman Cooper defines collaboration in ministry as "(a calling of) all the baptized to a communal expression of their priestly,

³ Paul VI, *Apostolicam Actuositatem: Decree on the Apostolate of the Laity* (Vatican City: Libreria Editrice Vaticana, 1965); National Conference of Catholic Bishops, *Called and Gifted* (Washington, D.C.: NCCB, 1980); and United States Conference of Catholic Bishops (USCCB), *Called and Gifted for the Third Millennium* (Washington, D.C.: USCCB, 1995).

⁴ Loughlan Sofield and Carroll Juliano, *Collaboration: Uniting Our Gifts in Ministry* (Notre Dame: Ave Maria Press, 2000), 20.

⁵ *Ibid.*, 19.

⁶ *Ibid.*, 9.

prophetic, and royal ministry, to utilize their gifts in building up the ecclesial community, to mutual respect, and to participate in dialogue.”⁷ Marti Jewell, project director of the National Association of Lay Ministry’s Emerging Models Project (EMP) states, “The multiplication of responsibilities in today’s parish setting makes it nearly impossible to work alone. Collaboration begins with strategic planning and vision setting processes which includes the entire parish.”⁸ The EMP project is detailed in Chapter V of this paper.

Theologian Zeni Fox, who has studied the multiple ways in which people in parish leadership work together, has identified collaboration as the most notable characteristic. “The principle of collegiality between pope and bishops was taught by Vatican II. Since the council,” Fox clarified, “this idea of collaboration has influenced the church at every level. This perspective has been built into the fabric of the institutional life of the church, since the revised Code of Canon Law has placed an emphasis on structures and processes that further collaboration.”⁹

According to Bishop Gabino Zavala, Canon Lawyer and Auxiliary Bishop of the San Gabriel Pastoral Region of the Los Angeles Archdiocese, “it [collaborative leadership] is integral to decision making. Every decision should be made in consultation.

⁷ Norman Cooper, *Collaborative Ministry: Communion, Contention, Commitment* (New Jersey: Paulist Press, 1993), 1.

⁸ Marti Jewell, “Lay Ecclesial Ministers and the Future of Parish Leadership,” in *Emerging Models of Pastoral Leadership Project*, June 27, 2006, <http://www.emergingmodels.org/article.cfm?id=18> (accessed August 8, 2010).

⁹ Zeni Fox, “A Theologian’s Commentary: Emerging Models of Pastoral Leadership,” Carole Ganim, ed., *Shaping Catholic Parishes: Pastoral Leaders in the 21st Century* (Chicago: Loyola Press, 2008), 148.

The key in all of this is collaboration . . . it is shared leadership and shared responsibility.”¹⁰

Although identifying and fostering best practices for collaboration is critical to parish leadership, pastoral leaders in the EMP found it, “challenging to coordinate collaborative efforts among male-female teams and among ordained and non-ordained professional staff.”¹¹ Pastoral leaders in the EMP expressed their view that collaborative skills are the least well developed of pastoral skills in their experience, particularly shared vision, shared decision making, calling forth gifts and wisdom of community, and creating opportunities for shared prayer and discernment.¹² Their formation directors pointed to a desire to develop programs that emphasized collaborative skills among parish leaders.¹³

Obstacles to Collaborative Ministries

Every generation in the church faces exceptional challenges. Today’s church is challenged with an understanding of collaborative ministry, a concept acknowledged since the Second Vatican Council. Sofield asserts that the sole purpose of collaborative ministry is to foster the mission of Jesus Christ and to create the conditions which allow

¹⁰ Nancy Munro, “Bishop Zavala: We Need Your Gifts,” *The Tidings*, March 27, 2009, 6.

¹¹ Marti Jewell and David Ramey, *The Changing Face of Church: Emerging Models of Parish Leadership Project* (Chicago: Loyola Press, 2010), 106-107.

¹² *Ibid.*, 107.

¹³ Marti Jewell, “Preparing Lay Parish Leaders for the 21st Century” (D.Min. diss., Catholic University of America, 2008), 3.

for the coming of the reign of God.¹⁴ He further alerts that collaborative ministry is messy, sometimes difficult, and at times, painful.¹⁵ The latter is particularly evident in the Vatican position paper, “Instructions on Certain Questions Regarding the Collaboration of the Non-Ordained Faithful in the Sacred Ministry of Priest”, as evidenced by the stated objective of this document:

To provide a clear, authoritative response to the many pressing requests which have come to our Dicasteries from bishops, priests and laity seeking clarification in the light of specific cases of new forms of “pastoral activity” of the non-ordained on both parochial and diocesan levels.¹⁶

Eight dicasteries (Vatican offices) released a magisterial document in response to the numerous requests for clarification on the pastoral activity performed by the non-ordained at parishes and in dioceses. It is important to note that the specific dicasteries are critical governance offices in the Holy See, including the Congregation for the Doctrine of the Faith (CDF) and those with oversight for bishops, clergy, laity, consecrated life, canon and legislative texts, worship, and sacraments. According to Canon Law, “instructions clarify the prescripts of laws and elaborate on and determine the methods to be observed in fulfilling them” (cc. 34). Hence, it is a legally binding application of the law.

According to theologian Edward Hahnenberg, the four theological principles of the document depict its starting points as clearly distinguishing the laity from the

¹⁴ Sofield and Juliano, 45.

¹⁵ Ibid., 11.

¹⁶ Congregation for the Doctrine of the Faith (CDF) and Vatican Dicasteries, *Instruction on Certain Questions Regarding the Collaboration of the Non-Ordained Faithful in the Sacred Ministry of Priest* (Vatican City: Libreria Editrice Vaticana, 1997), 3.

ordained:¹⁷ (a) The common priesthood of the faithful and the ministerial priesthood, (b) Unity and diversity of ministerial functions, (c) The indispensability of the ordained ministry, and (d) The collaboration of the non-ordained faithful in pastoral ministry.¹⁸

Hahnenberg's observation regarding the starting point from a perspective of ordination is specified in the document:

Before addressing the concrete situations which were presented to us, it is necessary to look briefly at the essential theological elements underlying the significance of Holy Orders in the organic make-up of the Church. This is so that the ecclesiastical discipline will be understood better in light of the truth.¹⁹

The majority of the document's references were papal doctrines and canon law that focused on ordination. Canon law was stipulated as the basis for the definition of collaboration between the ordained and the laity, "This collaboration was regulated by successive post-conciliar legislation and particularly by the *Codex Iuris Canonici*."²⁰ The dicasteries specified several canons in reference to the laity's tasks and functions, for example evangelization (cc. 225), vocation of marriage (cc. 226) official positions, e.g. diocesan chancellor, tribunal judge, or finance council member (cc. 228§1 and 228§2). This paper does not treat the complexities of these codes that indicate the laity's: (1) limitations of participation and (2) deputation by the sacred pastor. Hahnenberg summarizes,

¹⁷ Edward Hahnenberg, *Ministries: A Relational Approach* (New York: Crossroads Publishing Company, 2003), 19.

¹⁸ CDF and Vatican Dicastries, 4-7.

¹⁹ *Ibid.*, 4.

²⁰ *Ibid.*, 7.

The instruction presents the activities listed above as part of a broad “sacred ministry” that belongs to the ordained priest. Lay people can collaborate with the priests in what is properly the priests’ ministry, but the non-ordained do not enjoy a right to such tasks and functions.²¹

A commentary on the fourth theological principle, “The Collaboration of the Non-Ordained Faithful in Pastoral Ministry,” is that the principle

distinguishes rights and duties of the non-ordained as, first, “those which are theirs in virtue of their secular condition” and second “those which are along the lines of collaboration with the sacred ministry of clerics” and to which they therefore have no right. These latter ministries may be entrusted to them, within limits and by deputation, when the ordained ministers are not available.²²

A language based strictly on the theology or canonical premises of ordination restricts a relational approach to a more subservient role of laity to clergy. From a legislative perspective, it appears that laity is at the service of the ordained without equal participation and without the benefit of full sharing of gifts.

Albeit several conferences of bishops reacted negatively to the prohibitory nature of the norms cited in the interdicasterial instruction relevant to the laity, a canonical overview indicated that the bishops’ responses were primarily due to the “singling out of aberrations and abuses that had not been experienced in their territories.”²³ An encouraging perspective is the document’s thirteen articles of instruction that implies an acknowledgement and attention given to the movement of the laity’s gifts in the Church.

²¹ Hahnenberg, 19-20.

²² Frederick McManus, “Canonical Overview: 1983-1999,” in John Beal, James Coriden, and Thomas Green, *New Commentary on the Code of Canon Law*, (New York: Paulist Press, 2000), 18.

²³ Ibid, 17.

Although the identification of those gifts were categorized and delineated apart from the “sacred ministers” as secular, there is hope of further development of collaborative ministry, evidenced in the subsequent Church documents, including *Co-Workers in the Vineyard of the Lord*, *As I Have Done for You*, *Gathered and Sent*, and *Serving Shoulder to Shoulder* (see Appendix A). Cardinal Roger Mahony describes,

Even in the model of a Parish Life Director who is appointed by the Archbishop and entrusted with the leadership of a parish, it is done in collaboration with a Priest Minister, empowering the community to be a sign of the reality of the Reign of God.²⁴

Consequently, collaboration requires a relational approach engaging God, the minister and community.

Sofield characterized other major obstacles to collaboration essentially as fear-based and influenced by low self-esteem, arrogance, burnout, hostility, unwillingness to deal with conflict, lack of knowledge or capacity, and unwillingness to share faith.²⁵ The first step in implementing collaborative ministry, according to Sofield, is to assess the present level at which the group is operating: Are the members simply co-existing, cooperating for the sake of getting along, or is there collaboration, a clarification, recognition and integration of gifts?

A factor highlighted above as an obstacle to collaborative leadership is conflict resulting from tensions that can arise in a working relationship, particularly during dialogues. Kenneth Thomas and Ralph Kilmann, behavioral management psychologists,

²⁴ Roger Mahony, *Serving Shoulder to Shoulder: Parish Life Directors in the Archdiocese of Los Angeles* (Los Angeles: Archdiocese of Los Angeles, 2006), page 4.

²⁵ Sofield and Juliano, 24.

recognized that healthy conflict management skills are factors of a collaborative leadership style.²⁶ In the early 1970's, Thomas and Kilmann developed the TKI Conflict Mode Instrument as a behavioral research tool that produced results applicable to leadership development, team building, group dynamics and other interpersonal management. The TKI measures an individual's behavior in situations of conflict, with preferences for five different styles of handling conflict, called conflict modes: Competing, Collaborating, Compromising, Accommodating, and Avoiding. This instrument and applications will be discussed in more depth as an evaluation instrument in Section VI of this paper. TKI defines collaboration as both assertive and cooperative in an attempt to work with the other person towards a solution that fully satisfies the concerns of both. Collaboration between two persons might take the form of exploring a disagreement to learn from each other's insights in an effort to find a creative solution.²⁷

Joint Formation in Collaborative Parish Leadership

As will be discussed in this paper's historical and scriptural reviews, Jesus' disciples learned to evangelize and work together as a community of believers, making decisions faithful to Christ' teachings. Scripture depicts a practice of collaborative ministerial formation, particularly with Jesus' directives to ambitious disciples to be "servants of all the others" (Mark 10:35-45). However, during the evolution of the early Church, the naming and ordering of ministers created a hierarchy with accompanying

²⁶ Roger J. Volkema and Thomas J. Bergmann, "Conflict Styles as Indicators of Behavioral Patterns in Interpersonal Conflicts," in *Journal of Social Psychology* 135, No. 1 (1995): 5-15.

²⁷ Kenneth W. Thomas and Ralph H. Kilmann, *Profile and Interpretive Report* (California: Consulting Psychologists Press, 1974), 3.

limitations of ministries. “The challenge for today’s church,” Sofield asserts, “is to give birth to the vision of collaborative ministry proclaimed by the Second Vatican Council.”²⁸ The response to this challenge is evidenced by a substantially high number of lay ministers serving today’s church.²⁹ The EMP reported that many lay ministers are being formed at Catholic universities, special institutes, and through online training, as they strive for competency and deeper spirituality in ministry.³⁰

Called and Gifted for the Third Millennium, the prophetic USCCB document, clearly indicates that the proposed collaborative model, “challenges us to understand that we are, in reality, joined in Christ’s body, that we are not separate but interdependent.”³¹ Jewell has stated, “Ministry formation programs have an obligation to . . . form future leaders in the necessary connection between theology and practice, helping the ministry be rooted both in the practical reality ahead and the tradition in which it is practiced. . . . In order for formation programs to prepare students, they must enable the knowledge and skills to explore this emerging theology.”³² As cited above, formation directors participating in the EMP study underscored the need and scarcity of functioning models that foster joint formation inclusive of clergy and laity. Cooper emphasizes that joint formation is a critical component of effective collaborative ministry. He calls for

²⁸ Sofield & Juliano, 11.

²⁹ David DeLambo, *Lay Parish Ministers: A Study of Emerging Leadership* (New York: National Parish Life Center, 2005), 19. This 2005 national study reports that 30,632 lay parish ministers were working at least 20 hours per week in paid positions which was an increase of 5% since their 1997 study.

³⁰ Jewell & Ramey, *Changing Face of Church*, 116-117.

³¹ USCCB, *Called and Gifted for the Third Millennium*, 24.

³² Jewell, “Preparing Lay Parish Leaders for the 21st Century,” 7.

“Ministry formation programs (that) promote the development of communion among all participants, enables all the baptized to grow in holiness, utilizes the gifts of all in building the kingdom of God, respects the dignity of all, and promotes the collaboration of all in ministry.”³³

On a local church level, the contribution to ministry provided by joint formation was mandated by the Los Angeles Archdiocesan Synod Pastoral Initiatives for effective collaboration in parish leadership. Equally important to the effective development and implementation of a joint formation model was the strong leadership and support that has been demonstrated by Cardinal Mahony and Bishop Gabino Zavala, the auxiliary regional bishop of the San Gabriel Pastoral Region where I serve as a Pastoral Associate.

This paper will examine a historical survey of the scriptural, historical, and ecclesiological foundation of a theology of collaborative parish ministry, giving particular attention to emerging models of parish leadership in the Los Angeles Archdiocese. Section II of this paper will examine paradigm shifts in the American Church that have resulted in emerging modes of parish leadership and the evolution of collaborative parish leadership. Finally, I will describe a joint formation process for collaborative parish leadership which I designed and piloted in the San Gabriel Pastoral Region of the Archdiocese followed by a subsequent session for the Archdiocese Office of Parish Life.

³³ Cooper, 141.

PART I:
Scriptural, Historical, Ecclesiological,
Theological, Pastoral Context
of Collaborative Parish Ministry

CHAPTER I:

Scriptural Review of Collaborative Ministry

The successes and discoveries of contemporary initiatives and practices of collaborative parish leadership reflect small but important contributions made by a myriad of individuals and events throughout history.

Part I of the paper will survey collaborative ministry initiatives with special attention paid to historical connections to the Gospel message, and then trace the history of ministry from the early Church down to the contemporary Church as it exists in the Archdiocese of Los Angeles. The history of the formation of collaborative ministry initiatives is very much a history of the Holy Spirit's movements throughout generations.

Ministry in the Gospels

The teaching and works of Jesus embraced all humanity with an inclusive, collaborative spirit of mission, inviting all to become co-workers in His vineyard. He sent the disciples in pairs, "two by two" with authority and specific instructions on how to be on mission (Mark 6: 7-13).³⁴ Jesus valued each human's inherent dignity, over status or prestige, as exemplified in His exhortation to the apostles, when He addressed James' and John's ambitions to be the "greatest in the kingdom" (Mark 9: 33-37; Mark 10: 35-45). In terms of ministry, Jesus encouraged the disciples to be servant-leaders. Personal ambition is not a characteristic of an effective minister and is counter to collaboration that strives for the good of the whole Christian community.

³⁴ *The New American Bible* is used throughout this paper, unless otherwise noted.

A theme of collaboration rings clearly throughout the gospels. The selection and mission of the disciples are evidence that Jesus required collaborative disciple-servants (Matt 10:5-23). This missioning was sealed on Pentecost when the Holy Spirit of the Triune God remained with the disciples forever, as promised by the Messiah. (Acts 2: 1-6, 11; Matt 28:20; Luke 24: 49.)

Early Church Responses to Collaborative Leadership Between Ordained and Non-Ordained

An understanding of the rich and complex tradition of early Christian life enlightens the development of this paper in regard to collaborative ministry. Teachings and collaborative practices of the apostles proliferated geographically from Jerusalem to Asia Minor, extolling the Good News of Christ in fulfillment of the mission of building God's kingdom. Paul's letters to the Romans and to the Corinthians referred to Christ's work as a newness of life (Romans 6:4), where the old had passed away and the new had come (2 Cor 5:17). This new relational structure was the Body of Christ (1 Cor 12). God's creative love was proclaimed by the Apostolic letters as constantly at work in relationship with the Word made flesh. Although human and institutional failings could attempt disruption of these well intended propositions of collaboration, the Holy Spirit intervened and transcended infrastructures as evidenced by (1) The Spirit's varied gifts manifested in the unity of members of Christ Body (1 Corinthians 12) and (2) The unity of faith between Peter and Paul that transcended cultural differences of Judaeo-Christians and Gentile Christians at the Council of Jerusalem (Galatians 2). Paul explains the enrichment of a faith community when the diversity of the Spirit's gifts evolve into a

unifying body of “first apostles, second prophets, third teachers, then miracle workers, healers, assistants, administrators, and those who speak in tongues.” (1 Cor 28) All complement one another while united through the excellence of the greater gift of love (1 Cor 13), foundational to collaborative ministry.

Scripture depicts early Christian leaders, such as Aquila and Priscilla, as committed to mission leadership. Life in the Christian community was “of one heart and mind” (Acts 4: 32). Communal life was practiced with characteristics of (1) adherence to the apostles’ teachings; (2) Eucharistic-centered liturgies; and (3) sharing of personal goods and meals in common. (Acts 3:42). Luke makes it clear that members chose freely whether to retain or to sell their properties for the benefit and care of the poor in the community (Acts 2: 44 & 45). According to Thomas O’Meara, the various ministries and functions in the apostolic church included Apostles/disciples as church founders, prophets who spoke the Word of God, teachers who expounded on the Word as guided by the apostles and disciples, overseers with administrative tasks, and a variety of other ministers (preachers, healers, etc).³⁵

In order that the apostles could “concentrate on prayer and the ministry of the word,” they selected seven among their disciples, Stephen, Philip, Prochorus, Nicanor, Timon, Parmenas, and Nicolaus of Antioch, to work as their assistants (Acts 6: 1-7). Later, while Paul and Barnabas were establishing churches in Iconium, Lystra and Antioch, “They appointed presbyters for them in each church and, with prayer and fasting, commended them to the Lord,” (Acts 14: 23). Paul indicated a desire for

³⁵ Thomas O’Meara, *Theology of Pastoral Ministry* (New Jersey: Paulist Press, 1999), 89-92.

collaborative ministry on several occasions in scripture. He named and commended the leaders, including Phoebe as a minister of the Church at Cenchrae, Epaphroditus, Mary, Andronicus, Junia, Ampliatus, Urbanus, Apelles, to name a few other leaders (1 Rom 16: 1-16). Paul invited all the churches of Christ to welcome one another. He specifically instructed the Corinthians, Thessalonians, and Romans with the following descriptions of ministerial communities:

- “I urge you brothers that there be no divisions among you, but that you be perfectly joined together in the same mind and in the same judgment.
(1 Cor 1:10).
- “Calling to mind your work of faith and labor of love and endurance in hope of our Lord Jesus Christ, . . . knowing, brothers loved by God, how you were chosen.” (1 Thessalonians 1:3 & 4).
- “For by the grace given to me I tell everyone among you not to think of himself more highly than one ought to think, but to think soberly, each according to the measure of faith that God has apportioned. For as in one body we have many parts, and all the parts do not have the same function, so we, though many, are one body in Christ and individually parts of one another. Since we have gifts that differ according to the grace given to us, let us exercise them: if prophecy, in proportion to the faith; if ministry, in ministering; if one is a teacher, in teaching; if one exhorts, in exhortation; if one contributes, in generosity; if one is over others, with diligence; if one does acts of mercy, with cheerfulness. Let love be sincere; hate what is evil, hold

on to what is good; love one another with mutual affection; anticipate one another in showing honor.” (Rom 12: 3-10).

Elements of Paul’s ministerial communities are synonymous with qualities of collaboration identified by Norman Cooper and Loughlan Sofield such as shared vision, respect, gratitude, unification of gifts, perseverance and recognition.³⁶

³⁶ Cooper, 53-57; Sofield and Juliano, 19.

CHAPTER II:

Historical Survey of Collaborative Ministry

Under the authority of Pope Clement of Rome (30 – 100 AD) and Ignatius of Antioch (50-110 AD), there was a movement in Syria, Asia Minor and Rome to name and order ministers of the Church. The following titles emerged:

- The *episcopus* was the bishop, an overseer with responsibility for preserving unity and faithfulness of the people.
- *Presbyteroi* or elders were collegial leaders of the church, primarily responsible for liturgical and extraliturgical services as deemed by the bishop.
- *Diakonoi* were assistants to the Bishop, with responsibility for administration, financial stability of the church and caritative support of the needy.
- *Laikoi*, a Greek word meaning “of the people” was first referenced by Clement in 95 A.D., as the designation for worshipers who were not ordained. However, Hippolytus of Rome (170-236) established rules and rites for ordination that distinguished the ordained from the laity.³⁷

However, overshadowing the emphasis on the ordering of ministries was the persecution of early Christians for their faith. These persecutions continued from the first century until the early fourth when Constantine, proclaimed religious tolerance of Christians throughout the Roman Empire with the issuance of the Edict of Milan (313 AD). Constantine supported the Church financially, promoted Christians to high-ranking civil offices, restored property that had been confiscated during the Great Persecution of Diocletian and granted privileges to clergy, e.g. exemption from certain taxes.³⁸ Scholars

³⁷ O’Meara, 91-95.

³⁸ Jo Ann Hoeppner Moran Cruz and Richard Gerberding, *Medieval Worlds: An Introduction to European History, 300-1492*, (New York: Houghton Mifflin Company, 2004), 55-56.

debate whether Constantine adopted his mother Helena's Christianity in his youth, or whether he adopted it gradually over the course of his life.³⁹ Whatever the case, Constantine's endorsement of the Christian religion was a turning point for early Christianity. Along with the imposition of a Roman Senate model on the Church, Constantine further delineated the distinction between secular laity and ordained ecclesial ministers by a movement to large, Eucharist-centered church buildings. The roles of the ordained became increasingly sacral with elaborate liturgies and the establishment of Roman architectural basilicas such as the Church of the Holy Sepulcher and Old Saint Peter's Basilica.

From the period of Constantine up to the time of the Second Vatican Council, church history reveals a kaleidoscope of Christian ministries and structure. Subsequent to the collapse of the Roman Empire, feudalism developed in Europe during the Medieval period (9th-16th centuries) along with an influx of monasteries and religious houses of women. Alternatives to traditional monastic or regular fraternities developed in the early Middle Ages because of the emergence of piety among the laity. While being faithful to the gospel, members of these groups attempted to live in the world, honor work and even marry (e.g., in the Third Orders of the mendicant Franciscans). This was further evidenced during the Renaissance and Counter-Reformation periods (14th-17th centuries) with the manifestation of multiple religious orders and confraternities of lay Catholics inclusive of oblates and third orders rendering service to society. Slowly the People of

³⁹ Peter Brown, *The Rise of Christendom*, 2nd edition (Oxford: Blackwell Publishing, 2003), 60.

God responded to the question of what it means to practice a personal spirituality and how to be more engaged in serving the Church.

The few examples of collaboration between ordained and lay ministers during the Medieval and Renaissance eras mainly involved religious women and the ordained, as discussed below.

St. Clare and St. Francis of Assisi

During the thirteenth century, both Clare and Francis exhibited lives of profound sanctity. Both of their parents desired that their children marry into affluent families, but this was not their desire, for they wished to give their lives to God. Clare ran away from home and Francis accepted her into his order, cut her hair and then personally – along with several brothers – escorted her to a convent to become a nun.⁴⁰ Their influence on respective religious orders emphasized a life of self-imposed poverty and humility.

St. Teresa of Avila and St. John of the Cross

The efforts of St. Teresa of Avila and St. John of the Cross, in furthering the development of established religious orders in 16th century Spain, indicated collaborative leadership. Theologian Raimundo Panikkar commented in the preface of Teresa's *Interior Castle*, "He [John] joined St. Teresa in the noble work of reforming the Carmel among men, as Teresa had already begun among women . . . unlike Teresa he never

⁴⁰ Emilie Griffin, ed., *Francis and Clare of Assisi Selected Writings*, trans. Regis J. Armstrong, and Ignatius C. Brady (San Francisco: Harper Collins Spiritual Classics, 2006), viii.

became the juridical founder, but he was the inspiring soul of Carmel.”⁴¹ Through their dialogues, discourses and spiritual exercises, Teresa’s and John of the Cross’ inspirations and strategies influenced the formation of the Discalced Carmelites. Teresa and John established guidelines for their orders’ austere contemplative prayer lives that would benefit the whole Church and the world.

St. Vincent de Paul and St. Louise de Marillac

Prior to the 1600’s, religious women lived within a cloistered monastery performing a ministry of contemplative prayer. The first "Confraternities of Charity" were organized by Saint Vincent de Paul, a French priest in 1617 at Chatillon-les-Dombes. Mademoiselle Le Gras (Louise de Marillac) assisted him with the Confraternity’s mission of serving the poorest of the poor.⁴² It was agreed by Vincent and Louise that a group of young women who generously volunteered service to the Confraternity would come under her auspices. The Company of the Daughters of Charity was approved by the Archbishop of Paris in 1655 and by Rome in 1668. Since its beginning, the Company has always been and remains subject to the authority of the Superior General of the Congregation of the Mission.

These few examples of collaborative ministerial leaderships occurred during the medieval, reformation and counter-reformation periods. However, according to O’Meara, Roman Catholic perceptions of medieval influence on the church’s institutional

⁴¹ Teresa of Avila, *Teresa of Avila: The Interior Castle (Classics of Western Spirituality)*, trans. Kieran Kavanaugh and Otilio Rodriguez (New Jersey: Paulist Press, 1979), xv.

⁴² Frances Ryan, ed., *Vincent de Paul and Louise de Marillac: Rule, Conferences, and Writings* (New Jersey: Paulist Press, 1995), 39–45.

organization and liturgy date from the close of the medieval times during the Baroque epoch (17th-18th centuries). O'Meara further explains, "Because this cultural Baroque epoch faded into the theological impoverishment of the eighteenth century, it received no critique, was not clearly replaced, and never truly ended. Thus its influence lasted on—often without notice."⁴³

Pope Pius IX convoked the First Vatican Council in 1868; the definition of papal infallibility was one of its most notable accomplishments. However, there were no references to ministerial roles for the laity in the church. In reflecting upon church history since the era of the apostles, there were relatively nominal examples of collaboration between ordained ministers and laity. Hence, the influence of the upcoming Vatican II was dramatic as discussed in the next section of this paper.

Vatican II Influence on Collaborative Ministry & Church Leadership

Two Vatican II documents that addressed the laity were *Lumen Gentium: Dogmatic Constitution on the Church* (November 21, 1964) and *Apostolicam Actuositatem: Decree on the Apostolate of the Laity* (November 18, 1965). The term laity refers to all the faithful except those in holy orders and those in (consecrated) religious life (L.G. 31). The laity share in the three munera of Christ: priestly, prophetic, and the royal office, and share in the mission of the whole people of God in the Church and in the world (A.A. 2 & 9). Although the documents specified that the laity are commissioned through baptism and confirmation to be participants in the salvific mission of the Church,

⁴³ O'Meara, 115.

called in a special way to become salt of the earth in a direct form of cooperation in the apostolate of the hierarchy (L.G. 33), only certain areas of the apostolate of the laity were explicitly recognized by the hierarchy in Chapter IV of the *Apostolicam Actuositatem*. These areas referred to the laity's collaboration as citizens of the world in building up and conducting of the "temporal order" with reference to family, professional, cultural, and social life. (A.A. 16)

According to theologian Fox,

The preeminent thinker influencing their [Vatican II] work was [Yves] Congar, who had addressed these questions in his *Lay People in the Church*. . . . In Congar's writing in 1953, there is a great effort to present the roles of clergy and laity as part of a whole, as united in a communion, not as dichotomized. For the most part, the council formulations do not dichotomize the roles of clergy and laity, but since the council there has been some tendency to do this.⁴⁴

Although the conciliar documents cover a broad area of Church concerns, Fox points out that the documents imply that the laity's role is specific to the secular service of management of the church's temporal goods, while the documents describe the ordained's role as separate and sacred. However, Fox sees progress since the Council in the recognition of the laity's contribution to the church:

The principle of collegiality between pope and bishops was taught by Vatican II. Since the council, this idea of collaboration has influenced the church at every level. This perspective has been built into the fabric of the institutional life of the church, since the revised Code of Canon Law has

⁴⁴ Zeni Fox, "Lay, Ministry, and Secular Character," ed. Susan Woods, *Ordering the Baptismal Priesthood: Theologies of Lay and Ordained Ministry* (Collegeville: Liturgical Press, 2003), 142.

placed an emphasis on structures and processes that further collaboration.⁴⁵

Pope John Paul II's *Christifidelis Laici*, a post-synodal apostolic exhortation, clarified that the laity's gifts are specific to the oversight of the Church's temporal goods, indicating an encouragement of ordained and lay ministers to work collaboratively.

Kenan Osborne, O.F.M., summarizes the concerns regarding the distinction of the roles of the laity and the ordained,

The documents from Vatican II contained many significant and groundbreaking sections on lay ministry today. Subsequent documents from the Roman Curia have ambitiously strengthened the role of lay ecclesial ministers. Excellent as these documents are, they have also presented mixed signals, which are particularly evident in the presentations on the inter-relationship of lay and clerical ministers. This interrelationship is a sensitive topic, since the theologies of baptismal ordination, presbyteral ordination, and official institution into lay ecclesial ministries have had lengthy theological histories.⁴⁶

Tensions and insecurities fostered by the mixed signals of official documents have provided evidence that the roles of laity in the Church are evolving. The American Bishop's 1980 pastoral statement *Called and Gifted*, along with the 1995 sequel *Called and Gifted for the Third Millennium* were somewhat more balanced than the subsequent *On Certain Questions* (1997) from the eight dicasteries of the Vatican Office, that set forth austere delineated guidelines for the lay ministry. *Co-Workers in the Vineyard*, published in 2005 by the United States Conference of Catholic Bishops (U.S.C.C.B) celebrated the role of laity and clarified the term Lay Ecclesial Ministers (LEMs) with a

⁴⁵ Fox, "A Theologian's Commentary: Emerging Models of Pastoral Leadership," 148.

⁴⁶ Kenan B. Osborne, "Envisioning a Theology of Ordained and Lay Ministry: Lay/Ordained Ministry – Current Issues of Ambiguity," in Woods, 195.

“positioning of the Church for the 21st century.”⁴⁷ Amy Hoey, RSM, a theologian who served on the subcommittee for the *Co-Workers* document reflected on a caution presented by one of her group members: “we really aren’t sure yet what the Holy Spirit is doing with the Church and it may be premature to attempt to position the lay ecclesial ministers into a framework which is obviously changing, with which the Holy Spirit is still working.”⁴⁸ This caution was countered by a statement of reality from one of the lay advisors to the subcommittee that for over 30 years laity had given their “professional lives to the Church” and required recognition, affirmation and guidance on further preparation of LEMs.⁴⁹

John O’Malley, S.J., a Church historian, asserts that an understanding of the history of the church depends greatly on one’s interpretive lens. The developing theology reflected in recent Church documents (see Exhibit 1) indicate that the re-shaping of the Church and its community is occurring or developing gradually and naturally, without being forced or contrived; such is the nature of service that is a response to a call of the Holy Spirit.

⁴⁷ USCCB, *Co-Workers in the Vineyard of the Lord: A Resource for Guiding the Development of Lay Ecclesial Ministry* (Washington, DC: USCCB, 2005), 15.

⁴⁸ Amy Hoey, “Call-Response-Relationship: A Theological Grounding for Lay Ministry” (paper presented at Boston College, October 22, 2006), 2.

⁴⁹ Ibid, 2-3

CHAPTER III:

Parish Ecclesiology: A Community of Ordained and Laity in Mission and Communion

How do we define parish ecclesiology? Susan Woods explains that a parish is Eucharistic-centered (centered in Christ), in communion with the baptized, as a community.⁵⁰ “The presbyteral identity” states Woods, “is within the parish’ identity, based on who and what the presbyter represents.”⁵¹ Are not the functions of the presbyter and the lay minister derived from the needs of the community? “The ecclesial community,” Woods further states, “finds its most immediate and visible expression in the parish.”⁵² Such an understanding of a Eucharistic community-centered ecclesiology is fundamental to collaborative ministry. “It [the community] identifies the areas in need of ministry, searches for the gifts which are present in the community to respond to those needs, and develops the structure to [connect] the needs and gifts [of the ministers].”⁵³ This process and structure demands collaborative ministry. Ecclesiologist Richard Gaillardetz asserts that ecclesial relationships exist within a public and structural dimension. The minister’s ecclesial position, or re-positioning in the case of LEMs, is called publicly forth by the parish community and is accountable to it. “A certain responsibility for leadership and coordination on behalf of every parishioner within the

⁵⁰ Susan Woods, “Presbyteral Identity within Parish Identity,” in Woods, 182-187.

⁵¹ Ibid., 186-187

⁵² Ibid, 183.

⁵³ Sofield and Juliano, 161.

community”⁵⁴ is required by this ecclesial relationship between parish and minister. In clarifying the appropriate stance for collaborative ministry, the question of function and representation becomes important in understanding the ecclesiology of parish.

Aurelie Hagstrom, theologian, further articulates the identity, role and spirituality of the laity vis-à-vis the ecclesiology of the Second Vatican Council. Her reflection concurred with a renewal of ecclesial thought based on the “biblical theme of Church as the people of God, rooted in baptism, rather than on an exclusively canonical point of view.”⁵⁵ A leading theologian on collaborative ministry, Loughlan Sofield, responds that ministry is relational and Trinitarian which indicates that ministers come “to be” both through what they do and who they are within a community in mission.”⁵⁶

The conclusion, according to Alexander Schmemmann, “is clear: there is no *opposition* between clergy and laity in the Church. Both are essential. The Church as a totality is *Laity* and the Church as a totality is the Inheritance, the Clergy of God . . . in complete obedience to God that establishes the harmony between clergy and laity, make them *one body*, growing into the fullness of Christ.”⁵⁷

Having considered a foundational survey of scripture, theology, Church history and ecclesiology pertinent to collaborative ministry and leadership, we can consider a

⁵⁴ Hahnenberg, 130.

⁵⁵ Aurelie P. Hagstrom “The Secular Character of the Vocation and Mission of the Laity: Toward a Theology of Ecclesial Lay Ministry,” in Woods, 154-161.

⁵⁶ Sofield and Juliano, 95.

⁵⁷ Alexander Schmemmann, "Clergy and Laity in the Orthodox Church," *Protopresbyter Alexander Schmemmann*, <http://www.schmemmann.org/byhim/clergyandlaityinthechurch.html> (accessed August 8, 2010).

new paradigm of church as it has evolved with the realities of emerging models of collaborative parish leadership, as found in the local Church of the Los Angeles Archdiocese and the relevant formation of ordained and LEM's.

PART II:
Today's Realities of Collaborative Parish
Leadership

CHAPTER IV:

Realities of the Los Angeles Archdiocese in the Context of Collaborative Parish Leadership

Sofield defines collaborative ministry as “the identification, release, and union of all the gifts in ministry for the sake of mission.”⁵⁸ This language of collaborative relationship as the grounding of Christian ministries serves as a starting point from which to address theological, pastoral, institutional and liturgical questions. O’Meara uses a concentric-circle model to depict a collaborative relationship that includes both the Triune God and the People of God.⁵⁹ Consequently, we can conclude that collaboration requires a relational approach engaging God, the minister and community. A language based solely on the theology of ordination disregards a relational approach in favor of a more subservient role of laity to clergy.

Three pastoral letters--*As I Have Done for You* (2000), *Gathered and Sent* (2003), and *Shoulder-to-Shoulder* (2006)--written by Cardinal Roger Mahony underscore his stance that a community of the baptized is the core of collaborative parish leadership in the Los Angeles Archdiocese. Amy Hoey echoes Mahony, saying that lay ministry is not simply a band aid approach in responding to the contemporary challenges in the Church such as the abuse crisis, a shrinking and aging priest population, significant growth in the number of new Catholics, and society’s “ism’s” (commercialism, materialism, pluralism, etc.). She reiterated a foundational premise of *As I Have Done for You*, “Even if

⁵⁸ Sofield and Juliano, 17.

⁵⁹ O’Meara, 157-158.

seminaries were once again filled to overflowing and convents packed with Sisters, there would still remain the need for cultivating, developing, and sustaining the full flourishing of ministers that we have witnessed in the Church since the Second Vatican Council.”⁶⁰

Lay ministry is, in itself, a legitimate expression of a response to the baptismal call shared by all. Mahony’s three documents emphasized collaborative, inclusive ministry based on the proposition that all the baptized are given a share in Christ’ priestly ministry with fundamental equality, although roles and responsibilities are distinct and differentiated.⁶¹

An Archdiocesan Synod was convoked in 2000 with the Cardinal’s directive: “Mere adjustment and small shifts in practice will not suffice. What is called for is a *major reorientation* in our thinking about ministry as well as in our ministerial practice.”⁶² The issue of collaborative parish leadership had become significant in the sizeable archdiocese experiencing an exponential growth in baptisms that Pope Benedict XVI recently acknowledged as having exceeded the total number baptized in all of Europe in 2008.⁶³

⁶⁰ Mahony, *As I Have Done for You*, 15-16.

⁶¹ Ibid., 16.

⁶² Mahony, *Gathered and Sent*, 8.

⁶³ Roger Mahony, “Briefing at the Annual Deanery meetings in the Los Angeles Archdiocese” (presented on February 2009).

At the conclusion of the Synod in 2003, Mahony promulgated six Pastoral

Initiatives:

- I. Evangelization and “The New Evangelization”
- II. Structures for Participation and Accountability
- III. Ongoing Education and Formation: Adults; Young Adults; Youth
- IV. Ministry and Leadership: Lay; Consecrated; Ordained
- V. Eucharist and Sacramental Living
- VI. Social Justice: Living at the Service of God’s Reign

Initiatives II and IV focused on collaborative parish leadership, as further addressed by *Shoulder-to-Shoulder: Parish Life Directors in the Los Angeles Archdiocese*, co-authored by Cardinal Mahony and the Archdiocesan Office of Parish Life. Parish Life Directors with full responsibility of a parish in the absence of a priest emerged as a new model of lay leadership. Data revealed by the National Parish Life Center on *Lay Parish Ministers*, as well as from the Lily Endowment’s *Emerging Models of Pastoral Leadership Project*, informed the Archdiocese Office of Parish Life of alternative models of collaborative parish leadership. Collaboration of diversified gifts of ordained and non-ordained is underscored by Mahony’s statement, “even in the case of a Parish Life Director, who is appointed by the Archbishop and entrusted with the leadership of a parish, (leadership) is to be done in collaboration with a Priest Minister’s (gifts).”⁶⁴

⁶⁴ Mahony, *Serving Shoulder to Shoulder* (Los Angeles: Archdiocese of Los Angeles, 2006), 4.

San Gabriel Region Realities in Context of Collaborative Parish Leadership

Collaborative leaders empower the gifts of all the baptized while working together toward a shared mission. They bring the fullness of the Catholic tradition to the community: communal, sacramental, pastoral, and prophetic. They respect the Spirit that is present and active in the community and in its members. Leaders appear to be focused on several areas of collaboration. These include professional practice, empowerment of the gifts of others, and the use of prayer and prayerful discernment with parishioners.⁶⁵

Marti Jewell, D.Min., and David Ramey

The goals of the Synod's Pastoral Initiatives II and IV were to foster accountability, collaborative leadership, and inclusive participation of the ordained and non-ordained parish leaders in the Los Angeles Archdiocese. Shortly after their promulgation in 2003, Bishop Gabino Zavala, like the other Auxiliary Bishops, was charged by Cardinal Mahony to establish a Regional Pastoral Council in response to these Synod Initiatives.

San Gabriel Regional Bishop Zavala is known as a compassionate, pastoral, and open leader. He acknowledged that Council membership would be initially challenging, with the unprecedented inclusion of so many non-ordained in leadership asked to serve as advisors to the Bishop. He acknowledged that he did not have all the answers and made it clear that he was dependent on the Holy Spirit, as well as on the guidance of his Council members.

⁶⁵ Marti Jewell and David Ramey, "Marks of Pastoral Excellence, Sustaining Pastoral Excellence Newsletter," *Emerging Models of Pastoral Leadership Project* (September 1, 2005); <http://www.emergingmodels.org/article.cfm?id=7> (accessed August 8, 2010).

There were neither norms nor benchmarks in this unprecedented work other than the Council Members' shared commitment to advise the Bishop on implementation of the Synod's Pastoral Initiatives, prayerful discernment, and an agreement that the parishes also had no pre-existing evaluative norms relevant to the Initiatives. Team learning and building became the initial focus of the Council, with experts addressing and engaging the Bishop and members in hours of dialogue, processes and methods. Assuring autonomy of the Council every step of the way, it was evident that Bishop Zavala practiced a collaborative, consultative, supportive, and situational leadership style.

Standing committees of the San Gabriel Region Pastoral Council developed a three-year Goal and Implementation Plan for each of the six Pastoral Initiatives. Monthly, the committees presented proposals that were critiqued by the Bishop and the Council. In most cases, parish education forums on each Pastoral Initiative resulted from the Council's deliberation, with the Bishop's vision as a keynote directive at each workshop. If the committee's goals were not totally achieved at one of the workshops, the Bishop would note that it was a learning experience for the committee and the Council. The Bishop's collaborative leadership style was a unique and rare model in the Archdiocese that effected a viable, emerging Church community engaging ordained and laity in collaborative ministry, implemented the demands of the Synodal Initiatives in the San Gabriel Pastoral Region, and maintained a joint formation leadership model for parish ecclesial teams that can enhance collaborative competency and leadership skills.

Having discussed the realities of the Los Angeles Archdiocese and the San Gabriel Region's responses to the Synodal Pastoral Initiatives related to collaborative

parish leadership, the next chapters of this paper will explore the dynamics of emerging models of collaborative parish leadership and the need for joint formation of the ordained and LEM's.

CHAPTER V:

Emerging Models of Pastoral Leadership Project

Lay ecclesial ministers must be able to collaborate with both the ordained and the parishioners in “equipping the community for every good work....” In order to provide for vibrant parish life in the future, those in ministry must recognize the interdependent web of relationship of pastors, parish pastoral staffs, and parishioners in working together for the mission of the church. Together they function as a total ministering community, the contribution of each essential to the life of the parish. . . . Therefore, lay ecclesial ministers need to have an understanding of leadership that is rooted in and serves the community. They need to be collaborative in order to work within the growing isolation that many are experiencing. One gift lay ecclesial ministers bring to the parish is their ability to widen the circle of people who can work together to provide vital parish life. Not only is the ability to work collaboratively a desirable form of ministry, it is fast becoming a matter of survival!⁶⁶

Marti Jewell, D.Min.

In the American Church, four novel parish leadership models emerged during the beginning of the second millennium: (1) Clustering, (2) Twinning, (3) Parish Life Directors and Priest Ministers, (4) Mega-Churches.⁶⁷ The emergence of these models

⁶⁶ Jewell, “Lay Ecclesial Ministers and the Future of Parish Leadership.”

⁶⁷ Marti Jewell and David Ramey, “Best Practices of Parish Leadership, National Ministry Summit,” *Emerging Models of Pastoral Leadership Project*, position paper to the National Ministry Summit, April 21, 2008, 3, <http://emergingmodels.org/doc/Parish%20Leadership%20Summit%20Report.pdf> (accessed August 15, 2010).

Four emerging models of parish leadership are : (1) Clustering – Parishes that share a pastor but maintain separate financial, operational and staffing structures; (2) Twinning—Similar to “Clustering” with a common pastor, these parishes have fully-integrated pastoral teams and/or shared ministries; (3) Parish Life Directors/Coordinators—In the absence of a resident pastor, parishes are under the leadership of Parish Life Directors/Coordinators (deacons, religious or laypersons) assigned by a bishop under Canon 517.2. The revised Code of Canon Law affirms this calling in various ministerial areas, including the “care of souls” that takes place within a parish. This is an activity centered on the church’s responsibility to teach, sanctify, and govern the people of God. “Full care of souls” is entrusted to priests (Canon 150) but partial care is a responsibility that can be shared by many, including laity, deacons, and vowed religious. It is this

motivated extensive research during the Emerging Models of Pastoral Leadership Project (2003 to 2008) conducted by six national organizations representing lay and ordained leadership: National Association for Lay Ministry (NALM), Conference for Pastoral Planning and Council Development, National Association of Church Personnel Administrators, National Association of Diaconate Directors, National Catholic Young Adult Ministry Association, and the National Federation of Priests Councils. Funded by the Lilly Endowment, the project implemented a variety of formal and informal research methodologies including six Regional Symposia throughout the country comprised of pastoral leaders: Pastors, Deacons and Lay Ecclesial Ministers (including Parish Life Coordinators, Pastoral Associates, and Directors of Religious Education). Diocesan Staff and some Parish Pastoral Council Members were also participants in the Regional Symposia. “The guiding principle of the project was the belief that the life of the Catholic Church in the U.S. today depends on sustained collaboration, through the guidance of the Holy Spirit at all levels.”⁶⁸ As a result of the project, a growing and credible source of information, including several recent publications (*Shaping Catholic Parishes: Pastoral Leaders in the 21st Century*; *Parish Life Coordinators: Profile of an Emerging Ministry*, *Pastoring Multiple Parishes*, and *The Changing Face of Church: Findings of the*

collaborative model and the baptismal call to service that form the basis for understanding Canon 517.2. Sacramental ministry and liturgies are coordinated with either priests on staff or infrequent-priest presence as in rural areas, (4) Mega parishes – Parishes with 6,000 or more families are considered mega-parishes. Typically a resident pastor works with distributed leadership groups or ministry clusters for coordination of lay ministries.

⁶⁸ Mark Mogilka, Kate Wiskus, “Pastoring Multiple Parishes,” *Emerging Models of Pastoral Leadership Project Series* (Chicago: Loyola Press, 2009), p. 3.

Emerging Models of Pastoral Leadership Project) is now available to those who are preparing tomorrow's ecclesial leaders.

The findings of the Emerging Models Project point to increasingly complex challenges for those in pastoral leadership as parish systems become more and more complex, whether through merging, clustering or changing demographics. "Resources from other disciplines, such as leadership theory, systems theory, or organizational planning and management will prove useful in developing pastoral leaders for the emerging realities... and it will be important to learn from some of these disciplines."⁶⁹ Applications of these disciplines, atypical to traditional church system methodologies, can enlighten approaches to relatively new parish leadership models that strive for collaboration.

The Emerging Models Project identified six leadership characteristics: "pastoral, prophetic, ethical, collaborative, and welcoming as well as spirit-filled."⁷⁰ The study leaders referred to these characteristics as Marks of Excellence which participants considered important for the viability of their respective parishes. The Emerging Models of Pastoral Leadership Project defined these six marks of excellence, including the Pastoral Leaders reflections, as follows:⁷¹

⁶⁹ Jewell, "Preparing Lay Parish Leaders for the 21st Century," 121.

⁷⁰ Ibid, 2.

⁷¹ Jewell and Ramey, "The Changing Face of Church: Emerging Models of Parish Leadership," 101-110.

Collaborative

Collaborative leaders empower the gifts of all the baptized while working together toward a shared mission. They bring the fullness of the Catholic tradition to the community: Communal, sacramental, pastoral, and prophetic. They respect the Spirit that is present and active in the community and in its members.

Pastoral leaders appear to be focused on several areas of collaboration. These include professional practice, empowerment of the gifts of others, and the use of prayer and prayerful discernment with parishioners.

Ethical

Ethical leaders respect the dignity of the person. They are faithful to the Gospel and the mission and ministry of Jesus, using appropriate behavior in both the personal and professional arenas.

Commenting on ethical behaviors, leaders focus both on professional praxis, and personal integrity, along with a respect for the boundaries of others. They call for transparency in organizational standards.

Inclusive

Inclusive leaders invite, support, and animate diversity in the parish, paying particular attention to diverse cultures, languages, ethnicities, gender, generations, abilities, and beliefs, in ways that are respectful and mutually enriching.

Pastoral leaders order inclusive behaviors into two distinct categories. First, they call for a strong multi-cultural awareness as the face of the U.S. parish changes. Many parishes have two, three, sometimes fifteen, twenty, or more language bases in a single

parish. Secondly, they speak of calling forth of the gifts and leadership of all parishioners, especially of young adults.

Pastoral

Pastoral leaders are called to be faithful to the mission of the church and to the building of the Kingdom. They must be able to care for the overall welfare and needs of the community, while empowering the members of the community to care for one another.

Leaders describe that the call to be pastoral is foundational to all they do and informs each of the marks of excellence. When they speak of being pastoral they include collaboration, shared responsibility, and a strong relational presence towards others, while supporting the needs of the parish community.

Prophetic

Prophetic leaders move the parish in a direction that is faithful to the Gospel and into mission. Providing outreach to those beyond the parish membership, they are ecumenical, evangelistic, justice-focused, and mission directed.

Pastoral leaders speak of offering a faithful witness to a sense of justice inside the church and in the world. They strongly believe this stance must involve a commitment to being rooted in the biblical tradition. These leaders observe that being prophetic, in this way, is intrinsic to being a pastoral leader.

Welcoming

Welcoming leaders ensure that all who desire a closer relationship to God are genuinely received and welcomed, in a spirit of heartfelt hospitality, openness, and

eagerness both to give and to receive. Leaders use the language of hospitality and inclusion when they speak of being welcoming.

The project leaders envision a future characterized by collaborative, competent, and mission-focused pastors and LEMs in service to parish communities.

Complementary to the Emerging Models of Pastoral Leadership Project (EMP), a Doctor of Ministry project conducted by Marti Jewell in 2007/2008, former Associate Director of NALM and Project Director of the EMP Project, surveyed ministry formation program directors. Participants indicated that theological studies, pastoral and spiritual formation, along with professional practices, are paramount in the development of LEMs. “They expressed a desire for material (resources) relating to skills development, especially in the area of collaboration.”⁷² The formators envisioned a pastoral environment that will introduce theological and pastoral situations in which a collaborative mode of conflict management will enrich resolutions.

In an article, “Insights from the Field,” Jewell stated,

The challenge facing ministry formators today in forming the character of the pastoral leader for leadership in the 21st century is indeed, daunting. The good news is that it can be done in ways that are totally unexpected and yet attainable within the current structures. The characteristics [of effective leaders] will serve pastoral leaders whatever the socio-economic setting, demographics, or geography.⁷³

⁷² Jewell, “Preparing Lay Parish Leaders for the 21st Century,” 3.

⁷³ Marti Jewell, “Insights from the Field: Vision and Challenge for Parish Leadership,” *Emerging Models of Pastoral Leadership Project*, 2006, <http://www.emergingmodels.org/doc/reports/Insights%20From%20the%20Field%2011-06.pdf> (accessed August 8, 2010).

A review of the Southwest, Pacific Northwest and North Central Leadership Symposia reports underscored Jewell's assessment that proper formation of a pastoral leader is demanded across geographic boundaries.

433 respondents had participated in four symposia of EMP.⁷⁴ Teams of ordained and LEMs discussed their experiences with and dreams of parish leadership in each of the Regional Symposia. They were asked to rate their existing leadership according to the Marks of Excellence: collaborative, ethical, pastoral, prophetic, inclusive and welcoming. The regional data is depicted in Appendix B in three charts: Figure 1 distributes study participants by parish leadership title; Figure 2 shows each region's parish ratings based on effectiveness, importance and confidence; and Figure 3 indicates parish leaders' effectiveness in demonstrating specific behaviors (Marks of Excellence.)⁷⁵

Collaboration was rated by more than 80% of participants as an important/very important pastoral leadership element at their respective parish (Figure 2). However, only 62% of parish leaders rate their own parishes as effective/very effective in the practice of collaboration; this was one of the lowest ratings. When overlaying this with the 17% who rated their respective parishes as "ineffective" in "Collaboration," this ranks as the least practiced of the marks tested. (Figure 3). Clearly collaboration is an area seen by parish leaders as needing attention. This observation should be coupled with the relatively low rating of practice of "inclusivity," i.e. who is included, which can be a surrogate indicator

⁷⁴ Jewell and Ramey, *The Changing Face of Church*, " 149.

⁷⁵ Jewell and Ramey, "Marks of Pastoral Excellence."

of collaboration. Ineffectiveness in the practice of “inclusivity” is the next lowest rating to “collaboration.”

Despite the considerable level of change and restructuring occurring within Roman Catholic parishes, these respondents have a fairly optimistic view of the future, with approximately 80% expressing that they are ‘confident’ or ‘very confident’ that the parish of the future will be a vibrant faith community. (Figure 2)

Of special interest to this study are the comments regarding “Collaboration” from the participants in various Symposia Regions that underscore the desire of parish leaders to work together with shared leadership.

Southwest (California & Arizona)⁷⁶

More collaborative effort between ordained and laity is a necessity for survival of the church. There is no shortage of priests, just a shortage of vision. I pray for eyes wide open and ears that hear. (Parish Council Member)

Shared leadership will be essential or parishioners will be neglected. Priests must be willing to let the leadership of the laity emerge.” (Director of Religious Education)

Shared vision and collaborative leadership. (Priest)

Pacific Northwest (Washington, Oregon, Idaho, Montana, Hawaii)⁷⁷

Competition between parishes and pastors must give way to collaboration and cooperation. (Priest)

⁷⁶ David Ramey, “Southwest Leadership Symposium Report,” *Emerging Models of Pastoral Leadership Project*, February 20-22, 2006, <http://www.emergingmodels.org/doc/reports/Southwest%20symposium%20final%20report.pdf> (accessed August 8, 2010).

⁷⁷ David Ramey, “Pacific Northwest Leadership Symposium Report,” *Emerging Models of Pastoral Leadership Project*, November 8-10, 2004, <http://www.emergingmodels.org/doc/reports/Pacific%20Northwest%20symposium%20summary%20report.pdf> (accessed August 8, 2010).

Collaborative efforts are an organic engagement of many people on various levels of commitment. (DRE)

North Central (Iowa, Nebraska, Wyoming, Missouri, Indiana)⁷⁸

This is a high point. All the leadership sees that they need to collaborate. (Diocesan Staff)

We are a servant-leader, collaborative, collegial corporate system—core staff is in the practice of co-pastoring with the pastor, with council acting as a visioning body asking, “What does Christ desire of us in the next 5 years?” (PLC)

I must admit, I see myself as collaborative. I hope to be a more collaborative listener with decisions made in timely fashion. (Priest)

The Emerging Models of Pastoral Leadership Project and its affiliated studies underscore the fact that formation of the ordained and LEMs in collaborative leadership will contribute significantly to the vibrancy of the parish of the future.

⁷⁸ David Ramey, “North Central Leadership Symposium Report,” *Emerging Models of Pastoral Leadership Project*, November 7-9, 2006, <http://www.emergingmodels.org/doc/reports/North%20Central%20symposium%20final%20report.pdf> (accessed August 8, 2010).

CHAPTER VI:

A Formation Model in Collaborative Ministry

Collaboration is an essential element of spirituality, ecclesiology and interpersonal dimensions since people have many charisms to share with one another in building up the kingdom of God.

Reverend Norman Cooper, D.Min.

Studies such as the Emerging Models Project, pastoral writings and diocesan promulgations all describe a contemporary Church that is inching beyond the classic hierarchical style of pastoral leadership on the national, regional and local levels. Some pastoral leaders are confident that emerging models of parish leadership will stimulate team re-structuring, accountability, and sharing of responsibilities in many parishes. Effective formation of both the clergy and LEM partners is essential to this transitioning of parish leadership. As the U.S. Conference of Catholic Bishops cautions, “Inadequate and faulty formation harms rather than helps the mission of the Church.”⁷⁹

Reverend Norman Cooper, author of *Collaborative Ministry: Communion, Contention, and Commitment*, argues that “ongoing formation programs that enable individual ministers to explore key issues in developing collaborative ministry are to be encouraged at the parish, diocesan, and national level Collaboration in ministry assists the promotion of the gospel and fosters communion.”⁸⁰ Cooper designed, developed, implemented and evaluated a workshop entitled, “Developing Collaborative Ministry Within the Parish” that promoted collaboration in ministry among diocesan

⁷⁹ USCCB. *Co-Workers in the Vineyard of the Lord*, 34.

⁸⁰ Cooper, 120-121.

offices, pastoral teams, pastoral councils, small base ecclesial communities, and all engaged in formation for ministry.

In the early 1990's, Cooper's five-day workshop in the Milwaukee archdiocese, consisting of 2 ½ hours per day, set as its objective formation in collaborative ministry for the ordained and non-ordained.⁸¹ The extensive workshop integrated theory, theology, and pastoral praxis with a focus on:

1. An ecclesiology of communion,
2. communal spirituality,
3. leadership styles, and
4. pastoral planning.

Each of Cooper's sessions required that participants engage in pre-work based on readings relevant to the session that were then explored through subject presentations, reflections, small group dialogues, and large group sharing. Each session's description and results are noted below: with definitions and conclusions as follows:

- I. Collaborative ministry is rooted in the image of the church as a communion, not an ecclesiology, in which all the people of God participate in the universal call to holiness, mission, and ministry. All the baptized are called to participate...in mission and contribute toward communion in the church.⁸² Vatican II and post-conciliar documents are the foundation for theory and theology of the

⁸¹ Ibid., 128.

⁸² Ibid., 121.

ecclesiology of communion and collaborative ministry⁸³ (A.A. 1 & 6; L.G. 10 & 12).⁸⁴ Cooper's conclusion was that collaborative ministry has a solid ecclesiological foundation, (see L.G. 39, 40 & 1987 Synod of Bishops.)⁸⁵

- II. Spiritual leadership promotes communion. The pastor's leadership necessitates "a model for the pastoral team that exercises spiritual leadership and promotes communion...with the Pastoral Team as co-responsible."⁸⁶ A model of spirituality that facilitates communion and empowers collaborative ministry was extracted from Chiara Lubich's *From Scripture to Life*, supplemented by Wilkie Au's prayer exercises in *By Way of the Heart*, with emphasis on reflection and contemplative discernment.⁸⁷
- III. The leadership styles that promote communion and foster collaborative ministry with a focus on training, evaluation, feedback, and supervision were drawn from Loughlan Sofield and Brenda Harmann's *Developing the Parish as a Community of Service*.⁸⁸ Certain leadership styles (Hierarchical Classic style; a pastor-dependent Charismatic/Intuitive style; and some Semi-Mutual styles) fail to

⁸³ Ibid., 122 & 186.

⁸⁴ Paul VI, *Apostolicam Actuositatem: The Decree on the Apostolate of the Laity*. All are called to be active in mission and ministry and to evangelize society (A.A. 1) Ordained, inclusive of lay ministry, are called to service of word and sacraments. (A.A. 6). John XXIII, *Lumen Gentium: The Dogmatic Constitution on the Church* (Vatican City: Libreria Editrice Vaticana, 1964). In baptism all of us share in the priestly, prophetic, and royal priesthood (L.G. 10). Laity assist pastors preach more effectively (L.G. 12).

⁸⁵ Cooper, 187.

⁸⁶ Ibid, 192.

⁸⁷ Ibid., 122.

⁸⁸ Ibid, 122.

integrate planning with implementation. Cooper's conclusion was that a collaborative leadership style fosters communication, shares feelings, experiences, values, trusts and accountability; and enables healthy conflict and confrontation resolutions.⁸⁹ Effective teams selected the leadership style that suited their pastoral needs, formation and evaluation processes.⁹⁰

IV.& V. The final two sessions utilized a collaborative team exercise with a review of the mission statement and of a pastoral plan process. The Milwaukee archdiocese parish-based planning in *Walking Together in Collaboration* was the process reviewed in Cooper's collaborative ministry workshop. Parish leadership teams reviewed their respective mission statements in light of Milwaukee's pastoral planning process which integrated ecclesiology, spirituality, and interpersonal leadership concepts in a collaborative model, thereby promoting communion. Milwaukee's pastoral plan described how the team intended to achieve communion and mission by developing a parish into a community of disciples.⁹¹ The exercise raised the team's consciousness regarding the need for team formation, skill development, and identification of consultants and facilitators for pastoral planning processes.

Overall, the Cooper collaborative ministry model impressively applied a comprehensive research and evaluation methodology together with consistent application

⁸⁹ Ibid, 193–197.

⁹⁰ Ken Blanchard refers to this style as situational leadership. Ken Blanchard, *Leadership and the One Minute Manager* (New York: William Morrow and Company, Inc, 1985), 97.

⁹¹ Cooper, 201.

of ecclesiology, spirituality, and interpersonal leadership styles. Two considerations present opportunities for improvement in the formation model:

1. Today's contemporary parishes, that are laden with obligations, would have difficulty making the extensive time commitment for joint formation training that Cooper implemented over a decade and a half ago (1993), and
2. The attempt to evaluate collaborative leadership, vis-à-vis examination of a pastoral planning process without a measurement of leadership style changes, focuses narrowly on the process in lieu of the effectiveness of collaborative leadership.

This paper's hypothesis is that a simpler, less time consuming development/dialogue session and praxis exercise, that integrates some of Cooper's methodology, can more effectively foster and measure joint formation of parish ecclesial teams in collaborative leadership and decision-making.

PART III:
Doctor of Ministry Project —
Parish Leadership: A Shared Responsibility

CHAPTER VII:

A Pilot Program for Joint Formation for Collaborative Parish Leadership

Cooper affirms that training for collaborative ministry “includes the acquisition of knowledge, positive attitudes, mastery of particular skills, and competence in the role of pastoral leadership. The leadership style adopted in team ministry affects the whole training process.”⁹² This latter premise was evaluated in my proposed pilot program for joint formation. The development of a joint formation model for collaborative parish leadership in the San Gabriel Pastoral Region was a further outcome of the Los Angeles Archdiocesan 2003 Synod. The participants’ experiential knowledge and skills were my given assumptions for this joint formation session. Leadership that demonstrated positive attitudes in working relationships, competence in enabling and supporting team members, and collaborative leadership styles are critical to this project.

Purpose of the Project in Ministry

The primary objective of the project was to design, implement and evaluate a pilot formation workshop focusing on collaborative parish leadership in the Los Angeles Archdiocese that engaged both priests and Lay Ecclesial Ministers (parish life directors, pastoral associates, directors of religious education, youth ministers) in joint decision making. The workshop was conducted in two sessions incorporating distinct methodologies. The first session engaged discussion and exercises with the intent of identifying elements that contribute to collaborative leadership while the second session

⁹² Ibid., 61

engaged participants in a pastoral planning exercise that encouraged shared visioning and collaborative decision making. Effectiveness of this exercise on influencing leadership styles will be evaluated with a Thomas-Kilmann tool measuring pre- and post styles.

The overall goals for the pilot are as follows:

Session #1: Dialogue and Development on Parish Leadership: A Shared Responsibility.

1. Clarify the definition of collaborative parish leadership and
2. To identify which components in the joint formation model in collaborative parish leadership affected the joint decision making process and indicate how they did so.

Session #2: Joint Formation Workshop on Pastoral Planning.

Based on learnings from the first session, goals were to:

1. Test whether focus on an issue with shared vision can effect collaborative leadership decision making.
2. Measure the effectiveness of the joint formation workshop in changing a leadership style towards a collaborative mode, particularly in handling conflict during Pastoral Planning.

Joint Formation Session #1: Dialogue & Development

Methodology

Several prior planning meetings with Bishop Zavala and members of the Bishop's Regional Pastoral Council (priests, religious orders and lay members), along with my proposed pilot project presentations to the Regional Pastoral Deans, provided input on the design and implementation of a development session that would foster collaborative leadership. In 2009, a joint formation model pilot consisted of a dialogue and development session including 160 parish leaders: Priests, parish life directors, pastoral associates, deacons, directors of religious education, and youth ministers. Twenty-seven parishes represented more than 30% of those in the Pastoral Region with participants who reflected the diversified composition of parish team leaders by age, gender, ethnicity, education, and experience levels. The dialogue and development session was entitled, "Parish Leadership: A Shared Responsibility."

In view of the demands of time experienced by ecclesial parish leaders, the agenda was limited to one four-hour morning session. The Bishop's keynote vision speech on collaborative leadership was integrated into the session. The moderator and facilitators utilized various adult learning approaches as described in the annotated agenda below.

Joint Formation Session #1:
 Parish Leadership: A Shared Responsibility
 Dialogue & Development
 Annotated Agenda⁹³

Teams of parish leaders, comprised of priests and Lay Ecclesial Members (LEMs), developed joint decision-making skills through sharing visions, visualizing concepts, observing panel parish role models, and participating in case study exercises and presentations. I was the moderator for Session #1 and facilitator of the group exercises. The following annotated agenda describes the session that included Bishop Zavala's vision statement on collaboration, which encouraged participants in dialogue, panel reviews and case study exercises:

AGENDA (# Minutes)	PROCESS DESIGN NOTES
Stage 1 Welcome, Invocation and Agenda Overview (15)	After an opening prayer and meditation/reflection exercise led by the Bishop, participants will share reflections on their meditation with an individual next to them.
Perception and Experiential Sharing: Hopes, fears, expectations (15)	The moderator opens the forum with the purpose of the dialogue and development session, followed by a brief sharing of the participants' experiences; perceptions and expectations of collaborative parish leadership.
Bishop's Vision Presentation: Context Setting (15)	The Bishop shares his vision of collaborative parish leadership, encouraging the group to explore joint decision making processes & recommendations

⁹³ Annotated Agenda format is from Ingrid Bens, *Facilitating with Ease!* (San Francisco: Jossey-Bass, 2005), 194-196.

AGENDA (# Minutes)	PROCESS DESIGN NOTES
Visualizing: What does collaborative parish leadership look like and does not look like? (15)	Reverend Timothy Nichols, a professor from St. John's local seminary briefs group with images of collaborative parish leadership, utilizing four types of leadership styles typically found at parishes: Telling, Selling, Consulting, Collaborative
Parish Panel Models (See Appendix C) (40)	Two parish teams, selected by the Bishop and the Region's Deaneries, present one or more examples of their experiences of collaborative parish leadership: <ul style="list-style-type: none"> ▪ Shared vision/mission ▪ Gifts of team members synergized ▪ Spirit that "we're in this together" ▪ Collective wisdom ▪ Shared challenges of leadership ▪ Established infrastructures
Break (15)	

AGENDA (# Minutes)	PROCESS DESIGN NOTES
Parish Small Group Dialogue (30)	<p>Participants will divide into table groups comprised of their parish teams. They will be presented with 3 scenarios that typify a contemporary parish issue:</p> <ol style="list-style-type: none"> 1) 85% of families with children in religious formation do not attend Mass. How can these families be encouraged to participate in liturgy? 2) How does the parish assist the increase # of unemployed parishioners? 3) What are other ways of sustaining the parish's financing in view of today's economic constraints? <p>Participants are informed that written instructions on the 40 minute exercise are on their tables, along with newsprint and writing markers. Instructions are:</p> <ol style="list-style-type: none"> 1) Select a scenario to discuss; 2) Based on what was heard or seen today, discuss how their table group would approach addressing the scenario; 3) Have a scribe summarize in bullet points, using the newsprint and markers at the table; 4) Select someone from their group to present (briefly 2 mins.) their recommendations to the larger group.
Break (15)	

AGENDA (# Minutes)	PROCESS DESIGN NOTES
Plenary (60)	<ul style="list-style-type: none"> ▪ Team representatives will present recommended solutions for their selected scenario in order to assess if their process led to any decisions. Solutions are briefly addressed by the larger group. ▪ Collect newsprint from each table and have participants within their small groups reflect and discuss experiences of collaboration and how it affected their process of decision making. If participants were not able to reach consensus, have group describe 2 or 3 elements that prevented joint decision making and allow brief comments/observations within their small group. ▪ Was there a sense of change or improvement in the team's approach to decision making? This aspect of the training effectiveness will be probed more during a post-evaluation, several months after the experience at the Dialogue & Development Session and actual experience at the parish.
Evaluations (10)	<p>Determine participants' perception of the helpfulness of the session with a self-administered written survey at the end of the session, as well as suggestions on the morning session:</p> <ol style="list-style-type: none"> 1) Overall rating & comments 2) Scoring & comments on topics, speakers, logistics, exercise, 3) What parts of the session contributed most to a collaborative discussion and decision making process? 4) Suggestions?
Adjourn/Closing Prayer (10)	<ul style="list-style-type: none"> ▪ Gratitude expressed to planners, supporters, participants, speakers, panelists, etc. ▪ Clarify next steps with distribution of presentation notes to parishes

Joint Formation Session #2:

Pastoral Planning

Dialogue & Development

Methodology

Archdiocesan Office of Parish Life Formation Workshop,

Pastoral Planning: How to Get Started

Two important findings from Session #1 were: (1) The vision statement from the primary leader (e.g. the bishop) needs to foster a shared vision of collaborative working relationships that embraces participants' gifts and (2) A project on which parish leaders can focus (e.g. a planning process) can effect collaborative decision making. Sofield underscored these contributing factors to collaborative leadership, "Processes that facilitate collaborative leadership are: The formulation of a clear, realistic and shared vision; a mechanism [focused project] for the identification and union of gifts . . . the deepening of a collaborative spirituality."⁹⁴ He further stated, "Collaboration generally emerges when there is a perceived need."⁹⁵ Pastoral planning typically is motivated by a perceived need.

⁹⁴ Sofield and Juliano, 161.

⁹⁵ Ibid., 172.

Joint Formation Session #2:
Pastoral Planning
Dialogue & Development
Annotated Agenda

The follow up to the San Gabriel Pastoral Region's session on "Parish Leadership: A Shared Responsibility" had as its goal the further clarification of these factors. An Archdiocesan wide workshop was conducted. It was comprised of teams of parish life directors, pastoral associates and priest partners who dialogued and developed joint decision-making skills through shared visioning, visualizing, and small group discussions involving a pastoral planning process that encouraged collaborative parish leadership while addressing the why, who, what, when, and how of getting started with pastoral planning. Changes in individual leadership style, particularly in managing conflict, were measured before and after the pastoral planning group discussions in order to determine influence of joint formation in effecting collaborative parish leadership.

As with the dialogue/development session I served as moderator the pastoral planning workshop, in collaboration with a facilitator who led the latter. The annotated agenda of the almost four-hour workshop was as follows:

AGENDA (# Minutes)	PROCESS DESIGN NOTES
<p>Stage 1 Welcome, Invocation and Agenda Overview (15)</p>	<p>After an opening prayer, a group reflection and discussion on paragraph #3 of Pope John Paul's <i>Novo Millennio Ineunte</i> is led by the workshop facilitator:</p> <p>“Dear Brothers and Sisters, it is especially necessary for us to direct our thoughts to the future which lies before us . . . Now is the time for each local Church to assess its fervour and find fresh enthusiasm for its spiritual and pastoral responsibilities, by reflecting on what the Spirit has been saying to the People of God in this special year of grace, and indeed in the longer span of time . . . ”⁹⁶</p>
<p>Perception and Experiential Sharing: Hopes, fears, expectations (15)</p>	<p>The moderator reviews the purpose of the earlier dialogue and development session, followed by a brief sharing of the participants' experiences, perceptions, and expectations of pastoral planning that engages collaborative parish leadership.</p>
<p>Archdiocesan's Vision Presentation: Context Setting (15)</p>	<p>Director of Archdiocesan Office of Parish Life shares vision of pastoral planning that incorporates collaborative parish leadership and instructs parish leaders to encourage respective parishes to explore joint decision making processes.</p>
<p>Visualizing what pastoral planning does and does not look like? (20)</p>	<p>Moderator leads discussion by presenting visuals of groups conducting planning meetings with personalities depicting leadership behaviors/styles of “Collaboration, Compromising, Accommodating and Avoidance” behaviors.</p>

⁹⁶ John Paul II, *Novo Millennio Ineunte* No. 3, (Vatican City: Libreria Editrice Vaticana, 2001).

AGENDA (# Minutes)	PROCESS DESIGN NOTES
<p>Small Group Discussion: Pastoral Planning Model Introduction, Definition and Pre-Planning (40)</p>	<p>Participants were divided into table groups comprised of their parish teams with focused exploration on the following topics:</p> <ul style="list-style-type: none"> ▪ The Facilitator presented a definition of Pastoral Planning that was discussed by small groups, “As a system of communication, pastoral planning is a structure that brings these groups [pastors and faithful] together and harmonizes them in working for the Kingdom of God.”⁹⁷ ▪ Large group dialogue on the spirituality, theological and scriptural aspects of pastoral planning led to subsequent small group discussions and decisions to plan. ▪ Leadership partners identified core planning teams for respective parish planning and discussed necessary formation and orientation processes for their teams. These discussions were shared with the large group as integral to the pre-planning process on “How to Get Started.”
<p>Break (15)</p>	
<p>Small Group Discussions & Summary Presentations (60)</p>	<p>Each Small Group presented decisions on “How to Get Started with Parish Planning Processes,” including:</p> <ul style="list-style-type: none"> ▪ Definition Perception ▪ Shared Vision of Planning Objectives/Goals ▪ Core Planning Team Composition ▪ Planned Introduction Process to Core Team ▪ Timing of Initial Stages ▪ Initial Meeting Agenda ▪ Listing of Factors that Contributed to Group’s Pastoral Pre-Planning Discussions ▪ Conflict Resolution Approaches

⁹⁷ Kevin Kennedy, *Model for Parish Pastoral Planning* (Private Printing, Washington: Archdiocese of Washington, 2005), 6.

AGENDA (# Minutes)	PROCESS DESIGN NOTES
Evaluations and One-on-One Reviews (40)	<p>Participants completed a Thomas-Kilmann survey that measured leadership styles in handling interpersonal conflicts. The parish leaders (e.g. Parish Life Director and Priest Minister) tallied partner's responses and categorized leadership style based on a rating scale established by the Thomas Kilmann scoring system. Individual categories were then compared to respective benchmarks that were measured prior to the workshop. Small groups discuss implications of personal ratings with awareness of team's leadership styles and how to move towards a collaborative effort in working together. A brief commitment statement to work collaboratively was written and shared between parish leader partners.</p>
Adjourn/Closing Prayer (10)	<ul style="list-style-type: none"> ▪ Gratitude expressed to Cardinal, Office of Parish Life Director, participants, supporters, etc. ▪ Review of Group Expectations vis-à-vis Workshop Experiences

CHAPTER VIII:

Project Evaluation:

Self-Administered Surveys and Personal Interviews

Three levels of evaluation were conducted:

1. Self-administered surveys that evaluated the helpfulness of the Dialogue and Development session were distributed at the conclusion of the morning gathering. Sixty-one participants rated the helpfulness of each part of the session that contributed to their respective group's effort to work collaboratively together: Shared Visioning, Visualizing, Panel Role Modeling, Small Group exercise on case studies, or some other factor.
2. Several months after the session, twenty minute telephone interviews were conducted among 22 participating priests and lay ecclesial ministers, profiling several areas: (1) Demographics of participants; (2) Pre-disposition to collaborative leadership via prior training or work experience; (3) Perceived personal leadership style; (4) The impact of Dialogue & Development Session on current working relationship between priest and LEM partners in parish leadership.
3. A third evaluation process utilized the Thomas-Kilmann (TKI) Conflict Mode Instrument that measured pre- and post- modes of leadership style in managing conflict that could arise as an obstacle between priests and LEM parish leaders during a joint decision making process. The participants completed 30 questions

that indicated their preferred leadership style or mode in various situations. A scoring scale was applied to responses which categorized participants into five different modes in handling differences, defined by the TKI below:⁹⁸

- **Competing** is assertive and uncooperative, a power-oriented mode. When competing, an individual pursues his or her own concerns at the other person's expense, using whatever power seems appropriate to win his or her position. Competing might mean standing up for your rights, defending a position you believe is correct, or simply trying to win.
- **Collaborating** is both assertive and cooperative. When collaborating, an individual attempts to work with the other person to find a solution that fully satisfies the concerns of both. It involves digging into an issue to identify the underlying concerns of the two individuals and to find an alternative that meets both sets of concerns. Collaborating between two persons might take the form of exploring a disagreement to learn from each other's insights, resolving some condition that would otherwise have them competing for resources, or confronting and trying to find a creative solution to an interpersonal problem.
- **Compromising** is intermediate in both assertiveness and cooperativeness. When compromising, the objective is to find an expedient, mutually acceptable solution that partially satisfies both parties. Compromising falls on a middle ground between competing and accommodating, giving up more than competing but less than accommodating. Likewise, it addresses an issue more directly than avoiding but doesn't explore it in as much depth as collaborating. Compromising might mean splitting the difference, exchanging concessions, or seeking a quick middle-ground position.
- **Avoiding** is unassertive and uncooperative. When avoiding, an individual does not immediately pursue his or her own concerns or those of the other person. He or she does not address the conflict. Avoiding might take the form of diplomatically sidestepping an issue, postponing an issue until a better time, or simply withdrawing from a threatening situation.
- **Accommodating** is unassertive and cooperative—the opposite of competing. When accommodating, an individual neglects his or her own concerns to satisfy the concerns of the other person; there is an element of self-sacrifice in this mode. Accommodating might take the form of selfless generosity or charity, obeying

⁹⁸ Thomas and Kilmann, 8.

another person's order when you would prefer not to, or yielding to another's point of view.

Evaluation Results

(See Appendix G: Profile Survey Instrument)

Participant Profiles

Results from the telephone surveys that were conducted after the first Dialogue and Development session identified the participants as having high levels of competency, education and experience. With an average of eleven years pastoral experience, the ordained (40% of participants) and LEM parish leaders have Masters or Doctorate degrees with specialized training in pastoral administration, pastoral care, spiritual direction, business management, finance, marketing, or community organizing. Areas of professional and ministerial responsibilities encompass leadership, decision making, ministry management, worship/prayer presiders, and preaching. Most perceive themselves as collaborative leaders although few have participated in a formal collaborative training session and none in joint formation. Interestingly, priests indicated participation in joint decision-making processes although LEMs didn't share similar experiences in general.

Collaborative Leadership Definitions

(See Appendices E, F, G)

On a scale of 1 to 5 (with 5 as highest), the majority rated the Dialogue and Development Session as a 4 or 5. One pastor said, "Leaders already had skill sets but needed more understanding of ecclesiology with the community defining it with a new vision of collaborative ecclesiology—doing it together." Another priest stated, "New

pastors need training on collaboration and guidance on how to be a pastor for and with the people, inclusively.” A Chair of the Region Pastoral Council exclaimed, “Great practical training on ‘how to.’ People slowly, cautiously treaded into collaborative roles. There was no rushing, no pushing. The workshop dignified the levels from which we had to surface.” A Parish Life Director described the session as, “Focusing experiences on what collaborative leadership means.” Several other descriptions of the session were presented:

Working together

Resolutions enhanced by combining, sharing gifts.

Shared vision on what we are really here for in focusing on the whole.

Leads to openness, focusing on the mission of Jesus, not just corporate style processes.

Speak out of other people’s opinions, considering other people, in consultation with others.

All have gifts with different levels.

Conscientious decision making that challenges leaders to be advisors to the pastor who makes final decision.

A combined response from a deacon and a pastoral associate defined collaborative leadership succinctly as, “*Coming together prayerfully with shared wisdom in making decisions. It is not focused on a self-agenda. It empowers others while directly addressing conflict with openness as key.*”

Joint Formation Components Contributing to Effective Collaborative Leadership

(See Appendices E & F)

Sixty-one of the 127 session participants (48%) completed the self-administered evaluations immediately after the Development & Dialogue Session. Over 95% scored

the session as helpful/very helpful. The Bishop's vision address was highest rated by 98% of the participants, and underscored by comments, as the most effective factor in contributing to the small group's efforts to work together collaboratively on case studies:

Pastoral Associate: *"Bishop's remarks were refreshing, inspiring and essential to developing shared leadership and vision."*

Priest: *"Loved Bishop Zavala – he always makes me glad to work for the church"*.

DRE: *"Nice to hear Bishop say again that he values shared leadership."*

Priest: *"Bishop's personal invitation to leaders to share gifts is best example."*

Region Pastoral Council Member: *"Bishop's role modeling is not just an exercise; he takes it seriously, sets the tone and expects collaboration to be a common parish practice."*

Leadership is essential in fostering joint formation. The bishop's vision statement encouraged collaborative parish leadership with his emphasis on spirituality, formation and sharing gifts. An ordained participant observed, "The Bishop's statement is, one that inspires and affirms parish priorities. This is very progressive but it's clear what parts are important."

The second highest factor that was helpful in working together collaboratively, as indicated by 97% of session participants, was the experience of the opening prayer and reflection. During the session's plenary, one group expressed gratitude for and trust in team members' gifts pursuant to sharing prayerful reflections. "An even playing field coerced deeper listening," stated a youth minister after the prayer session. A respondent to the post-session telephone survey reflected, "Prayer evoked a respect for one another

so that we could see Christ in the other . . . we saw the purpose of our actions as for others, for community, not for self, not ego-centric decision-making.”

An equally strong factor that was rated as helpful/very helpful by 97% of participants was the focus on the case study exercise that encouraged collaborative discussions and joint decision making among the small groups. The importance of this factor was clarified in the telephone survey regarding the formation session’s effectiveness:

Pastoral Associate: *“Small group work on a project was the most helpful. People were able to express gifts and opinions; not intimidated but encouraged.”*

Parish Life Director: *“The vignettes [case studies] demonstrate the essence of collaborative formation. We immediately established a shared vision with a shared project on a common issue. If we can develop a learning pattern through working together on a focused project, like pastoral planning, perhaps it will become a natural part of our fabric in working on daily, routine tasks collaboratively”*

Priest: *“Leadership needs to involve others; focus on an issue like planning that involves parents and others in community.”*

One of the parish panelists during the Dialogue and Development Session exhibited the importance of a collaborative working relationship as a natural part of their infrastructure or “fabric” with a description of how their parish community was immediately mobilized for a peace walk after the shooting of a youth. A peace walk is a form of community healing that also diverts attention from violent gang retaliation. A natural flow of expeditious actions by parish leadership had evolved as a result of an established pattern of inclusivity, trust and sharing of gifts that was not solely Pastor-dependent.

Leadership Style Changes

Prior/Post Joint Formation Sessions

The Thomas-Kilmann instrument measured the effectiveness of the joint formation workshop in changing a leadership style towards a collaborative mode, particularly in handling conflict during Pastoral Planning. As described above the Thomas-Kilmann survey consists of 30 questions indicating behavioral choices as individuals interact, particularly when tensions arise. The survey instrument was applied two months prior to the Pastoral Planning workshop with an email distribution of the questions. Participants returned responses to me for scoring with a TKI template that categorized behaviors into five groupings: Avoiding, accommodating, competing, compromising and collaborating. These scores served as the benchmark behavior indicator for respective priest and LEM participants.

A post-evaluation was conducted as the final exercise of the Pastoral Planning workshop. Priest and LEMs once again completed the TKI survey, then scored and categorized one another's responses utilizing the TKI template. Upon returning the results to respective participants, the parish teams received written descriptions of the behavior categories that included examples on when and how to use the behavior characteristic. This led to a discussion among the parish teams on the meaningfulness of the behavior and how to synergize behavior preferences with a goal towards working together collaboratively.

Results of the pre-and-post surveys (Appendix I) indicated the following:

TKI Benchmark (see Appendix I)

The five behavior categories included: Avoiding, Accommodating, Competing, Compromising, and Collaboration as defined above in the “Evaluation” description of the Thomas-Kilmann measurement process. Interestingly, neither priests nor LEMs scored in the “Competing” category: indicating that these parish leadership teams fundamentally respected one another, their gifts and partnerships. According to the TKI description, “Competing is a power-oriented mode” in which a person pursues his or her own concerns at the other person’s expense with a sole objective of winning. The TKI further indicates that “Competing” is useful when one is standing up for their rights and defending a position that is vital to the welfare of the individual or to the organization or “when quick, decisive action is vital—for example, in an emergency.”⁹⁹ On the other hand, “Avoiding” was the demonstrative behavior by the highest percentage of participants (42%), especially among priests (50%). This seems to complement the fact that none of the priests indicated “Accommodating” leadership styles in the pre-workshop measurement. TKI refers to “Avoiding” behavior as unassertive and uncooperative taking the form of diplomatically side-stepping an issue, postponing an issue or simply withdrawing from a threatening situation. Thomas-Kilmann asserts that this behavior is indicative of one who feels harried or overwhelmed by a number of issues. TKI’s advice is to “devote more time to setting priorities—that is, deciding which issues are relatively unimportant and perhaps delegating them to others.”¹⁰⁰ Delegation

⁹⁹ Ibid., 8 and 12.

¹⁰⁰ Ibid., 8 and 15.

implies that either the designee will now have the opportunity to handle the issue in a collaborative fashion or will simply execute the task. If the latter is the outcome, this further underscores that an “Avoiding” behavior does not contribute to a collaborative situation of working together towards team mutuality.

Nearly a third of participants in the benchmark measurement (30%) indicated “Compromising” behaviors, which ranked second to “Avoiding”. “Compromising” is considered a neutralizer in that TKI defines it as “seeking a quick middle-ground position without exploring the issue in depth. The emphasis on bargaining and trading create a cynical climate of gamesmanship (e.g. labor-management bargaining)”.¹⁰¹ This reticent behavior prevents the fair-share results that collaboration fosters.

The “Collaborating” behavior category was scored as relatively low, with less than a quarter of participants (22%) being identified as collaborators. As described above in the TKI description of categories, “when ‘Collaborating,’ an individual attempts to work with the other person to find a solution that fully satisfies the concerns of both. The behavior elicits commitment and ownership of the solution by incorporating others’ concerns into a consensual decision.”¹⁰² “Collaborating” processes consume time and energy yielding joint gain and an integrative outcome that dignifies those involved.

Post-TKI Evaluation Results (see Appendix I)

In order to test the effectiveness of the joint formation workshops on the priest and LEM participants, another wave of the TKI was self-administered utilizing the same

¹⁰¹ Ibid., 8 and 14.

¹⁰² Ibid., 8 and 13.

30 questions and scoring template. This was conducted at the end of the Pastoral Planning workshop. During this round, participants scored one another's responses, compared results from the benchmark evaluation and discussed changes in behavior scores. The following was noted:

The "Collaborating" category had moved to second highest percentage of participants (28%) which was a six percentage point (pp) increase over the benchmark (22%). It ranked second to the "Compromising" (42%) behavior that indicated the highest level of change with a 12pp upward shift. Accompanying these changes in leadership behaviors was the substantial drop in the "Avoiding" category of 24pp. This change was particularly indicative among priests whose "Avoiding" behavior dropped 40pp while LEMs in this category dropped 17pp. An examination of changes in "Collaborating" leadership styles between priests and LEMs show a 10pp and 5pp increase respectively. Clearly, behaviors had changed favorably towards more "Collaborating" and "Compromising" leadership styles with shifts away from unhealthy "Avoiding" styles at the conclusion of the joint formation workshops. The implication is that the workshops had a positive impact on parish leadership (priests and LEMs) behavior changes and that involvement in subsequent joint formation sessions could promote further movement towards collaborative leadership styles.

CONCLUSION:

Leadership, Courage, Vision, Spirituality, Formation

The fundamental objectives of this pastoral project were to: (1) Define collaboration that is applicable to the ordained and non-ordained working together in parish leadership, (2) Identify characteristics of an effective joint formation process on collaborative leadership that is inclusive of priests and LEMs, and (3) Evaluate the impact of the pilot joint formation model on parish leadership styles. Summary results indicate that courage and vision among hierarchical leaders, along with prayerful, committed, competent, well formed teams of priests and LEMs contribute substantially to collaborative parish leadership. Salient results from this project are as follows:

Definition

A succinct definition of collaborative parish leadership is teamwork between priests and lay ministers that emphasize group prayer, shared vision and wisdom, inclusivity of gifts, and openness in decision making. This definition is described by a pastor after the planning workshop as *“Coming together prayerfully with shared wisdom in making decisions that are not focused on a self-agenda, empowering others while directly addressing conflict with openness as key.”*

Characteristics of Effective Joint Formation Process

Critical components and characteristics of an effective joint formation process for collaborative leadership are:

1. Beginning formation sessions with prayer and reflection focused on Christ' mission as the basis of a team's shared vision, with participants functioning as one around the table of the Lord.
2. A lived vision communicated by local church hierarchy that presents clarity, conviction and sincerity about objectives and goals of leadership. Responses from participants strongly referred to the influence of church leadership on collaborative work styles (for example the Bishop's role modeling and vision statements). This concurs with Sofield's assertion that Church leadership has the potential to enhance collaborative ministry when diocesan leaders embrace fully and/or clearly convey its implications.¹⁰³
3. Work patterns that begin with inclusive pastoral planning, modeling by the pastor or parish life director and evolving into a natural parish infrastructure that is welcoming, trusting and sharing of gifts. This infrastructure fosters a church on mission which Richard Gaillardetz refers to as ecclesial communities reflecting,

The origins of the Church . . . inextricably linked to Jesus' gathering a community of followers who . . . were empowered by his Spirit to continue his mission to serve, proclaim, and realize the coming reign of God.¹⁰⁴

Noteworthy is the question, how does collaborative leadership facilitate those times in parish life when urgent situations require expedient responses without the benefit of extensive planning, e.g. a fatal gang-related violent action? It was noted

¹⁰³ Sofield and Juliano, 168.

¹⁰⁴ Richard Gaillardetz, "The Ecclesiological Foundations of Ministry in an Ordered Communion," ed. Susan Woods, *Ordering the Baptismal Priesthood: Theologies of Lay and Ordained Ministry*, 29.

at one of the formation sessions that decision making is facilitated by infrastructures of collaborative teams who are trusting of one another's gifts in addressing the situation. Ken Blanchard a renowned management consultant refers to these decisions as situational leadership.¹⁰⁵

Influence of Joint Formation on Leadership Styles

Joint formation sessions involving parish priests and LEMs can influence leadership styles particularly in the handling of interpersonal differences in an effort to work together collaboratively. When the leadership style of team mates is acknowledged and understood, it enhances formation efforts to work towards collaborative decision making. Although priests and some LEMs initially demonstrated "Avoiding" behaviors when confronted with tensions during interactions, post-evaluations indicated that joint formation workshops that focus on working together collaboratively enabled them to modify leadership styles to "Collaborating." Another interesting fact is that many who had modified behaviors from "Avoiding" to "Compromising" could benefit from further joint formation on collaboration.

With the Los Angeles Archdiocesan Synod's emphasis on collaborative parish leadership, the local Church benefitted from this new formation model on several levels: in the Archdiocese itself, the San Gabriel Pastoral Region (SGPR), and parish leadership teams of ordained and non-ordained. As Chair of Bishop Zavala's SGPR Council, I was charged with conducting a collaborative ministry project that resulted in a formation

¹⁰⁵ Blanchard, 103.

process engaging priests and LEMs in joint decision making. The formal training programs that are now a part of the Archdiocesan Office of Parish Life and in the San Gabriel Pastoral Region indicate that the piloted workshops were effective and replicable. This is further evidenced by the Synod Initiative IV Report from the Archdiocesan Pastoral Council (APC) which states, “The [archdiocesan] committee urges that implementation of processes of collaboration and shared decision making be integrated into existing formation programs: seminary, diaconate, parish life director/pastoral associate, and college and secondary levels, thus strengthening the initiative and strategy.” (See Appendix J).

Further Implementation of Visionary Leadership

An Archdiocesan Pastoral Council committee on which I served was established to develop the report on Initiative IV. The first point of business, after prayer, reflection and introductions, was a clarification of the goals and processes for reporting on this Initiative. As discussed above, the heart of Synod Initiative IV was centered on developing strong, effective collaboration between the clergy and laity. Desiring to ground its work in the spirit of the Synod experience of 2003, the Committee re-visited the Synod documents, reflecting on Cardinal Roger Mahony’s clear leadership, as expressed through his pastoral letters and the DVD *Panel Discussion on Emerging Leadership Models* presented to parish leaders by the Archdiocese of Los Angeles at the Mater Dolorosa Retreat Center in 2008.

The Committee also noted that Synod Initiative IV was bound closely to Synod Initiative II with objectives of strengthening relationships of collaboration and decision-

making between the ordained and laity as parish leaders. It is encouraging that confidence in the joint formation workshops that were piloted as discussed through this project paper is indicated in the report as having addressed the collaborative leadership formation emphasized by Synod Pastoral Initiatives II & IV. The on-going work of implementing these Initiatives will require ongoing education, encouragement and effective, courageous collaboration at the local level. (See Appendix J).

Archdiocesan recommendations presented in the evaluation paper on Synod IV are that these joint formation processes for the ordained and non-ordained on collaborative leadership be instituted at the local seminary and universities. The congruence comes from the fact that both the Los Angeles Archdiocese and *Co-Workers in the Vineyard of the Lord* “roots all ministerial activity in the life of the Triune God—the relational life of Father, Son, and Spirit.”¹⁰⁶

¹⁰⁶ Fox, “A Theologian’s Commentary”, 148.

APPENDIX A:
Chronology of Ecclesial Documents
on Lay Ministry

- 1964 – *Lumen Gentium*, John XXIII, Chapter 2 “People of God”
- 1965 – *Apostolicam Actuositatem: Decree on the Apostolate of the Laity*, Paul VI
- 1980 – *Called and Gifted*, National Conference of Catholic Bishops, (NCCB)
- 1988 – *Christifidelis Laici*, John Paul II
- 1995 – *Called and Gifted for 3rd Millennium*, United States Conference of Catholic Bishops (USCCB)
- 1997 – *Instruction on Certain Questions Regarding the Collaboration of the Non-Ordained Faithful in the Sacred Ministry of Priest*, Congregation for the Doctrine of the Faith
- 2000 – *As I Have Done For You*, Roger Cardinal Mahony
- 2003 – *Gathered and Sent: Documents of the Synod of the Archdiocese of Los Angeles 2003*, Roger Cardinal Mahony
- 2005 – *Co-Workers in the Vineyard of the Lord*, USCCB.
- 2006 – *Lay Parish Ministers*, National Parish Life Center, NY Study
- 2006 – *Serving Shoulder to Shoulder: Parish Life Directors in the Archdiocese of Los Angeles*, Roger Cardinal Mahony.

APPENDIX B:

Emerging Parish Leadership Models

Project Data

Figure 1
Regional Symposia Participant Distribution

Participant Type*	Southwest (57)	Pacific Northwest (60)	North Central (55)
Priests	7	28	30
Parish Life Directors/Coordinators**	12	16	11
Pastoral Associates**	12	28	9
Directors of Religious Education**			
Deacons	7	2	7
Diocesan Staff	25	10	17
Parish Pastoral Council	11	0	

Source: Emerging Models of Pastoral Leadership Regional Symposia, 2006.

* Some participants are not included in distribution due to non-reporting of title/function

**Lay Ecclesial Ministers: Parish Life Directors/Coordinators, Pastoral Associates,
Directors of Religious Education

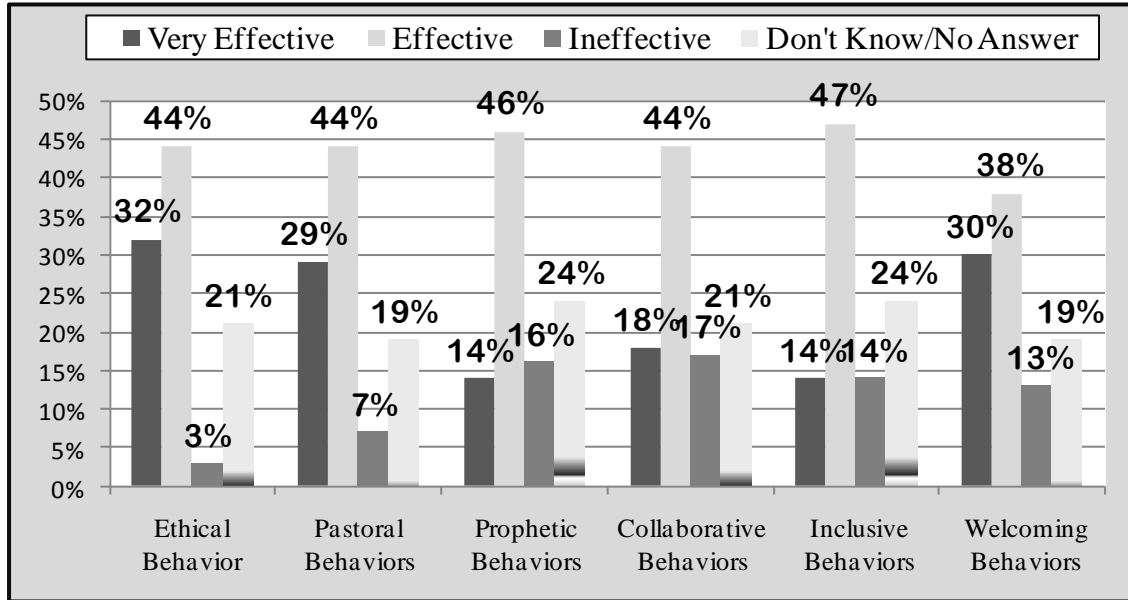
Figure 2
Regional Symposia Participants Ratings of Parish
in Pastoral Leadership Elements:
Effectiveness, Importance & Confidence

% Participants Rating	Southwest	Pacific Northwest	North Central
Parish Effective/Very Effective in Marks of Excellence Behaviors*	62%	66%	65%
“Collaboration” is Important/ Very Important	86%	88%	83%
Confident/Very Confident that Parish is Becoming a Vibrant Faith Community	80%	78%	79%

Source: Emerging Models of Pastoral Leadership Regional Symposia, 2006

* Marks of Excellence Behaviors: Ethical, Pastoral, Prophetic, Collaborative, Inclusive, Welcoming

Figure 3
Effectiveness of Parish Leadership
in Demonstrating Concrete Behaviors of Excellence Ratings
by Pastoral Leaders, Participating in Symposia, of Respective Parishes
(All Respondents)



- A. Ethical behavior
- B. Pastoral behaviors
- C. Prophetic behaviors
- D. Collaborative behaviors
- E. Inclusive behaviors
- F. Welcoming behaviors

Welcoming behaviors	Ethical	Pastoral	Prophetic	Collaborative	Inclusive	Welcoming
Effective-Very Effective	76%	73%	60%	62%	61%	68%
Ineffective	3%	7%	6%	17%	14%	3%

Source: Emerging Models of Pastoral Leadership Study, 2006

APPENDIX C:
Parish Leadership:
A Shared Responsibility Panel

Parish Panel Monsignor, Timothy Nichols, Moderator

Dolores Mission Parish: Fr. Scott Santarosa, S.J. (Pastor) & Team

St Stephen Parish: Sr. Susan Slater (Parish Life Director) & Team

Identify a project or process in which you utilized “collaborative leadership” with your parish leadership team: Priest, pastoral associate, pastoral minister, youth minister, deacon, others in parish leadership. Describe what transpired (10 minutes):

- a. What was your goal, vision or expected outcome?
- b. Describe the process, e.g. Who was involved in preliminary discussions? Who else was included in later discussions? What basically occurred during discussion(s)? How many times did you meet?
- c. What was actual outcome?
- d. Was there something that could have been improved? If yes, what?

APPENDIX D:

Parish Leadership: A Shared Responsibility Small Group Exercise

Here are three scenarios with instructions on what to do.

SCENARIOS

1. Given the economic crisis that we are experiencing, what role can our parish play in assisting families in need e.g., families where the breadwinners have lost their jobs and their health benefits and/or are losing their homes?
2. In our parish, there are many undocumented day laborers who are frequently harassed by the police, what can we do to help them?
3. A recent survey indicates that 90% of the parents or the students enrolled in our Religious Education Program are not attending Sunday mass. What can we do to influence them to attend mass on a regular basis.

INSTRUCTIONS

1. Select a scenario.

Based on what you heard or have seen today, discuss how your table group would approach addressing the scenario.
2. Have a scribe summarize in bullet points, using the flip chart paper and markers at your table.
3. Select someone from your group to share (briefly 2 mins.) with the larger group.
4. You have 40 minutes to complete your group dialogue and exercise.

Happy Collaborating!

APPENDIX E:
Workshop I: Post Evaluation Form
(Self Administered after Workshop)
Parish Leadership: A Shared Responsibility
San Gabriel Region Pastoral Council

This survey is to evaluate the helpfulness of this dialogue/development workshop and to provide components that contributed to efforts in joint decision making and working together collaboratively.

1. Please rate the overall “Parish leadership: A Shared Responsibility” (Collaborative Leadership) dialogue and development session:

Very Helpful: 54% Helpful: 42% Not Helpful: 4%

Comments: _____

2. Was the information provided:

Very Helpful: 54% Helpful: 40% Not Helpful: 6%

3. Please rate the individual sessions.

- a. Opening Prayer & Reflection

Very Helpful: 76% Helpful: 21% Not Helpful: 3%

- b. Bishop’s Vision Address

Very Helpful: 86% Helpful: 12% Not Helpful: 2%

4. Overview on “What is or is not Collaborative Leadership (visualizing)

Very Helpful: 57% Helpful: 39% Not Helpful: 4%

5. Parish Panel Examples

Very Helpful: 56%

Helpful: 41%

Not Helpful: 3%

6. Small Group Dialogue and Case Study Exercises

Very Helpful: 62%

Helpful: 36%

Not Helpful: 2%

What contributed most to your group's effort in dialoguing and collaborative decision-making during the case studies?

Comments: (SEE APPENDIX F)

Thank you

APPENDIX F:
Workshop I: Open-End Responses
Parish Leadership: A Shared Responsibility
Development & Dialogue Session Evaluation Self-Administered
Survey

Bishop Leadership

Loved Bishop Zavala – he always makes me glad to work for the church.

Nice to hear Bishop say again that he values shared leadership.

Bishop's remarks were refreshing, inspiring and essential to developing shared leadership and vision.

Happy sweet Quincera, Bishop.

Parish Panel Presentations/Role Models

Very important to give concrete examples of parish governance that is not priest-centered.

A great method of delivery with 2 good examples of collaborating.

Examples of leadership on panels gave on how they handled situations in their parish community was enlightening.

Gratitude

Thank you for the attendance outcome and showing what great communities we have all around.

This is an important step forward. It is essential to the survival of our church to continue to educate, form and encourage priests and lay leaders about how to make shared leadership a reality.

Warm, welcome, grateful.

Appreciate Msgr. Tim Nichols for his role. It is a delicate balance to lead when clericalism is the elephant in the room.

First time participating in a talk where relationships are pertinent in our parish.

Thanks for keeping language and concepts simple.

Thank you for an excellent succinct, workshop.

Appreciated that the agenda was well developed, the time keeper kept it going and the process was fruitful.

Handouts were excellent, gives ideas for self-reflection on my own leadership.

Suggestions:

More time

On comments and active live scenarios; perhaps a film clip showing different groups working on issues.

Would like time to work with a different parish table to form more of a new community

Would have been helpful to hear each table's summary, but time was the issue (St Denis)

Hay mucha comunidad hispana que no hablamos ingles. There are many Hispanic communities that don't speak English. Hope there is a workshop totally in Spanish.

Future Seminar

Need to know how we are doing on improvements in our parish community.

Good start for encouraging parishes to do collaborative leadership style, need follow up: "Very Helpful," great leadership modeling – "Sorry our pastor was missing"

Not Helpful (1)

Table exercise was too long. Most people that attend this workshop are doing "collaborative ministry already. We need more advance information. Share information and ideas that have worked in different parish settings.

APPENDIX G:

Workshop I: Participants Profile

Telephone Survey

Parish Leadership: A Shared Responsibility Dialogue & Development Session

Introduction: The purpose of this survey is to profile the participants of the San Gabriel Region's Dialogue and Development Session on Collaborative Parish Leadership entitled "Parish Leadership: A Shared Responsibility." Sections 1 through 4 of the survey focus on your previous training experiences and on your leadership style prior to the Dialogue and Development Session. Section 5 focuses on your leadership style following the session.

Section 1: Knowledge and Training in Parish Leadership prior to the Dialogue and Development Session

1a. In what areas of parish leadership have you received formal training? [CHECK ALL THAT APPLY. IF PARTICIPANT HAS NOT RECEIVED FORMAL TRAINING IN PARISH LEADERSHIP, SKIP TO QUESTION 1E IN THIS SECTION]

Pastoral Administration	4	Spiritual Director	3
Director of Religious Education	2	Community Organizer	3
Principal		Leadership Development Coordinator	1
Liturgy Director/Coordinator	2	Outreach Coordinator	1
Music Director		Development Director	
Pastoral Care Director/Coordinator	3	Business Manager	2
Parish Council	1		

1b. Where did you receive formal training in parish leadership? In total, how many years have you participated in formal training (programs/curriculum)?

Location		Location	
Archdiocesan program	8	Seminary	3
Parish program	2	Adult Classes (high school or community sponsored)	
College/university	11		

1c. What was specifically addressed in your parish leadership training?

Group prayer	4	Joint decision making	
Meditations/personal faith sharing	4	Business Management	4
Leadership	5	Finances	
Decision making	5	Ministry Management	3

1d. If the formal training resulted in a certificate or degree, what type of degree was received?

Associates Degree		Masters of Art/Science	11
Bachelors of Art/Science	2	Doctorate (Ph.D., DMin, etc)	2
Certificate	5	Instituto de Pastoral y Evangelización	1

1e. Indicate in which areas of parish leadership you actually worked, and the number (#) of years you worked in each area.

Areas	# Yrs	Areas	# Yrs
Pastoral Administration	46	Spiritual Director	31
Director of Religious Education	49	Community Organizer	4
Principal		Leadership Development Coordinator	
Liturgy Director/Coordinator	42	Outreach Coordinator	
Music Director		Development Director	
Pastoral Care Director/Coordinator	26	Business Manager	22

Section 2: Collaborative (Shared) Leadership Training prior to the Dialogue and Development Session

1. Was education on *collaborative* parish leadership part of your formal training?
Yes (9) No (10) Not Certain (3) [IF NO, SKIP TO SECTION 4.]

a. If yes, indicate who participated?

Pastor or other Priests	4	Deacon	1
Parish Life Director		Youth Minister	
Pastoral Associate	2	Parish Administrator/Business Manager	
Director of Religious Education	5	Parish Pastoral Council Chair	2

2. Rate effectiveness of the learning experience in developing your personal collaborative leadership style on a scale of 1 to 5, with 5 as excellent. *Average response = 4*

3. Who or what made the learning experience on collaborative parish leadership effective? [CHECK ALL THAT APPLY.]

Session leader(s)	5	Space, environment	
Vision speech		Experience sharing	9
Exercises	7	Role playing	4
Discussion topics		Panel presentations	
Length of Program/Session	3	Other	

4. What do you consider is your current leadership style [READ DEFINITION TO PARTICIPANT AND CHECK ONE]:

Competitive		Confrontational	
Compromising	9	Collaborative	11
Other: Situational	2		

Section 3: Joint Formation (Ordained & LEMs) prior to the Dialogue and Development Session

1. Have you participated in a joint formation learning environment that included both Ordained and LEMs? [IF NO, SKIP TO SECTION 4]
a. If yes, how many years ago? (2)
b. Who participated: [CHECK ALL THAT APPLY]

Pastor or other Priests	4	Deacon	
Parish Life Director		Youth Minister	
Pastoral Associate	2	Parish Administrator/Business Manager	
Director of Religious Education	2	Parish Pastoral Council Chair	

2. Where was the joint formation learning session held?

Archdiocesan program	6	Seminary	
Parish program		Adult Classes (high school or community sponsored)	
College/University	2		

3. What was the primary learning objective?

Leadership	3	Parish Business Management	
Decision Making	3	Pastoral Ministries Management	6
Joint Decision Making		Finance	
Other:			

4. If leadership was the primary objective, what were the 3 topics most important to you that were covered?
a. *Goal setting*
b. *Leadership Vision*
c. *Spirituality, Character*
5. If parish leadership was an objective of the learning session, what was specifically addressed? [CHECK ALL THAT APPLY]

Group prayer		Finance	
Meditations/Personal Faith Sharing	5	Parish Business Management	
Leadership	6	Ministry Management	4
Decision Making		Other	
Joint Decision Making			

Section 4: Parish Leadership Decision Making Practices Prior to Dialogue and Development Session

1. How many years have you been involved in parish leadership? *11.2 yrs. average*
2. What is your title?
Pastor (4), Associate Pastor (3), Parish Life Director (3), Pastoral Associate (4), Director of Religious Education (2), Youth Minister (2), Business Manager (3)
3. Which of the following parish leadership responsibilities are you involved?

AREAS		AREAS	
Pastoral Administration	15	Spiritual Direction	5
Religious Education/Formation	4	Community Organizer	2
School Administration		Leadership Development	
Liturgy Planning	15	Social Services Outreach	
Liturgical Music		Development/Funding	
Pastoral Care	11	Business Management	9
Other		Other: Youth Ministry	2

4. How would you rate your working relationship with your Pastor, on a scale of 1 to 5, with 5 as excellent? *4.5 average rating.*
5. Prior to participation in the San Gabriel Region's Dialogue & Development session on Collaborative Parish Leadership, entitled "Parish Leadership: A Shared Responsibility," did your parish leadership (Pastor & Lay Ecclesial staff) practice joint decision making? *Yes (11) No (9) Not Certain (1)* [IF NO, SKIP TO Question #7 THIS SECTION]
6. If Yes, briefly describe an experience that reflected a joint decision making process?
Liturgy planning, pastoral planning, retreat, community organizing, capital campaign, religious education.
7. How was conflict handled during the decision making process?
Calmly talked things through, at times rescheduled meeting, listened, prayed together, reflected.
8. What does collaborative parish leadership decision making mean to you?
Working together, agreeing to disagree, all cards on the table, weaving gift, similar visions.
9. a. Has the parish participated in a Pastoral Planning process?
Yes (5) No(12) Not Certain (4)
b. Please describe briefly your Pastoral Planning process.
Lots of listening, had a facilitator, included stakeholders, had calendars and timelines synchronized, looked at strengths & opportunities, set goals and mission.
10. Were parish missions/visions developed by a team that included the Pastor and you?
Yes (3) No (2)

Section 5: Post Dialogue and Development Session Evaluation

1. Was a new way of joint decision making learned at the San Gabriel Region Dialogue and Development Session? *Yes (12) No (6)*
2. Rate the level of change in the joint decision making process your parish leadership team uses in coming up with solutions and decisions since the San Gabriel Region's Dialogue & Development Session. *average rating, 4=High*

Rating	5	4	3	2	1
Level of Change	Very High	High	Average	Some Change	No Change

3. Rate the overall effectiveness of having participated in the San Gabriel Region Dialogue & Development session on collaborative parish leadership, entitled "Parish Leadership: A Shared Responsibility." On a scale of 1 to 5, with 5 as highly effective. *average rating=4*
 - a. Why was it effective or ineffective?
Discussion helped teams realize that we're on the right track, could see the benefits of practicing collaboration. The agenda was tight and to the point. Would like to do it again.
4. Below, first indicate if your parish leadership team has implemented the skill or learning aid. Then rate the skill or learning aid on effectiveness in improving your parish's collaborative leadership, on a scale of 1 to 5, 5 is very effective.

	Implemented: Y = Yes N = No	Very Effective 5	Effective 4	Somewhat Effective 3	A Little Effective 2	Not Effective 1
Team-Shared Vision	Y=11 N = 9	5				
Understanding "What is and What is not" Collaboration	Y = 6 N=14		4			
Parish Role Models	Y=12 N = 6		4			
Developing a Meeting Agenda	Y=14 N = 6		4			
Team Model as Priest & Lay Ecclesial Minister	15 = Y 6 = N		4			
Small Group Work Process on Parish Issues	19 = Y 2 = N	5				
Other skill and/or learning aid	Affirmation of current practices					

5. Describe how your team came up with solutions and decisions that addressed the scenarios in the small group exercises at the Dialogue & Development Session.
- a. How did you work as a team?
Respected one another, tried to listen, made lists open to suggestions, honest about limitations, checked in by ensuring all contributed and had an opportunity to be heard.
- b. What were key components?
Bishop's vision statement helped us see one another's gifts; being together with time to think about challenging parish issues, prayer & reflection, structure of the process.
6. Was a joint decision making process involving parish leadership experienced at your parish prior to the San Gabriel Region's Dialogue & Development Session? Briefly describe the experience.
 Yes _____ No _____ *Most responded yes but couldn't recall specific experience.*
7. If you have suggestions for future Dialogue & Development Sessions, what are they?
Let's do a follow up session; keep it short and sharp like the current agenda.
8. Should a joint Dialogue & Development Session become a formal part of parish leadership training/formation? *Yes (12) No (7) Not Certain (2)*
- a. Why or why not?
It's ideal but will we make the time?

b. If yes, where should it be conducted:

LOCATION		LOCATION	
6	Archdiocesan program	6	Seminary
7	Parish program		Adult Classes (high school or community sponsored)
	College/university		Other

9. What do you suggest is the best approach in establishing and maintaining a collaborative parish leadership style?
Seeing Christ in the other; respect and dignity; praying together frequently, recognizing others' gifts; hearing one another; remove the egos.

THANK YOU

APPENDIX H:
Workshop II: Pastoral Planning
Participants Distribution

Number and Percent

Participants in Workshop II: Joint Formation in Pastoral Planning

	Number	Percent
Priests	15	40%
Pastoral Associates	18	47%
Parish Life Directors	5	13%
Total	38	100%

APPENDIX I:

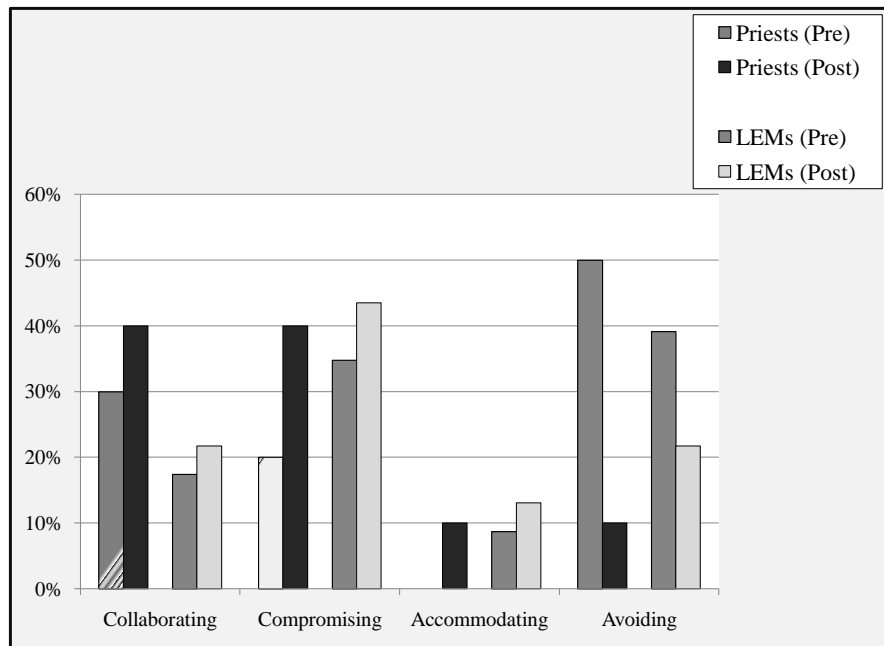
Participants' Leadership Styles:

Pre-Post-Pastoral Planning Workshop

Thomas-Kilmann Self-Evaluation

Percent of Priests vs.

Lay Ecclesial Ministers (LEMs)



Although “Competing” is a TKI conflict mode, none of the participants scored in this category; therefore, it is not reflected in the graph. In the pre-workshop measurement, the priests did not indicate “Accommodating” leadership styles; but, there were a higher percentage of priests in the “Avoiding” styles than any other category. However, the post-workshop percentage infer that the priests’ leadership styles had moved to either “Compromising” or Collaborating.”

APPENDIX J:
Archdiocesan Pastoral Council Report
Pastoral Initiative IV

Ministry and Leadership:
Lay, Consecrated Life, Ordained

Note: This appendix, a Los Angeles Archdiocesan report on the progress of the Synodal Initiative IV, focuses on collaborative leadership programs with a strategy to train ordained and lay ministers together on processes that foster shared decision making. The Joint Formation Model of collaborative leadership piloted in my Doctor of Ministry project is among the recommendations highlighted below. The Joint Formation Program is to be instituted on several levels: parish, archdiocese, the local seminary, and universities.

Origins of the Report

At its January 26, 2008 meeting, the Archdiocesan Pastoral Council (APC) considered a proposal to offer Cardinal Mahony six reports, one on each of the Initiatives of the 2003 Synod. The six reports would outline the work being done throughout the archdiocese in implementing the six initiatives. An ad hoc committee studied the APC's ability and willingness to do these reports. In May, 2008, the APC heard the report and endorsed the proposal. Synod Initiative IV is the fourth report to be prepared.

Scope of the Report

A committee¹⁰⁷ was established by the APC to develop the report on Initiative IV. The group met at Holy Family Church, South Pasadena, for its initial meeting. The first point of business, after introductions, was a clarification of the goals and processes for reporting on this Initiative.

¹⁰⁷ Committee Members: Yolanda Brown, Sister Ann Carla Costello, Ben Decenario, Deacon David Estrada, Joan Harper, Sister Carolyn McCormack, Sister Susan Slater, Cambria Smith.

The heart of Synod Initiative IV is centered on developing strong, effective collaboration between the clergy and laity. Desiring to ground its work in the spirit of the Synod experience of 2003, the Committee re-visited the Synod documents, reflecting on Cardinal Roger Mahony's clear leadership, as expressed through his Pastoral Letters and the DVD *Panel Discussion on Emerging Leadership Models* presented by the Archdiocese of Los Angeles at Mater Dolorosa Retreat Center in 2008. The Committee also reviewed the work of the Synod itself and the remarkable participation of the laity whose dynamic, spirit-filled response to claiming their baptismal responsibility for the mission of the Church in Los Angeles through active, appropriate leadership was clear and strong. The Committee also noted that Synod Initiative IV is bound closely to Synod Initiative II. Both Initiatives call for strengthened relationships of collaboration and decision-making so that the laity can more effectively assume their rightful role in their individual parish life. It is encouraging that a strong foundation already exists to initiate these strategies. The on-going work of implementing them will require education, encouragement and effective, courageous collaboration at the local level to produce the changes needed to implement them.

Synod Pastoral Initiative IV states: On the archdiocesan level, processes are to be established to ensure better collaboration and cooperation among the laity, religious and clergy so that the laity can more effectively assume their baptismal responsibility in the mission of the Church. The focus of this initiative is the establishment of processes that will create collaboration and cooperation between the laity, religious and clergy in order to strengthen lay leadership for active participation within the church of Los Angeles. While this priority touches the entire archdiocese at many different levels, there are limited financial resources available at this time to implement educational programs and/or processes. However, a strong archdiocesan commitment as expressed by Cardinal Mahony offers a hopeful future for this Initiative.

Development of the Report

The committee felt that requesting a survey to be completed by the Regional Pastoral Councils would not be helpful as many were yet grappling with how to interpret and approach this initiative given its breadth and scope. Other means of gathering data as to the development of Initiative IV throughout the Regions must be initiated.

Questions have been raised regarding the clarification of Initiative IV's Pastoral Priority, "processes are to be established to ensure better collaboration and cooperation among the laity, religious and clergy so that the laity can more effectively assume their baptismal responsibility in the mission of the Church." Basic distinctions between lay and clerical leadership as well as ideas about using existing lay formation programs to promote an understanding of collaboration are dimensions of this question that need to be further explored and will be included in the recommendations for the on-going work of Initiative IV.

Ultimately this Synod Initiative deals with the question of how can we better serve the People of God and engage them in all the work of the Church which is not otherwise restricted to the ordained. Speaking of the emergence of lay leadership in the parish, Cardinal Mahony stated in his Pastoral Statement "As One Who Serves", "...perhaps nothing is more important than cultivating, nurturing, and sustaining collaboration between and among priests, deacons, vowed Religious and lay leaders", a collaboration which is made easier by "recognizing the importance of bringing different gifts to bear in the common mission of the Church." The root of this collaborative enterprise lies in understanding the rich diversity of gifts that all the People of God can contribute in direct service to the Church as she strives to bring about the reign of God on earth. As the Church fully utilizes the richness of these gifts, the fruits of the Spirit are unleashed and parish life flourishes.

Synod Initiative IV: Strategy 1

“A plan for the joint training of ordained and lay leaders, especially in processes of collaboration and shared decision making is to be implemented.”

According to Canon Law, ordained ministers (pastors) are legally responsible for their parishes. Pastors can invite laity to participate in their apostolates; however, they are not required to do so. In the spirit of Synod Initiative IV, the Committee recommends that pastors, deacons and PLDs come together and actively participate in training programs aimed at strengthening consultation and delegation skills for pastoral ministry.

The following reflect work being done in the various Regions at this time:

- San Fernando Region is actively working toward an educational plan for their Region in a focused and timely manner. They have been studying the U.S. Bishops’ document, *Co-Workers in the Vineyard*.
- It is important to note the work of the San Gabriel Region with regard to this strategy. The Regional Council has convened a very successful joint formation gathering of deaneries entitled “Parish Leadership: A Shared Responsibility.” The development and dialogue session addressed the issue of collaboration among lay and ordained leaders, including a series of vignettes intended to help resolve issues for pastoral planning together. On-going development of this strategy is in place for the coming months.
- Our Lady of the Angels is involved in a process of discernment regarding key issues identified by the parishes.
 - Santa Barbara Region is working through their Deaneries and are using their Deacons for educational efforts in the parishes.
- San Pedro Region has a strong relationship with the parishes; a consistent plan is being developed.

Synod Initiative IV: Strategy 2

“A School of Ministry for Laity” or its equivalent is to be established in each pastoral region to train parishioners for participation in a variety of parochial ministries.”

The lay apostolate celebrates the joy of being active Christians in the world.

Regional efforts to promote this strategy include the following:

- San Fernando Region is encouraging the development of a Ministerial Formation Plan for the parishes in this region.
- San Gabriel Region is encouraging a program that blends the Santa Barbara and San Fernando Region’s plans with a strong focus on pastoral education. Working with Sisters Edith Prendergast and Mary Elizabeth Galt, the Regional Pastoral Council launched its School of Ministry pilot in October 2010, including a two year certificate program inclusive of classes in Ecclesiology, Scripture, Leadership Development and Liturgy/ Sacraments, using the Master Catechist model as the instructional vehicle. A third year option will provide specialization in a pastoral ministry. The School of Ministry classes are in Spanish and English. The Spanish track will be offered at two parishes in the Region. There is a willingness to open up the program to participants from other deaneries.
- Our Lady of the Angels Region is supporting a ministerial formation program that is task specific, functional and practical.
- Santa Barbara Region is supporting and encouraging catechetical formation for all parishioners. The growing number of Deacons in this Region allow for this formation to occur throughout the parishes where the Deacons are assigned.
- San Pedro Region is creating strong relationships with the parishes. However, because of changes in the Region’s leadership, their work on Initiative IV continues to be in process.

Four Regions are encouraging the RENEW program which has proven to be a successful parish faith formation program. The fifth Region is using a variety of evangelization programs which are proving effective. Parish Social Justice programs

offer opportunities for parishioners to come together for education and action on issues of social justice concerns. Regional pastoral councils provide leadership and ministry training as well as opportunities for ongoing formation for parish pastoral and finance councils.

Ultimately, the responsibility for training parishioners for pastoral ministry rests in the hands of the pastors/parish life directors in consultation with their parish councils. A comprehensive archdiocesan plan to address the formation of parishioners for participation in parochial ministries needs to be formulated and implemented. Limited resources impact the ability to address this need.

Finally, in a hopeful spirit of affirmation and support, the Synod IV Committee recommends that parishes seek ways to promote and officially honor lay Christians who are currently doing exemplary work both within and outside of their parishes in the Archdiocese of Los Angeles.

Synod Initiative IV: Strategy 3

“Women are to be included on an equal basis in all aspects of Church leadership, administration and ministry not otherwise restricted by Church doctrine.”

There has been improvement in the commitment to be inclusive of women, both religious and lay, over the past twenty five years. The Archdiocese of Los Angeles has not only recognized but also demonstrated that the charism of leadership within the Church is not intrinsically connected to ordained ministry. This has allowed laywomen as well as laymen increased access to leadership responsibility within the parish as well as Archdiocesan structures. Women hold key leadership positions in the Archdiocese, both professional and volunteer, and include: the Chancellor, the Director of the Office of

Religious Education, the Director of the Office of Worship, the Vicar for Women Religious, the Director of the Office of Parish Life, the General Counsel, the Moderator of the Archdiocesan Pastoral Council, and Moderators of several of the Regional Pastoral Councils. Increasing numbers of lay ecclesial ministers (LEMs), including Parish Life Directors and Pastoral Associates, are responding to the call of the Holy Spirit: the majority of these LEMs are women. In selecting their regional council members, the Bishops seek gender balance. That said, this strategy continues to need attention and implementation. There is no qualitative data on how this strategy is being implemented at the parish level.

Conclusions

1. This Synod Initiative is unique in itself. Its primary focus is the development of lay pastoral leadership for the Church of Los Angeles and its many and varied ministries. How that development will take place is the work of the Church's leadership: the Archbishop, the Archdiocesan Pastoral Council, the Regional Pastoral Councils, the Deaneries and the individual parishes/pastors/Parish Life Directors.
2. The success of this initiative, the enterprise of collaboration, is to be found in the "fruits of the Spirit" which have emerged in parish life. Parishes which have successfully engaged the laity, ordained and religious in healthy collaboration are places where, in the words of Peter Maurin, "It is easy to be good". They are places where a wide range of vibrant ministries, the majority lay-led, flourish. They are places where parishioners are excited to be involved in their parish. They are places where the faithful grow in number because their faith is deepened and enriched and they feel welcomed. They are places of growth and creativity in the Holy Spirit. These parishes model for us the dynamic, faith-filled possibilities that collaborative leadership holds for the People of God.
3. Each Region is currently engaged in a variety of projects for Synod Initiative IV in a manner that seems most appropriate for their regions. More research must be done to update and clarify these projects.
4. It is important to note that significant progress has been made as a result of the work of the 2003 Archdiocesan Synod:

- The Archdiocesan Pastoral Council is in place, strategically representing the Archdiocese of Los Angeles' five Regions, as well as its religious, priests, deacons, brothers and Parish Life Directors, and Pastoral Associates.
- Each of the five Regions has a Regional Pastoral Council who, working with their Regional Bishop, is seeking to implement the six initiatives of the 2003 Synod.
- These Regional Pastoral Councils are working with the local parishes to strengthen Parish Councils. Additionally, the development of a strategy calling for the creation of a Stewardship Council in each parish is underway.
- New emerging models of parish leadership are being implemented; there are growing numbers of parishes that are “twinning”, “clustering” and a number of new Parish Life Directors have been appointed. The number of Pastoral Associates continues to grow.

Recommendations

1. The committee recommends on-going study and familiarity across the Archdiocese of Los Angeles through the APC, RPC, Priests Council and Parish Councils with the following documents:
 - Christifidelis Laici: Post-Synodal Exhortation on the Vocation and the Mission of the Lay Faithful in the Church and in the World, Pope John Paul II, December 1988
 - Co-Workers in the Vineyard: A Resource for Guiding the Development of Lay Ecclesial Ministry, U.S. Conference of Catholic Bishops, 2005
 - Pastoral Letters of Cardinal Roger Mahony
 - As I Have Done For You, A Pastoral Letter on Ministry, 2000
 - Gathered and Sent, Documents of the Synod, Archdiocese of L.A.
 - As One Who Serves, Pastoral Letter on Lay Leadership In the Archdiocese of Los Angeles, 2005
 - Serving Shoulder to Shoulder: Parish Life Directors in the Archdiocese of Los Angeles, November 2006
2. The committee urges that implementation of formation processes of collaboration and shared decision-making, that educates ordained and lay ministers together, be integrated into existing formation programs: seminary, diaconate, Parish Life Director/Pastoral Associate, and college and secondary levels, thus strengthening the initiative and strategy.

3. The committee recommends that the Archdiocesan Pastoral Council consider the feasibility of convening an archdiocesan-wide Re-visioning Day that is rooted in the six Pastoral Initiatives.
4. The committee suggests that a more cohesive, integrated strategy be developed to assist in better leveraging educational resources across the regions to support formation and education of the laity.
5. Limited funding for these educational efforts impacts how the Initiative will be addressed at all levels: archdiocesan, regional, deaneries and parishes. Securing resources for these projects would strengthen the Initiative's success.
6. While the roles for women in leadership have expanded significantly in recent years, this topic needs to be addressed on an ongoing basis and should continue to be an area of growth for the Archdiocese of Los Angeles. The critical role that women play in the Church must continue to be articulated at all levels.
7. The committee proposes the establishment of an archdiocesan Ad Hoc committee to promote the most practical implementation of this initiative.

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