



PARTICIPANT RESPONSE SHEET

Human Resources at the Diocesan Level

SUMMARY

This video details the growth of the Catholic population and contrasting decline in clergy and religious. It addresses these challenges with Leadership Roundtable recommendations, including the need for dioceses to provide centralized recruiting for parishes and ongoing training and formation of priests and lay ministers. It also describes the lack of an effective Human Resources management system and the need for a performance review program for all staff. The video profiles the Archdiocese of Chicago's Human Resources Management System.

RECOMMENDED AGENDA AND TIMETABLE

2 HOURS 35 MINUTES

- 5 minutesWelcome and Opening Prayer
- 25 minutesVideo – Human Resources at the Parish Level
- 35 MinutesChallenge: Attracting the Best “Talent” in a Time of Shortage of Priests and Religious
- Challenge: Lack of Training for Priests for Leadership Positions
- Challenge: Lack of Training for Lay Minister
- 30 minutesChallenge: Lack of an Effective Human Resources Management System
- 10 minutesExample: Archdiocese of Chicago
- 30 minutesAssess your Diocese
- 5 minutesThanks, Prayer, Announcements (next steps, meetings, etc.)

NOTES DURING VIDEO

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Permission is granted for dioceses using the *Resource for Diocesan Planning* to duplicate this Participant Response Sheet.

DISCUSSION GUIDE

CHALLENGE: Attracting the Best “Talent” in a Time of Shortage of Priests and Religious 35 MINUTES

Have you thought about the effect the low numbers of clergy and religious is having/is going to have on your diocese? The effect the changing clergy/laity mix is having/is going to have on your diocese? Specifically with regard to:

- Sharing of priests
- Number of Masses
- Availability of priests to administer the sacraments
- Availability of pastors with management experience
- Increasing reliance on laity in leadership roles
- Availability of experienced lay leaders

Having named some of the challenges/problems associated with a reduction in clergy, now name the opportunities presented by each problem.

Has your diocese been proactive when it comes to adjusting and preparing for the reality of the clergy/laity mix? If yes, please provide details. If not, what steps does it need to take?

RECOMMENDATION: Provide Centralized Recruiting for the Parishes

Does your diocese currently provide centralized personnel recruiting for the parishes? If not, should it and what steps need to be taken to provide such a service?

CHALLENGE: Lack of Training for Priests for Leadership Positions

Cardinal William Levada, Prefect of the Congregation of the Doctrine of the Faith: “Now we see guys coming out of the seminary at 40, 50. They’re— at two or three or four years—we’re going to need to put them in . . . as pastors. And the seminary doesn’t prepare people with the practical managerial insights to operate the business aspects of it . . . I think that’s a need. I wouldn’t be afraid about putting the same model in everywhere. If you had one model that worked, give it to us, and we’ll work it and make the adaptations we need.”

RECOMMENDATION: Dioceses Need to Provide Ongoing Training and Formation of Priests

How do priests in your diocese receive ongoing training and formation, including coaching and feedback?
Does the diocese provide it?

How does the bishop receive ongoing training and formation?

Please describe ongoing formation and training programs for priests and the bishop in your diocese that you think are examples of best practices.

If your diocese currently does not provide continuing formation programs, what steps need to be taken to put them in place and to make them available to the clergy and to the bishop?

CHALLENGE: Lack of Training for Lay Ministers

In the video, Francis Butler, President of FADICA observes: "There are over 200,000 laypeople who have stepped forward to serve the church in administrative and ministerial roles. That's the good news. But the bad news is that there is little scholarship assistance available to prepare lay ministers for these roles. They must fend for themselves to acquire their education. And so none of us can be certain that the quality of their ministry will meet expected standards."

RECOMMENDATION: Dioceses Need to Provide Training and Formation for Lay Ministers

How do lay ecclesial ministers in your diocese receive ongoing education and training?

Does the diocese offer formation and training programs for lay ecclesial ministers to the parishes?

You saw how the Diocese of San Jose's Institute of Leadership in Ministry trains lay leaders. Has your diocese developed a similar program to ensure that lay ecclesial ministers are educated and well formed?

As noted in the video, the National Association of Lay Ministers (NALM) has developed competencies and certification for lay ministers. Could your diocese benefit from this resource?

Please describe ongoing formation and training programs for lay ministers, particularly lay ecclesial ministers, in your diocese that you think are examples of best practices.

CHALLENGE: Lack of an Effective Human Resources Management System**30 MINUTES**

The importance of an effective Human Resources Management System complete with annual reviews and adequate compensation was emphasized throughout the video by both Church and business leaders.

RECOMMENDATION: Effective Performance Review Program for All Diocesan Staff

Discuss how your diocese has succeeded in or needs to work on implementing standard human resource policies. Specifically, if it doesn't have a performance-based culture in place, what steps does it need to take to introduce one with established guidelines for performance management?

What type of performance measurement system does your diocese have in place to evaluate the bishop, pastors, priests and lay staff?

Some dioceses require pastors and clergy to participate in annual performance reviews. Do you see this as a good practice? What benefits do you see in such a review?

Some dioceses require lay staff to participate in annual performance reviews. Do you see this as a good practice? What benefits do you see in such a review?

Does your diocese have a human resources department staffed with a human resources professional?

Does your diocese have diocesan made personnel policies that are made available for parish adoption and use?

RECOMMENDATION: Adequate Compensation and Motivation

The U.S. Conference of Catholic Bishops noted in a recent pastoral statement "Co-Workers in the Vineyard of the Lord": While not all those working for the Church are paid, all deserve recognition and affirmation of their contribution to its mission. Those lay ecclesial ministers serving in paid positions need fair compensation for their work. The Church has a long history of speaking about the dignity of work and the proper recognition of people's service. In a comprehensive personnel system, this area includes salary plans that may establish ranges through which individuals may progress, as well as benefit plans (e.g., health insurance, family leave, child care assistance, funding for ongoing education). These issues can be particularly challenging when resources are limited. Compensation packages vary from one geographic region to another depending on the finances of each diocese and the cost of living in a given area. (USCCB, December 2005, p. 63)

Discuss whether your diocese offers lay staff adequate compensation packages to attract and keep qualified, experienced people. If not, what steps need to be taken to enhance their compensation packages?

EXAMPLE: Archdiocese of Chicago's Human Resources Management System**10 MINUTES**

The video profiled the Archdiocese of Chicago's Human Resources management system. Carol Fowler, the Director of Personnel Services for the Archdiocese, says that human resource expertise is an absolute necessity at the diocesan level. Fowler's department is responsible for all human resource functions in the archdiocese for clergy, religious and lay staff. These functions include recruitment and placement, policy development, compensation, performance review and ongoing formation.

Does your diocese offer these kind of services to the parishes? Do pastors, principals and other managers and supervisors feel they can seek human resources assistance from the diocese, especially when difficult situations arise?

In the case of large dioceses, are human resources professionals available in the field to each institution on a regional basis for both support and compliance?

As noted in the video, the National Association of Church Personnel Administrators (NACPA) has prepared self-audits for each diocese, religious institution, parish or school to evaluate their Human Resources functions based on a series of benchmarks or best practices. If your diocese did not perform such an audit in preparation for this meeting, would your diocese benefit from participation in this type of self-audit?

ASSESS YOUR DIOCESE**30 MINUTES**

Using these standards adapted from "Standards for Excellence: An Ethics and Accountability Code for the Nonprofit Sector," how would you rate the performance of your diocese in each of these categories?

Personnel Policies

- *A diocese should have written personnel policies and procedures, approved by the bishop, governing the work and actions of all employees and volunteers of the diocese. In addition to covering basic elements of the employment relationship, e.g., working conditions, employee benefits, vacation and sick leave, the policies should address employee evaluation, supervision, hiring and firing, grievance procedures, employee growth and development, confidentiality of employee and client and parish records and information.*
- *With respect to volunteers, the diocese's policies and procedures should also address initial assessment or screening, assignment to and training for appropriate work responsibilities, ongoing supervision and evaluation and opportunities for advancement.*

Employee Performance Evaluation

- *A diocese should have written job descriptions for each employee that clearly identifies roles and responsibilities.*
- *Dioceses should have a system in place for regular written evaluation of employees by their respective supervisors, which should take place at least annually.*

Employee Orientation

- *New employees of the diocese should receive an orientation, which includes review of the diocese's personnel policies and procedures and position description.*

In the area of Human Resources, what are the top three strategic challenges facing your diocese?

What is the appropriate response for each challenge? When responding, please bear in mind the following human resource functions:

- Recruitment
- Hiring
- Evaluation
- Compensation
- Training and Retraining
- Career Development and Planning
- Health Benefits and Retirement Planning

What are the principal obstacles currently preventing the implementation of recommended actions?

What are the conditions that must be fulfilled on the part of the laity, the bishop and the clergy to make recommended actions a reality?

CONCLUSION

Sharing ideas — The Leadership Roundtable would appreciate feedback on these topics and any examples of best practices you have to share. Also, did you come up with ways to improve the management of your own diocese? If so, have you established a timetable for your next steps? Who is responsible for what?

EVALUATION OF VIDEO PROGRAM AND DISCUSSION TOPICS

Leader should collate notes/minutes from the meeting and also send a copy to the Leadership Roundtable. Please send your responses to info@nlrcm.org or use the online form at www.nlrcm.org/bestpractices.

FURTHER RESOURCES FOR HUMAN RESOURCES MANAGEMENT AT THE DIOCESAN LEVEL

Part of the ongoing role of the Leadership Roundtable is the promotion of best practices and raising awareness of organizations, web sites, programs, literature, courses, events, etc. of which parishes might not be aware. Please visit www.nlrcm.org for an updated list of resources.

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