



# THE ARCHDIOCESE OF ST. ANDREWS AND EDINBURGH

**Capacity Building Consultancy Project**

**CONFIDENTIAL**

**Report to The Consultancy Project Team  
On  
The Main Findings, Conclusions and Recommendations  
Of  
The Working Group on organisational Structure of the  
Archdiocese**

**NOVEMBER 2006**

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## CHAPTER 1:INTRODUCTION

**1.1** It was widely accepted, prior to commencement of the consultancy project, that there were problems with the way the organisational structure of the archdiocese was operating and that at least some of these problems were linked to weaknesses in the structure itself. For example:

- Policy decisions arising from the “Together in Hope” initiative were either not being implemented, being implemented in part or taking far longer to implement than had been planned.
- This appeared to be associated with reluctance on the part of a significant minority of clergy to engage fully with the change programme embodied by the “Together in Hope “ programme. Amongst the reasons suggested were weaknesses in the organisational arrangements for the personal and professional support of priests and differing views about the role of priests, their place within the structure and, in particular, the relationship between priestly responsibilities, on the one hand, and accountability for the exercise of these responsibilities on the other.

**1.2** The situation wasn’t helped by the fact that certain key posts and bodies did not have authorised written descriptions of their roles. The fact that the archdiocese did not have anything approaching a comprehensive, authoritative organisational chart didn’t help either. Numerous people also reported that they did not understand the present structure.

**1.3** The Pastoral Support Group (PSG) therefore decided to include a review of current structure in its action plan for the consultancy project and set up a Working Group for that purpose. Its remit was to:

- Put together a draft chart of the current organisational structure of the archdiocese based on the best information available;
- To assess how well suited the current structure is for the purpose of governing and managing the diocese’s affairs – carrying out its ministry;
- To pinpoint any significant weaknesses requiring attention;
- To consider ways in which the structure can be improved and made more fit for purpose; and
- To report its findings, conclusions and any recommendation to the CPT for consideration.

**1.4** This confidential report summarises the Group’s main findings, conclusions and recommendation. It is submitted to the CPT as a working document to assist its deliberations.

## CHAPTER 2: METHODOLOGY

**2.1** The CPT decided early on that the best way to obtain an accurate picture of the current structure, expose its strengths and weaknesses and identify the action needed to improve it, would be to adopt a twin-track approach:

1. Conduct a survey of individual post-holders and members of official bodies about their understanding of their roles and the roles of the bodies to which they belonged, and their place within the archdiocesan structure; and
2. Compare the survey findings with written evidence drawn from other sources about the responsibilities of these roles, notably; - descriptions of roles; Canon Law; minutes of meetings of such bodies as the APC, Deans, PSG and Council of Priests; reports; policy statements; the Archdiocesan Directory, the “Red book” etc.

**2.2** The survey commenced prior to the first meeting of the Working Group. The plan was to send a questionnaire to a sample of all known individual post-holders. For the purposes of comparison, the CPT decided to send questionnaires to:

- Two individual post-holders chosen at random, wherever there were a significant number of people holding a similar role, and to
- A representative sample of 10 parish priests.

In the event, a questionnaire was sent by mistake to every parish priest, both secular and religious, and to priests with other roles besides that of parish priest, a total of 85.

**2.3** Questionnaires were also sent to Chairs/Presidents or those with similar roles on all official archdiocesan bodies with the request that they

- Complete 1 questionnaire themselves and
- Arrange for another member of that body to do the same.

**2.4** The number of questions was restricted in order to keep demands on respondents to the minimum. A commitment was also made to do everything possible to protect the anonymity of individual respondents, to use the information they provided for the purposes for which it was requested and to give a copy of the chart of the current structure to every respondent, once it was available.

**2.5** The Working Group’s first meeting on 14 December 2005, focused on setting the context for its work, clarifying its purpose and agreeing a set of key concepts that would guide its work. **This conceptual framework provided the criteria for assessing the evidence emerging from the review and, therefore, underpins the recommendations made in this report.** It is described in detail in Appendix 2. It is based on:

- The premise that the archdiocese is an “organisation” as well as a “way of life”;
- The concept of “organisational structure” as the sum of the roles that exist in an organisation and the relationship between them; and
- The view that the sole purpose of any structure is to enable the organisation to run its affairs and achieve its mission, which, in the case of the archdiocese, means carrying out its pastoral ministry.

**2.6** The remaining 3 meetings were devoted to unravelling the confused picture of the current structure emerging from the review, assessing the evidence and identifying the scope for improving the structure and the way it operates in practice. The Group regularly reported back its emerging findings and conclusions to the CPT. We believe these helped to shape many of the policy decisions contained in Chapter 2 of “Now is the Favourable Time”. These, in turn, provide the framework for some of the other recommendations in this report.

**2.7** The Group was required to complete its work and submit its final report to the CPT by the beginning of May 2006 at the latest, so that the CPT could meet its own planning deadlines. This meant a very tight planning schedule and matters were not helped by delay in getting the Group off the ground until December 2005 and by the consultant’s hospitalisation in January 2006.

**2.8** One result was that, despite its best efforts, the Group was not able to explore all the issues thrown up by the review as thoroughly as it would have wished e.g. the current views about the role of deans; reasons why vicars general appeared to place so little emphasis on their management responsibilities; variations in the structure of parish communities and the scope for improving the coordination of effort at parish level.

**2.9** The Group concentrated its efforts on identifying weaknesses in those parts of the diocesan structure most likely to impact on its capacity to govern its affairs efficiently and effectively: namely, those concerned directly with:

- Managing the pastoral ministry; and
- Providing administrative and pastoral support services to deaneries and their respective parish networks

Its main objective was to identify those changes that would make the structure more fit for purpose. However, it was also concerned to explore how best to persuade people about the benefits of change and secure their support for the change agenda.

**2.10** In the event, the planning schedule for the consultancy project changed dramatically with the decision to give more time to consultation: one consequence being that the CPT does not now need to consider this Group’s report until the late Autumn.

This allowed the consultant to explore some of the findings in greater depth, using any additional information available. He incorporated the results of most of this work into an earlier draft of this report for consideration and comment by members of the Group. This final version of the Group report takes account of their views.

**2.12** Recommendations for action are highlighted in the body of the report and summarised in APPENDIX VIII

## CHAPTER 3: OVERVIEW

**3.1** We wish to say at the outset that we do not believe our recommendations contain anything that is new or radical in the field of good governance. All they do is draw on what is already widely known about what constitutes good practice in running any enterprise and apply it to the needs of the archdiocese; with the objective of improving the way it organises and manages its pastoral ministry. None of it should be new to CPT members. Our difficulty has more to do with finding the communication strategies that will persuade a wider audience that what is being proposed makes good sense and offers much to their advantage.

**3.2** Our recommendations form an integrated, mutually dependent and mutually supportive package of proposals. They need to be taken forward together as part of a coordinated action plan.

**3.3** **Our main conclusion is that previous judgements about weaknesses in the way the structure currently operates are largely true, that many of the problems that people are experiencing in their day-to-day pastoral work are indeed rooted in these weaknesses and that this is having a detrimental effect on the morale of priests.**

**We think the main source of these problems is that the archdiocese does not have a coherent framework of clear, comprehensive statements about the roles that make up its organisational structure; and that; as a result, its structure is not well suited to carrying out its pastoral ministry.**

**We also consider that, while weaknesses in governance may be due in part to lack of appreciation of the knowledge and skills needed to manage any organisation, it is also associated with a genuine unease amongst many priests about the relevance of a management approach to the pastoral mission of the Church. We believe that these concerns are holding back essential improvements in the structure, especially at middle management and senior levels in the archdiocese and need to be addressed as a matter of urgency..**

We appreciate that these are complex and sensitive issues, which need to be explored openly and honestly by the archbishop and his community of priests, in a spirit of mutual respect and a willingness to learn: and directed at building a structure that best serves the interests of the community of faith entrusted to their care.

We see merit, as part of that debate, in exploring the view that the Church is both “a way of life” and “an organisation” and the consequences this has for the way it carries out its mission – especially in so far as this relates to such concepts as responsibility and accountability.

**3.4** We believe that, in principle, the remedies are not difficult to find. Indeed, it is clear that some of the remedies being recommended in this report were identified well before the start of the consultancy project but never carried through. These and others were picked up by the CPT and are now embodied in “Now is the Favourable Time”. This report contains more.

**3.5** **The challenge for the diocesan leadership lies first and foremost in doing what the evidence indicates must be done to remedy these weaknesses.** This amounts to an ambitious programme of change. It will require understanding and respect for the fears and anxieties of those facing these changes and the supports they

need to adjust to them. It will require good planning. It will also require a firm commitment to finding the necessary resources to do what needs to be done, when it needs to be done. All this work will take time, skill, courage and persistence to see it through to a successful conclusion.

**3.6 A further challenge will be how to persuade the people of the diocese, both clergy and laity, supporters as well as doubters, that what the leadership plans to do is for their benefit and that this time it will deliver. Otherwise, we fear that the leadership will lose more credibility, a lot of hard work will be wasted and, most important, the spiritual life of the diocese will suffer.**

## **CHAPTER 4. MAPPING THE CURRENT STRUCTURE**

### **Section 1: The over-all Structure**

**4.1** A fundamental assumption underlying the review was that, even though the diocese did not have an official, up-to-date, clear and comprehensive description of its current organisational structure, there would be a sufficiently widespread, shared understanding of that structure to enable the Group to produce such a description quite easily (in the form of an organisational chart). The expectation was that this shared knowledge base would extend to views about the strengths and weaknesses in the structure, making it relatively easy to identify the remedial action needed to make the structure more fit for purpose. This is not what happened.

**4.2** The review turned out to be an extremely time-consuming, complex and hazardous exercise. It was severely hampered by

- The poor response to the survey (c.f. para. 5.1ff.);
- The lack of crucial written information about key roles (c.f. para. 5.5 ff.);
- Uncertainties and frequently conflicting views amongst survey respondents about their own and other people's roles within the structure (cf. para. 5.9ff); and
- Differences between these views and evidence available from other sources.

This lack of clarity centred around the group of roles that form the core executive components of the pastoral ministry within the diocese's organisational structure, and which are therefore critical to its successful operation – those of parish priest, dean, vicar general and the archbishop.

**4.3 We could find no evidence of a widely shared view about what the current structure looks like. Many simply did not know.** People seemed to have their own "working understanding" and this seemed to be selective and reactive – to take account of the day-to-day realities and pressures of carrying out their particular responsibilities, as they understood them. We do not think this is a healthy state of affairs. It certainly helps to explain some of the inconsistencies and tensions that emerged during the course of this review.

**4.4 We decided that the only way to make sense of the available evidence and come up with a reliable map of the diocese’s current structure was to use Canon Law and official diocesan records as our primary source of guidance – focusing on what these had to say about what the structure should look like, and how it should be operating.**

**4.5** We found this an uncomfortable decision to live with, mainly because what Canon Law says about how this component of the diocesan structure should be operating is very different from most people’s experiences of how it actually operates, even though inconsistency and wasted effort are significant features of the way it currently operates. This is particularly true of the significant differences between the views of some members of the clergy and what Canon Law says about the key roles parish priests, deans and vicars general and the relationship between them and the archbishop (see para. 6.5). We feel obliged to highlight these difference even though the model structure presented by Canon law sets the diocese yet another challenge to change at a time when the clergy are already under considerable pressure and feeling unsupported. We appreciate that this may well increase the risk of them disagreeing with our assessment of the evidence. However, we see no alternative. That risk must be taken. Otherwise, there is little of chance of securing an open and honest dialogue about the problem, much less the remedy.

**4.6 Our conclusions are set out in appendix 3 in the form of an organisational chart. We are confident that, although there may be scope for improvement, this chart is both accurate and complete enough to provide a good working description of the diocesan structure as it should be at the present time.** As such, it provides a firm starting point for future amendment once decisions have been made about what improvements are needed to make the structure more fit for purpose. It is now up to others to argue the case for an alternative interpretation.

**4.7** This chart does not yet include the planned changes to the structure contained in “Now is The Favourable Time”. This is because we consider the CPT needs to have agreed what the current structure looks like before making proposals for changing it. In addition, “Now is the Favourable Time” alluded to the possibility of further changes following consideration of this report and further consultation. This process is continuing.

**4.8 With that in mind, we recommend that the CPT accepts the interpretation of the organisational chart in Appendix 3 offered by this Group and uses this interpretation as its baseline template for further amendments, subject to the views of a canon lawyer and any necessary improvements in the content or presentation.** This report contains most of the information it will need for that purpose.

**4.9 We further recommend that, immediately the future structure has been decided, a chart of the new organisational structure is produced and distributed throughout the diocese. This should be accompanied by an official commentary that describes clearly what kind of organisation the diocese is, its core components and how the structure is meant to work.**



**4.10 We recommend that the task of producing a draft new chart and the draft commentary, be allocated to the Pastoral Development Office (or its successor within the new structure (see chapter 7, section 4). Once prepared, it should be submitted for consideration by the APC and approval by the Archbishop, subject to their views about wider consultation.**

**4.11 Finally, we recommend that the Pastoral Development Office (or its successor) be mandated to provide everyone who participated in the survey with a copy of the revised organisational chart as a gesture of thanks for their efforts, under a covering letter from the Archbishop.**

## **Section 2: Organisational structures of Parish Communities**

**4.12** The organisational chart at appendix 4 includes all the known individual roles and groups that are currently active in one or more parishes in the diocese. A commentary is provided at Appendix 5. Taken together, they highlight the fact that, although there are many similarities between parishes, there is no such thing as a typical parish structure. For example, only a handful of parishes have assistant priests and only one has a permanent deacon. Some parishes without a resident parish priest have a Pastoral Coordinator: others do not. Likewise, some parishes have Parish Pastoral Teams for coordinating the day-to-day work of the parish; others do not. Many don't have a Catechist. Some don't even have structures required by Canon Law e.g. Parish Pastoral Councils (C.536) and Finance Committees (C.537). Some of these differences are likely to reflect the presence/absence of a resident priest.

**4.13 The one common characteristic of all parish structures is that the parish priest, under the authority of his archbishop, manages the affairs of the parish, or parishes, entrusted to him.** This is provided for in Canon Law and is clearly understood by the parish priests who participated in the survey. How they choose to exercise their responsibilities and the accountability that goes with them is another matter and there is evidence throughout this report that practice varies a lot.

**4.15 As far as we can establish, there is no written diocesan guidance available to assist Parish Priests with organising the pastoral care of the parish community, or communities, entrusted to them. Canon Law clearly expects parish priests to carry out the “offices of teaching, sanctifying and ruling with the cooperation of other priests and with the assistance of lay members of Christ’s faithful” but offers little guidance on how this might be done; concentrating mainly on setting out his key responsibilities, special functions and certain other specific requirements e.g. finance. (c.f. Canon 519, 529.2, 530, 532 etc.)**

**4.15 It would therefore appear that, despite the vision of a collaborative ministry of priest and people aspired to by “Together in Hope”, parish priests are largely left to develop their own parish structures.** The structures in individual parishes are therefore bound to reflect the insights, interests, and attitudes of individual parish priests, as well as such other factors as the demographic and cultural differences between the local communities they serve. It may also be the case that the variations on the model set out in Appendix 4 embody the practice wisdom that has developed in different parishes over many years and continues to evolve in response

to new insights into the meaning of pastoral ministry and changing circumstances e.g. reducing number of priests. Taken together, the various pastoral activities embraced by these roles represent models of good practice developed at a time when every parish was blessed with numerous priests who also undertook much of the activity themselves. That is no longer the case and parish priests are having to rely increasingly on “the assistance of lay members of Christ’s faithful” in order to exercise their own pastoral role to the full, not to mention promoting the pastoral role of the laity. It would be a tragedy if the accumulated wisdom of previous generations were not distilled and handed on as a body of guidance to assist with this challenging transition. Such an approach might also help to offset the risk of major change in the way individual parishes are run that sometimes accompanies a change of parish priest.

**4.15 We therefore recommend that a working group of experienced pastoral leaders be established to develop models of best practice for organising the pastoral care of parish communities, including communities that don’t have a resident parish priest.**

**We recommend that this work be grounded in a shared understanding of what constitutes a “Parish Community”, building on the contributions made on this issue in recent years.**

**We also recommend that the work includes an examination of the scope for:**

- **Delegating responsibilities to lay people that will enable the parish priest to concentrate on those aspects of pastoral care that only he can provide; and**
- **Ensuring continuity of good practice following the departure of the parish priest.**

## **CHAPTER 5: PEOPLES’ PERCEPTIONS OF THEIR OWN AND OTHER PEOPLES’ ROLES IN THE ARCHDIOCESE.**

### **Section 1: The Response Rates to The Survey Questionnaire**

**5.1 The response rate to the survey questionnaires varied considerably from poor to very good:**

- Just over 1/3 of the priests responded (30 out of 85).
- 24 of these responded primarily in their capacity as Parish Priests.
- Since many parish priests have more than one priestly role at any one time, this meant that very few of the priests responses focussed primarily on other priestly roles and, in only one case, were 2 responses received relating to the same role i.e. Vicar General. This was because they were not given guidance about which of their roles they were expected to represent.
- 30 individual post-holders, other than parish priests, responded – 24 lay people and 6 priests, a response rate of 76%.
- Responses were received from 9 of the 16 different official bodies included in the survey. This produced 11 responses out of a possible 32, a 33% response rate. Only 1 of the 2 Deanery Pastoral Councils and 1 of the 4 Parish Pastoral

Councils, included in the survey, produced a response. In each case both members responded.

**5.2** The response rate of lay people was significantly better than that of priests. Possible explanations include “consultation fatigue” on the part of the clergy and weaknesses in the survey design that had the effect of alienating at least some clergy (cf. para. 6.6)

**Nonetheless, the survey generated information about people’s views from across the diocese, within which the views of the clergy were strongly represented. This information tended to confirm information from other sources both about current weaknesses in the structure and the underlying reasons, thus producing a strong body of evidence on which to base judgements.**

## **Section 2: The Significance of Transparency about Peoples’ Roles and Responsibilities for the Well-being of the Archdiocese**

**5.3** This review is based on certain assumptions:

- That the structure of the archdiocese is the sum of the formal roles that exist within it, and the relationship between them;
- That the sole purpose of these arrangements is to enable the archdiocese to carry out its pastoral ministry;
- That responsibility for overall governance of the archdiocese includes the duty to ensure that its structure is fit for purpose and that it operates as intended.

**5.4** It follows that, the more people are unclear about what is expected of them and what they can reasonably expect of others, the greater the risk of misunderstandings; poor communication and collaboration; variations and inconsistencies in day-to-day pastoral activity; wasted effort, disillusionment and low morale; and a lack of cohesion, common purpose and sense of achievement.

The greater the number of roles affected and the more critical the roles are to successfully carrying out the church’s mission in the archdiocese, the greater the problems are likely to be and the more likely it is that the source of these problems is to be found in weaknesses in the structure, rather than purely in the way it is managed.

## **Section 3: The Availability of authorised written role descriptions**

**5.5** There is strong evidence to suggest that at least one third of both individual posts and the official diocesan bodies either do not have an authorised written description of their role, or are the subject of disagreement as to whether they have one or not.

**5.6** These missing written roles are spread right across the diocese but include key individual posts such as Parish Priests, Deans and Vicars General and Vicars Episcopal; key bodies such as the Archdiocesan Pastoral council, the Pastoral Development Office and the Pastoral Steering Group; and key office bearers, such as the Chairs and Presidents of Pastoral Councils.

**The inclusion of the roles of parish priest, deans, vicars episcopal and vicars general in this list is based on our understanding that, although Canon Law**

**provides general guidance on the key components and other matters relating to these roles, it does not seek to provide detailed written descriptions of the duties attached to these roles. It would appear to consider this a matter for the local bishop to decide, taking account of the circumstances of his diocese.** The wisdom of adopting this approach is evident from the widely different views among members of the clergy about the nature of these roles.

**5.7** In addition, the examples of role descriptions we were able to examine as part of this review (about 20), showed wide variations in layout and content, and frequently revealed a lack of essential information e.g. about the duties associated with the proper exercise of the responsibilities of these roles, how accountability will be exercised and how the individual post or body relates to other individual post-holders and/or official bodies in the structure. Some official bodies do not have a written constitution. Some have office bearers without written descriptions of their roles. Some have written procedures for carrying out their work; others do not.

**5.8 This is poor practice by any standard of governance, is bound to lead to the kind of problems mentioned in para. 5.4 above and is extremely damaging to the work of the diocese.** Transparency and accountability are the essence of good governance. This applies first and foremost to “Who does What” within the structure.

#### **Section 4: The Content of Roles**

**5.9** In the absence of so many properly described and authorised roles, some of them crucial to successfully carrying out the pastoral ministry, it should not be surprising to find that people have different views about their own and other people’s roles and that this is causing all sorts of problems. This is what we found.

#### ***Parish Priests and Vicars General***

**5.10** The views of the 24 **parish priests** who took part in the survey about their key responsibilities varied from very vague e.g. “running the parish” (3), to clear, concise statements that broadly matched the key responsibilities of parish priests listed in Canon Law (6). Most were somewhere in the middle and were characterised by variability and partiality e.g. only 9 mentioned both preaching and Administration of the sacraments among their key responsibilities.

With regard to their main duties, 15 mentioned celebration of Mass, 12 mentioned liturgy preparation, 8 mentioned preaching, 8 mentioned administration of the sacraments and 8 mentioned visiting the sick and homebound. Thereafter, there was little similarity and some significant gaps. For example, formation of the laity was mentioned four times, ecumenical work and working with the Parish Pastoral council once. There was no mention of promoting lay participation in the archdiocese’s pastoral ministry.

**5.11** A large minority of parish priests said they did not see it as part of their role to advise any other person or body in the diocese on matters of policy or practice (10). This contrasts with the importance priests attach to being consulted by their bishop on such matters (cf. records of recent assemblies of priests and responses to “Now is The Favourable Time”).

**5.12** Further discussion might well reveal widespread agreement amongst parish priests about their key responsibilities and duties but we would not count on it. A majority (15) said they were clear about their role, despite giving different descriptions of its responsibilities and duties. About half (13) were confident that most or all other parish priests shared that understanding. A sizable minority were not so clear about their role (6) and not so confident about how many other parish priests shared their own understanding of their role (9). Some said they had no idea whether other parish priests shared their own views (4).

**5.13** We think it far more likely that, in the absence of a written description of their role; competing demands on their time; personal preferences; weak management oversight; limited practice guidance; and limited access to training opportunities; their ministry will tend to be reactive, responding more to immediate pressures rather than to longer term diocesan policy objectives, and leading to wide variations in practice. We found little evidence to suggest otherwise (See also chapter 6,)

**5.14** One of the two **vicars general** who participated in the survey said he did not have a written role description; the other said he did. Both said they were clear about their role and described it as essentially being that of an “advisor” to the Archbishop. One made no reference to any executive responsibilities, while the other referred only to “pastoral oversight” of his area and attendance at various meetings to “communicate” the Cardinal’s policy. These views do not sit easily with the provisions of Canon Law (cf. Canon 475ff.). One thought that other vicars general shared his understanding, while the other had “no idea”.

**5.15** **Taken as a whole, these findings indicate that neither parish priests nor vicars general have as widely shared an understanding of their responsibilities and tasks as they would like to believe. This is a significant finding, given the crucial importance of these two posts to the life of the diocese. It is bound to be reflected in practice. It might be asked, for example, what impact this lack of clarity, transparency and consistency amongst priests about their role has on their relationship with their parishioners?**

#### *Other individual Post-holders*

**5.16** Apart from parish priests and vicars general, most of the remaining individual post-holders were able to offer a clear description of their key responsibilities and main duties, whether or not they had an authorised written description of their role (20 out of 30 respondents). Most of these post-holders also said they were clear about their roles (21), although a significant minority, almost all lay people, were not (9). The two **deans** in the sample did not say much about their role due to weaknesses in the survey. However, both indicated that they were clear about their role. One was confident that all other deans shared his understanding, while the other thought “there is something of a shared understanding” (See also chapter 7, section 5). Almost all of these individual post-holders said their role did require them to formally advise other individuals and/or bodies in the structure. Other evidence suggested that this accurately described their roles.

### *Members of Official Bodies*

**5.17 Most members of official bodies made clear and concise statements about what they saw as the remit of these bodies but had little to say about the main duties that flow from it. The rest simply referred to the constitution, where there was one (5 of the 9 bodies had one). Those belonging to official bodies that had a constitution tended to be clearer about its responsibilities and duties than those who did not.** Members of 4 of the 9 bodies in the sample said they were unclear about some aspect of their body's remit – this applied equally to Members of bodies with and without a constitution. We also noted that the difficulties most mentioned by members of official bodies in carrying out their roles had to do with lack of clarity about aspects of their working relationship with other bodies.

Almost all members of bodies said that their role included responsibility for giving formal advice to other individuals or bodies in the structure and other evidence about their remits suggested this was accurate.

### **Section 5: Overall Conclusions and Recommendations**

**5.18 It is abundantly clear from these findings that, in the absence of a written role description, there can be no guarantee that anyone who claims to understand his/her own role, that of another post-holder or that of an official body, actually does.** This does not make for effective communication or collaboration. It also makes it extremely difficult to ensure that planning decisions are implemented, to provide people with the support and training to make the most of their efforts, to monitor and review progress and to improve the quality of the ministry. We were aware of difficulties in all these areas.

**5.19 Our overall conclusion is that many of the inconsistencies and weaknesses in current pastoral management and practice and the day-to-day frustrations and disappointments that go with them are attributable, at least in part, to the absence of clear, comprehensive and authoritative statements about all the formal roles within the structure. We consider that this is one of the main reasons why the diocese has had so much difficulty taking forward the vision of a collaborative ministry enshrined in the “Together in Hope” initiative. We reported as much to the CPT in December 2005 and fully support the Cardinal’s recent decision to ensure that “everyone who contributes formally to the work of the church. "will have a written description of their role” (“Now is the Favourable Time”, 2.2, no.9).**

**5.20 The Group recommends that this is done as a matter of urgency and that adequate resources are set-aside for that purpose.** The objective should be to provide every one – priests and laity, paid and unpaid - with an authorised, clear, comprehensive, written description of:

- What is expected of them, and
- How they will be held to account for the exercise of their stewardship.

**5.21 We also recommend that a standard template is used for that purpose, along the lines of the model described in Appendix x.** We suggest it should also include reference to:

- Arrangements for reviewing work progress and planning future work;

- Assessment of any future training needs and action to address them;
- Other post-holders and/or bodies with whom ongoing contact is considered essential for the proper exercise of the role.

This model can be adapted to suit the particular requirements of individual post-holders and official bodies and the complexities of different roles, as long as the essential information required by the template is included e.g. the role of a parish priest will be a far more elaborate document than that of a stall keeper.

**5.22 We wish to stress that the exercise should cover all individual roles, whether paid or unpaid, eminent or lowly, held by members of the clergy or the laity, or a combination.** This is because we believe that everyone who is prepared to commit time and effort to working for the diocese, in whatever capacity, deserves to have that contribution formally acknowledged and valued in the form of a statement endorsing what they are signing up for and an acknowledgement that the diocese has a reciprocal responsibility to support and train them, as necessary. This approach has the added advantage of motivating them and sustaining their contribution over time

**5.23** In the case of members of official bodies, the role descriptions should cover the distinct responsibilities and duties of:

- The official body itself;
- Each Office Bearer; and
- Other members.

**5.24 We recommend that each official body should have its own handbook of standard procedures for conducting its work.** As well as copies of the above roles, these practice manuals should include information about such matters as:

- Composition;
- Frequency and duration of meetings;
- Preparing for, managing and reporting on meetings,
- Standards of conduct e.g. confidentiality, attendance at meetings; and
- The arrangements for planning, reviewing and reporting on its work.

A simple template could be developed for this purpose, perhaps in the form of a “Table of Contents”. This would save time, as well as provide for a consistent approach. The Pastoral Development Office has copies of various practice guides that could be used for this purpose. The Archdiocesan “Finance Procedures and Guidelines” and the “Red Book” offer examples of this approach and useful starting points for developing these practice manuals.

Copies of these handbooks should be readily available to anyone who wants to see them and should be held in one place (c.f. para.6.24 below)

**5.25** The amount of time and effort needed to complete this work is likely to be considerable. **We therefore recommend that the highest priority be given to the role of the parish priest.** We think that the importance of providing a description of this role, that is true to Canon Law, but expressed simply and in such a way as to capture the emerging vision of this leadership role described in “Now is the Favourable Time”, cannot be over-emphasised. It will not be enough but it would be a huge step forward.

**5.26** Thereafter, we recommend that priority be given to posts and bodies without a written description of their role, in the following order:

- **Individual posts and bodies that make up the core executive and advisory functions directly concerned with carrying out the pastoral ministry, especially those of vicar general and dean;**
- **Functional roles at both diocesan and local levels, notably vicars episcopal and chaplaincies; and**
- **Others.**

Once this work is complete, all other existing roles should be reviewed to ensure that they meet the required standard.

**5.27** We recommend that over-all responsibility for managing this piece of work be given to the Vice Chancellor. This is properly a Human Resource Management function and the only part of the present structure with any such responsibility is the Vice Chancellor's Office. However, he does not have the resource capacity needed to do the detailed work and complete it quickly. **We therefore recommend that a Project Team be set up to undertake the detailed work with its own project manager and secretarial support.** We consider it important that the project manager has experience in human resource management and suggest that consideration be given to recruiting a member of the laity. The Pastoral Development Officer has prepared material to assist with the design of the work programme. We consider it vitally important to draw on the knowledge and experience of existing post-holders when preparing drafts of their roles.

**5.28** We recommend that, as soon as work on drafting the roles of parish priest, dean, and other key diocesan posts and bodies is completed, each is checked for compliance with Canon Law and submitted to the Cardinal for ratification. It would then be a matter for him to decide whether wider consultation would be appropriate before making the final decision. We think he would be wise to do so, at least for the roles of parish priest, dean vicar general and vicars episcopal and the remits of the Archdiocesan Pastoral Council and Trustees (c.f. Chapter 7, Sections 1 and 2).

**5.29** A brief summary of all individual post-holders and official bodies at diocesan level, and how they can be contacted, should be included in the archdiocese's "Catholic Directory"; along the lines adopted in the Glasgow Directory. We also recommend that consideration be given to including this information on the archdiocese's website.

**5.30** We further recommend that the section in the Directory on deaneries has an introduction summarising the role of the dean and the deanery pastoral council; and the section on parishes has a similar introduction for parish priests and parish pastoral councils.

**5.31** We think there would be considerable benefit in having a diocesan "Hand book" containing up-to date information about the structure, policies and practice guidance of the archdiocese, which would supplement the information contained in the Directory. It could be used for induction purposes and as the basis for a "Training Module" on the structure as required (see Chapter 7, Section 7).



## CHAPTER 6: AUTHORITY AND ACCOUNTABILITY

### Section One - Hierarchical Accountability

#### 6.1 The role of each person and body in an organisation must make clear:

- What their respective responsibilities are;
- That they have the authority to exercise these responsibilities; and
- To whom they are accountable for discharging these responsibilities.

(See Appendix II).

How this accountability is exercised depends on the structure of the organisation and the lines of accountability within it. Canon Law sets out the broad structural framework for every diocese throughout the Church. This includes a model for what has been described as the "middle management" level in this structure: that is, the roles of vicar general, vicar episcopal and vicar forane. It leaves it to the local bishop to decide which combination of these roles best suits the circumstances in his diocese.

**6.2 It is now widely accepted that the archdiocese does not yet have a sufficiently robust middle management structure to provide the Archbishop with the assistance he needs to govern his archdiocese effectively and that this is largely responsible for many of the shortcomings in management practice identified elsewhere in this report.** Strenuous efforts have been made to remedy this situation over a number of years (see Chapter 7, Section 5). These are now beginning to bear fruit in the form of the decisions for improving the structure that are set out in "Now is the Favourable Time" (cf. chapter 2; 2.2). These have received a favourable initial response from the clergy, even though they have continuing concerns.

**6.3 We do not think that simply establishing this new structure will be enough to secure its success.** Ultimately, that will depend on how much support it receives from the clergy. For this to happen, they must be persuaded that the new structure offers them real benefits in their spiritual lives and in their pastoral ministry. We do not think this will be easy to achieve. There appear to be a large number of clergy who are reluctant to support a strengthening of the middle management structure. The reasons why some clergy feel this way are complex and we could not explore them in any detail. We certainly don't pretend to understand fully why they feel this way. This clarity can only be achieved by an open, honest and well-informed dialogue between members of the clergy and their Archbishop. This dialogue must be based on mutual respect, a commitment to learn and a shared determination to do what is best for the well being of the faith community entrusted to their care. What follows is offered as a contribution to that process.

**6.4 There are no clear descriptions of the roles of parish priest, dean, vicar general and vicar episcopal. As a result, it seems that the authority invested in these roles, and the arrangements for ensuring proper accountability for how well they are carried out, have become blurred and open to different interpretations.** This increases the risk of people not knowing where authority lies for decision-making and of inconsistent decisions. This can have all sorts of harmful consequences. It can:

- Create uncertainty about how and why some decisions are being made.
- Raise concerns about certain individuals or groups having too much influence over decision-making: especially if these people are not seen to have authority

to inform decisions and this is accompanied by failure to abide by established procedures for consultation.

- Erode mutual trust and a sense of common purpose; and encourage scepticism about the prospects for change
- Result in decisions not being implemented
- Allow people to pass the buck when things go wrong and avoid their own responsibility for helping to put it right.
- Generate a tendency for people to opt out and “do their own thing”
- Undermine the capacity of the Archbishop to ensure that policy decisions are being implemented and that guidance is being listened to and taken into account on the ground.
- Deprives the Archbishop of a framework for monitoring what is happening on the ground, reviewing progress, taking action to improve the quality of pastoral care and supporting those who provide it.

We found evidence that people are experiencing some of these harmful consequences and may be experiencing others.

## **6.5 Views about being managed**

### **(i) Parish Priests**

- Almost all the parish priests who responded to the survey (21) said they were accountable to their archbishop for how well they carried out their ministry. Twelve said they were also accountable to others, notably their parishioners (7), God (3), the diocesan office (1), their provincial (1) and their dean (1). No one mentioned the vicars general. It is therefore hard to avoid the conclusion that few parish priests accept that they are answerable to their archbishop for how well they exercise their role through their deans or their vicars general. In fact, most (17) did not see themselves being line managed by anyone, including the archbishop (the survey described a “line manager” as someone with immediate responsibility for overseeing, supporting and appraising another person’s performance in some way).

Two of the seven parish priests who said they were line managed by the archbishop also said that this related only to their role as hospital chaplain. In fact, this is supposed to be the responsibility of their dean.

The same uneven pattern was evident in the responses of priests with other roles e.g. vicars episcopal.

These views appear to be at variance with Canon Law (cf. canons 475ff and 553ff) and with requirements of the Archbishop (cf. “Role of Vicar General” and “Responsibilities of Dean” issued around 1998). This may help to explain why some parish priests seem to have chosen not to establish PPCs or provide parish profiles, despite what appear to be clear directives from their Archbishop.

At the same time, almost all parish priests were clear that their appointment to this role gave them the authority to manage the affairs of the parish community entrusted to them (under the authority of their archbishop) and to hold others to account for their contribution to the pastoral care of their parish. These contrasting views give the impression that some parish priests are not being consistent in the way they think about issues of accountability. It is hard to believe that other priests don’t find this unsettling.

**(ii) Deans**

- We were able to learn little about the views of deans because of weaknesses in the survey design. The meetings of deans during spring 2004 concluded that the “middle management” role of deans needed to be strengthened. As against this, one dean said that he was line-managed by his Archbishop but did not consider that he had the authority, as part of his role as dean, to make decisions and require that they be carried out. He added that deans ought to be relating to their Archbishop and not to the “middle management of vicars general”. It is possible that other deans have similar views.

**iii) Vicars general**

- The two vicars general in the survey sample said they were accountable to their archbishop. One said he was line-managed by the archbishop and that his role included authority to manage; the other said that he was not and that his role did not include such authority. One believed that the other vicars general shared his views about his role; the other said he had no idea. The third vicar general said in another context that he was uncertain about his responsibilities as vicar general.

**6.6 The above findings suggest that priests have different and sometimes conflicting views about authority and accountability. The nub of the problem appears to be that, while all are clear that they are accountable to their Archbishop, many do not welcome the prospect of exercising it through their respective deans or vicars general.** It is difficult to see any practical benefit from maintaining this position, either for the priests or for their Archbishop, since it would be impossible for him to personally provide effective oversight and support to every member of his presbyterium of priests.

**6.7 On reflection, we accept that the survey failed to acknowledge sufficiently the vocational aspects of the priesthood and, despite its best efforts, used language that appeared to undervalue the priestly vocation.** Some priests were understandably confused and upset by this. As one put it, “ I don’t regard it (his role as parish priest) as a job. It is a vocation in service of God’s people”. Another described the use of language as “more geared to commercial organisations rather than the voluntary nature of the Church”. He pointed out that the church is not an organisation like any other and that the relationships that apply in the Church simply do not apply elsewhere, especially in commercial organisations.

We agree.

We also agree that the pursuit of holiness lies at the heart of:

- Everything that priests are called to be by virtue of their baptism; and
- Everything that they are called to do by virtue of their priestly ordination; and .

That this must have primacy in the archdiocese’s organisational structure e.g. by providing for priestly formation.

However, this does not change the fact that:

- Priests are called to carry out various roles as part of their priestly vocation;
- These roles are essential to the well-being of their community of faith; and that

- There need to be arrangements in place for ensuring that they are answerable for how well they carry out this aspect of their calling and have the supports they need to do so e.g. by providing training.

**6.8** We believe action is urgently needed to improve the structure. The responses from priests at the two recent assemblies of priests and “Now is the Favourable Time” seem to indicate a growing commitment to such a strategy. The challenge lies in working out how this can be achieved within the framework provided by Canon Law and in finding the knowledge, skills and courage to do it. It would seem premature to claim that the Church has nothing to learn from how other organisations tackle these difficult issues without first finding out how they go about it and the impact. For instance, voluntary organisations in Scotland dedicated to the care of others routinely describe the roles of their members, both paid staff and volunteers, in terms similar to those used in the survey.

**6.9** **Before offering a few suggestions as to why so many priests hold the views described in para. 6.5, we wish to stress that we do not think this is due to any fundamental lack of goodwill on the part of these priests.** We say this even though there may be times when they feel that too much reliance is placed on their goodwill. The following alternative explanations seem to offer a more realistic insight:

- Those who hold the views described in para. 6.5 are dedicated, hardworking priests. They are under pressure to take on more responsibilities and to change their approach to their pastoral ministry due to the reducing number of priests. During all this time, they have had to cope with a lack of clarity about what is expected of them and inadequate arrangements for their personal, spiritual and professional support. They can therefore be forgiven for feeling overwhelmed, undervalued, and frustrated at the failure to address their concerns. Their experience of management has not been a positive one. It is therefore easy to see how they might feel sceptical about the chances of improvement. It might also help to explain why they sometimes convey the impression that they are being un-cooperative and unwilling to change. The responses of some priests to “Now is the Favourable Time” suggest that they continue to feel this way.
- It may be that some priests do not recognise the connection between weak management practice and weaknesses in the management structure. This could result in some priests opposing the very remedy that offers the best chance of overcoming current weaknesses in management practice.
- Many priests are uneasy about the relevance of approaches to management that have proved helpful in other organisations. This might be because they are unfamiliar with modern thinking about how organisations can best manage their affairs to achieve success. Perhaps, they have little direct experience of the benefits of good management and, therefore, the scope for adapting good practice to the service of the pastoral ministry. Very few priests have had training in management. We could find few examples where the knowledge and expertise acquired through such training has been used to the benefit of the whole priestly community.

## Views about managing

**6.10** The reservations that parish priests have about being managed seem to be mirrored by a reluctance to manage on the part of vicars general and, probably, some deans. We do not find this surprising. As we understand the current structure, some parish priests also have management responsibilities in their role as deans and vicars general. They must find this extremely difficult since they don't have clear descriptions of their different roles and the relationship between them; and don't have sufficient training in the skills needed to carry them out. We think that some of these priests may well have doubts about:

- Their authority to make management decisions;
- The willingness of others to acknowledge their authority and support them when they make such decisions;
- Their competence to carry out their role; or
- Any combination of these.

**6.11** We believe this may well be the case. If so, it helps explain why strengthening the management role of deans has proved so difficult. It may also be that the delay in resolving this problem has encouraged the view that, since the Archbishop "has overall responsibility in all things temporal and spiritual" any decisions worth making cannot be made without reference to him. Another factor may be that these longstanding structural weaknesses have led to an over-reliance amongst priests on their special relationship with their Archbishop as their preferred way of dealing with the harmful consequences of these weaknesses.

Whatever the reasons, it is clear that more and more responsibility for day-to-day management decisions is falling on the shoulders of the Archbishop. While this has the benefit of giving him more frequent contact with his clergy and people and more opportunity to respond to their personal and pastoral concerns, it also:

- Increases the risk of reactive and inconsistent decision making; as a response to immediate pressures and sometimes bypassing established policies and procedures;
- Reduces the time available for dealing with his responsibilities for governance and his external responsibilities as a member of the community of bishops, as Cardinal and as the Church's representative in civil society.

We think this has been happening and has put him in an impossible position. This is because there is no way he can routinely carry the full weight of both governing the archdiocese and managing the implementation of archdiocesan policy. This is more likely to damage his health than provide the remedies, despite his best efforts. That is now changing.

**6.12** The Archbishop has just laid the foundations for breaking out of this vicious circle in "Now is the Favourable Time" by setting out an enhanced management role for deans. He has also begun to build on these foundations by focusing on the role of the vicar general and the rest of the structure at diocesan level. We believe that these steps lead logically to the creation of a senior management team that will help him to support the work of the deans, assist him directly with the responsibilities of governance, and create an overall structure that is fit for the purpose of carrying out Christ's mission in the archdiocese (see chapter 7, section 3).

**6.13** There appears to be a tendency for documents setting out archdiocesan policy and guidance to shy away from distinguishing clearly between direction and discretion. Words like "ask", "request" "reflect" are used when the intention is clearly prescriptive. For example, the status of the PPC guidance document issued in March 2005 was described in the APC minutes of 5 March 2005 as "more descriptive than prescriptive" and issued "for reflection" when the content clearly implied that some of it was prescriptive and some of it was guidance about good practice. The draft document entitled "Called to Holiness" presents similar difficulties. While its stated intention is to provide a "structured plan for Formation", it requires nothing of anybody, limiting itself to proposing a programme of action as a guide – a model of practice that everyone is invited to sign up to and apply to their own circumstances. Experience suggests that, at best, this will produce an uneven response ranging from very little to quite a lot. It is not helpful to those for whom these documents are written to leave any room for doubt about what is expected of them. It is more likely to confuse than stimulate appropriate action.

### **Conclusions and recommendations**

**6.14** The Group concluded that urgent action was needed, not just to clarify these key roles within the archdiocesan structure, but equally importantly, to motivate and empower priests to fulfil their roles and responsibilities to the best of their ability. This requires action capable of persuading them that there are genuine benefits for them and the people they serve from doing things differently: particularly by committing themselves to the discipline of being genuinely accountable for their ministry.

**6.15.** This action needs to start by finding a language that enables the clergy to appreciate the importance of having a structure for carrying out their ministry that values both the vocational and organisational aspects of the church's life. The next step is to develop a structure that reflects this relationship accurately but is expressed in language that is empowering. There is no need to use words like "line management" or appraisal". The essential requirement is that the description of each role:

- Makes clear that the priest concerned has the authority to get on with carrying out his responsibilities;
- States explicitly the person to whom he is immediately answerable for the way he carries out his ministry; and.
- Makes clear what the responsibility invested in any role to manage the pastoral ministry of another priest means in practice. This might be done by meeting regularly to review what is happening; insisting, if necessary, on compliance with diocesan policy; exploring ways of enhancing the spiritual lives of his people; reflecting on his personal, material, professional and spiritual needs and concerns; considering how these can best be met; and deciding action to address them.

**6.16** The benefits of adopting such an approach should then become obvious. They might include:

- The opportunity to participate in the proposed review of their roles; particularly with regard to the key duties flowing from their responsibilities;

- The knowledge that they have clear authority to get on with doing what was asked of them and respond to local needs within a clear framework of diocesan policy, guidance and planning priorities;
- Access to the personal, spiritual and professional supports they need to enrich their spiritual lives and exercise their roles to their full capacity;
- Priority in diocesan resource planning to pastoral needs of local parish communities;
- Scope for innovation, creativity and flexibility
- The advantages of transparency about their own and other people's roles and the knowledge that everyone is singing from the same hymn sheet
- Greater cohesion, consistency and shared sense of direction within the community of priests.

**6.17 We recommend as follows:**

- 1. Every priestly appointment must include a clear explanation of the role to which they are appointed and that of the priest to whom they are directly answerable i.e. dean, vicar episcopal, vicar general or Archbishop.**
- 2. Every official document that requires action, especially one that carries the signature of the Archbishop, should distinguish clearly between what is prescriptive and is discretionary.** This means distinguishing clearly between what people are being required to do and how much scope they have for reflecting on what is being said and applying this to their particular circumstances. This can only increase transparency and release people to carry out their responsibilities in the clear knowledge of what is expected of them, including the scope for creativity and initiative.
- 3. Consideration should be given to setting up a series of workshops in the near future for the community of priests to explore what the diocese can learn from best practice in organisational management within the diocese, elsewhere in the Church and in civil society.** We suggest that a project Planning Team be set up for that purpose, with membership drawn from priests who have already achieved qualifications in organisational management and members of the laity with relevant experience. We further suggest that this exercise should have the benefit of an external facilitator with expertise in this area. We think there would be merit in starting these workshops as soon as the new structure is finalised and written descriptions are available for the roles of parish priest, dean, vicar general and vicar episcopal.

**Section Two – Outward Accountability**

**6.18 One characteristic of a healthy organisation is that it demonstrates commitment not just to upward accountability but, also, to outward accountability.** This kind of accountability is present when members of the organisation:

- Recognise that they are accountable to their peers, collaborators and supporters, especially to those they serve: and
- Act accordingly.

It is rooted in the interconnection between people's roles and the fact that they depend on each other to fulfil their own responsibilities properly and thereby realise the mission of the organisation. It expresses itself through effective communication, consultation and collaborative practice.

It is part of the purpose of the structure to embody and promote this form of accountability through the way it describes people's roles and the systems and procedures set down for the exercise of these roles.

**6.19 Whatever the potential benefits of a hierarchical structure in terms of tackling in-efficiencies, inconsistent practice, self-interest and variable quality, it also carries the risk of creating a blame culture and weakening morale. Where outward accountability is present, it reduces reliance on hierarchical solutions and its associated risks through its emphasis of community of interests, shared purpose, mutual obligation and mutual support. It also provides a powerful stimulus for change in response to changing needs and circumstances.**

**6.20 There is ample evidence to suggest that a strong culture of accountability amongst those responsible for the archdiocese's pastoral ministry, towards each other and towards those they serve, is crucial to the well being of the archdiocese as a community of faith.**

The archbishop sees "collaboration at every level of Church life being essential to the future of the Church" in his archdiocese. He also places the development of a shared ministry of priests and laity at the centre of this vision.

Almost every respondent to the survey considered that ongoing contact with other individuals and bodies was critical to fulfilling their own responsibilities properly. This extends not just to effective communication but also to collaborative practice – reliance on the assistance of others as well as working together on some joint task. It extends not just to those working in the pastoral ministry but also to the links between them and those working in the archdiocesan pastoral and administrative agencies.

**6.21** However, the archdiocese still has some way to go before it achieves an acceptable standard of practice. The following are just a sample of known shortcomings:

- The fact that so many of those contributing to the work of the diocese either have no written description of their role speaks for itself (cf. para. 5.18). These are the essential building blocks for effective communication, collaborative practice and the development of a culture of mutual obligation and mutual support in any organisation.
- The archdiocese is experiencing serious difficulties in developing PPCs, DPCs and the APC as the core expression of its collaborative approach to the pastoral ministry of its priests and people. These communication and collaborative problems are occurring both within these bodies and in their relationship with each other. They were recently highlighted in the responses to "Now is the Favourable Time".
- We also know that the diocesan support agencies were experiencing difficulties collaborating effectively with each other and with deaneries and parishes (see chapter 7, section 4 below)
- Almost all respondents to the survey said that they needed to maintain contact with numerous other individual post-holders and official bodies at every level in the structure. While many said they were at least "clear enough" about the



roles of these posts and bodies, a significant minority said they were not (about 30% of individual respondents, other than parish priests, said they were not clear enough about at least "some" of those they needed to work with). Some members of bodies specifically mentioned that difficulties they were experiencing in their working relationships with other bodies and individual post-holders stemmed from a lack of clarity about their roles. This makes for uncertainty, confusion and waste of time and risks people being less effective than they otherwise might be.

**6.22 Building a comprehensive framework of clear statements about the roles of everyone who contributes to the work of archdiocese, priests and laity, is the obvious first step in promoting a culture of outward accountability.** This

approach needs to be built into the design of people's roles.

**Another important step would be to establish a communication strategy aimed at keeping people informed about what is happening in the archdiocese, promoting collaboration and ensuring that everyone has the opportunity to contribute to shaping the life of the Church at parish, deanery and archdiocesan levels.** This should lead to a rolling programme of action to ensure that it happens. It should encompass the use of technologies such as CCTV, DVDs and the archdiocesan website, as well as the more traditional methods. There is likely to be a wealth of expertise amongst the laity that could be harnessed for this purpose. Some of the recommendations elsewhere in this report are intended to form part of such a communication plan. More work is needed.

We think that parish priests could make an enormous contribution to the development of a culture of outward accountability by modelling the culture in the way they go about their ministry, with special emphasis on the core objective of "Together in Hope" – the promotion of a shared ministry of priests and people at parish level.

**6.23 We therefore recommend that**

- 1. The APC commissions a draft communication strategy and action plan for consideration, refinement and submission to the archbishop for approval and implementation.**
- 2. Careful consideration be given when preparing role descriptions to:**
  - a) Those other individuals and bodies with whom the post-holder needs to maintain contact in order to fulfil his or her responsibilities properly; and**
  - b) How this can be best incorporated into the list of duties in this role.**
- 3. Consideration is given to the merits of organising a series of workshops for parish priests and their people to explore ways in which they might be able to assist him in the exercise of his accountability to them as their "Servant Leader".** These workshops might be organised as soon as the new structure of parish groupings is in place. We suggest that these workshops would benefit from an independent facilitator, who might be the Diocesan Training Officer recommended elsewhere in this report (see para.7.65) This approach might be extended in due course to considering practical ways in which members of the laity might assist him by sharing aspects of his ministry.

## CHAPTER 7: SPECIFIC ISSUES

### Section 1. The Trustees

**7.1** The Office of the Scottish Charity Regulator has indicated that the general duties of charity trustees set out in Part I, Chapter 9 of the “Charities and Trustee Investment (Scotland) Act” 2005”, covers all the functions normally associated with governance of registered charities. This includes providing over-all leadership, direction and oversight of the affairs of the charity as well as controlling its finances and safeguarding its assets. **The current diocesan structure does not appear to match this standard.**

**7.2** The Trustees annual report to the Inland Revenue (2004) and the latest edition of the “Red Book” appear to limit those Trustee responsibilities concerned with aspects of governance of the archdiocese to over-all control of its finances and safeguarding its assets. Of course, the Trustees may well see their governance role in much broader terms but we could find no clear evidence of this in official documents.

**7.3** The above documents make it clear that the Trustees also have delegated corporate responsibility for the administration of the diocese’s finances and assets (cf. The “Red Book”, page 2, last paragraph). This comes closer to describing the role of a Finance and General Purposes Committee than that of a Board of Trustees.

**7.4** We appreciate that, unlike other charitable bodies, the diocese is part of a larger hierarchical body and that, within this structure, the diocesan bishop has over-all executive authority for the management of its affairs. It is therefore perfectly entitled to combine governance and administrative responsibilities as part of the role of its Trustees. We also recognise that this arrangement probably contributed significantly to the quality of the policy and procedures set out in the newly revised “Red Book”. However, we are concerned about the capacity of this structure to promote good governance, especially when the scope of the role is limited to finance and property.

**7.5** The body charged with responsibility for the remaining functions of governance in the current structure is the APC. Unlike the Trustees, its role is purely advisory.

**7.6** This means that responsibility for advising the Archbishop on governance of the diocese lies with 2 distinct bodies that have little connection with each other. It helps a great deal that the Archbishop and the Senior Vicar General are members of both bodies. However, we do not think this is enough to achieve the kind of coherent, collaborative approach “at every level in the life of the Church”, including governance, that the Archbishop sees as “essential to the future life of the Church” (“Together in Hope”; Pastoral Letter of 24 November, 2002). We doubt whether, given that the Trustees only has a membership of three and no lay members, it is as well placed as it would like to be to achieve this purpose.

**7.7** This structure also leaves the diocese exposed to the risk of criticism by the Scottish Charity Regulator on the grounds that it lacks a well-integrated, cohesive approach to overall governance of its affairs. In this regard, it seems worth noting that

the Freedom of Information Act requires that the minutes and reports of the Trustees should be available on request and not just to those “who have a legitimate interest”.

**7.8 We therefore recommend a review of the present arrangements for governing the diocese’s affairs, with particular reference to the roles of the Trustees and the APC.** Although important, it is not essential to undertake this review straight away, since the archdiocese already has a lot more urgent work on its plate. We also think it right that the practice guidance set out in the new “Red Book” should have the chance to bed in.

**7.9 We understand that the Conference of Bishops is currently reviewing the role of diocesan trustees in the light of recent charity legislation. We therefore recommend that the archdiocese commits itself to completing this review within the next 3 years, in collaboration with any action being taken by the Conference of Bishops, and sets out detailed plans to that effect in the archdiocesan strategic plan currently in preparation.**

## **Section 2: The Archdiocesan Pastoral Council**

**7.10 It was decided very early in the development of the TinH programme that the APC would revise its structure and constitution so that “the laity, religious and priests, working with the Archbishop, will play a more central role ...” in the strategic planning for the diocese. (April 2003).**

**7.11 That review started but was not completed and those changes made to its structure were not discussed beforehand with other archdiocesan bodies.** This is a matter of serious concern, not least because the successful implementation of the collaborative approach to the development of the pastoral ministry envisaged by “Together in Hope”, is critically dependent on the effectiveness and, therefore, the credibility of the APC.

- ❖ The APC has not got a comprehensive, authorised statement of its responsibilities and duties.
- ❖ Some work has been done on the roles of its office bearers but this has not been completed.
- ❖ Some work has also been done on working arrangements e.g. collaboration with DPCs and PPCs; but this appears to have got lost.
- ❖ There are as yet no written policies and procedures to guide how it should go about its work, even though it helped to develop policy and practice guidance for Parish Pastoral councils.

**7.12 This sends out the wrong message about the importance attached to the APC’s role in the structure and undermines its capacity to do its job properly. It may also help to explain why:**

- The APC is not mentioned in the 2004 Trustees report as having a role in governance of the diocese, and is referred to in the 2005 Directory as an “organisation”, not as part of the diocesan structure;

- Few lay people appear to know about the APC, or have any appreciation of the importance that the Archbishop attaches to its strategic role; and
- Some priests question its value.

**7.13 Urgent action is required to remedy this situation and ensure that the APC is ready and able to fulfil its responsibilities when implementation of the Strategic plan begins; sometime in 2007.**

**7.14 We therefore recommend that the APC establishes a small working group to:**

- 1. Prepare a draft constitution, including a framework of policy and procedures for consultation with PPCs, DPCs and the Council of Priests prior to consideration by the full Council and ratification by the Archbishop;**
- 2. Arrange a training programme for APC members to assist implementation.**
- 3. Devise a plan for promulgating and promoting the role of the APC throughout the archdiocese ( incorporating planned action to open up an on-going dialogue between the APC and the rest of the archdiocese).**

### **Section 3: The Pastoral Steering Group**

**7.15** In April 2003, the Archbishop announced the establishment of the Pastoral Steering Group, the purpose of which was “to coordinate and oversee the implementation of the proposals and policies” of the “Together in Hope” initiative (Pastoral Letter, April, 2003). The PSG later defined its role as follows:

To help set up the structure to implement *Together in Hope*.

- 1) To have a consistency between the agenda of the Archdiocesan Pastoral Council and the Council of Priests.
- 2) To help make connections with regard to the pastoral life of the diocese.
- 3) To view the wider vision of the diocese and support processes that help reflection beyond *Together in Hope*.

It described itself as “the executive of the APC” and was described by the Archbishop as having responsibility to help him “make decisions”.

**7.15** Membership of the PSG comprises the Archbishop, the Chairs and Secretaries of the APC and the Council of Priests. The Pastoral Coordinator and the Pastoral Development Officer attend its meeting but it is not clear in what capacity.

**7.16** There was no formal consultation about the remit of the PSG prior to it being set up, either with the 2 bodies it seeks to represent or more widely in the archdiocese. Thereafter, very little information was provided about its responsibilities and main duties, or the nature of the authority invested in the different aspects of its role e.g. it gets no mention in the Directory. In all these circumstances, it is doubtful whether many people understand its place in the structure and there is a significant risk that some people will look on it with suspicion – a situation hardly conducive to fulfilling its remit successfully.

**7.17** Despite these weaknesses and the fact that it was seriously under resourced, **there is ample evidence from PSG minutes and elsewhere that this Group has contributed an enormous amount towards implementing the programme of action for taking forward the Together in Hope initiative as set out in the Archbishop's Pastoral letter of 24 November 2002.** It also contributed significantly towards the work of the APC and to taking forward its decisions and is rightly highly valued by the Archbishop. Up until now it has fulfilled a vital role in the structure. However, this has been achieved at a price.

**7.18** The role of the PSG properly describes the responsibilities of a senior management team. However, excluding the Archbishop, none of its members have senior management responsibilities in the archdiocese. We can only guess as to why how and why this happened. What is important is that it had the unintended harmful effect of masking serious weaknesses in that part of the archdiocesan structure concerned with the management of the pastoral ministry. Thankfully, the PSG filled this vacuum but, in doing so, unwittingly assumed responsibilities that properly belonged elsewhere; namely, with those who had management responsibilities at diocesan level for

- Carrying out the church's pastoral ministry in the archdiocese (vicars general and deans) and
- Providing administrative and pastoral support services (vicars Episcopal, various commissions, the pastoral development office, Finance, and Fabric and planning).

**7.19** These underlying weaknesses are now being exposed and addressed as part of the current consultancy project, of which this report is part. Action is already underway to remedy the situation. This is described in "Now is the Favourable Time" (see especially policy nos. 6, 7, 13 and 14 and appendix nos. 5, 6 and 10).

**7.20** We believe that, on the basis of what we have learned from the experience of the PSG, there is an overwhelming case for disbanding it and replacing it with an archdiocesan senior management team with responsibility for:

- Ensuring that the APC has the information and any other practical assistance it needs to fulfil its strategic planning function;
- Assisting the Archbishop with implementation of strategic planning decisions; and
- Monitoring and evaluating progress and reporting back to the APC as part of the over-all strategic planning process.

**7.21** We therefore recommend establishing a senior management team with the above remit to replace the PSG.

**7.22** We also recommend that:

- The criteria for membership of this team should be as set out in "Now is the Favourable Time", 2.2. No.14;
- It is chaired by the Archbishop;
- Is provided with proper secretarial support;
- It should have a name that accurately reflect its function e.g. "The Diocesan Pastoral Management and Support Team"; and

- **It should have a clear written remit and a handbook setting out the procedures that will guide its work. We suggest that these procedures include reference to the scope for inviting others to attend its meetings e.g. the Chair of the APC.**

**7.23** If adopted, the above arrangements will allow the APC and the Council of Priests to relinquish this extra burden and concentrate instead on improving their capacity to assist the Archbishop with the onerous task of governing the diocese in accordance with their distinct roles and perspectives.

- ❖ Mention is made earlier in this section about ways in which the APC can improve its performance.
- ❖ With regard to the Council of Priests, we recommend that it be invited to take the opportunity provided by the present review to:
  - Review its strengths and weaknesses as the consultative body representing the community of priests, taking account of the concerns expressed by the recent assemblies of priests; and
  - Explore with the Archbishop the scope for enhancing its contribution to governance of the diocese.

**7.24** **Members of the Council of Priests already attend APC meetings as members of the PSG. If the PSG is disbanded, we recommend that the Council of Priests be given a permanent place on the APC in its own right.** This will allow it to contribute to the work of the APC from the perspective of the community of priests, as well as working for decisions that serve the common good of the diocese.

#### **Section 4: Archdiocesan Pastoral Support Agencies**

**7.25** We are using the phrase “archdiocesan pastoral support services” to describe the network of 5 individual posts and 8 groups that contribute directly to the development of the archdiocese’s pastoral ministry – and who therefore need to work together and support each other’s efforts (they are identified in the organisational chart at APPENDIX III by the yellow boxes). The members of this network have distinct but complementary responsibilities and report directly but separately to the Archbishop.

**7.26** **From what we have learned about the structure of this network and how it operates, we believe that it is not well suited to its purpose and falls short of realising its full potential.** This is based on our view that this part of the archdiocesan structure is unclear, unduly elaborate, un-coordinated, poorly connected to the rest of the structure and extremely difficult to manage efficiently and effectively. For example:

- ❖ Not all the individual posts have a written description of their roles. Only some of the Groups have written constitutions, written descriptions of the roles of their office bearers, or written policies and procedures for carrying out their responsibilities and duties.

- ❖ It would appear that members of the network are left to manage their affairs in their own way; and that is what they do. They do things differently and there is little evidence of attempts to learn from each other or develop a shared view about what constitutes good practice in pastoral support activity. Most of these agencies have a small number of paid employees, usually part-time, who can become quite isolated.
- ❖ Some individuals and groups need to work with each other more than with others because they have similar roles and/or their roles complement and support each other e.g. vocations and priestly formation.
- ❖ There appears to be some over-lapping of activities and a lack of clarity about the boundaries of responsibility between certain groups e.g. whether responsibility for supporting children's liturgy should lie with liturgy or pastoral development.
- ❖ There is confusion in some groups about where responsibility lies, or should lie, for managing the work of that group, either in whole or in part e.g. managing the work of a commission or a member of staff.
- ❖ While all are clear about their responsibility to advise the Archbishop and confident in their authority to do so, some seem less sure about their responsibility to advise and assist those engaged in the pastoral ministry, less confident that they have the authority to do so and, occasionally, unsure that their efforts will be welcomed locally. There is evidence of poor take up of training and other assistance provided to assist local pastoral development.
- ❖ There is widespread, strong support for the kind of collaborative approach advocated by "Together in Hope" but this is not matched in practice.
  - There are no arrangements for coordinating their activities. Although most groups meet about 3/4 times a year under the auspices of the Pastoral Development Office, these meetings appear to lack any sense of purpose beyond simply sharing information. They are viewed as unsatisfactory and as leading nowhere by most of those who attend them.
  - With the exception of the PDO, none of the members of the network have any formal contact with the Archdiocesan Pastoral Council, either individually or collectively. This makes it hard for them to contribute significantly to strategic planning in this crucial area of the pastoral ministry. The PSG concluded in 2004 that something needed to be done to improve matters but nothing has come of it until now.
  - The same situation applies to their contact with the vicars general.
  - Contact with deaneries and parishes varies and appears in some cases to lack clear purpose. This will be a crucial aspect of their work once the deaneries become the main focus at local level for planning and implementing pastoral action within the proposed diocesan strategic plan. In this context, the less elaborate this network is, the more efficient and effective the communication between it and the deaneries is likely to be.

- ❖ It seems unfair and unwise to arrange matters so that the Archbishop has to directly manage each of these individuals and groups (a total of 15) and coordinate their overall contribution to planning and implementing strategic policy. This is a very demanding brief, which is bound to take a lot of his time away from overall governance and pastoral care of his priests. That apart, it would make a lot more sense under the new structural arrangements for the Archbishop to allocate these responsibilities to the Vicar General so that he can concentrate more on developing a strong senior management team (see section 3 above).
- ❖ Vicars Episcopal hold 2 of the individual posts and lead 5 of the groups. Although the demands on their time and energy vary, they are not inconsiderable and need to be set against increasing demands of their pastoral responsibilities in their parish communities. While there are clear benefits from appointing a Vicar Episcopal to head up some of these groups e.g. liturgy, the rationale is less clear for others e.g. Social Care. An approach based on the knowledge and skills required by these posts might well reveal scope for savings on priestly resources, as was done with religious education.

**7.27 We wish to make it absolutely clear that the above comments are about the structure of this network and about the way it operates. They are not intended in any way as a criticism of the dedication and hard work of those responsible for this area of pastoral activity, nor to detract in any way from the quality of their work.** Our purpose is purely to open the way to structural improvements that will clarify and highlight the valuable work that these people do and empower them to play their full part in developing a collaborative ministry of priests and laity.

**7.28 We therefore recommend a review of the way these services are organised and managed, as a matter of urgency. We further recommend that the main focus of this review should be on:**

- ❖ **Simplifying the structure;**
- ❖ **Coordinating the activities of its members; and**
- ❖ **Integrating it into the over-all structure of the diocese – at strategic planning, senior management and local levels.**

**7.29 We believe that the alternative model for organising the work of these agencies described below and summarised in Appendix VI has much to commend it and offer it as a contribution to that review.**

**7.30** The following are some of the key features of the proposed model as we currently envisage it:

- ❖ The structure would be made up of 2 groupings of related functions, each with its own Director. Their roles would involve oversight and support of the work in their own cluster and shared responsibility for coordinating the work of the network, both internally and externally, to the benefit of the pastoral ministry as a whole.
- ❖ They would report to the Vicar General.



- ❖ The roles and functions of the individuals and groups in each of these clusters would remain much as they are at present. The difference would lie in the way they work with others.
- ❖ The present functions of the PDO would be subsumed within the role of the Mission and Ministry Office.
- ❖ The span of responsibility and workload of the Mission and Ministry Office would be sufficient to justify the appointment of a full time Director. That Director would probably be a layperson.
- ❖ The Director of Priests and Religious would be a Vicar Episcopal. His role would also include responsibility for priestly formation. However, this would not be a full-time appointment because this priest would inevitably have other pastoral responsibilities and the volume of work would probably not warrant it.
- ❖ Both Directors would be members of the Archbishop's senior management team, along with the Vicar General.
- ❖ Both Directors would be ex officio members of the APC and other members of their offices would attend APC meetings as required.

**7.31** The proposed model takes account of the need to make the most of scarce resources. We are aware that the new Vicar General will continue to have responsibility for running a parish and that the additional demands of overseeing the work of the pastoral support services and tying these into the work of the ministry as a whole must therefore be kept to the minimum. This will only be achieved if the two directors have the knowledge, skills and leadership qualities needed to make a success of these roles, or are provided with the necessary training.

**7.32** We suggest that, if this model is adopted, the 1<sup>st</sup> priority for the Director of Priests and Religious should be an audit of the spiritual, personal and professional needs of the community of priests and the options for addressing them. With this in mind, we suggest that the establishment of a group of priests to assist with the care of their brother priests is delayed until after the Director has completed this exercise.

### **7.33 POTENTIAL BENEFITS OF THE PROPOSED MODEL**

- The needs of parish communities will be the central concern driving all pastoral activity, including pastoral support.
- Deaneries will be better placed to plan for and meet the pastoral needs of the parish communities they serve.
- Communication, cooperation and collaboration will increase at every level in the new structure and between each level, resulting in a stronger sense of common purpose.
- The deaneries, parishes and APC will get a better pastoral support service.
- The archdiocese will have a stronger, more balanced senior management team
- The proposed changes will involve minimum disruption of the existing network structure and lead to a more efficient use of available resources.
- Changes to the membership of the APC will enhance its effectiveness as a strategic planning body.

- The recruitment, formation and ongoing care and support of priests will have their rightful place at the heart of the archdiocese's concerns for the future of its ministry.
- Over time, the new structure will release some of the archdiocese's most experienced priests from administrative responsibilities of heading up departments to devote more of their time to their Parishes and Deaneries.
- Those who carry out these responsibilities will have a greater sense of their value to the life of the diocesan community, of shared endeavour and mutual support and of personal satisfaction in their roles.

### **7.34 CHALLENGES**

- Finding the right people for the 2 director posts
- Finding the additional funds for the salary of the Director of Mission and Ministry
- Identifying and meeting training needs;
- Persuading members of the network of the benefits of change;
- Not asking people to take on too much too soon
- Overcoming resistance to change;
- Securing active acceptance of the fundamental importance of continuing Faith Formation for all
- Successful implementation of other planned changes to the structure;
- Implementing the new local and archdiocesan planning systems successfully.
- Empowering the DPCs to take on their enhanced responsibilities with the new structure

## **Section 5: Deans and Deanery Pastoral Councils**

### **A. Deans**

**7.35 It has long been recognised that one of the major weaknesses in the present structure is the lack of strong middle management, even though Canon Law clearly provides for it in the roles of the vicar forane and area vicar episcopal. This weakness seriously undermined the contribution that deans could and should have made towards carrying forward the TinH agenda.** This was not due to a lack of good will, a lack of ideas, or of effort, especially on the part of the deans themselves. They were largely responsible for the issue being tabled at the APC meeting on 4 May 2004. At that meeting the Archbishop agreed an action plan to develop the role "in line with Canon Law and our diocesan developments".

**7.36** Sadly, very little progress was made with this crucial piece of work over the next 12 months. Fr. Barr submitted a paper for discussion at the Dean's meeting in December 04, when it was agreed to set up a sub-committee to prepare a draft role description for consideration by the deans. This sub-committee did meet but the work seemed to lose momentum after that.

**7.37** We suspect that among the reasons for this lack of progress was hesitancy about introducing concepts of management in general use in civil society, including voluntary social care organisations, into the “administration” of the pastoral ministry. This is despite the hierarchical nature of the Church and the provisions of Canon Law relating to administrative responsibility within dioceses. Exactly the same issues apply to the role of vicars general. **It was therefore always likely that any attempt to strengthen the middle management responsibilities of deans would fail unless accompanied by action to clarify the “administrative” responsibilities of vicars general.**

**7.38** Happily that is precisely what the Archbishop did (cf. “Now is the Favourable Time”, Chapter 2, 2.1, 6 and 7; and Appendix, nos. 5 and 6). However, the archdiocese must not forget the cost of taking so long in terms of the wasted effort, frustration, disappointment, cynicism and loss of morale that it may have caused, if only as a reminder of what could happen if it does not learn and apply the lessons from past experience.

**7.39** Like most others, we considered that the office of vicar forane as described in Canons 553-555 was sufficiently robust to support the new role for deans envisaged in “Now is the Favourable Time”: even though it tended to describe it more in terms of an enabling than a management role. **Having read Fr. Stephen Robson’s critique of these proposals “from a canonico-legal perspective”, we think he makes a very strong case for giving this role the faculties of an Area Vicar Episcopal.** Apart from the inherent benefits of an office that has clear “executive” powers, it is flexible, dovetails with the role of Vicar General and provides the opportunity to make a clean break with the past – including any expectation that deans are appointed primarily to represent the interests of the priests in his deanery

**7.40** We therefore favour investing this post with the authority of a Vicar Episcopal and entitling it “Area Vicar for (followed by the name of the area)” e.g. Area Vicar for West Lothian.

## **B. Deanery Pastoral Councils**

**7.41** At that same meeting on 4 May 2004, the Archbishop agreed to a proposal from the deans, endorsed by the APC, that “Deanery Pastoral Councils should, in time, and in line with the remit of the APC, (“investigate, ponder, recommend”) be given responsibility for the Deanery Area business rather than the priests deanery meeting. The latter should continue to exist and promote personal support and pastoral exchange...”

This decision makes it very clear that the DPC, like the PPC and the APC remains a purely consultative body.

**7.42** It was pointed out at the time that this decision had major implications for the way deans and parish priests carry out their roles (neither of which are yet clear) and for the training of the laity for ministry. It would appear that the intention was to discuss how it would be progressed at a future APC meeting but no firm timetable was set. It was later discussed at the meeting of the Council of Priests on 27 November 04 and that of the deans on 1 December 04. Both these meetings exposed

wide differences of view about the purpose of the DPC. It is hard to escape the conclusion that some of those present at the Deans meeting did not like the decision made on 4 May 04 and wanted it “re-examined”. The minutes of the deans meeting do not record the outcome of their discussion, other than to say that this “was an ongoing task”. No decision was made about what to do next. While it may be true that some deans and other priests had good cause to feel that they had not been sufficiently consulted prior to the decision of 4 May 04, this is hardly a sufficient explanation for the degree of resistance.

**7.43** The importance of the Archbishop’s decision lay in the fact that it made the DPC, as a joint forum of priests and laity, the principle source of advice on pastoral matters to the dean and, under his leadership, of advice to the APC about the pastoral concerns of the deanery. This mirrors the roles of the PPCs and the APC and strengthens the links between them. It was therefore a crucial step forward in the process of developing a shared ministry of priests and laity with “collaboration at every level of the Church being essential to the future of the Church”, which lies at the core of the TinH initiative. It sits well with the guidance issued in May 2005 about the role of DPCs and is essential to the success of the Archbishop’s recent plans for developing the role of pastoral councils (“Now is the Favourable Time”, Chapter 2, para. 2.2, No 1)

**7.44** We see no advantage in going back on the decision made at the APC meeting on 4 May 2004. On the contrary, it needs to be implemented sooner rather than later. We therefore recommend that the Archbishop ask the APC to prepare a timetable for implementing it; in consultation with the deans and DPCs; and that the resulting action plan to achieve it is included in the diocesan strategic plan.

## **Section 6: Resource Planning**

**7.46** With hindsight, most of those responsible for planning the implementation of the “Together in Hope” initiative would agree that not enough attention was paid to the resource implications of such a challenging agenda. This probably applied as much to human resources as to finance. Combined with a weak management structure, this was bound to produce problems further down the road.

**7.47** The PSG had difficulty from the outset with the volume of work involved in taking forward the 12-point action programme. This intensified later on with the added requirements of servicing the work of the APC and assisting the Archbishop in other unspecified ways. With the best will in the world, things were bound to go wrong. We should not therefore be surprised that, as a result, some policy decisions were not implemented or only partially implemented; and others delayed long beyond the planning deadlines e.g. the diocesan pastoral support group, the establishment of PPCs and DPCs, the AFFC strategic planning exercise, the work of the role of deans, amongst others.

**7.48** We also found that a common feature of day-to-day decision making was the number of times the minutes of meetings of various bodies recorded a decision to do

something without indicating whether the workload implications had been addressed, much less what priority this decision should have against other demands on a person's time. In addition, such records frequently failed to indicate who was being required to do what, by what means and to what deadlines. Matters were not helped by the fact that quite a few of the individual post-holders and official bodies did not have written descriptions of their responsibilities and duties e.g. the required number of working hours per week; or the frequency and duration of meetings. **We believe that the policy decisions set out in "Now is the Favourable Time" to strengthen the structure will go a long way to remedying these weaknesses. But they will need to be accompanied by a range of personnel development initiatives e.g. staff manuals, handbooks for members of official bodies and training programmes. This is a Human Resource Management responsibility. At present, this role is held by the Vice Chancellor and he maintains a "Staff Handbook" for Gillis Centre personnel and provides them with training opportunities (see also paras. 7.56 -7).**

**7.49** The remit of the Adult Faith Formation Committee established to draft a strategic plan for consideration by the APC included "gathering and recommending resources for delivery of the plan", assessing the financial implications and producing a "plan to deal with" them. This plan, entitled "Called to Holiness", was due for implementation from September 2005 but has still to be considered by the APC and is not yet supported by cost estimates. Even so, it appears to assume that a Director of Formation will be appointed within 1 year from commencement of the plan and makes passing reference to activities, events and materials with clear cost implications.

**7.50** One would normally expect such matters to be sorted out before the draft plan is submitted to the APC. At the same time, it does not seem reasonable to expect the AFFC to do this without assistance from people with financial management expertise. This expertise is located within the Archdiocesan Finance Committee (AFC) but, as far as we know, has not yet been accessed by the AFFC. As things stand, the APC can't be expected to fill this gap because it operates without any formal, ongoing links with the AFC. This is a recipe for wasted effort, frustration and even further slippage in the planning timetable.

**7.51** The AFC contributed to taking forward the "Together in Hope" agenda by earmarking funding for lay formation initiatives and setting out clear eligibility criteria and associated procedures for securing diocesan funding – stressing the importance of financial discipline, early planning, accurate costing and setting priorities. It has continued this work of improving standards of financial management in the diocese through its contribution to the "Red Book" (October 2005) and its recently issued "Finance Procedures and Guidelines" (January 2006) and support services. **However, we do not believe that AFC is contributing as much as it could to the development of an integrated framework of financial policy and procedures directed at assisting pastoral planning at diocesan, deanery and parish levels.**

**7.52** This may be due to a lack of clarity about the scope of its role e.g. the "Red Book" makes no mention of any responsibility it might have for assisting the work of the APC. **For the removal of doubt, we therefore recommend that the role of the**

**AFC be reviewed and, if this is not clearly stated, broadened to include responsibility for ongoing assistance to the APC with the assessment of the financial resource implications of strategic planning options and how they might be addressed.**

**7.53** We also recommend that the AFC be requested to prepare a draft framework of financial policy and guidance to assist pastoral planning at every level in the diocesan structure, in consultation with the APC and other pastoral councils. This material could then be submitted to the Trustees for consideration and final approval by the Archbishop. We think this approach can only serve to demonstrate that finance is at the service of the pastoral ministry, build on the excellent work already done on financial management by the AFC and empower the clergy and laity to work together more effectively.

**7.54** On a more modest scale, we recommend that consideration be given to amending the Parish Financial Return to include a reference to training as a legitimate item of parish expenditure. This could be achieved by amending No.69 to read “Formation and Training” or giving Training its own line.

7.55 We understand that the commitment to a continuing “audit and pastoral review” of properties and buildings is being implemented, although we did not have time to enquire about the details. However, we did learn that those involved in strategic pastoral planning are not well informed about what is happening, or its implications for their work. There were also suggestions from the survey and elsewhere that the role of the Fabric and Planning Committee (F&PC) was not as well understood as it needed to be by parishes and other diocesan bodies. Certainly, it has no ongoing working links with the APC.

We mention this here for 2 reasons:

- ❖ To re-enforce the importance attached by “Together in Hope” to systematic auditing of local needs as an exercise in its own right; and
- ❖ To stress the potential benefits to the pastoral ministry from a strategic approach to asset management.

**7.56** We think that there could be considerable benefit in the APC and the F&PC adopting a collaborative approach to these areas of activity, especially at a time when property needs are changing and the diocese is increasingly being faced with the painful reality of having to close/mothball church property, or turn it to another use. There is also the fact that, with the reducing number of priests, the future of the pastoral ministry in the medium term is becoming more dependent on the contribution of the laity, including paid posts. This is becoming more difficult to achieve because these appointments are a major drain on diocesan funds, while diocesan income from parishes is decreasing. This makes it very important to explore any alternative funding options e.g. from a differential approach to the use of residential accommodation for priests. In this regard, the CPT should be aware that the Leasing Committee is already making a significant contribution in this area. Its leasing strategy is not only saving on the costs of leaving Church properties empty but also generating an annual income in excess of £260k: with the potential to increase this much further. The APC might find it useful to know the rules that apply to the ownership and use of these kinds of income and, in particular, the scope for using it to support strategic planning objectives e.g. training.

**7.57 We therefore recommend that the APC invite the F&PC to discuss the scope for coordinating future planning for the pastoral ministry and property management.**

**Section 7: Training and Development**

**7.58 A key measure of whether an organisation has a structure that is fit for purpose, is whether those who hold responsibilities with the organisation have the knowledge and skills they need to carry out these responsibilities** competently and, if not, are given the opportunity to acquire and develop them. This requires, amongst other things, comprehensive training and development policies and arrangements for delivering them efficiently and effectively. Failure to meet this standard can have dire consequences:

- It underuses the organisation's most precious resource – its people;
- It undermines people's sense of personal and professional worth; and
- It weakens the organisations capacity to carry out its mission.

**7.59 The archdiocese currently falls short of this standard.** Some progress is being made. For example, the Vice Chancellor's Office has recently set up a training budget for Gillis Centre personnel, in consultation with the AFC and we understand that some diocesan bodies have training budgets for their own staff as well as the provision of training courses for other diocesan personnel. However, the archdiocese does not yet have training policies and procedures that address the training needs of its priests and laity. In a word, it does not yet have a diocesan training strategy and associated training budgeting arrangements.

**7.60** The above weaknesses continue to hamper implementation of the "Together in Hope" initiative. The harmful consequences can be seen, for example, in the difficulties that priests continue to experience in adapting to the challenges of developing a collaborative pastoral ministry of priest and people (cf. minutes of the PSG meeting on 8 May 2003).

**7.61 The current consultation exercise provides an ideal opportunity to remedy this state of affairs.** The new diocesan structure, and the enhanced "management" responsibilities of deans within it, should provide some of the essential building blocks for that purpose.

**7.62** Despite the above weaknesses, it must be said that a lot of good work has gone into providing training opportunities for both priests and laity over the last few years. This has come mainly from the diocesan pastoral support agencies, notably the Pastoral Development Office, The Social Care Commission and The Pastoral Support Service. The difficulty is that these initiatives tend to be one-off events/programmes, dependent of the initiative of particular individuals/groups and not tied into an over-all training plan for the diocese. There have also been occasions where the intended beneficiaries have not taken full advantage of the opportunities on offer e.g. the poor take-up of PPC training by parish priests and the training offered on "Funeral Rites".

**7.63** The APC clearly recognized the importance of priestly training for the success of "Together in Hope" from the beginning and set up a working group to consider the

matter, towards the end of 2002. This group produced a draft training and development policy and planning framework that included the following recommendations:

- Every priest to have a commitment to training and professional development
- Individual/deanery training/development plans to be agreed once a year with the dean.
- Plans should take account of individual, deanery and diocesan priorities.
- After full consultation with the Archbishop, an annual programme of training activities – Deanery and Archdiocesan – be drawn up.
- A central training/development group to be established to
  - Share practice/issues
  - Oversee arrangements
  - Oversee budget
  - Evaluate

**7.64** This paper was due for discussion at the APC meeting in February 2003 but we could find no record that this discussion took place, either then or later. It did lead to some training initiatives but did not achieve its main purpose - “a Diocesan Plan, giving Diocesan Priorities”. Although circumstances have changed since then, this paper still has much to offer the debate about the place of training in the future development of the archdiocesan community of faith and the decisions about how it should be organised.

**7.65** Finding the right structure may not prove that simple. It will need to address such issues as:

- Whether to follow the normal practice of locating responsibility for Training within Human Resource Management (alongside related responsibilities such as recruitment, selection, induction, ongoing personal and professional support and appraisal); and, if not, how these activities are going to be coordinated?

At present, the Vice Chancellor is the only person in the archdiocese with HRM responsibilities. These only extend directly to lay paid employees working in the Gillis Centre: although he also acts as a reference point for information and advice about HRM matters for the whole archdiocese. He sees merit in extending the HRM remit of the Vice Chancellor to include management oversight of a specialist training unit for the whole diocese – priests and laity. He also thinks it might be feasible for him to take on this added responsibility within his current 3 day working week, provided he had access to sufficient administrative support (he has none at present). He is very clear that he does not have professional skills to take on the role of diocesan “Training Officer”.

The above approach would sit well with other developments currently taking place elsewhere in the structure. For example, the archdiocese seems to be moving towards including more and more HRM responsibilities within the role of the Director of Priests. It would not take much to subsume the full range of HRM functions in relation to priests within this remit, while extending it to include religious. In this model, the Director of Priests and Religious would continue to have access to general HRM information and advice, along with access to training provision, from the Vice Chancellor’s Office.



- Whether to appoint a single person with responsibility for providing/securing training opportunities for the whole diocese, priests and laity, or to make separate arrangements for priestly and lay training?

While the latter arrangement might sit well with the proposed role of Director of Priests and Religious, it is hardly the most efficient use of training capacity and doesn't allow for the fact that priests and laity may often have common training needs. It also raises questions about the best use of scarce priestly resources and whether there are priests with the necessary training expertise and experience to do the job.

- What kind of arrangements is best suited to the development of an integrated approach to "Formation" and "Training"?

The documentation relating to this issue appears to suggest that these are 2 distinct but complementary concepts, both of which are crucial to living the mission of the Church in the diocese (cf "Called to Holiness" and papers relating to the remit of the Pastoral Development Office). But it is difficult to find a clear explanation of the meaning of these 2 concepts and how they relate to each other. This makes it difficult to decide where to locate responsibility for training provision within the structure. We consider this to be a crucial issue and recommend action to clarify these concepts before deciding how best to organise training provision.

- Who should be responsible for what in relation to training?

We consider it very important for the new arrangements to distinguish clearly between:

- a) Day-to-day responsibility for identifying training needs and planning to meet them and
- b) Responsibility for helping to develop realistic training plans and ensuring that training needs based on planning decisions are met, either directly or through access to other training expertise.

We support the view that, generally speaking, those who have immediate responsibility for making sure that other people carry out their responsibilities competently, and supporting them in their efforts to do so, are thereby responsible for a) above e.g. line managers; while training personnel are responsible for b).

**7.66** We do not have a firm view about how Training provision should be organised, except to say that it needs to be organised as part of a comprehensive, coordinated approach to HRM for the whole archdiocese. Bearing in mind our earlier recommendations with regard to the establishment of a Senior Management Team, we are inclined to favour a single "Training Officer" for the whole diocese. This person would need to be thoroughly familiar with current models of adult learning and have expertise in organising and delivering adult learning programmes. We favour locating this post within the Vice Chancellor's Office, along with its other HRM responsibilities. This would make it clear that Training is a resource for the whole archdiocese; clergy and laity; separately and together, as needs require. We envisage:

- Management oversight being provided by the Vice Chancellor;
- The proposed Director of Priests and Religious having HRM responsibility for the archdiocese's community of priests; but with

- The Vice Chancellor Office operating as the central resource for information and advice on HRM matters and training provision for the whole archdiocese.

In these circumstances, we think it would be appropriate for the Vice Chancellor to be a full member of the Senior Management Team.

**7.67 We recommend the immediate establishment of a small working group to consider how best to organise training for all its personnel – clerical and lay; paid and unpaid – taking account of the above questions; and make recommendations for consideration by the APC and decision by the Archbishop.**

**7.68** Numerous suggestions have been made over the years for inclusion in any diocesan training plan, notably the list put forward by the deans in February 2003. These suggestions include:

Leadership skills	Collaborative skills	Communication skills
Team working skills	Networking skills	Planning skills
Time management skills	Administration skills	Budgeting skills
Property management	Formation methodology	Bench-marking
Induction programmes	Spiritual Direction	
Skills in preparing for, chairing, and recording meetings		
Presiding over Pastoral Council meetings		
Exercises in spiritual development – retreats, scripture readings, prayer accompaniment		
Courses in faith formation for parents		

Clearly, many value the training opportunities already being provided and want to see them continuing e.g. training of Eucharistic Ministers and Mass Readers; Leading Prayer; Leading Funerals; and Bereavement Counselling.

Another interesting example is the current series of training sessions for Parish Administrators organised by the Pastoral Development Office jointly with the Vice Chancellor's Office.

The current consultancy project has already generated a number of other suggestions from respondents to the consultation document "Now is the Favourable Time" and is bound to generate more.

Felim O'Leary  
Consultant  
19 November 06

## APPENDIX I

### Capacity Building Consultancy Project Working Group set up to review the Archdiocese's Organisational Structure

#### List of Members

Felim O'Leary (Consultant): Chair  
 John Lindsay (Pastoral Development Officer): Secretary  
 Mr. Robert Belderbos (Vice-Chancellor)  
 Mrs. Anthea Donaghue (Centre Manager, Gillis Centre)  
 Father Michael Fallon (Dean, Holy Rood)  
 Mr. Danny Friel (Chair, Archdiocesan Pastoral Council)  
 Mr. Anthony Gavin (Archdiocesan Representative on Fife Council Education Committee.)  
 Very Rev. Edward Hone C.Ss.R. (Episcopal Vicar for Religious)  
 Right Rev. Mgr. Philip Kerr (Vicar General)  
 Mrs Maureen McEvoy (Social Care Coordinator)

**Note:** Right Rev. Mgr. Anthony L. Duffy (Archdiocesan Treasurer) agreed to join the group but was unable to attend any of its meetings.

## APPENDIX II

### Excerpt from "Setting the Scene" – A Presentation to 1<sup>st</sup> meeting of the workingGroup by the Consultant.

#### Some Key Concepts

##### Organisation

All agree that the church is about a way of life and that the Archdiocese is first and foremost a "Community of Faith".

But the Archdiocese is also an organisation because it needs to organise the way it lives in a businesslike and professional manner, if it is to grow and prosper as Jesus intended, with the God given gifts at its disposal.

- It exists for a God given purpose – its MISSION
- It knows what it needs to do to realise its purpose – its GOALS
- It gets on and does it – its PASTORAL MINISTRY

It does so in accordance with Canon Law. It must also be mindful to the requirements of civil and criminal law –Health and Safety, Child Protection etc and its legal obligations as a registered charity.

#### **STRUCTURE**

*This is nothing more or less than the sum total of the formal roles that currently exist in an organisation and the relationship between them.*

**Unpacking this definition:**

**ROLE** (see paper 2)- The formal function of a person or thing in an organisation.

**This includes: -**

**TITLE** – describes/identifies the role e.g. “Bishop”

**RESPONSIBILITIES**– describe whatever it is the person or thing is legally or morally responsible to take care of/make sure happens; e.g. “Govern the local church”

**DUTIES** – describe the tasks/action the person or thing is obliged to carry out to fulfil his/her/its responsibilities. E.g. “ develop and share his vision for his Church with his people”

Every Role carries the **AUTHORITY** to carry out its responsibilities and makes the person /body **ACCOUNTABLE** for their performance of that role.

**RELATIONSHIP** - Roles are almost invariably **INTERDEPENDENT**.

People in these roles, whether as individuals or members of a body/group, depend on others if they are to fulfil their roles properly (although the nature of that dependence will vary according to the nature of the role e.g. “the Bishop needs the allegiance, support and commitment of his people”. Roles are therefore about **COMMUNICATION** and **COOPERATION** – people need to know what is expected of them and what they can legitimately expect from other others. Roles are also about **MANAGEMENT** – being held to account, being valued, motivated, encouraged, supported, trained; setting performance standards and ensuring they adhered to etc.

Roles are about **RECOGNISING THE VALUE OF PEOPLE** in those roles. Not to set out a person’s roles in writing is diminish their value and expose them to exploitation.

### ***FIT FOR PURPOSE***

Roles are about:

- Getting things done;
- Deciding who does what;
- Arranging the way different people do what they do so that they are working together in ways that best serve the needs of the organisation; and
- Making sure they do it well.

Having the right kind of structure is therefore tied to the purpose of the organisation. In the case of the Archdiocese, this means doing what it does to achieve its goals and realise its mission:

- **Economically**– at the minimum necessary cost (people, materials, money);
- **Efficiently** - Making the best use of available resources (ditto as above)
- **Effectively** – achieving the intended results/outcomes

### ***OVERVIEW***

**A good structure gives direction, cohesion, impetus and discipline to the work of an organisation. It recognises, values and makes the most of the resources of its members for the benefit of the organisation as a whole. The Archdiocese cannot afford to want less.**

**Note- The Consultant gave CPT members more detailed material on governance in November 2005.**





## **Glossary of terms used in the “Model” Parish Diagram**

### **Parish Priest:**

Priest, appointed by Cardinal O’Brien to be responsible for a Parish, or several Parishes. In the Catholic Church, for a Parish to exist, a Priest must be its pastor, even if he does not live in that parish.<sup>1</sup>

### **Assistant Priest:**

In Scotland, usually referred to as “the Curate”, appointed to help the Parish Priest, often a newly ordained priest.<sup>2</sup>

### **Deacon:**

There are 2 types of Deacons: (a) one ordained as a stage on the way to the Priesthood; (b) Permanent Deacon, a ministry in its own right. This was an ancient order in the early church, but a practice which stopped through the centuries; the Second Vatican Council restored it: essentially the Deacon is a ‘Servant’ especially in relation to the poor, and in the Liturgy he preaches the Gospel and assists with the distribution of the Eucharist.<sup>3</sup>

### **Parish Pastoral Council:**

A group of parishioners who work with the Parish Priest to guide and plan the work of the parish.<sup>4</sup>

**Parish Pastoral Team:** Group of people who support and advise the Parish Priest; it may include the Parish Sister(s) and Chair and Secretary of the P.P.C., or Parish Catechist.

### **Finance Committee:**

Group of people to help the Parish Priest administer the Finances of the parish.<sup>5</sup>

### **Parish Secretary:**

Perhaps more common in larger Parishes (but as Parishes join together perhaps more necessary than in the past) a volunteer or paid worker who does administrative tasks like typing, filing etc.

**Administrative Assistant:** like a Parish Secretary, but with greater responsibility (given by Parish Priest) to take decisions relating to aspects of Parish life.

**Fabric Committee:** (sometimes ‘Fabric and Planning Committee’ sometimes combined with Finance Committee) group of parishioners who help maintain the parish buildings: church, house, Hall.

### **Readers:**

Parishioners who proclaim the Readings (other than the Gospel, which is reserved to a Deacon or Priest) at Mass. They might also read the Bidding Prayers.

### **Extraordinary Ministers of Communion:**

Parishioners selected by the parish Priest and trained to assist in the distribution of the Body and Blood of Christ at Mass, particularly in our Archdiocese where the common practice is to receive the Blood of Christ from the chalice as well as the Body of Christ in the form of the consecrated host. These may also help the priest by taking Communion to the Sick and house-bound. “Extraordinary”, because the “ordinary” or normal Minister of Communion is the Priest or Deacon.<sup>6</sup>

### **Lay Ministers:**

Lay people who help lead liturgy (as permitted) in the absence of a priest, e.g. leading the funeral rites for reception of the body into church, and perhaps leading prayers at the graveside.

**Parish Assistant:**

The role of these varies from Parish to Parish. They may be a volunteer or employed to assist the P.P. in a particular area of parish work, e.g. Youth Work, Adult Faith Formation, Sacristan, or the person everyone in the parish goes to for information when the P.P. is not available.

**Catechist:**

Lay-Person trained in passing on the Faith of the Church, often a volunteer, but might be a paid parish employee; might be a Theology Graduate.

**Youth Ministry Team:** person or persons who work with the youth of the parish, again, may be volunteers or employed. Type of work done varies from Parish to Parish.

**Parish Directory / Parish Profile:**

Booklet outlining the life of the parish, detailing ministries, Groups and individuals who can be contacted for information. Requested by Cardinal O'Brien from every Parish, to help him in his planning, but very useful for every Parishioner.<sup>7</sup>

**Child Protection Coordinator:**

Volunteer who helps administer the Archdiocesan policy on ensuring all who work with young people or vulnerable adults are suitable for this.

**Accountant:**

Some parishes, as well as a Finance Committee, employ a qualified accountant to examine their books and ensure these comply with Government legislation which applies to registered Charities.

**Gift Aid Coordinator:**

Gift Aid is the name given to the process by which employed people who donate money to the parish can reclaim the tax paid on this for the Church. A volunteer Parishioner might take responsibility for ensuring that everyone knows about this, and ensuring envelopes (or direct payments from the bank / building society) are used; again, this is to satisfy government legislation.

**Collection Counters:**

Volunteer parishioners who count, and sometimes bank the Sunday Mass collections.

**Housekeeper:**

Less common than in the past, someone, usually a woman, who does housework in the Parish House, generally a paid employee.

**Stall Keeper:**

Usually a volunteer Parishioner (or team of Parishioners) who look after the stall at the back of the church, selling mass cards, Christmas cards, religious objects, Catholic Newspapers etc

**Church Cleaners:**

Volunteer parishioners, almost always women, who keep the church clean.

**Pass Keepers:**

Parish volunteers, men and women, who meet people arriving for Parish Liturgies, especially Sunday Mass. They carry out tasks like distributing leaflets and hymn-books, sometimes escorting people to seats, and generally help people feel welcomed to the church.



**Sacristan:**

Generally a volunteer parishioner, male or female, who prepares the altar for Liturgies, especially Mass.

**Altar Servers:**

Volunteers, generally boys or girls, though also adults, who assist at Liturgies.

**Music Leader:**

Person who has responsibility for the music and singing at Mass, usually an experienced musician or singer, and generally a volunteer, though sometimes paid.

**Musicians & Choir:**

Volunteers who help lead the singing at Liturgies, especially Sunday Mass

**Children's Liturgy Leaders:**

Parish Volunteers who lead the younger parishioners in the Liturgy of the Word at Sunday Mass, adapted to their needs.

**Ecumenical Ministry Team:**

Not very common, a group of parishioners who help the Parish in its relationships with Christians of other non-catholic Christian communities.

**Parish Outreach Team:**

Also not very common, Parishioners who work at helping share the Gospel with others outwith the Parish.

**R.C.I.A. Group:**

Volunteer Parishioners under the direction of the Parish Priest who lead those wishing to become part of the local Parish Catholic community as they prepare for full membership of the Church at Eastertide. They will usually share their faith and provide some teaching, and may also invite others to provide input from time to time.

**R.C.I.C** The same as above, but with older children

**OTHER GROUPS: e.g. Baptism Preparation Group, Marriage Preparation Group, Bereavement**

**Group:** Volunteer parishioners who help prepare parents who ask to have children baptised; help couples preparing for marriage by sharing their faith with them and providing teaching on the sacraments; (There might also be help in preparing children for other Sacraments.); support in various ways Parishioners trying to cope with the death of a loved one.

**Chaplains**, e.g. Hospital Chaplain, School Chaplain, Residential Home Chaplain: priest who ministers to these institutions in their Parish; the role may be shared with other priests in the area. Frequently, in our Archdiocese, lay-people carry out many of the functions of the Chaplain, and might coordinate the visits of the local clergy.

**Dean:** Can. 553 §1 The Vicar forane, known also as the **dean** or the archpriest or by some other title, is the priest who is placed in charge of a vicariate forane.<sup>8</sup>

**Deanery Pastoral Council:** Assembly of Parish Priests and lay-Representatives from each Parish to plan for collaboration in various areas of pastoral Ministry in the Deanery, e.g. common Marriage Preparation courses.

**Prayer Groups:** these can take many forms: Rosary Group, Charismatic Prayer Group, Franciscan Prayer

Group: group of Parishioners who gather to pray in a particular way, usually with the support and encouragement of the Parish Priest.<sup>9</sup>

### **SVDP:**

Society of Saint Vincent de Paul: Women and men who make a commitment to care, physically and spiritually, for the poorer and more deprived members of society. This Society is independent with its own constitution and rules, but is generally present and active in every Catholic Parish

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<sup>1</sup> *Can. 519 The parish priest is the proper pastor of the parish entrusted to him. He exercises the pastoral care of the community entrusted to him under the authority of the diocesan Bishop, whose ministry of Christ he is called to share, so that for this community he may carry out the offices of teaching, sanctifying and ruling with the cooperation of other priests or deacons and with the assistance of lay members of Christ's faithful, in accordance with the law. [and see following Canons)*

<sup>2</sup> *Can. 545 §1 Whenever it is necessary or opportune for the due pastoral care of the parish, one or more assistant priests can be joined with the parish priest. As cooperators with the parish priest and sharers in his concern, they are, by common counsel and effort with the parish priest and under his authority, to labour in the pastoral ministry.*

<sup>3</sup> See Diocesan Information Sheet issued in 2004 for more detailed description of this.

<sup>4</sup> Guidelines are available in every Parish, and from the Pastoral Development Office. In this Archdiocese every Parish should have a P.P.C., following the directions of Cardinal O'Brien in his Pastoral letter of Sunday, November 24<sup>th</sup>. 2002.

*Can. 536 §1 If, after consulting the council of priests, the diocesan Bishop considers it opportune, a pastoral council is to be established in each parish. In this council, which is presided over by the parish priest, Christ's faithful, together with those who by virtue of their office are engaged in pastoral care in the parish, give their help in fostering pastoral action.*

*§2 The pastoral council has only a consultative vote, and it is regulated by the norms laid down by the diocesan Bishop.*

<sup>5</sup> *Can. 532 In all juridical matters, the parish priest acts in the person of the parish, in accordance with the law. He is to ensure that the parish goods are administered in accordance with cann. 1281 - 1288.*

*Can. 537 In each parish there is to be a finance committee to help the parish priest in the administration of the goods of the parish, without prejudice to can. 532. It is ruled by the universal law and by the norms laid down by the diocesan Bishop, and it is comprised of members of the faithful selected according to these norms.*

<sup>6</sup> Immensae Caritatis – Pope Paul VI, January, 1973

<sup>7</sup> Implementation Group, March 19<sup>th</sup>. 2002

<sup>8</sup> *Can. 555 §1 Apart from the faculties lawfully given to him by particular law, the Vicar forane has the duty and the right:*

*1° to promote and coordinate common pastoral action in the vicariate;*

*2° to see that the clerics of his district lead a life befitting their state, and discharge their obligations carefully*

*3° to ensure that religious functions are celebrated according to the provisions of the sacred liturgy; that the elegance and neatness of the churches and sacred furnishings are properly maintained, particularly in regard to the celebration of the Eucharist and the custody of the blessed Sacrament; that the parish registers are correctly entered and duly safeguarded; that ecclesiastical goods are carefully administered; finally, that the parochial house is looked after with care.*

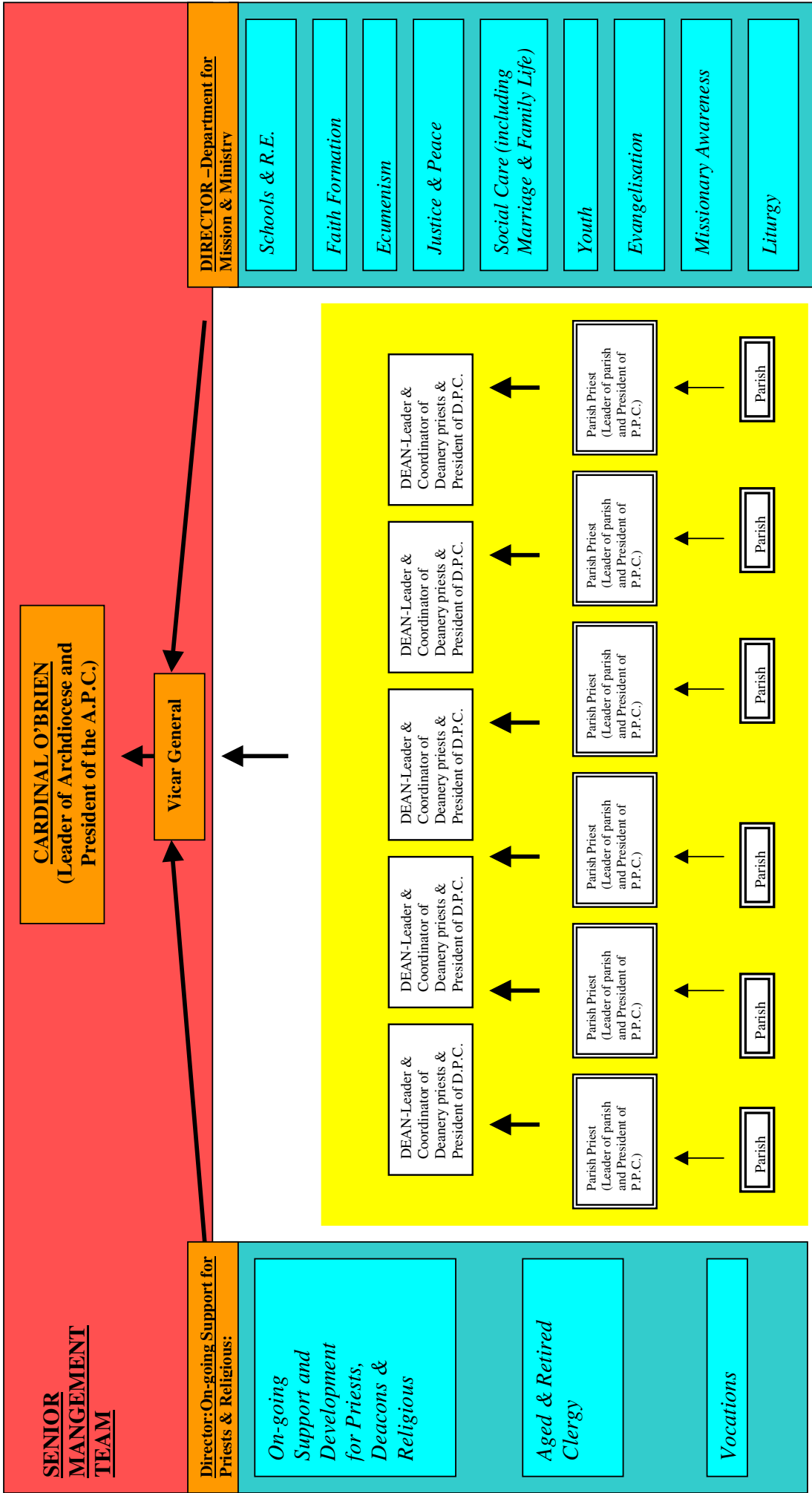
*§2 In the vicariate entrusted to him, the Vicar forane:*

*1° is to encourage the clergy, in accordance with the provisions of particular law, to attend at the prescribed time lectures and theological meetings or conferences, in accordance with can. 272 §2[3]. 2° is to see to it that spiritual assistance is available to the priests of his district, and he is to show a particular solicitude for those who are in difficult circumstances or are troubled by problems. §3 When he has come to know that parish priests of his district are seriously ill, the Vicar forane is to ensure that they do not lack spiritual and material help. When they die, he is to ensure that their funerals are worthily celebrated. Moreover, should any of them fall ill or die, he is to see to it that books, documents, sacred furnishings and other items belonging to the Church are not lost or removed.*

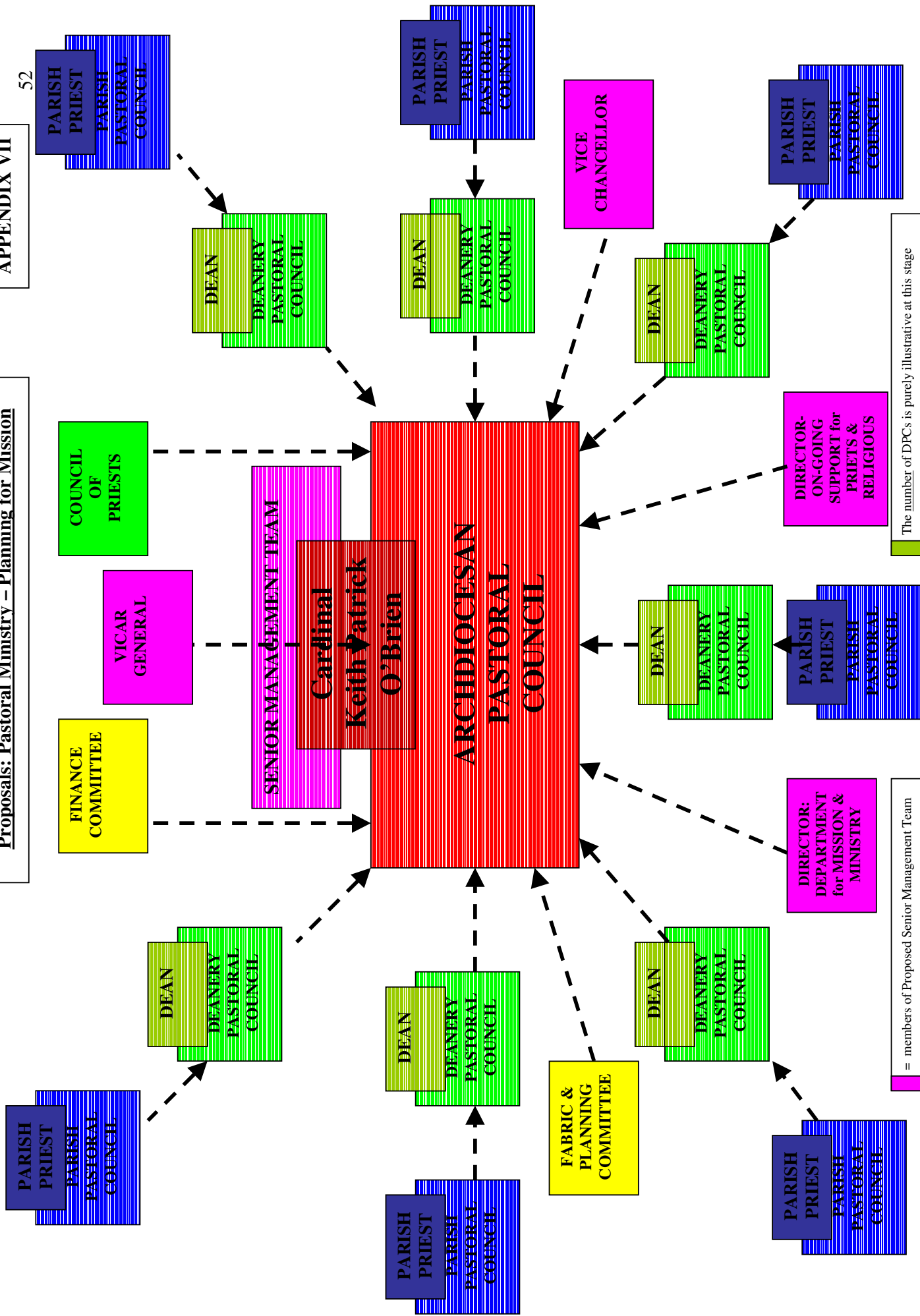
*§4 The Vicar forane is obliged to visit the parishes of his district in accordance with the arrangement made by the diocesan Bishop.*

<sup>9</sup> *Can. 215 Christ's faithful may freely establish and direct associations which serve charitable or pious purposes or which foster the christian vocation in the world, and they may hold meetings to pursue these purposes by common effort.*

**PROPOSALS: Pastoral Ministry - Management Structure**



*This appendix focuses on the part of the archdiocesan structure directly concerned with MANAGING the pastoral ministry. It presumes that the Pastoral Steering Group and the Pastoral Development Office will both be discontinued, the PSG will be replaced by the SENIOR MANAGEMENT TEAM, and the responsibility and work of the P.D.O will be carried out by the Department for Mission and Ministry. It also assumes that the work of the various advisory Commissions will continue. The next appendix, APPENDIX VII, describes the same part of the structure but from the perspective of STRATEGIC PLANNING.*



The number of DPCs is purely illustrative at this stage

= members of Proposed Senior Management Team

## APPENDIX VIII: SUMMARY OF RECOMMENDATIONS

*(Key Recommendations are in bold. The figures in brackets at the end of each recommendation refer to the relevant paragraph in the body of the report)*

### A. Organisational Chart

1. **The CPT should accept the interpretation of the organisational chart in Appendix 3 offered by this Group and use this interpretation as its baseline template for further amendments, subject to the views of a canon lawyer and any necessary improvements in content or presentation (4.8).**
2. **Once the new structure has been decided, a new organisational chart should be produced and distributed throughout the diocese, along with an official commentary that clearly describes what kind of organisation the diocese is, its core components and how the structure is meant to work (4.9).**
3. The task of producing a draft chart of the new structure and a commentary for approval by the Archbishop, via the normal consultation processes, should be allocated to the Pastoral Development Office (or its successor with the new structure)(4.10)
4. The Pastoral Development Office (or its successor) should be mandated to provide everyone who participated in the survey with a copy of the revised organisational chart as a gesture of thanks for their efforts, under a covering letter from the Archbishop (4.11).

### B. The organisational structure of Parish Communities

1. **A working group of experienced pastoral leaders should be established to develop models of best practice for organising the pastoral care of parish communities, including communities that don't have a resident parish priest (4.15).**
2. **This work should be grounded in a shared understanding of what constitutes a "Parish Community", building on the contributions made on this issue in recent years (4.15).**
3. This work should also address the scope for:
  - Delegating responsibilities to lay people that will enable the parish priest to concentrate on those aspects of pastoral care that only he can provide; and
  - Ensuring continuity of good practice following the departure of the parish priest.(4.15)

### C. Roles and Responsibilities

1. **The Archbishop's decision to ensure that everyone who contributes formally to the work of the Church will have a written description of their role should be implemented as a matter of urgency and adequate resources set-aside for that purpose ("Now is the Favourable Time", paragraph 2.2, No.9) (5.20)**

2. A standard template should be used for each role, along the lines of the model described in appendix 2, and each role should also include reference to:
  - Arrangements for reviewing work progress and planning future work;
  - Assessment of any future training needs and action to address them;
  - Other post-holders and/or bodies with whom ongoing contact is considered essential for the proper exercise of the role (5.21).
  
3. In the case of members of official bodies, the role descriptions should cover the distinct responsibilities and duties of:
  - The official body itself;
  - Each Office Bearer; and
  - Other members (5.23).
  
4. **Each official body should have its own handbook of standard procedures for conducting its work.** As well as copies of the above roles, these practice manuals should include information about such matters as:
  - Composition;
  - Frequency and duration of meetings;
  - Preparing for, managing and reporting on meetings,
  - Standards of conduct e.g. confidentiality, attendance at meetings; and
  - The arrangements for planning, reviewing and reporting on its work(5.24).
  
5. **The highest priority should go to defining the role of the parish priest. Thereafter, priority should go to posts and bodies that do not yet have a written description of their role, in the following rank order:**
  - **Individual posts and bodies that make up the core executive and advisory functions directly concerned with carrying out the pastoral ministry, especially those of vicar general and dean;**
  - **Functional roles at both diocesan and local levels, notably vicars episcopal and chaplaincies; and**
  - **Others. (5.225 – 5.26)**
  
6. Once this work is complete, all other existing roles should be reviewed to ensure that they meet the required standard (5.26).
  
7. The Vice Chancellor should have over-all responsibility for managing this work programme and a Project Team should be set up, with its own project manager and secretarial support, to undertake the detailed work (5.27).
  
8. As soon as the draft roles of parish priest, dean and all the diocesan roles are completed, they should be checked for compliance Canon Law and submitted to the Archbishop for ratification; subject to his views about the need for prior consultation (5.28).
  
9. A brief summary of all individual post-holders and Official bodies at diocesan level, and how they can be contacted, should be included in the archdiocese's "Catholic Directory" (5.29).

10. The section in the Directory on deaneries should have an introduction summarising the role of the dean and the deanery pastoral council; and the section on parishes should have a similar introduction for parish priests and parish pastoral councils (5.30).

#### **D. Authority and Accountability**

1. **Every priestly appointment must include a clear explanation of the role to which they are appointed and that of the priest to whom they are directly answerable i.e. dean, vicar episcopal, vicar general or Archbishop (6.17.1)**
2. **Every official document that requires action, especially one that carries the signature of the Archbishop, should distinguish clearly between what is prescriptive and is discretionary (6.17.2).**
3. Consideration should be given to setting up a series of workshops in the near future for the community of priests to explore what the diocese can learn from best practice in organisational management within the diocese, elsewhere in the Church and in civil society (6.17.3).
4. **The APC should commission the preparation of a draft strategic plan for improving communication throughout the diocese for consideration, refinement and implementation (6.22.1).**
5. Careful consideration is given when preparing role descriptions to:
  - Those other individuals and bodies with whom the person in this needs to maintain contact in order to fulfil his or her responsibilities properly; and
  - How this can be best incorporated into the list of duties in this role (6.22.2).
6. Consideration be given to the merits of organising a series of workshops for parish priests and their people to explore ways in which they might be able to assist him in the exercise of his accountability to them as their “Servant Leader” (6.22.3).

#### **E. The Trustees**

The archdiocese should commit itself to a review of the present arrangements for governing its affairs within the next 3 years, in collaboration with any action being taken in this area by the Conference of Bishops, and include detailed plans for that purpose in archdiocesan strategic plan currently being prepared (7.8-7.9).

#### **F. The Archdiocesan Pastoral Council**

1. **The APC establish a small working group to:**
  - 1) **Prepare a draft constitution, including a framework of policy and procedures for consultation with PPCs, DPCs and the Council of Priests prior to consideration by the full Council and ratification by the Archbishop;**

- 2) **Arrange a training programme for APC members to assist implementation; and**
- 3) **Devise a plan for promulgating and promoting the role of the APC throughout the archdiocese (7.14).**

### **G. The Pastoral Steering Group**

1. **The PSG should be disbanded and replaced by a Senior Management Team with the following remit:**
  - **Ensuring that the APC has the information and any other practical assistance it needs to fulfil its strategic planning function;**
  - **Assisting the Archbishop with implementation of strategic planning decisions; and**
  - **Monitoring and evaluating progress and reporting back to the APC as part of the over-all strategic planning process (7.20 – 7.21).**
2. **The membership of this team should comprise those with key responsibilities for managing and supporting the pastoral ministry at diocesan level (cf. “Now is The Favourable Time, para.2.2, No.14).**
3. **It should be chaired by the Archbishop and have access to sufficient secretarial support to fulfil its duties competently (7.22).**
4. **It should have a name that accurately reflects its function e.g. “The Diocesan Management and Support Team” (7.22)**
5. **It should have a clear written remit and a handbook setting out the Procedures that will guide its work.** These procedures should include reference to the scope for inviting others to attend its meetings e.g. the Chair of the APC. (7.22)
6. **If these recommendations are accepted, the Council of Priests should be given full permanent membership of the APC (7.24).**

### **H. Archdiocesan Pastoral Support Agencies**

1. **There should be a review of the way these services are organised and managed, as a matter of urgency. The main focus of this review should be on:**
  - **Simplifying the structure;**
  - **Coordinating the activities of its members; and**
  - **Integrating it into the over-all structure of the diocese – at strategic planning, senior management and local levels (7.28).**
2. **The alternative model for organising the work of these agencies described in para7.30ff and summarised in Appendix VI is offered as a contribution to that review (7.29).**



3. If this model is adopted, the 1<sup>st</sup> priority for the Director of Priests and Religious should be an audit of the spiritual, personal and professional needs of the community of priests and the options for addressing them (7.32).

#### **I. Deans and Deanery Pastoral Councils**

1. Consideration should be given to investing the role of the Dean with faculties of an **Area Vicar Episcopal** as described in Canon 475ff. and entitling it “Area Vicar for (followed by the name of the area)” e.g. Area Vicar for West Lothian (7.40)
2. The Archbishop should re-affirm his policy decision made at the APC meeting on 4 May 2004 and instruct the APC to prepare a draft timetable for implementing it, in consultation with the deans and DPCs for consideration and endorsement by the Archbishop (7.44).
3. Once confirmed by the Archbishop, this action plan should be included in the diocesan strategic plan (7.44).

#### **J. Resource Planning**

1. The role of the AFC be reviewed and, if this is not clearly stated, broadened to include responsibility for ongoing assistance to the APC with the assessment of the financial resource implications of strategic planning options and how they might be addressed (7.52).
2. The AFC should be requested to prepare a draft framework of financial policy and guidance to assist pastoral planning and management at every level in the diocesan structure, in consultation with the APC and other pastoral councils (7.53).
3. Consideration should be given to amending the Parish Financial Return to include a reference to training as a legitimate item of parish expenditure (7.54).
4. The APC should invite the F&PC to discuss the scope for coordinating future planning for the pastoral ministry and property management (7.57)

#### **K. Training and Development**

A working group should be established at the earliest opportunity to consider how best to organise training for the whole archdiocese – clerical and lay; paid and unpaid – taking account of the questions addressed in para.7.65; and make recommendations for consideration by the APC and decision by the Archbishop (7.67).