

DIOCESE OF ORANGE



STRATEGIC PLAN

2018-2023

Executive Summary

FINDINGS, RECOMMENDATIONS AND IMPLEMENTATION PRIORITIES

NOVEMBER 30, 2018

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DIOCESE OF ORANGE



STRATEGIC PLAN

Preface:

*In consultation and collaboration with hundreds of individuals and groups through Project Fidelium, the Strategy Task Force and the Strategic Planning Work Groups, we have considered the challenges and opportunities before us and how best to focus our resources and efforts in the future. In the course of this process, key themes of **Evangelization and Faith Formation, Governance and Leadership, Clergy Formation, Stewardship and Finance, and Catholic Education** have emerged with great clarity. This Executive Summary of the Diocesan Strategic Plan details the process that brought us to this point and lays out the work of implementation that will now begin.*

“The joy of the Gospel fills the hearts and lives of all who encounter Jesus. Those who accept his offer of salvation are set free from sin, sorrow, inner emptiness and loneliness. With Christ joy is constantly born anew. In this Exhortation I wish to encourage the Christian faithful to embark upon a new chapter of evangelization marked by this joy, while pointing out new paths for the Church’s journey in years to come”

-Pope Francis, Evangelii Gaudium, No. 1

I. Letter from the Most Rev. Kevin Vann, Bishop of Orange

Dear Brothers and Sisters in Christ,

“Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit and teaching them to obey everything that I have commanded you.”

-Matthew 28: 19-20

(Diocese of Orange, Mission Statement)

The nature of the Christian life is to be on “mission”, which is certainly to be found in the documents of the Second Vatican Council and especially in the writings of Saints Pope Paul VI and John Paul II. Now more than ever, as those entrusted with the mysteries of God, and with positions of responsibility in the life, teaching and worship of the Church, we must be clear about this Mission of the Church, giving witness to Jesus among us, living His Gospel message of love, humility and charity, and inviting “all nations” to become disciples of Him. Pope Francis has also emphasized in *Evangelii Gaudium* “I invite all Christians, everywhere, at this very moment, to a renewed personal encounter with Jesus Christ, or at least an openness to let him encounter them; I ask all of you to do this unfailingly each day. No one should think that this invitation is not meant for him or her, since “no one is excluded from the joy brought by the Lord”. It is for the sake of this mission, then, that we have undertaken this effort with Project Fidelium and the Strategy Task Force. In every era the Church must consider the particular ways this mission must be pursued.

I am grateful to the literally hundreds of individuals and groups that have contributed to these considerations in these past two years of Project Fidelium and the Strategy Task Force. These contributions can be seen as an expression of the “Connections” articulated in our Pastoral Plan which states: “Without Connection! there is no Catholic faith community, no way to remember Jesus, to pass on His story and offer the mercy, forgiveness and love that is the full message of God” - Diocese of Orange Pastoral Plan. Passing on the story of Jesus is at the heart of our mission, which he entrusts to us daily. In recent months, I have listened very carefully and weighed the thoughtful recommendations that have been developed in this process. This process has identified the priorities that will focus our efforts and our resources for the coming years. Therefore, I am directing the Bishop’s Office, the Pastoral Center, our clergy, parishes, schools and lay leadership of the Diocese to focus their efforts on the following:

Evangelization and Faith Formation of our children, youth, young adults, adults and seniors to make Jesus known or known better and to foster a lifelong journey of discipleship. Each parish will provide or be provided with the necessary resources to be effective in this effort. **Governance and Leadership** with clarity, accountabilities and clear communication. **Clergy Formation** that strengthens and enables our priests and deacons, in their ministry in service to those entrusted to them by the Lord, to minister, preach the Gospel message, celebrate the Eucharist and provide the faithful with an enriching sacramental life while remaining faithful to their vocations. **Stewardship and Finance** accountabilities that are focused on the new priorities of the Diocese aligned with our Mission. This is not just another program but is about clear priorities. **Catholic School Education** for families seeking spiritual and academic formation of their children and youth in an environment that is Christ centered and focused on forming the whole person.

This means that we will need to make other decisions and changes in how we use our human and fiscal resources, and this will require thoughtful discernment, to be sure. But such decisions must always be made in the light of Faith and the Lord who calls us forth each day. Having been sent as the Shepherd of our local Church I know that I do not make these decisions in isolation but together with all of you as we travel

the road to eternity together in our journeys of life and faith. In order to live to the greatest extent at this providential time where the Lord has placed us together, I implore all of the Faithful of Christ, consecrated religious, priests, deacons and lay faithful, especially all of those involved in the apostolic movements in our local Church, to bring to new life, within our local faith communities, an ardent zeal as experienced at Pentecost, to grow in faith, knowledge and holiness, and a deep contagious love of God. Let us pray to be “set on fire” in a world that is so much in need, especially to those who are poor and marginalized and calling out to find the love of God around them.

Ultimately the goal of all which is set forth in these pages and which will be lived out in the months and years to come can be found in the last canon of the Code of Canon Law, to which as a canonist and a pastor I continually refer to: Canon 1752: “And the salvation of souls, which must be always be the supreme law in the Church, is to be kept before one’s eyes”.

Thank all of you for your involvement in the months of this planning process, and for your ministry, leadership and care for the Lord’s people, whom in His providential care He sends our way and entrusts to us.



Most Reverend Kevin W. Vann, J.C.D., D.D.
Bishop of Orange in California

II. Introduction and Background - Diocese of Orange Strategic Plan

A. Introduction:

The Diocese of Orange has grown rapidly since it was established in 1976. It is now the 7th largest Catholic Diocese in the United States with many very large, ethnically diverse and vibrant parishes. This dynamic growth, coupled with the 2012 purchase of the former Crystal Cathedral, has necessitated the collaborative preparation of a thoughtful, prayerful and thorough Strategic Plan to help guide the Diocese now and into the future.

B. Background:

In late 2016 Bishop Kevin Vann initiated Project Fidelium and the Strategy Task Force. Based on the reports of their work, which included extensive pastor interviews and surveys, Bishop Vann in 2018 convened and chartered six Strategic Planning Work Groups, made up of key stakeholders from across the Diocese. These work groups were asked to make planning recommendations that took into account the work of Project Fidelium and the Strategy Task Force. Each work group met multiple times over the course of five months, conducted additional interviews and outside research and prepared reports of their findings and recommendations. These reports were then presented to a Pastor Advisory Group and a Strategic Planning Steering Committee for additional input and counsel. The final set of recommendations, resulting from hundreds of interviews, along with a compendium of documents gathered as part of the Strategic Planning journey, were presented to the Bishop for his discernment and consideration and ultimate approval.

This result of this effort has been to provide the Bishop the necessary framework to establish and prioritize the organizational systems, structures and resources (both near and long-term) that will be needed to create and implement an integrated strategic, operating, and financial plan for the Diocese. With clear goals and objectives, structures can be established that are aligned to facilitate the vibrant ongoing transformation and stewardship of the Diocese. This first ever Diocese of Orange Strategic Plan is intended to support the best possible Catholic experience for the faithful as part of the on-going 43-year history of the Church in Orange County.

C. Mission and Vision:

The Mission and Vision of the Diocese of Orange are important and essential in describing the purpose of the Diocese, what it is striving to move towards in the future and the culture that it seeks to promote among its people. In light of the recent revelations about scandal there can be no ambiguity about our responsibilities to the faithful, young and old alike, with an absolute focus on our faith in God and the enduring power of the Holy Spirit to help heal. Our Mission and Vision, taken together, provide an overall framework for the Diocese and its current and future actions. It is through a prayer-filled discernment process, inspired by the Holy Spirit, that priorities are set, difficult decisions are made and the go-forward accountabilities are made clear. We are compelled to ask, "By saying yes to this course of action are we helping to achieve our Mission and Vision, while remaining true to the Gospels?" This question finds a reflection in the apostolic exhortations and encyclicals of the Successors of St. Peter who have lead the Body of Christ in the last years of the 20th century and the first years of the 21st century.

D. Mission of the Roman Catholic Diocese of Orange:

The Mission of the Diocese describes its core purpose as to why it exists. It acts as both an anchor and a guide for the Diocese. Bishop Vann has chosen, as the Mission Statement of the Diocese of Orange, the words of Jesus. Before his ascension Jesus proclaimed, to His apostles, a mandate to spread the Gospel message:

“Go therefore and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit and teaching them to obey everything that I have commanded you.”

Matthew 28:19-20

Jesus is sending his apostles forth to make other disciples, baptizing them and teaching them to follow the call of God by allowing their lives to be transformed by the Holy Spirit. This Mission clearly establishes a priority for Evangelization and Faith Formation and reflects Pope Francis’ call for “Missionary Disciples” and the spirituality of the movement “Communion and Liberation,” when it says that, ***“If Christ is isolated from the heart, sooner or later he ceases to be interesting.”***

“We wish to confirm once more that the task of evangelizing all people constitutes the essential Mission of the Church. Evangelizing is in fact the grace and vocation proper to the Church, her deepest identity. She exists in order to evangelize, that is to say, in order to preach and teach, to be the channel of the gift of grace, to reconcile sinners with God, and to perpetuate Christ's sacrifice in the Mass, which is the memorial of His death and glorious resurrection.” Pope Paul VI

“Do not be afraid. Open wide the doors for Christ”

Pope Saint John Paul II on the day of his installation as Bishop of Rome on October 22, 1978.

E. Vision of the Roman Catholic Diocese of Orange:

“Inspired by the Holy Spirit, in faithfulness to our lay or religious vocations, we will go forth giving living witness and example to the Gospel message of love, humility and charity. We will seek a prayer-filled and sacramental life of faith lived in community with respect for all human life and especially for those who find themselves on the margins.”

III. Areas of Strategic Focus for the Diocese of Orange

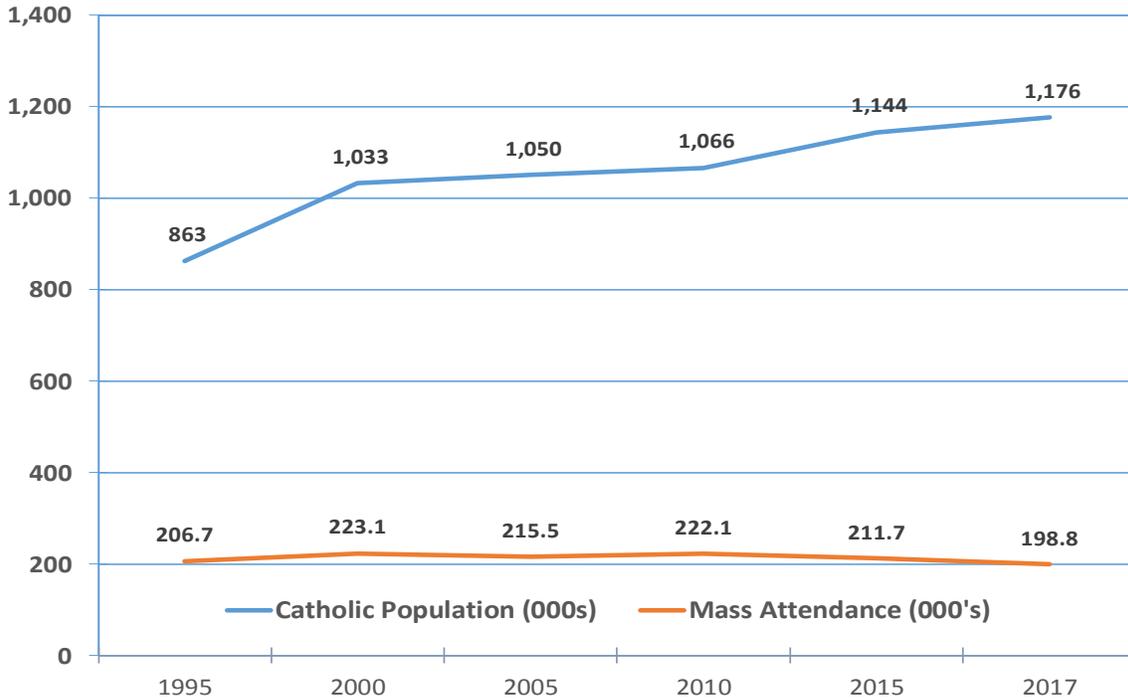
Through the work of Project Fidelium and the Strategy Task Force, six areas of strategic focus were identified as essential for the Diocesan Strategic Plan:

- ❖ **Evangelization and Faith Formation**
- ❖ **Governance and Leadership**
- ❖ **Clergy Formation**
- ❖ **Stewardship and Finance**
- ❖ **Catholic School Education and Schools Sustainability**
- ❖ **Christ Cathedral Campus Plan**

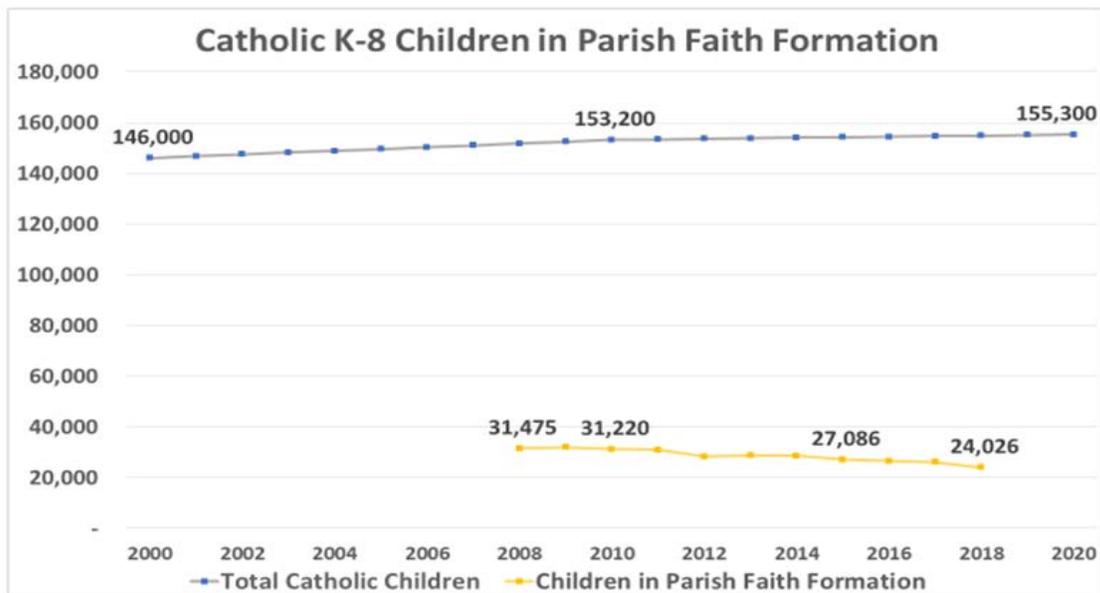
IV. Summary of Key Findings

A. Evangelization and Faith Formation:

- ❖ The *number* of Catholics attending mass has not increased in the past 20 years, even though the number of nominal Catholics has increased in the same period by 33%:



- ❖ The *percentage* of Catholics attending mass continues to fall, from 28% in 1995 to 17% today. Studies have shown that large numbers of youth and young adults are leaving the church.
- ❖ The number of K-8 aged children in parish faith formation programs has declined by 25% in the last ten years, even as the number of Catholic K-8 children in the Diocese has increased:



- ❖ Most parishes, and the Diocese, have inadequate staffing and financial resources for effective evangelization and faith formation. Pastors do not rate their parishes or the Pastoral Center well in faith formation or evangelization, especially for young adults.
- ❖ Clergy faith formation needs to be adequately resourced. Homilies need to be inspirational.
- ❖ Pastors are required to be both spiritual leaders and business leaders; this leads to competing and conflicting pastoral priorities.
- ❖ Many of the faithful do not have a basic knowledge of the path to holiness nor do they know how to pray. The impression can be given, then, that some parishioners are leaving their communities because their individual spiritual needs are not being met.

B. Governance and Leadership:

- ❖ There is a need for a clearly communicated Mission and Vision for the Diocese that is “owned” by the Pastoral Center departments in service to the parishes. There is a lack of a unified direction and sense of mission and some departments are “siloed” at the Pastoral Center.
- ❖ Responsibility, authority and accountability have not been clearly spelled out for personnel at the Pastoral Center, the parishes and the schools. This has resulted in a lack of accountability and inadequate decision-making.
- ❖ There are unclear governance standards and inconsistencies in personnel policies, procedures and practices throughout the Diocese.
- ❖ Some Pastoral Center departments may not be adequately serving the parishes. The Pastoral Center is viewed as too focused on “rules and regulations.” Policies and procedures are not communicated clearly to the parishes and schools by the Pastoral Center.
- ❖ Boards and other committees do not have a clear understanding of their advisory responsibilities, accountabilities, and delegated authorities.
- ❖ Communications, while improved, are in need of significant enhancement.

C. Pastor Interviews - Themes:

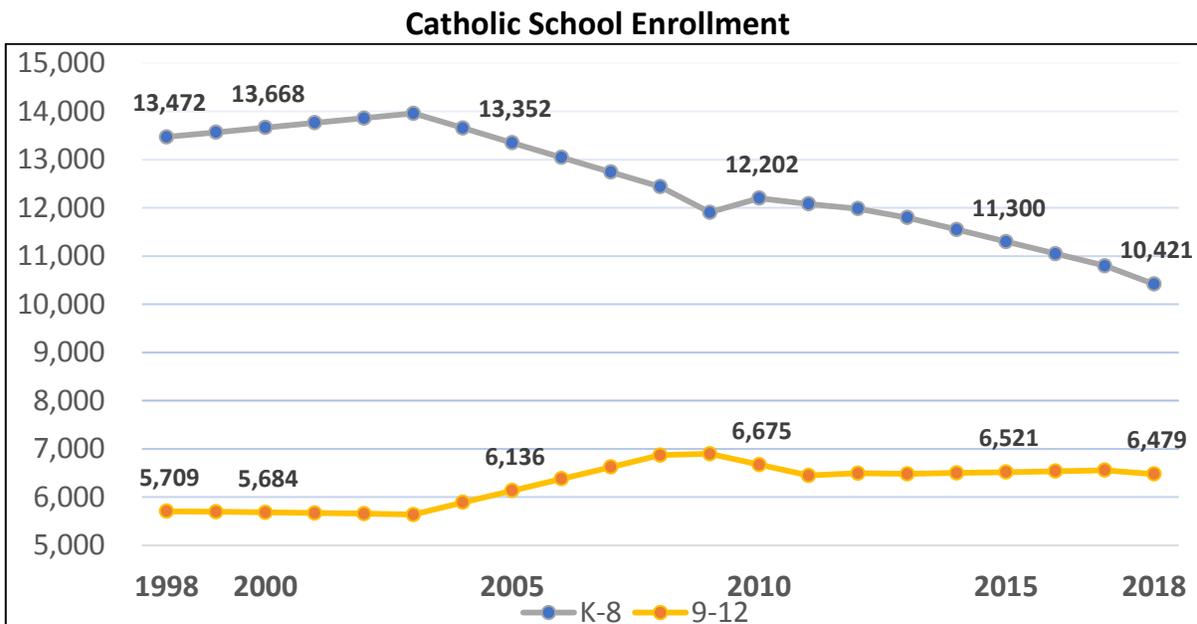
- ❖ Improved clergy spiritual formation and leadership training are absolutely essential going forward.
- ❖ There is the need for a clear, well communicated vision and set of priorities for the Diocese, which all pastors can understand and act upon. Adequate financial support to parishes must be considered in all planning or in any new initiatives put forth by the Diocese.
- ❖ Governance needs to be improved and made clear, including all processes and authorities related to decision-making.
- ❖ A collaborative and focused approach to Evangelization and Faith Formation is needed and should involve all pastors and key diocesan personnel.
- ❖ More clarity and transparency is necessary on finances, especially concerning the Christ Cathedral campus and the school subsidies.
- ❖ A plan is needed to help ensure that both the Christ Cathedral and the schools become self-sufficient.
- ❖ A review is needed of the purpose, scope and frequency of fundraising asks in the parishes to ensure alignment with the priorities of the Strategic Plan.
- ❖ Expectations, with accountability, are needed for all clergy.

D. Stewardship and Finance:

- ❖ Stewardship giving needs to be reinvigorated throughout the Diocese. The Orange Catholic Foundation can be instrumental in helping to create a culture of philanthropy in support of the Mission, Vision and priorities of the Diocese.
- ❖ Full fiscal transparency, with clear, up-to-date fiscal policies and procedures, needs to be communicated throughout the Diocese.
- ❖ The Christ Cathedral campus is currently under development and a long-term plan is needed to increase revenues, pay down any remaining debt, and make the overall campus and Cathedral Parish self-sufficient.
- ❖ To ensure consistent fiscal management, the finance staffing throughout the Diocese is in need of professionalization with updated position descriptions and required competencies.
- ❖ Diocesan and Orange Catholic Foundation subsidization funding for financial shortfalls throughout the Diocese needs a full review. Plans are needed, by site, for fiscal improvements, stewardship initiatives, and alignment with the priorities of the Diocesan Strategic Plan.

E. Catholic Education and Schools Sustainability:

- ❖ Enrollment in the high schools has remained steady, primarily because of an influx of non-Catholic students, now 33% of the total. Elementary school enrollment peaked in 2003 and has declined by 25% since then. There are approximately 3,000 empty seats in the elementary schools.



- ❖ Catholic schools have a critically important role to play in evangelization and in the mission of the Church. However, there appears to be a ‘disconnect’ between how the Department of Catholic Schools (DCS) and many clergy view the excellence of faith formation in the Catholic schools. Educators rate faith formation highly while many pastors rate it much lower. Evidence indicates there is a strong need to improve Catholic identity and faith formation in the schools.
- ❖ The Catholic high schools in the Diocese are generally well run and are strong academically.

- ❖ Elementary schools are strong academically but have no consistent standards for business practices, school staffing, tuition pricing or tuition assistance. This has resulted in inefficiencies and operating losses.
- ❖ The elementary school operating losses have been covered through diocesan subsidies. These subsidies are increasing every year and in fiscal year 2017-2018 were (\$6M). This amount of ongoing subsidization is not fiscally sustainable.
- ❖ Marketing for student retention and recruitment in the elementary schools is inconsistent and, in many cases, ineffective.

F. Christ Cathedral Campus Planning:

- ❖ The Mission of the Diocese in evangelization and faith formation must take primacy in campus planning.
- ❖ A gift store is needed for the Christ Cathedral campus. A properly run gift store is an important opportunity for Evangelization and Faith Formation of the faithful of the Diocese, visitors and pilgrims. The religious goods, books and educational materials will help to generate important revenues.
- ❖ Hospitality and food services are needed on the Christ Cathedral campus for all visitors and pilgrims.
- ❖ With the opening of Christ Cathedral, improved signage (way-finding) will be needed to assist visitors and to help them park and navigate around the campus.
- ❖ Security must be improved and enhanced for the campus, for events and for Christ Cathedral.
- ❖ It is a critical priority that the Christ Cathedral Parish and Christ Cathedral Campus be fiscally self-sustaining and able to manage all obligations and debts.

V. Diocesan Strategic Plan Goals Summary

A. Evangelization and Faith Formation:

- ❖ *Goal: The Diocese, with its parishes and schools, will act to fulfill its Mission and Vision by promoting a personal relationship with Jesus and the celebration of the sacraments resulting in increased mass participation, expanding the number of Catholics actively participating in faith formation and increasing the number of Catholic youth and young adults active in the church.*

B. Governance and Leadership:

- ❖ *Goal: The Diocese, in order to achieve its Mission and Vision, will have in place governance and leadership structures and processes that help ensure responsible, effective and efficient management of all diocesan operations, including the parishes and schools.*

C. Clergy Formation:

- ❖ *Goal: Clergy will be provided access to spiritual formation education and training as well as access to trained spiritual directors and opportunities for annual priest retreats and/or private retreats. The Diocese will emphasize to all clergy (pastors, parochial vicars, administrators, and deacons) the place of prayer in their lives and the importance of the sacrament of penance.*

D. Stewardship and Finance:

- ❖ *Goal: The Diocese, its pastoral center departments, ministries, parishes, schools and governance structures, will appropriately manage resources to achieve its Mission and Vision, to ensure ongoing sustainability and to maximize ministry outcomes. It will collaboratively work with the parishes to assist them in enhancing operating effectiveness and increasing ordinary income.*

E. Catholic Education and School Sustainability:

- ❖ *Goal: The Diocese will educate and form the Catholic identity of the youth of the Diocese through stable, academically excellent and faith-filled Catholic Schools.*

F. Christ Cathedral Campus Plan:

- ❖ *Goal: Christ Cathedral will be established as the preeminent center for evangelization and faith formation in the Diocese. Visitors to the campus will be given a welcome, hospitable experience that affirms the Catholic faith. Campus operations will become financially self-sustaining with revenue derived from events, retail operations and appropriate land uses.*

VI. Diocesan Strategic Plan – Immediate Goals (1-24 months)

A. Evangelization and Faith Formation:

- ❖ Bishop Vann to author a Pastoral Letter, after the dedication of the Cathedral, on the topic of Evangelization and Faith Formation announcing a ***“Year of Prayer”*** in 2020 for the Diocese. The letter will emphasize the essential roles of the parishes and schools of the Diocese in implementing the Mission of the local Church.
- ❖ Design and implement a five-year plan for formation in evangelization in the Diocese, including enhancing liturgical life and the Sunday experience at all parishes.
- ❖ Appoint an Advisory Committee to help evaluate and plan for resources dedicated to parish faith formation programs throughout the Diocese.
- ❖ Establish and implement leadership training, team building and coaching for parishes to help promote evangelization to the faithful, seeking to foster effective evangelization of young adults and to triple, annually, the number of young adults attending and participating in young adult and youth ministries.
- ❖ The Diocese will seek to assist parishes in funding and supporting programs to engage youth and young adults. It will establish and assist in funding regional teams of young adult coordinators and missionaries. It will oversee funding of youth ministers in parishes with financial constraints. The Diocese will provide formation for pastors and parish leaders on the best practices of engaging and evangelizing youth and young adults.
- ❖ As a complement to the above, the Diocese will continue to strengthen the Eucharistic adoration in our parishes, with a goal of round-the-clock adoration where possible. This will provide a means for growth in holiness and relationship with the Lord for all, and for a strengthening and increase in those responding to the call for priestly vocations and consecrated life. Bishop William Johnson, the first Bishop of our Diocese, actively promoted Eucharistic adoration.
- ❖ Christ Cathedral Parish will seek to become *the* model parish in evangelization and faith formation.

B. Governance and Leadership:

- ❖ Develop standard and consistent governance definitions and provide Canon Law educational opportunities to appropriate staff, leaders, boards and committees.
- ❖ As part of implementing the Strategic Plan, review all Pastoral Center departments. Make changes as necessary to their purpose, activities, processes, staffing, and job descriptions to align with the plan priorities.
- ❖ Re-evaluate all diocesan boards, councils, commissions, task forces and committees. Review and revise, as necessary, current charters, governance documents and guidelines. Sunset any unnecessary governance structures or duplicated efforts.
- ❖ Schedule and facilitate periodic interaction between the chairs of the various boards and councils. Distribute the current Diocesan Pastoral Center organizational chart that shows reporting structures and areas of responsibility (a current phone list to be kept up-to-date for all diocesan sites).
- ❖ Develop standardized operational resources and tools for all human resource activities and financial reporting for all diocesan sites.
- ❖ Define and communicate processes and procedures for decision-making between the parishes and the Diocese. Diocesan leaders to adopt standards of excellence for all diocesan and parish governance systems and structures. Develop systems of responsibility and accountability for maintaining and achieving these standards.
- ❖ Prepare a comprehensive manual of all policies and procedures, guidelines and decrees that address how decisions are made and who has the delegated authority to make them.
- ❖ Diocesan Communications Department to develop and manage a Diocesan Master Calendar of all major diocesan happenings and distribute it to all parishes. This will help ensure better coordination of events and avoid conflicts with parish life.

C. Clergy Formation:

- ❖ The Diocese will provide assistance and resources for clergy training in evangelization and faith formation programs for parishes and schools.
- ❖ Clergy to be provided access to spiritual formation education and training as well as access to trained spiritual directors and opportunities for annual priest retreats and private retreats. Emphasize to all clergy the place of prayer in their daily lives.
- ❖ The Diocese will provide homiletic training, clergy study days and convocations on spiritual topics specific to pastors, parochial vicars and deacons.
- ❖ Training will be given to the clergy and support will be provided to the parishes to assist them in hiring qualified administrative personnel and/or parish business managers. This will allow the clergy to focus on the spiritual welfare of the parish, parishioners and school.
- ❖ Arrange for regional and/or deanery approaches to evangelization and faith formation initiatives. Engage with the clergy and deans to find solutions that work for local faith communities.
- ❖ Bishop Vann, assisted as appropriate, will undertake pastoral visits to the deans, deaneries, pastors and parishes to align them with diocesan priorities, expectations and canonical accountabilities.

D. Stewardship and Finance:

- ❖ Align diocesan budgets with the Mission, Vision and Strategic Plan priorities as approved by Bishop Vann. Ensure financial sustainability of all Cathedral Parish and campus operations by increasing sources of revenue and controlling operating expenses to generate free cash flow to pay off any remaining debt. Integrate shared uses and services management between the RCBO and the Cathedral, with overall Christ Cathedral campus operations reporting to the Episcopal Director of Operations.
- ❖ Invigorate stewardship giving throughout the Diocese in coordination with the Diocesan Stewardship Office. Establish a Diocesan Stewardship Office, headed by a member of the clergy, to assist in the oversight of the annual Pastoral Services Appeal. Align the special collections and financial asks of the parishes and schools with the Strategic Plan. Act to reduce the number of these special collections.
- ❖ The Orange Catholic Foundation (OCF) to assist in raising and growing funds, with specific goals and objectives, to provide for the fiscal wellbeing of the Diocese, its programs, services, facilities and schools. Align all diocesan philanthropy with the Mission, Vision and Strategic Plan priorities as approved by Bishop Vann.
- ❖ The Diocese and OCF to provide fundraising and stewardship education resources to assist pastors, parishes and schools in raising funds and reducing the need for ongoing subsidizations.
- ❖ Implement a diocesan-wide standardized Information technology platform, including financial systems, to improve and simplify business practices, cash management, and all accounting systems and structures. Ensure full fiscal transparency at all diocesan sites.
- ❖ Provide diocesan funded education and training in the ‘professionalization’ of the staff responsible for the financial management at all parishes, schools and other diocesan sites. The Diocesan Chief Financial Officer to assist in the oversight of hiring, training, and implementation of all policies, procedures and approval processes related to financial management.
- ❖ The Diocesan Human Resources Department to assist in establishing standardized job descriptions, including competencies and skills, for all those charged with financial management.

E. Catholic Education and School Sustainability:

- ❖ Implement new Catholic identity evangelization and faith formation initiatives in the schools.
- ❖ Reorganize the Department of Catholic Schools; develop new Mission, Vision and Value statements; and hire key staff in support of the schools’ Strategic Plan.
- ❖ Initiate a comprehensive targeted marketing campaign to increase enrollment through retaining existing students and recruiting new students. Highlight the values of a Catholic education.
- ❖ Establish, set and enforce school staffing standards and policies and procedures for tuition management and increases. Design and implement regional models for tuition assistance programs (starting with the most under-enrolled schools) to fill empty seats.
- ❖ Make necessary improvements to the Marian Alliance model.
- ❖ Provide leadership training at all levels and standardize all “back office” systems.
- ❖ Perform a comprehensive schools’ safety evaluation and take corrective action as needed.
- ❖ Standardize job descriptions and salary standards for all staff and create measurable performance metrics; offer opportunities for professional development.

- ❖ Seek to increase donations and contributions to support the elementary schools.
- ❖ Determine methods of ensuring equal access for low-income students and equality of academic resources across schools.
- ❖ Develop approaches to strengthen collaboration and support among the principals and schools.
- ❖ Evaluate and strengthen, as needed, all Consultative School Boards and ensure that every school has a functioning school board.
- ❖ Develop a clear description of responsibilities for pastors with a parish school.

F. Christ Cathedral Campus Plan:

- ❖ Complete the Christ Cathedral construction for the Cathedral dedication planned in July 2019.
- ❖ Complete the expansion of the Memorial Gardens in 2019.
- ❖ Ensure that the Cathedral strongly models evangelization and faith formation for the benefit of the entire Diocese.
- ❖ Enhance the Christ Cathedral Campus visitor experience by opening a gift shop, food and beverage services and overall hospitality services by the spring of 2019.
- ❖ Provide ongoing docent guided tours for visitors and pilgrims to the Christ Cathedral Campus.
- ❖ Improve overall parking, signage, way finding, and provide visitor maps and guidebooks.
- ❖ Maintain campus security at all times.
- ❖ Develop plans for the long-term sustainability of campus operations, funding and debt.

G. Communications:

- ❖ Update the Diocesan Communication Plan and establish a Diocesan Master Calendar.
- ❖ Re-evaluate all current media strategies and budgets to align with the diocesan Mission, Vision, and Strategic Plan priorities.
- ❖ Provide timely, ongoing communications to all key stakeholders.
- ❖ Provide a cost-benefit analysis before any new communications campaign is established.

VII. Diocesan Strategic Plan - Mid-Term Goals (2 - 3 years)

A. Evangelization and Faith Formation:

- ❖ Identify and invite a religious community, with a charism of intercessory prayer, to make their home in the Diocese of Orange in support of evangelization efforts, the pastoral life of the Diocese and vocations.
- ❖ Establish a 'Center for Catholic Evangelization and Faith Formation' through a media and communication plan with the produced content aligned with the Strategic Plan. Develop a content library available to parishes, schools and other ministries.
- ❖ Establish the Christ Cathedral as the preeminent center for the creation and dissemination of excellent content focused on evangelization and faith formation.
- ❖ Replace the existing diaconate preparation with the Masters program offered jointly by St. John Seminary and the Diocese of Orange. Offer ongoing formation for deacons.

B. Governance:

- ❖ Provide education and reflection on Canon Law to inform and instruct governance leaders and to provide context in both Theology and Ecclesiology.
- ❖ For those governance structures not required by Canon Law, conduct a review every 30-36 months to include:
 - How groups are chartered, established and approved.
 - Board or Committee Chair training.
 - Clarity about the sponsorship of groups and delegated authorities.
 - Criteria for how groups are regularly reviewed.

C. Clergy Formation:

- ❖ Continue to refine regional or deanery approaches to Evangelization and Faith Formation.
- ❖ Clergy will be encouraged to make use of ongoing access to spiritual formation education and training as well as access to trained spiritual directors and opportunities for annual priest retreats and/or private retreats. Continue to emphasize to all clergy the place of prayer in their lives.
- ❖ Consistent administrative training will continue, as necessary, for pastors, parochial vicars and deacons.
- ❖ Bishop Vann, assisted as appropriate, will continue pastoral visits to the deans, deaneries, pastors and parishes to ensure alignment with diocesan priorities, expectations and canonical accountabilities.

D. Stewardship and Finance:

- ❖ Take necessary action to ensure financial sustainability of all Cathedral campus operations. This to include generating adequate free cash flow to pay off debt and build diocesan reserves.
- ❖ Transform the Christ Cathedral Campus so that it becomes a global destination for Catholics, other Christians and pilgrims from throughout the world. Use appropriate media tools to enhance outreach, evangelization and faith formation.

E. Catholic Education and School Sustainability:

- ❖ Establish Catholic identity evangelization and faith formation measures to be used by all schools.
- ❖ Expand training and professional development for principals, teachers, and pastors with schools. Refine the pastor appointment process for the parishes with schools.
- ❖ Transfer additional schools to either the Marian Alliance or to a new Diocesan School model.
- ❖ Develop a plan to improve, or add, needed school facilities.
- ❖ Implement improved collaboration between the parish school and the parish religious education programs.
- ❖ Market the value of a Catholic education to promote student retention and new student recruitment.
- ❖ Establish school staffing standards aligned with academic programming.
- ❖ Provide ongoing professionalization and training for office staff.
- ❖ Standardize financial and IT technology platforms.
- ❖ Establish school safety standards.
- ❖ Assist in the capital campaign for increasing Catholic school endowments.

F. Christ Cathedral Campus Plan:

- ❖ Campus Operations, under the direction of the Episcopal Director of Operations, shall be responsible to ensure the following: campus operations are self-sustaining with revenue derived from events, retail operations and appropriate land uses. Review the MOU between the Diocese and Christ Cathedral to ensure ongoing collaboration and accountabilities for operations, revenues and expenses.
- ❖ Continued planning for appropriate campus development and land uses.

VIII. Diocesan Strategic Plan - Long-Term Goals (3 – 5 years)

A. Evangelization and Faith Formation:

- ❖ Ensure ongoing engagement of the Pastoral Center in service to the parishes, schools and the faithful of the Diocese in support of evangelization and faith formation.
- ❖ All pastors to be fully supported in having the necessary resources to ensure effective parish programs in evangelization and faith formation.

B. Governance:

- ❖ Provide education and reflection on Canon Law to inform governance leaders and to provide context in both Theology and Ecclesiology.
- ❖ Ongoing annual assessments of all governance structures to ensure effective leadership and decision-making.
- ❖ Sunset any governance structures that do not contribute or align with the Mission, Vision or priorities of the Diocese.

C. Clergy Formation:

- ❖ Regional and or Deanery approaches to Evangelization and Faith Formation will be modified as needed to help ensure best practices and outcomes among the parishes.
- ❖ Clergy will continue to be provided access to spiritual formation education and training as well as access to trained spiritual directors and opportunities for annual priest retreats and/or private retreats. Continued emphasis will be made to all clergy the place of prayer in their lives and the importance of the sacrament of penance.
- ❖ Bishop Vann, assisted as appropriate, will continue pastoral visits to the deans, deaneries, pastors and parishes to ensure alignment with diocesan priorities, expectations and canonical accountabilities. Clergy will be provided assistance as determined by the visits.

D. Stewardship and Finance:

- ❖ Continue to focus fiscal resources on evangelization and faith Formation.
- ❖ Continued philanthropy for a Schools Endowment Fund to help support Catholic education.
- ❖ Diocesan operating budgets will be balanced and aligned with the diocesan Strategic Plan priorities.
- ❖ Continue planning for long-term campus funding, upkeep, operations and land uses.
- ❖ Ensure cash reserves of the Diocese are replenished to ensure fiscal stability and capital funds for parish and school growth.

E. Catholic Education and School Sustainability:

- ❖ Provide on-going support for the Marian Alliance or a Diocesan Schools model. Adjust as necessary.
- ❖ Evaluate feasibility and launch a diocesan-wide capital campaign to grow the schools' endowment fund.

F. Christ Cathedral Campus Plan:

- ❖ Provide ongoing revenue growth and expense management to ensure a self-sustaining campus that does not require subsidization.
- ❖ Continue to seek best uses for the facilities and land.

IX. Implementing the Diocesan Strategic Plan, 2018 - 2023

A Strategic Plan is not meant to be static, but is a living document that must be adapted and changed. Implementation is the most important - and often the most difficult - step in Strategic Planning. Planning is a journey; it will have its ups and downs, never moving in a straight line. Implementation invariably runs into resistance, sometimes active and other times passive. In the best of circumstances change is difficult, and there is the tendency to resist it, often regardless of the need for change. When the culture of the organization has been in place for a long time, as it has been for the Diocese of Orange, change can be even more difficult. However, as Jesus reminds us, even a mustard seed can move a mountain. Jesus wants His Church to grow and to thrive through the Holy Spirit. Continued prayer and discernment will be a vital part of putting this diocesan Strategic Plan into action. Next steps by Bishop Vann will include the following:

- ❖ Proclaim a **“Year of Prayer”** for the Diocese in 2020 for the parishes and Catholic schools, recognizing that without the guidance of the Holy Spirit and help of the Lord, “we labor in vain who build.”
- ❖ Appoint the Strategic Planning Implementation Work Groups. Work groups to prepare and implement tactics for goal achievement.
- ❖ Align all Pastoral Center departments’ staffing and budgets with the priorities of the Diocesan Strategic Plan.
- ❖ Communicate to all pastors, clergy, deans and deaneries the goals and priorities of the Strategic Plan. Ensure that the priorities of their responsibilities are aligned with the priorities of the plan.
- ❖ Work, in collaboration, to foster transparency of all diocesan governance and leadership bodies.
- ❖ Ensure ongoing, transparent communication throughout the Diocese concerning the Strategic Plan.
- ❖ Establish a reporting and performance update process to measure achievement progress for each Strategic Plan goal. Monitor ongoing progress and make tactical adjustments as necessary.

A sincere thanks to all those who have participated in the creation of this first ever Diocese of Orange Strategic Plan. May the Holy Spirit continue to inspire us and may God continue to bless us with His grace.

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X. APPENDIX A

List of Participants in the Strategic Planning Process

APPENDIX A

I. TASK FORCE, TEAMS, STAFF AND WORK GROUP MEMBERS

A. STRATEGY TASK FORCE

NAME

COMPANY/POSITION

Tom Greeley, Chair

*Former Partner, Grant Thornton
Diocesan Finance Council, Vice Chair*

Bob Anderson

*CEO, Birtcher Anderson
OCF Board Member*

Patricia Bui

Firmware/Software Manager, Silergy Technology

Mark Dubeau

Former CFO and CAO, Diocese of Orange

Bishop Tim Freyer

Auxiliary Bishop, Diocese of Orange

Dr. Dennis Galligani

*Assoc. Vice President-Emeritus;
UC Office of the President*

Julie Garcia

Business Manager, St. Boniface Church, Anaheim

Al De Grassi

Sr. Vice President, Plaza Bank

Fr. Brendan Manson

*Pastor, St. Edward the Confessor Church, Dana Point
Diocesan Finance Council*

Andy Talley

*Managing Partner, Talley & Co.
OCF Board Member*

Annette Walker

*President, City of Hope, Orange County
Diocesan Finance Council*

SUPPORT STAFF

Alicia Grant

Executive Assistant, Pastoral Center

Darren Kaya

Research Associate, Pastoral Center

CONSULTANTS

Kevin Buck

President & Founder, Emergent Success

Michael Hunn

Advisor, Emergent Success

B. SCHOOL SUSTAINABILITY WORK GROUP

NAME	COMPANY/POSITION
<i>Dr. Dennis Galligani, Co-Chair</i>	<i>Assoc. Vice President-Emeritus; UC Office of the President Strategy Task Force Member</i>
<i>Tom Greeley Co-Chair</i>	<i>Former Partner, Grant Thornton Vice Chair, Diocesan Finance Council Chair, Strategy Task Force</i>
<i>Alan Arnold</i>	<i>EVP & Chief Tech. Officer, Vision Solutions Chairman, Orange Catholic Foundation</i>
<i>Jennifer Cochrane</i>	<i>Former Senior Account Executive, Procter & Gamble</i>
<i>Al De Grassi</i>	<i>Sr. Vice President, Plaza Bank Strategy Task Force Member</i>
<i>Fr. Antonio Lopez-Flores</i>	<i>Pastor, St. Anne Church, Santa Ana Diocesan Finance Council</i>
<i>Fr. Paw Lwin</i>	<i>Pastor, St. Pius V Church, Buena Park</i>
<i>Pat Murphy</i>	<i>President, Mater Dei High School, Santa Ana</i>
<i>Tuan D. Nguyen</i>	<i>Chair & CEO, Asian American National Comm. Vice Chair, Diocesan Consultative School Board</i>
<i>Fr. Steve Sallot</i>	<i>Pastor, Our Lady Queen of Angels Church Former Vicar General and Moderator of the Curia</i>
<i>Marge Shillington</i>	<i>Board Chair, St. Anne School, Santa Ana</i>
<i>Adela Solis</i>	<i>Principal, School of Our Lady, Santa Ana</i>
<i>Sally Todd</i>	<i>Former Acting Superintendent of Schools, Diocese of Orange</i>
<i>Angeline Trudell</i>	<i>President, Serra Catholic School, Rancho Santa Margarita</i>
<i>Sr. Johnellen Turner, OP</i>	<i>President & Principal, St. Catherine's Academy, Anaheim</i>
SUPPORT STAFF	
<i>Alicia Grant</i>	<i>Executive Assistant, Pastoral Center</i>
<i>Darren Kaya</i>	<i>Research Associate, Pastoral Center</i>

SCHOOL SUSTAINABILITY WORK GROUP - PROJECT TEAMS

TEAM 1: SCHOOL ENROLLMENT & AFFORDABILITY, INCLUDING FINANCES AND MARKETING

NAME	COMPANY/POSITION
<i>Alan Arnold, Co-Chair</i>	<i>SSWG Member OCF Chairman</i>
<i>Angie Trudell, Co-Chair</i>	<i>SSWG Member President, St. Junipero Serra Catholic School</i>
<i>Hank Evers</i>	<i>Director of Development & Communications, OCF</i>
<i>Ernie Garcia</i>	<i>Regional Business Manager, Catholic Schools</i>
<i>Deb McGrath</i>	<i>Director of Operations, Catholic Elementary Schools</i>
<i>Pat Murphy</i>	<i>SSWG Member President, St. Junipero Serra Catholic School</i>
<i>Marge Shillington</i>	<i>SSWG Member Board Chair, St. Anne School, Santa Ana</i>
<i>Andy Sulick</i>	<i>President, Santa Margarita High School</i>

TEAM 2: CATHOLIC IDENTITY AND FAITH FORMATION IN THE SCHOOLS

NAME	COMPANY/POSITION
<i>Jennifer Cochrane, Chair</i>	<i>SSWG Member Former Senior Account Executive, Procter & Gamble</i>
<i>Doreen Campbell</i>	<i>President, Kairos Clear</i>
<i>Armando Cervantes</i>	<i>Director of Youth & Young Adult, Diocese of Orange</i>
<i>Katie Dawson</i>	<i>Director of Faith Formation, Diocese of Orange</i>
<i>Fr. Antonio Lopez-Flores</i>	<i>SSWG Member Pastor, St. Anne Church, Santa Ana</i>
<i>Sr. Teresa Lynch</i>	<i>Principal, St Anne School, Santa Ana</i>
<i>Fr. Paw Lwin</i>	<i>SSWG Member Pastor, St. Pius V Church, Buena Park</i>
<i>Carol Reiss</i>	<i>Principal, Sr. Junipero Serra Catholic School,</i>

TEAM 3: ACADEMIC EXCELLENCE

NAME	COMPANY/POSITION
<i>Sr. Johnellen Turner, OP, Chair</i>	<i>SSWG Member Pres. & Principal, St. Catherine's Academy, Anaheim</i>
<i>Adela Solis</i>	<i>SSWG Member Principal, School of Our Lady, Santa Ana</i>

TEAM 4: SCHOOL GOVERNANCE AND LEADERSHIP

NAME	COMPANY/POSITION
<i>Al De Grassi, Chair</i>	<i>SSWG Member SVP, Plaza Bank</i>
<i>Sally Todd</i>	<i>SSWG Member Former Acting Superintendent of Schools</i>
<i>Fr. Fred Bailey</i>	<i>Pastor, Santa Clara de Asis Church</i>
<i>Tom Burnham</i>	<i>Chief Human Resources Officer, Diocese of Orange</i>
<i>Andy Talley</i>	<i>OCF Board Member</i>

TEAM 5: SCHOOL BUSINESS PRACTICES, FACILITIES AND TECHNOLOGY

NAME	COMPANY/POSITION
<i>Tuan D. Nguyen, Chair</i>	<i>SSWG Member Chair & CEO, Asian American National Comm. Chair, Diocesan Consultative School Board</i>
<i>Hank Evers</i>	<i>Director of Development & Communications, OCF</i>
<i>Brad Kimball</i>	<i>Information Technology Director, OCF</i>
<i>Gordon Schmitt</i>	<i>Board Member, Diocesan Consultative School Board</i>
<i>Ernie Garcia</i>	<i>Regional Business Manager, Catholic Schools</i>
<i>Jacqueline Kennedy</i>	<i>Former Enrollment Coordinator, Catholic Schools</i>
<i>Scott Gotreau</i>	<i>Director of Educational Technology, Catholic Schools</i>
<i>Andy Sulick</i>	<i>President, Santa Margarida High School</i>
<i>Ryan Lilyengren</i>	<i>Former Director of Communications, RCBO</i>
<i>Colleen Hoffman</i>	<i>Business Manager, St. Bonaventure School</i>
<i>Cathy Smith</i>	<i>Accounts Receivable/Registrar/Data Manager, St. Bonaventure School</i>

C. GOVERNANCE WORK GROUP

NAME	COMPANY/POSITION
<i>Sr. Katherine "Kit" Gray, Chair</i>	<i>Director of Mission Integration, Christ Cathedral</i>
<i>Armando Cervantes</i>	<i>Director of Youth and Young Adult Ministry, Diocese of Orange</i>
<i>Jeff Flocken</i>	<i>Healthcare Executive</i>
<i>Lauren McCaul</i>	<i>Cathedral Music Administrator, Christ Cathedral</i>
<i>Msgr. John Urell</i>	<i>Pastor, St. Timothy Church, Laguna Niguel</i>

D. CAMPUS ENHANCEMENTS & REVENUE WORK GROUP

NAME	COMPANY/POSITION
<i>Jim Cora, Co-Chair</i>	<i>Retired Chairman of Disneyland International</i>
<i>Bill Milligan, Co-Chair</i>	<i>Former Director of Real Estate, Diocese of Orange</i>
<i>Tony Jennison</i>	<i>Vice President of Philanthropy, OCF</i>
<i>Kymm Binnquist</i>	<i>Christ Cathedral Property Manager</i>

E. EVANGELIZATION WORK GROUP

NAME	COMPANY/POSITION
<i>Katie Dawson, Chair</i>	<i>Director of Parish Faith Formation, Diocese of Orange</i>
<i>Francis Cabildo</i>	<i>Campus Minister, Santa Margarita High School</i>
<i>David Calavitta</i>	<i>Director of Marketing/Design, Life-Teen</i>
<i>Deacon Steve Greco</i>	<i>St. Elizabeth Ann Seton Church, Irvine Founder, Spirit Filled Hearts Ministry</i>
<i>Fr. Duy Le</i>	<i>Administrator, San Francisco Solano Church, Rancho Santa Margarita</i>
<i>Ryan Lilyengren</i>	<i>Former Director of Communications, Diocese of Orange</i>
<i>Fr. John Moneyppenny</i>	<i>Director of Vocations, Diocese of Orange</i>
<i>Roxanna Payton</i>	<i>Executive Assistant, OCF</i>
<i>Cecilia Phan</i>	<i>Young Adult Coordinator, Diocese of Orange</i>
<i>Cathy Roby</i>	<i>Called and Gifted Team Leader, Diocese of Orange</i>
<i>Fr. Patrick Rudolph</i>	<i>Vicar for Priests, Diocese of Orange</i>
<i>Fr. Quan Tran</i>	<i>Vicar, Ecumenical and Interreligious, Diocese of Orange</i>

F. FAITH FORMATION WORK GROUP

NAME	COMPANY/POSITION
<i>Dr. Pia de Solenni, Co-chair</i>	<i>Chancellor and Theological Advisor to the Bishop, Diocese of Orange</i>
<i>Fr. Scott Borgman, Co-chair</i>	<i>Judicial Vicar, Diocese of Orange</i>
<i>Armando Cervantes</i>	<i>Director of Youth & Young Adults, Diocese of Orange</i>
<i>Deacon Frank Chavez</i>	<i>Director, Office of the Diaconate, Diocese of Orange</i>
<i>Fr. Tim Donovan</i>	<i>Parochial Vicar, St. Bonaventure Church, Huntington Beach Society of Faith and Family Life</i>
<i>Hank Evers</i>	<i>Director of Development & Communications, OCF</i>
<i>Victor Gallardo</i>	<i>Husband, father, businessman</i>
<i>Evelyn Garcia</i>	<i>Dynamic Catholic</i>
<i>Jennifer Kheriaty</i>	<i>Wife, mother</i>
<i>Monica Maier</i>	<i>Wife, mother, EWTN</i>
<i>Sr. Theresa Nguyen</i>	<i>Faith Formation Director, Christ Cathedral Parish</i>
<i>Molly Rose</i>	<i>Wife, mother, former teacher</i>
<i>Fr. Nicolaus Thai</i>	<i>Parochial Vicar, St. Cecilia Church, Tustin</i>
<i>Fr. Benedict Yang</i>	<i>Director, St. Thomas Korean Catholic Center, Anaheim</i>

G. FINANCE AND STEWARDSHIP WORK GROUP

NAME	COMPANY/POSITION
<i>Elizabeth Jensen, Chair</i>	<i>Chief Financial Officer, Diocese of Orange</i>
<i>Fr. Kerry Beaulieu</i>	<i>Former Pastor, Our Lady Queen of Angels Church</i>
<i>Karl Carrier</i>	<i>Independent Consultant, Carrier Consulting & Enterprises</i>
<i>Sean Connolly</i>	<i>Controller, Diocese of Orange</i>
<i>Fr. Chris Heath</i>	<i>Pastor, St. Hedwig Church, Los Alamitos</i>
<i>Neil Kessler</i>	<i>Director of Information Technology, Diocese of Orange</i>
<i>Debbie Leaverton</i>	<i>Director, Parish Stewardship Education and PSA, OCF</i>
<i>Michelle Lencioni</i>	<i>VP and CFO, Santa Margarita Catholic H.S.</i>
<i>Kelly Lind</i>	<i>Director of Decision Support, Diocese of Orange</i>
<i>Suzanne Nunn</i>	<i>Planned Giving Consultant, OCF</i>
<i>Randy Redwitz</i>	<i>Managing Partner, Redwitz & Company</i>
<i>Fr. Joseph Tran</i>	<i>Administrator, Holy Spirit Church, Fountain Valley</i>

II. PEOPLE/GROUPS CONSULTED - STRATEGIC PLANNING

A. PASTORAL CENTER PERSONNEL

Title/Ministry	Name
<i>Auxiliary Bishop</i>	<i>Bishop Timothy Freyer</i>
<i>Chief Financial Officer and former Controller</i>	<i>Elizabeth Jensen</i>
<i>Christ Cathedral Docent and Former President, Rosary Academy</i>	<i>Trudy Mazzarella</i>
<i>Director of Cemeteries</i>	<i>Mike Wesner</i>
<i>Former Director of Communications</i>	<i>Ryan Lilyengren</i>
<i>Director of Construction</i>	<i>Joe Novoa</i>
<i>Director of Educational Technology</i>	<i>Scott Gotreau</i>
<i>Director of Hispanic Ministry</i>	<i>Deacon Guillermo Torres</i>
<i>Director of Human Resources</i>	<i>Tom Burnham</i>
<i>Director of Information Technology</i>	<i>Neil Kessler</i>
<i>Director of Institute for Pastoral Ministry</i>	<i>Olivia Cornejo</i>
<i>Director of Mission Integration, Christ Cathedral</i>	<i>Sr. Kit Grey</i>
<i>Director of Parish Faith Formation</i>	<i>Katie Dawson</i>
<i>Director of Priest Personnel</i>	<i>Fr. Daniel Reader</i>
<i>Director, Office of the Diaconate</i>	<i>Deacon Frank Chavez</i>
<i>Director, Office of Worship</i>	<i>Lesa Truxaw</i>
<i>Director, Respect Life, Justice & Peace</i>	<i>Greg Walgenbach</i>
<i>Director, Vocations Office</i>	<i>Fr. John Money Penny</i>
<i>Director of Youth & Young Adult Ministry</i>	<i>Armando Cervantes</i>
<i>Episcopal Vicar and Rector, Christ Cathedral</i>	<i>Fr. Christopher Smith</i>
<i>Former Acting Superintendent of Schools</i>	<i>Sally Todd</i>
<i>Former Chancellor</i>	<i>Shirl Giacomi</i>
<i>Former Chief Administrative & Financial Officer</i>	<i>Mark Dubeau</i>
<i>Former Director of Real Estate</i>	<i>Bill Milligan</i>
<i>Former Director, Pastoral Care for Families in All Stages</i>	<i>Michael Donaldson</i>
<i>Former Director, Pastoral Center Services</i>	<i>George Balch</i>
<i>Former Enrollment and Marketing Coordinator</i>	<i>Jacqueline Kennedy</i>
<i>Former Superintendent of Schools</i>	<i>Greg Dhuyvetter</i>
<i>Former Vicar for Faith Formation</i>	<i>Fr. Jerry Horan</i>
<i>Former Vicar General, Pastor OLQA Church</i>	<i>Fr. Steve Sallot</i>
<i>Regional Schools Business Manager</i>	<i>Ernie Garcia</i>
<i>Senior Events Manager, Christ Cathedral</i>	<i>Cathryn Wallace</i>
<i>Vicar General, Former Judicial Vicar</i>	<i>Msgr. Steve Doktorczyk, JCD</i>

B. PARISH AND SCHOOLS PERSONNEL

<i>Title/Ministry</i>	<i>Name</i>
<i>Adult Ministry, St. Justin Martyr Church</i>	<i>Sandra Gutierrez</i>
<i>Business Manager St. Timothy & VP Finance, Serra School</i>	<i>Mary Kate Marconi</i>
<i>Business Manager, St. Edward the Confessor</i>	<i>Barbara Belavic</i>
<i>Business Mgr., St. Bonaventure School</i>	<i>Colleen Hoffman</i>
<i>Chair, Diocesan Consultative School Board</i>	<i>Sr. Judith Dugan</i>
<i>Finance Council Chair, St. Timothy Church</i>	<i>Jim Skorheim</i>
<i>Former Business Manager, St. Vincent de Paul Church</i>	<i>Karen Srajer</i>
<i>Head of School, Rosary Academy</i>	<i>Shawna Pautsch</i>
<i>Pastor, St. Boniface Church</i>	<i>Fr. Ed Poettgen</i>
<i>Pastor, Our Lady of Guadalupe, La Habra</i>	<i>Fr. Edward Becker</i>
<i>Pastor, Santa Clara de Asis Church</i>	<i>Fr. Fred Bailey</i>
<i>Pastor, St. Anthony Claret Church</i>	<i>Fr. Bill Cao</i>
<i>Pastor, St. Edward the Confessor Church</i>	<i>Fr. Brendan Manson</i>
<i>Pastor, Holy Family Cathedral</i>	<i>Fr. Patrick Moses</i>
<i>Pastor, St. Polycarp Church</i>	<i>Fr. Michael St. Paul</i>
<i>Pastor, St. Vincent de Paul Church</i>	<i>Fr. Jerome Karcher</i>
<i>Formal Principal, Blessed Sacrament School</i>	<i>Roisin McAree</i>
<i>Principal, Christ Cathedral Academy</i>	<i>Debbi Vallas</i>
<i>Principal, Mater Dei High School</i>	<i>Frances Clare</i>
<i>Principal, Santa Margarita High School</i>	<i>Raymond Dunne</i>
<i>Principal, Servite High School</i>	<i>Michael Brennan</i>
<i>Principal, St. Cecilia School</i>	<i>Mary Alvarado</i>
<i>Principal, St. Columban School</i>	<i>Barbara Barreda</i>
<i>Principal, St. Joseph School, Santa Ana</i>	<i>Dr. Brad Snyder</i>
<i>Principal, St. Pius V School</i>	<i>Dr. Joan Bravo</i>

C. ORANGE CATHOLIC FOUNDATION PERSONNEL

Title/Ministry	Name
<i>OCF Board Member</i>	<i>Steve Muzzy</i>
<i>OCF Chairman</i>	<i>Alan Arnold</i>
<i>OCF Consultant, Planned Giving Specialist</i>	<i>Sue Nunn</i>
<i>OCF Director of Development & Communications</i>	<i>Hank Evers</i>
<i>OCF Executive Director</i>	<i>Cindy Bobruk</i>
<i>OCF Parish Stewardship Education Director</i>	<i>Debbie Leaverton</i>
<i>OCF Philanthropy Associate</i>	<i>Michelle Dao</i>

D. INDIVIDUALS & APOSTOLATES CONSULTED

Title/Ministry	Name
<i>Center for Catholic Education, LMU</i>	<i>Fr. Robert T. Walsh, SJ</i>
<i>Charismatic Renewal</i>	<i>Deacon Steve Greco</i>
<i>Cursillo</i>	<i>Efrain Gutierrez</i>
<i>Cursillos de Cristiandad Hispano</i>	<i>Deacon Ramon Leonb</i>
<i>Encuentro Matrimonial Hispano</i>	<i>Angel and Martha Mendoza</i>
<i>Jovenes Para Christo</i>	<i>Armando Lopez and Roxanna Payton</i>
<i>Head of Security, Disneyland</i>	<i>Representative</i>
<i>Head of Security, South Coast Plaza</i>	<i>Representative</i>
<i>Holy Family School of Faith</i>	<i>Troy Hinkel, Co-founder and VP</i>
<i>LifeTeen</i>	<i>David Calavitta</i>
<i>Marriage Encounter</i>	<i>Mike and Lisa Bergler</i>
<i>Neo Catechumenate</i>	<i>Ed and Kathy Sumner</i>
<i>Notre Dame ACE Program</i>	<i>Fr. Time Scully</i>
<i>Private Investigator, Safety Consultant and retired law enforcement</i>	<i>Mike Pollok, J.D.</i>
<i>Renovación Carismática Hispana</i>	<i>Fr. Efrain Flores Alejandro Rosales</i>
<i>Renovación Carismática Hispana Adultos</i>	<i>Magaly Ponce</i>

E. PERSONNEL FROM OTHER DIOCESES

<i>Superintendent of Schools, Archdiocese of Los Angeles</i>	<i>Kevin Baxter</i>
<i>Former Superintendent of Schools, Archdiocese of Boston</i>	<i>Sr. Kathleen Carr</i>
<i>Former Superintendent of Schools, Diocese of Omaha</i>	<i>Patrick Slattery</i>
<i>Superintendent of Schools, Diocese of Sacramento</i>	<i>Lincoln Snyder</i>
<i>Former Superintendent of Schools, Diocese of San Jose</i>	<i>Kathy Almalzol</i>
<i>Director, John Paul II Center for the New Evangelization Archdiocese of Milwaukee</i>	<i>Rich Harter</i>
<i>Director, Office of the New Evangelization, Archdiocese of Oklahoma City</i>	<i>Carole Brown</i>
<i>Controller, Diocese of Fresno</i>	<i>Cynthia Martin</i>
<i>Customer Service Rep. Office of Stewardship, Diocese of Fresno</i>	<i>Belinda Ray</i>
<i>Director of New Evangelization, Diocese of Lansing</i>	<i>Craig Pohl</i>
<i>CFO, Diocese of Las Vegas</i>	<i>Deacon Aruna Silva</i>
<i>Chancellor, Diocese of Owensboro</i>	<i>Kevin Kauffeld</i>
<i>Director of Stewardship & Development, Diocese of Pensacola-Tallahassee</i>	<i>John Kennedy</i>
<i>Director of Parish Engagement, Diocese of Sacramento</i>	<i>Carrie Aranda</i>
<i>Diocese of San Bernardino</i>	<i>Msgr. Gerard Lopez</i>
<i>Stewardship Coordinator, Diocese of Wichita</i>	<i>Audrey Ronnfeldt</i>

F. SURVEYS CONDUCTED

*All Pastors
All High School Principals and Presidents
All Elementary School Principals and Presidents
All High School Faculty
All Elementary School Teachers
All Elementary School Board Members*

G. PERSONAL INTERVIEWS

All Pastors and Parish Administrators in the Diocese of Orange