

# IMPLEMENTATION OF THE PLANNING PROCESS WITHIN A DENOMINATIONAL JUDICATORY

By: Meryl Ruoss

1. A working paper for Bishops and Department Heads of the Episcopal Diocese of Tennessee
2. A working paper for the Council of the Diocese of Tennessee
3. Proposed job description for a Diocesan Planning Committee
4. Proposed job description for a Planning Officer

## BASIC STRUCTURE

Organization is a tool man utilizes for the management of power, his people, resources and influence. Any human constellation is organized to promote and achieve certain ends with its power. These intentions may be exceedingly modest (e.g. a "Book-keeping Quarterly"), or exceedingly grandiose (e.g. our Federal Constitution).

The effective organization is considered that one whose power of power is sufficient to achieve its ends, and whose structure attains such achievement. Generally, the church is considered as the grandiose end of the infantile state but as the practical end of the effective organization, rather. There is a lot of talk in the church about "reorganization". Much of it seems to be related to "new forms of ministry". More of it should be about "effective structure". I understand that meeting is to be focused on the latter.

WORKING PAPER  
FOR MEETING OF  
BISHOPS AND DEPARTMENT HEADS

March 29-31, 1967

There are four items which this paper will discuss in a preliminary way to help stimulate our thinking in preparation for our time together. These items are:

1. Basic Structure (A Model and The Diocese of Tennessee)
2. Line and Staff functions (A Model and The Diocese of Tenn.)
3. Ecclesiastical Authority - a unique structural element.
4. The Relation of Planning to Structure and Staff.

The author disclaims any expertise in Canon Law of the Episcopal Church. This paper reflects only partial understanding and some considerable experience with Diocesan structure and practice. There seem to be some similarities and many unique elements from Diocese to Diocese. What follows is hopefully adequate enough to get us started. Where Tennessee is inaccurately or inadequately represented the other participants in the meeting should freely modify the picture.

A. BASIC STRUCTURE

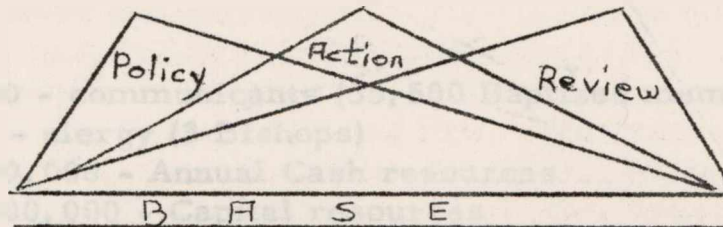
Organization is a tool man utilizes for the management of power, i. e. people, resources and influence. Any human constellation is organized to promote and achieve certain ends with its power. These intentions may be exceedingly modest (e. g. a "Barbershop Quartette"), or exceedingly grandiose (e. g. our Federal Constitution).

The effective organization is considered that one whose base of power is sufficient to achieve its ends, and whose structure actualizes such achievement. Generally, the church is considered at the grandiose end of the intention scale but at the modest end of the effective organization scale. There is a lot of talk in the church about "reorganization". Much of it seems to be related to "new forms of ministry". More of it should be about "effective structure". I understand this meeting to be focussed on the latter.

1. A Theoretical Model

The first process of organization is to assemble people, resources and influence (or respect). This aggregation of power is usually accomplished by promotional efforts geared to a few clearly stated intentions. The beginnings of a new mission is a typical church example.

The second process of organization is to authorize and enable the use of its power. Such delegation of power takes three forms; legislative, executive, and judicial. Every organization needs to describe its power and how it is going to be used (legislative). It then uses its power to act according to those stated intentions (executive). A representative organization must always provide an accountability for its action or use of its power (judicial). These three functions or branches of an organization could be called; policy, action, review. This can be expressed in the following figure:



In some situations a single person may well exercise one or more of the crucial functions, and assume the delegation of power from the base. The larger the organization, or the more power it has, or the more geography it encompasses--the more complex it becomes. The delegation of power gets fragmented into many departments, divisions, committees, etc. All such extensions must be built upon one of the three branches so that complexity does not become chaos. This provides guidance for responsibility and relationships to any part of the structure. It also provides a clear and firm relationship to the whole base of power. The base is not fractured by games of "horse and rider" in the super-structure.

The effective organization, is characterized by clarity of its fundamental anatomy. The base of power is clearly understood. How decisions are made to use it is well defined. Provision for the transmission of such decisions into action and program is explicit. The evaluation of experience and new factors in the situation are taken seriously.

At this point it may be necessary to remind ourselves that in this paper we're focussing on membership organizations. Such organizations exist because people voluntarily band together. The basic power of a membership organization is the vote and the dollar. The members who contribute both, generally desire to retain some measure of control over the purposes and uses of their aggregated power. This is policy control, and represents the essential difference between the church and a corporation, or the military. This difference cautions us against too simple a transfer of corporate models to the church.

2. The Diocese of Tennessee

What follows are my impressions from the study of the Constitution and Canons adopted in 1966, and from a variety of discussions in the Diocese in which I have participated. It undoubtedly needs modification to be accurate.

- a. Base:  
28,000 - communicants (35,500 Baptized members)  
160 - clergy (3 Bishops)  
\$4,000,000 - Annual Cash resources  
\$22,000,000 - Capital resources

For most intents and purposes this base is subject to a primary level of organization by parishes and missions. This primary level is geographical, canonical and constitutional. These 120 primary organizations in essence are the Diocese. Most of the people-base is directly tied to these primary organizations. Some of the financial base is not. Some financial resources and influence are generated by the Diocese as an organization. They are not a direct delegation of power from a people, or membership base.

b. Authorization and Use of Power:

The Diocese appears to be an organization whose base of power is a secondary delegation from a collection of primary membership organizations. This organization becomes visible in the Annual Convention, where policy control is exercised by delegates (i. e. the primary organization).

Since the Convention is not a continuing body, it delegates its policy-making authority, ad interim, to an elected Council of its members. This policy-making continuity is further represented by the Bishop who serves as President of both bodies. Planning ("long-range plans" and "careful studies") is specifically mentioned as one of the Council's policy-making responsibilities. In this they "shall work as closely as possible with the Bishop and Bishop Coadjutor."

Furthermore, the Council has been charged with "the duty--to devise ways and means for the proper performance.. (of) carrying on the mission of the Church within the Diocese". This and other references (such as "supervise the administration of the program of the Diocese") would seem to require the Council to see that a clear and effective executive function was established and maintained. This seems to be a general responsibility (Canon 6, Sec. 12, 13, 14, 15). The specific executive responsibility rests with the Bishop, the Council advising him. Departments are seen as the primary vehicles for the executive (i. e. implementing, program) function in the Diocese. The Council retains policy control (organization, definition of duties, provision of staff and budget) while administrative control is assigned to the Bishop. The latter is seen in Canon 6, Sec. 11:

- 1) "Each Department--shall advise, assist and cooperate with the Bishop in carrying on the program and the work."
- 2) "Each Department--shall carry out such other **functions** as may be-----requested by the Bishop."
- 3) "The administration of the program and work of each Department shall be the responsibility of the Bishop."
- 4) "The Council (Shall provide) such administrative assistants as shall be required to enable the Bishop-----etc."
- 5) Sec. 19: "The Bishop may appoint and remove -----ect."

Planning Commissions and Mission Districts (Canon 13) seem to be other means for discharging the executive function. "Planning Commission" appears to be a misnomer since their duties are restricted to program planning and implementation. It seems clear that Council retains policy control and that the Bishop retains administrative control. The Mission District seems to be solely an administrative device of the Chief Executive Officer - the Bishop.

The Review function of the Diocese is largely conceived in terms of reports by the executive function to the policy-making bodies. Staff and each of the three executive devices are required to report to the Council on past activities. The Departments and Planning Commissions are also required to submit projections of their activities to the Council. The Convention apparently participates in the Review function by receiving an annual report from the Council, as well as planning projections and budget projections.

While this definition of review seems less than adequate for an organization of such scope as the Diocese of Tennessee, it is somewhat better than typical church judicatories at this level. The clear provision for a planning process strengthens the structure in this instance.

The following figure might illustrate the organizational anatomy of the Diocese:

(SEE ATTACHED)

## B. LINE AND STAFF FUNCTIONS

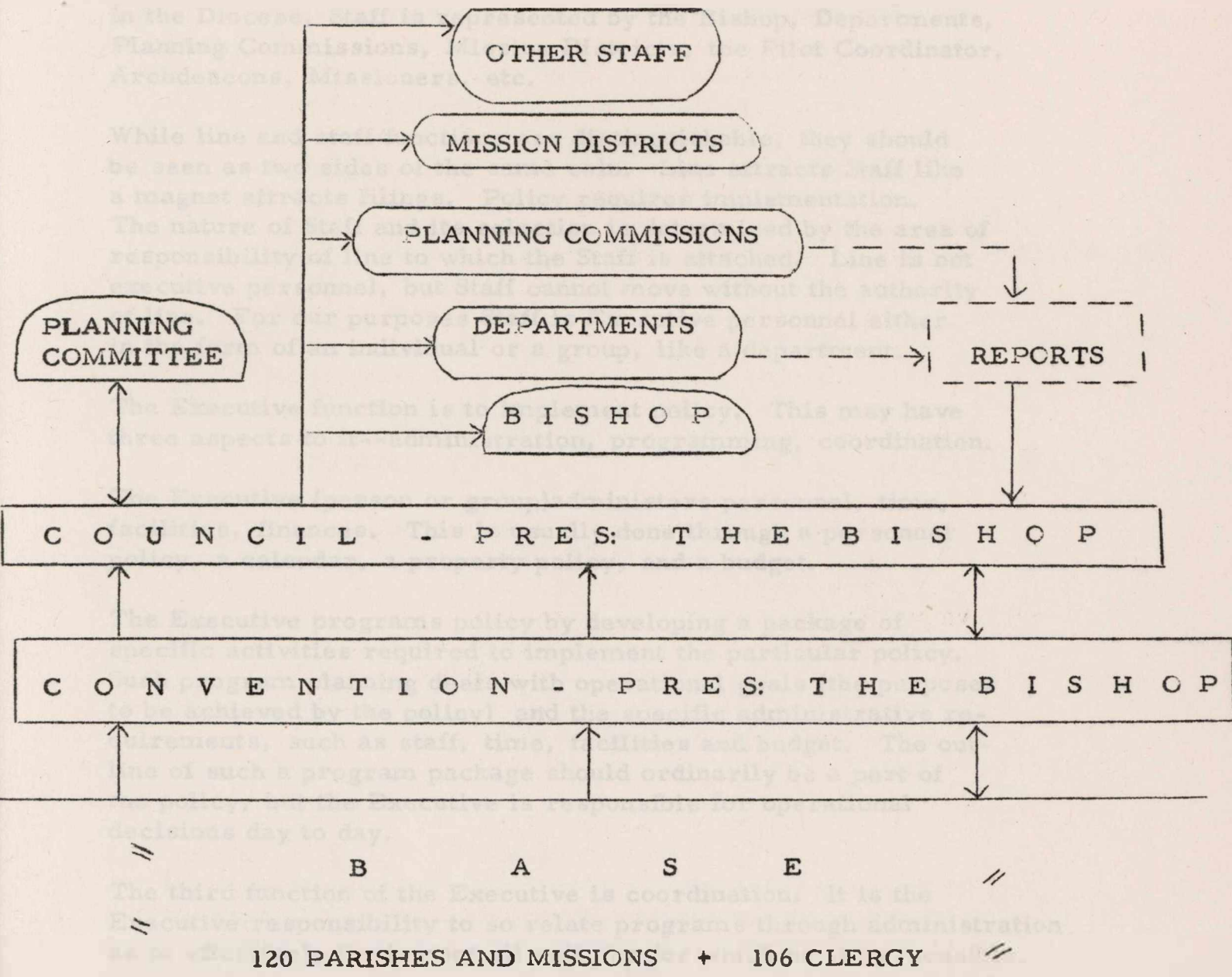
Line and Staff are two terms commonly used to describe closely related functions within an organization. For our purposes in this paper they will have the following connotations. Line: The chain of authority; the power of legislation or policy making; usually a group of persons who represent this authority and power.

In the Diocese the common line would be the Convention, the Council, and the Bishop.

P O L I C Y

E X E C U T I V E

R E V I E W



Staff: Individuals or groups not having legislative authority; associated to line in carrying out some special enterprise; executives, administrators, programmers; sometimes advisory functions re policy.

In the Diocese, Staff is represented by the Bishop, Departments, Planning Commissions, Mission Districts, the Pilot Coordinator, Archdeacons, Missioners, etc.

While line and staff functions are distinguishable, they should be seen as two sides of the same coin. Line attracts Staff like a magnet attracts filings. Policy requires implementation. The nature of Staff and its selection is determined by the area of responsibility of line to which the Staff is attached. Line is not executive personnel, but Staff cannot move without the authority of line. For our purposes Staff is Executive personnel either in the form of an individual or a group, like a department.

The Executive function is to implement policy. This may have three aspects to it--administration, programming, coordination.

The Executive (person or group) administers personnel, time, facilities, finances. This is usually done through a personnel policy, a calendar, a property policy, and a budget.

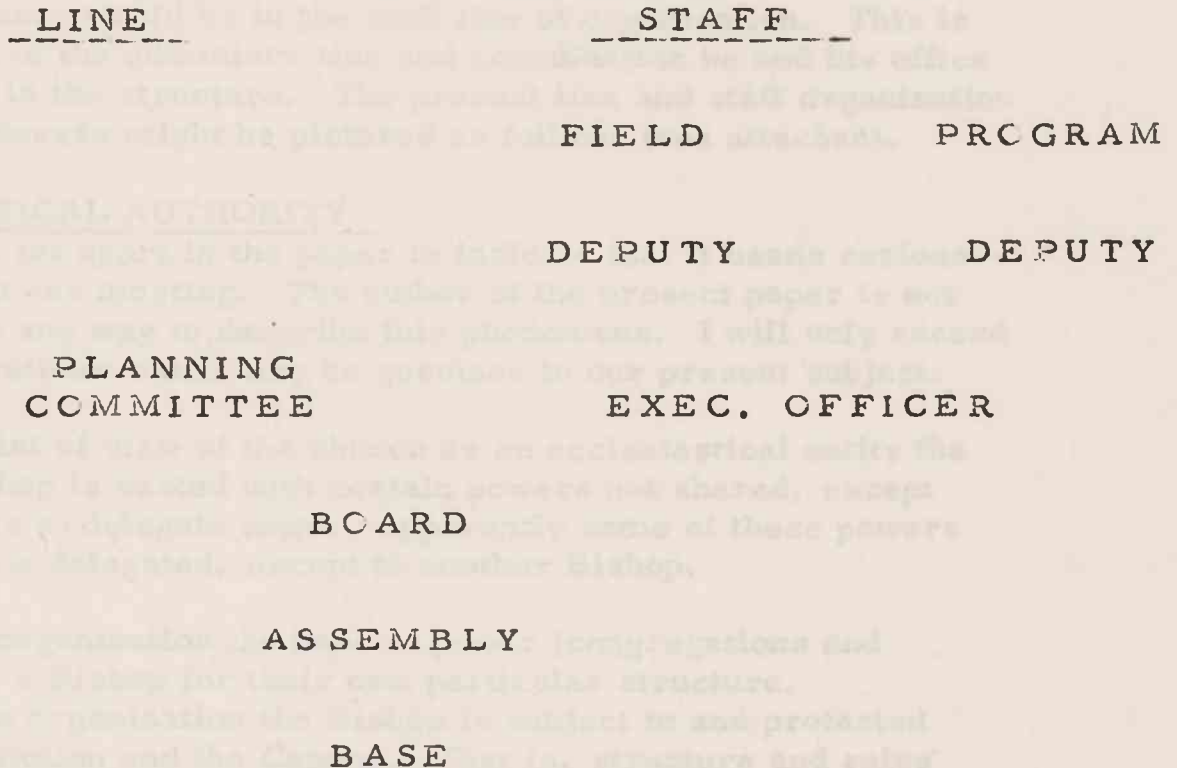
The Executive programs policy by developing a package of specific activities required to implement the particular policy. Such program planning deals with operational goals (the purposes to be achieved by the policy) and the specific administrative requirements, such as staff, time, facilities and budget. The outline of such a program package should ordinarily be a part of the policy, but the Executive is responsible for operational decisions day to day.

The third function of the Executive is coordination. It is the Executive responsibility to so relate programs through administration as to effectively implement all policies for which he is responsible.

In some organizations the Review function has its separate bodies and its separate personnel. By policy these are appropriately related to Executive and policy making functions. A formal planning process in an organization carries a major responsibility for Review. In the absence of a formal Review process (characteristic of most church organizations) the Planning Process may have to bear an even heavier burden for review. Sometimes staff from the Executive

function can be assigned to provide specific review services. Accountability and evaluation usually require more sophisticated conceptualization and servicing than our typical recording and reporting processes.

The following figure may represent a model of the line and staff functions.



2. Line and Staff in the Diocese

My understanding of the policy line in the Diocese is that it runs from Convention to Council with the Bishop playing the important role of continuity in this line. The Bishop also has an independent line of policy authority which is commonly referred to as "ecclesiastical authority".

The introduction of a formal planning process into the Diocese adds a strong advisory level to this policy line. The Planning Committee in no wise makes policy but it does become the major channel for policy development. It also plays a major role in the review function.

The executive function in the Diocese clearly functions under the Bishop as chief executive officer. Departments, Planning

Commissions, Mission Districts, and the personnel related to these various enterprises, as well as personnel in the "diocesan office" are all elements of the executive function. They are all related to the Bishop as chief executive officer but there are an additional set of cross-relationships between them which an organizational chart would have to clarify and make precise.

A Planning Committee appointed by the Council is a creature of the Council, not the executive function. A Planning officer who served as staff to the planning function and the Planning Committee, would be in the staff line of organization. This is because of the administration and coordination he and his office require in the structure. The present line and staff organization of the Diocese might be pictured as follows (see attached).

### C. ECCLESIASTICAL AUTHORITY

This item is set apart in the paper to indicate that it needs serious discussion in our meeting. The author of the present paper is not competent in any way to describe this phenomena. I will only record some observations which may be germane to our present subject.

From the point of view of the church as an ecclesiastical entity the office of Bishop is vested with certain powers not shared, except as he chooses to delegate them. Apparently some of these powers cannot even be delegated, except to another Bishop.

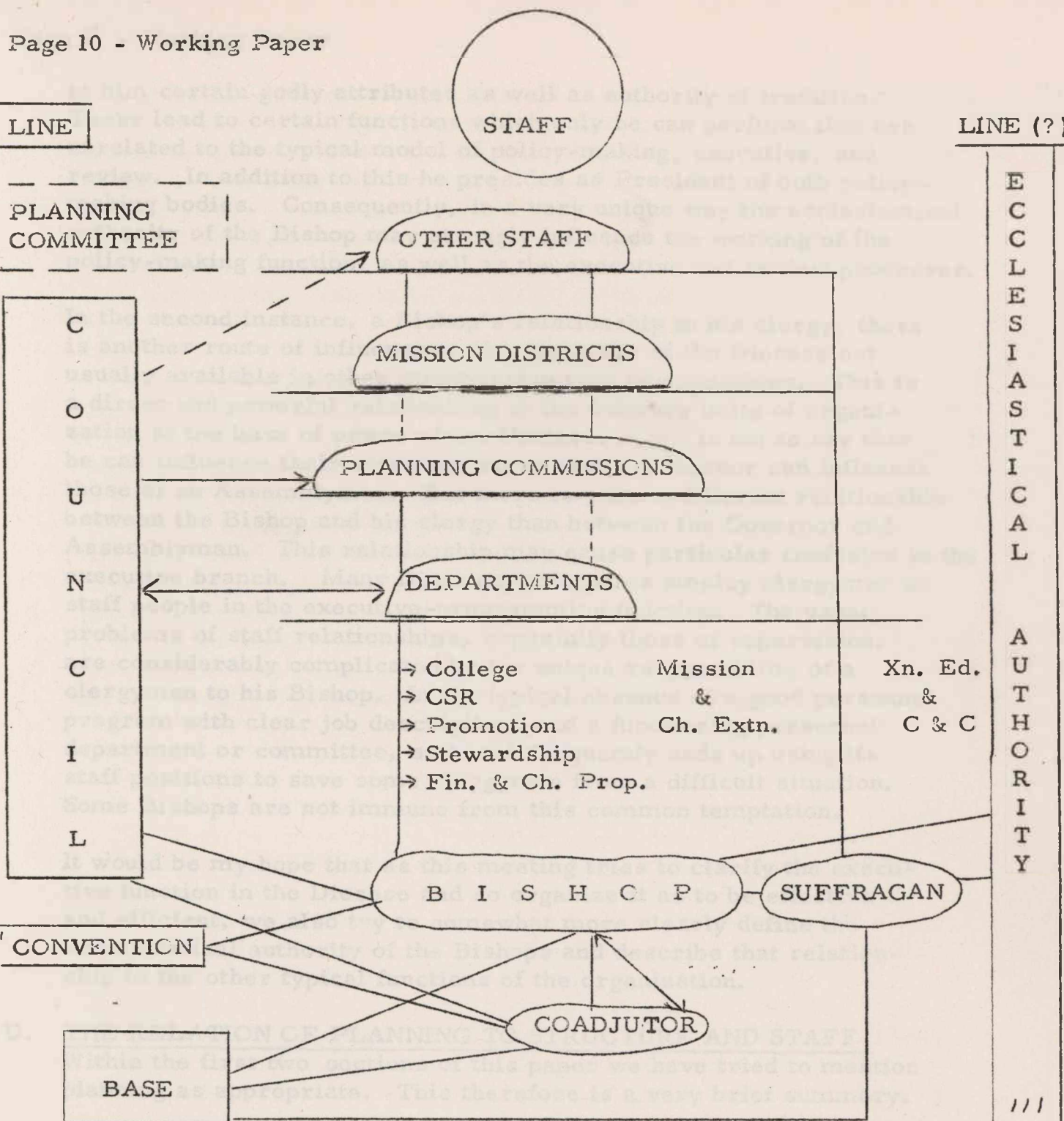
As a human organization the base of power (congregations and clergy) elect a Bishop for their own particular structure.

In this human organization the Bishop is subject to and protected by the Constitution and the Canons. That is, structure and rules made by the base of power order the life of the Diocese, including the work of the Bishop.

There are two unique attributes to the office of Bishop which have some considerable impact on a Diocesan model of organization. These are his prestige, and his relationship to the clergy. The matter of prestige is somewhat similar to that of the Governor of a state. By virtue of his office the Governor's word in the discussions of policy, and even the proposals for policy, carry a great deal of weight. His influence on other structures in society is likewise very heavy because of the weight of his office. So it is with the Bishop. His office carries a sort of global responsibility for the entire constituency, and the specific organization of the Diocese. This respect amounts to a considerable piece of the base of power of a Diocese. Unlike a Governor, however, the Bishop has attributed

LINE

LINE (?)



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The planning process is specifically related to the policy making function of an organization. The planning process is for the entire life of the organization. A Planning Committee responsible for guiding this process should be a creature of the policy-making body. In the Diocese of Texas, this would be a committee set up by the Council and responsible to it.

to him certain godly attributes as well as authority of tradition. These lead to certain functions which only he can perform that are unrelated to the typical model of policy-making, executive, and review. In addition to this he presides as President of both policy-making bodies. Consequently, in a very unique way the ecclesiastical authority of the Bishop may strongly influence the working of the policy-making function, as well as the executive and review processes.

In the second instance, a Bishop's relationship to his clergy, there is another route of influence on the structure of the Diocese not usually available in other membership type organizations. This is a direct and powerful relationship to the primary units of organization at the base of power of the Diocese. This is not to say that he can influence their votes any more than a Governor can influence those of an Assemblyman. But there is quite a different relationship between the Bishop and his clergy than between the Governor and Assemblyman. This relationship may cause particular confusion in the executive branch. Many Diocesan structures employ clergymen as staff people in the executive-programming function. The usual problems of staff relationships, especially those of supervision, are considerably complicated by the unique responsibility of a clergyman to his Bishop. In the typical absence of a good personnel program with clear job descriptions and a functioning personnel department or committee, a church frequently ends up using its staff positions to save some clergyman from a difficult situation. Some Bishops are not immune from this common temptation.

It would be my hope that as this meeting tries to clarify the executive function in the Diocese and so organize it as to be effective and efficient, we also try to somewhat more clearly define the ecclesiastical authority of the Bishops and describe that relationship to the other typical functions of the organization.

#### D. THE RELATION OF PLANNING TO STRUCTURE AND STAFF

Within the first two sections of this paper we have tried to mention planning as appropriate. This therefore is a very brief summary.

The planning process is specifically related to the policy making function of an organization. The planning process is for the entire life of the organization. A Planning Committee responsible for guiding this process should be a creature of the policy-making body. In the Diocese of Tennessee this would be a committee set up by the Council and responsible to it.

The planning process is responsible for policy development. Therefore, all recommendations to modify, eliminate or create policy should be channelled through the Planning Committee in one form or another. The Planning Committee would not serve as a department in the executive function. Nor should it be considered the review body. It should be responsible for stimulating adequate review processes in the organization. A more detailed job description and discussion of the Planning Committee is the subject of a separate paper.

A Planning Officer on the Diocesan staff should be considered in the Executive function and related to the chief executive officer in a similar way to all other staff. His particular job description however, would relate him to the Planning Committee. His job is to staff the planning process. This may require him to service the review function in many ways. But he is not the review officer. His responsibilities may also require him to frequently serve as advisor to the chief executive officer and other units and personnel within the executive function. But he is not implementing program in the usual sense. His program is planning. This places him in a unique relationship to the policy making function. A job description for a Planning Officer is contained in a separate paper.

A. The provision of general intelligence to the policy making, executive, and review branches of the organization.

B. The recommendation of policies for the continuing development of the mission.

A WORKING PAPER FOR  
THE COUNCIL OF THE DIOCESE OF TENNESSEE

Meeting April 18-19, 1967, St. George's Parish, Nashville, Tennessee

**INTRODUCTION:** The Council of the Diocese at a special business meeting March 4, 1967 took formal action to "place itself under the planning process". At the same meeting the Council authorized the preparation of "a job description and such other relevant matters for a planning committee and a professional staff assistant". A report was requested for its April meeting. This present paper, prepared at the request of the Diocesan, is designed to help respond to these actions of the Council.

This working paper is organized into five parts: A brief statement about the planning process, a section on the planning committee, another section on the planning officer, a typical budget, and a possible calendar for implementing the decisions of the Council re planning in the Diocese.

## I THE PLANNING PROCESS

The emerging shape of American life has often been described as "a planning society". Generally, this means that man is now beginning to plan his own continuing evolution. Specifically, it means that the major systems of our society are using planning as the primary technique for isolating issues, setting goals, and determining priorities. The Church as one of these basic systems is just beginning to use this discipline for policy development. The Church is beginning to discover that planning can help provide a responsible and continuous process for dealing with the questions "where must we be when?" and "how do we best get there?".

The planning process is a demonstration of the continuing need of any organization for enunciating a purpose and for pursuing its goals with maximum human intelligence and foresight. Planning focusses on the organization's responsibilities, policies, and program requirements. The planning process requires a deep sensitivity on the part of the policy makers and executives of the organization to the challenge of the future, i. e. the meaning of the historical process for the achievement of stated goals.

The functions of a planning process in the church might be described as:

- A. The provision of general intelligence to the policy making, executive, and review branches of the organization.
- B. The recommendation of policies for the continuing development of the mission.

- C. The development of a comprehensive system of priorities, rationally related to an ongoing analysis of change and long range trends.
- D. Setting in motion additional planning efforts as such needs are identified.
- E. The stimulation of a review and feed-back process, including evaluation of all programs and review of all policies.

There are some factors of general concern in a planning process at a jurisdictional level (Diocese). A diocesan planning committee would continually need to remind itself of such considerations as:

- A. The responsibility of the jurisdiction to provide "a larger view" of mission and opportunities for use by the local units.
- B. The impact on local units of jurisdictional and national policies and activities.
- C. Those issues and opportunities which are regional in character, within the jurisdiction or between jurisdictions.
- D. The national interest as represented in various denominational resources, programs and overview.
- E. Responsibility for leadership and impact upon the national structure.

Finally, we need to remember that a serious planning process is a goad and a burr. An important function of the planning process is to assure the presence within the system of a beachhead for innovation. A planning committee should be an enclave consistently pressing for the truth. It is not a barbituate designed to provide the system with peace of mind. The serious use of planning can help the Church move out of its ruts and boxes to become a visible presence at God's activities in His world.

(If additional resources would be helpful, see:

- A. Father Williamson's presentation on planning to the Council-- January 5, 1967;
- B. The materials on planning presented at Montgomery Bell State Park-- March 2 - 4, 1967;
- C. The author's piece "The Church in a Planning Society".

## II. THE PLANNING COMMITTEE

Today's setting in which the church makes decisions about its mission and work is one of continual rapid and major changes.

The basic responsibility of a Diocesan Planning Committee is to help the Church:

- A. Be alert to God's actions in the changes around it;
- B. To search out the meanings and implications for the church's life and work of such actions;
- C. To discover specifically what the Diocese should and can be doing in the light of A. and B.

Such responsibility requires the Planning Committee to focus on policy development. This focus affects all aspects of Diocesan life. Consequently, the Diocesan Planning Committee is one---

- with authority. For the Planning Committee to be competent for this task it must have a clear and public delegation of authority for planning. This policy action has already been taken by the Council of the Diocese.
- with a focus. The Planning Committee has a long-range and comprehensive focus--the total life and calling of the Diocese, with special reference to the future.
- with a job description. This should be prepared and adopted by the Council prior to the appointment of a Committee. A proposed job description for the Diocesan Planning Committee is found in Appendix A of this paper.
- with continuity. Effective planning is neither sporadic nor capricious. It must be sustained and continuous to achieve direction, fruitful feed-back and long-term effect upon policy of the Diocese. Such continuity requires serious commitment to the planning process throughout the Diocese.
- a long-term job. Planning never ends in the sense of "a completed plan". A Planning Committee is never "dismissed with thanks". The Diocese, the Council, and Planning Committee members all need to understand this is a job involving hard work over a long period of time.

- with resources. Effective planning requires a designation of adequate resources to enable the Planning Committee to properly function. Such resources are:
  - A. People. The special kind of people who make good members of a Planning Committee. Sometimes they need to be released from other assignments.
  - B. Time. The many hours a Committee member will be asked to designate for planning. The many hours the Council will need to devote to policy making.
  - C. Staff. Planning requires extensive staff work. At a Diocesan level it is rarely possible for volunteers to complete everything necessary. Eventually, professional staff assistance is required to keep the planning process moving efficiently and effectively.
  - D. Budget. Expenses for committee meetings and committee work; the purchasing of data, reports, research, and other resources; the maintenance of an office; and the securing of technical assistance and a professional staff require a definite budget commitment to the planning process.

Functions of a Diocesan Planning Commission:

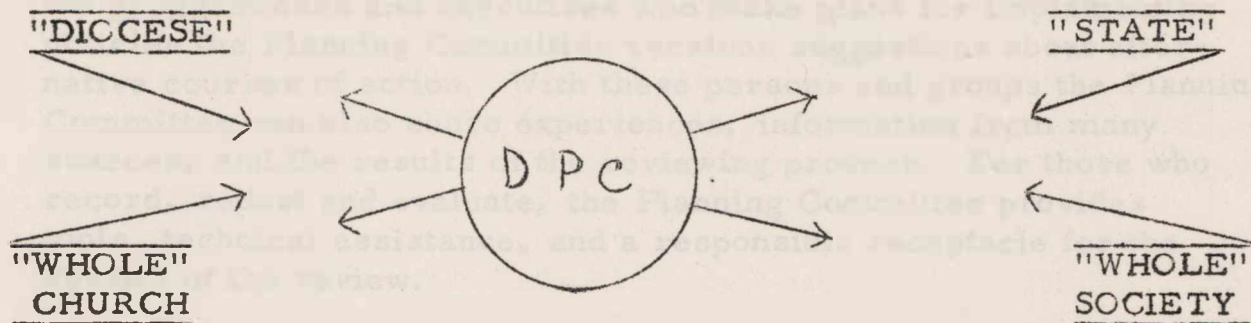
1. Maintain a Diocesan Policy Source Book. This is a unified document containing the existing policy of the Diocese i. e. the goals, decisions and programs by which we have been or are now implementing our work. It is the Planning Committee's responsibility to maintain such a basic Master Plan for the Diocese. If such a collection does not now exist, the Planning Committee must bring one into being as soon as possible.

Since policy statements may be lodged in many places, the codifying process may cover the history of how you have responded to your calling; the official records of Council and other groups; oral and written tradition ("We always have done it this way"), and administrative interpretation ("well, the Bishop has always taken care of that").

The Policy Source Book makes it easy to spot policy vacuums and to pinpoint areas of responsibility requiring policy modification and adjustment. In a real sense this comprehensive mission plan is always in the process of preparation. It is never quite completed, continually reflecting implementation, experience, changing conditions and new trends.

2. Communication. The emphasis is on creating a forum in which concerns of the world and the church are shared and discussed at a policy level. For the Planning Committee, communication is an indispensable two-way process of sharing, searching and listening. On the one hand, the Committee constantly needs data from many sources. On the other hand, the entire Diocese must be kept informed of its work. The planning committee must design ways in which all elements of the Diocese really participate in shaping policy recommendations.

Two-way planning communication could be pictured like this:



Network: An extensive communication network is essential for a Planning Committee to do its work well. This two-way network of relationships could be described as outward and inward. The outward flow is to share the Planning Agenda in such ways as will inform, elicit feedback, and otherwise fulfill the forum function of planning. The inward flow is from an established network of "listening posts" in the Church and the society which feed into the Planning Committee a wide variety of data - e.g. concerns, statistics, political climate, reactions, new ideas.

3. Coordination. This is the function which ascertains that the unit is related to the whole. For example, the Diocesan Planning Committee needs to coordinate its planning efforts with those going on in parishes, metropolitan areas, et. al. so as to assure the sharing of intelligence, the probable impact of policies being recommended at the various levels, and the effective inter-relationship of development activities. This coordinating function also reaches out from the Diocese to the larger region and to the national church.

Coordination in planning also means liaison with other planning bodies such as government and social agencies. Liaison is not just clearance or reporting of intentions. Coordination in this

sense is a serious effort to affect long-term goals and policy in the other systems, just as their efforts may be affecting the church's goals and policies. Every person or group whose actions alter the setting of the Diocese should be related to the Church's planning process at some point - or many points.

4. Advise. This is the function which clarifies the relation of planning to those who exercise the power of the organization, i.e. the Diocese. For example, the Planning Committee recommends goals and policies to those who set the direction of the Diocese and have the power to establish priorities, i.e. the Council. From the programmers and executives who make plans for implementing policies the Planning Committee receives suggestions about alternative courses of action. With these persons and groups the Planning Committee can also share experiences, information from many sources, and the results of the reviewing process. For those who record, report and evaluate, the Planning Committee provides tools, technical assistance, and a responsible receptacle for the results of the review.

The advisory function aims to make the church's choices as intelligent and faithful as modern tools can. The Planning Committee hopes to help the Diocese minimize mistakes and maximize resources. Of course, the Planning Committee cannot abridge the freedom of choice of the appropriate decision makers. That includes the freedom to be wrong.

### The Shape of the Planning Committee

The work of the Planning Committee is primarily exploratory and thoughtful. It recommends and advises. It does not make policy nor execute it. It doesn't build buildings, raise or spend large sums of money, or occupy center stage. It is a tough job to guide an organization in a careful systematic way from concern to action.

WHO: What type of person is a productive member of the Planning Committee, and finds satisfaction in such work? Experience indicates that a screening committee should assemble a panel of names of people who are:

- sensitive - to the needs of others; will help a small group function rather than block it.
- honest - about data and meanings; good and bad; sickness or health.
- open - to new ideas, and any kind of relevant information; inquisitive; never satisfied with half a picture.
- committed - to a total view of mission and church; hard work over a long period.

SIZE: Experience also indicates that the Planning Committee should be small. Since this committee does not make policy nor administer program the usual concern for checks and balances between special interests is not present. Also, the communication, or forum, function of planning makes the committee's work quite public, and many other persons in the Diocese are continually involved in the planning process.

The typical Diocesan Planning Committee has five members; the recommended range is three to seven. The council should appoint the Committee from the panel selected on the foregoing criteria.

CAUTION: Since it is a small committee every member should be chosen carefully.

- . Don't appoint representatives of particular interests or persons who will approach everything from the bias of a specific organization, or group, or viewpoint.
- . Don't appoint specialists only because of their expertise. No member should approach the work only in terms of his specialty. The Committee may coopt experts when needed.
- . Activists may disrupt the Committee. There are few short term achievements or quick successes. Members must be patient, willing to explore, and sometimes accept rejection of good and careful work.
- . These conditions also make it difficult for the status figure to be happy on the Planning Committee. Let him use his status in the political processes of decision-making where it might help in effectuating recommendations from the Committee.

TERM: Being a member of a Planning Committee is a demanding assignment. You must avoid riding anyone's special horse. You dare not be stampeded into premature action. It is not your duty to defend the old ways, nor may you refuse to see any value in the existing order. It takes some time for such a committee to learn its skills and to become a smoothly working unit.

Consequently, the term of office should be flexible. Some members may need to be relieved after a year or two. Other members may be able to fruitfully serve five or six years. Every replacement needs to be as carefully chosen as the original committee. Take particular care in designating a chairman who can keep the work organized and flowing, but who doesn't push too hard and too fast.

Since Council members already wear many "hats", they usually are not appointed to the Planning Committee. It is very important to keep Council's policy making function separate from the Planning Committee's policy-recommending function.

Much the same is true for the role of the Diocesan on the Planning Committee. He is already the president of the policy making body and the chief executive officer. He usually is not expected to be a working member of the planning committee, but does serve an indispensable function as enabler, prompter, and resource person.

## PLANNING WITHIN THE DIOCESAN STRUCTURE

The effective organization is characterized by the clarity of its fundamental anatomy. The base of power is clearly understood (parishes, clergy, convention). How decisions are made to use the power of the organization is well-defined (policy). Provision for the transmission of such decisions into action and program is explicit (executive). The evaluation of experience and new factors in the situation are taken seriously (review).

Unfortunately most church organizations have not quite so clear cut a structural picture. In the Diocese of Tennessee the policy-making role seems to be clear in the present canons. The current efforts to clarify the executive function will be most helpful. At the present time the review function seems to be most unclear and probably the weakest in the Diocesan picture.

The planning process, and the Planning Committee as its custodian in the Diocese, has a major relationship to all three branches of the organization.

1. A Planning Committee is responsible for policy development. In the Diocese of Tennessee the Convention is the ultimate policy-making authority. Since it is not a continuing body it delegates that authority, ad interim, to an elected council of its members. Planning is specifically mentioned as one of the Council's policy-making responsibilities, in close cooperation with the Bishops. Consequently, it would appear that the Diocesan Planning Committee should be created by the Council and responsible to it.

In a sense, the Planning Committee is doing the disciplined "leg work" which the Council as the policy-making body needs to have done. All recommendations to modify, eliminate, or create new policy should be channeled through the Planning Committee in one form or another. The Planning Committee takes all its recommendations to the Council.

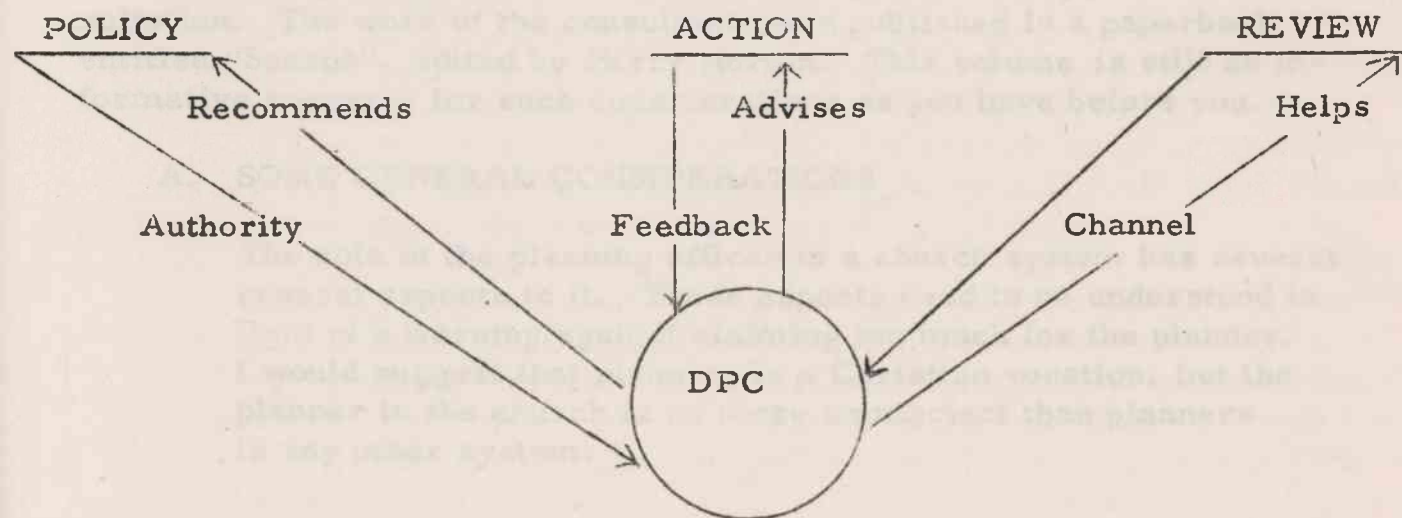
2. The Diocesan Planning Committee serves the Executive branch in an advisory capacity. It is not a Department in the executive function of the Diocese, but there is a close working relationship.

The Planning Committee, out of its experience in data collection, may be able to share valuable insights with the executives and programmers as they are deciding how to carry out policy which the Council has adopted. The Executives and implementers will be serving on task forces for the Planning Committee, putting together program packages, helping to sort out alternatives, and many times having to assist in the planning process, and the review process.

3. The Planning Committee should be responsible for stimulating adequate review processes in the Diocese. It should not be considered "the review body", although given the present vacuum in the organization the Planning Committee may have to assume some of this duty temporarily. The Planning Committee receives all data generated by the review process so that it can be utilized for future policy recommendations and helpful advice to the Executive decision-makers and programmers.

Review is the check and balance to see that implementation is actually producing what our policy said we intended to do. Review is also accountability, in terms of recording and reporting. To the recorded fact must be added interpretation and analysis. Consequently, evaluation is part of review. A Planning Committee includes in each of its recommended policy packages a design for the early and continuous review of that policy, and its related program.

A picture of the Planning Committee's relationship to the organization might look like this:



INTERACTION: There is one more important way to look at the relationship of the Planning Committee to the structure. This is from the perspective of the Planning Committee's communication function. The Committee must at every stage of its work take its recommendations to the policy-making body--the Council. The policy makers accept, reject or modify the proposals. Only after receiving authorization to proceed can the Committee take the item to the next stage.

At the same time the Planning Committee is in communication with numerous other persons, groups and contacts. This is a two-way flow of reporting, interpreting, collecting data, listening, and so forth. This interaction with the policy-making body and other points in the church and the world makes very realistic the description of planning as a process.

(A very helpful additional resource would be "The Planning Process" by Perry L. Norton, a publication of the Joint Urban Program).

### III THE PLANNING OFFICER

INTRODUCTION: This is not a discussion of the planner. We are not talking about one who stands above, grasps the true form of society or the institution, and then has the power to impose or engineer the implementation of that form. The planner in the church does not make the plans for the church.

We are talking about a professionally competent person on the staff of the Diocese who understands planning as a process and has the skills to so implement it in the Diocesan structure. Discussions about the role of the planner in the church have been going on for many years. The major landmark in this discussion was "A National Consultation on Personnel Needs in Church Planning" held in 1960. Your consultant was chairman of the steering committee for the Lily Endowment who sponsored the consultation. The work of the consultants was published in a paperback entitled "Search", edited by Perry Norton. This volume is still an informative resource for such considerations as you have before you.

#### A. SOME GENERAL CONSIDERATIONS

The role of the planning officer in a church system has several general aspects to it. These aspects need to be understood in light of a warning against claiming too much for the planner. I would suggest that planning is a Christian vocation, but the planner in the church is no more omniscient than planners in any other system.

1. A conceptualizer: one who sees the coherence in a pluralistic scene. This is the area with which the church could best deal. This is its diversity and this is its integrity. Here is the whole job to be done. Here are the threads that make the fabric--the people, the land, the uses people make of the land, the manipulators, the decision-making processes, the altar, the Body of Christ--in all its fragments, the life-preserving and the life-destroying. This is the maelstrom and this is the matrix. In a very real sense this is a prophetic role of setting forth the actual dimensions of the mission.
  
2. A guide: the church planner is one of a group carrying out a process. He is a special resource, and he has been delegated specific responsibility. He is not a manipulator, but rather a stimulator. He is responsible for introducing new concepts for discussion when others in the planning group have only routine experience as a resource. The church planner suggests new relationships when old patterns are rutted or lead to dead ends. These are new lines within the Body of Christ or between the church and the lines of society. As a guide within, not an expert from without, he is above all a creative realist. He insists that the church must grasp hold of the hard stuff of life and convert it to the use of the mission. The cynic will say "that won't work" or "we've tried it before," but the guide will insist that it is part of the whole task which must be held before the church until it does accept its mission.
  
3. A servant of dialogue: the planning officer understands that he will always be the bearer of the tensions between facts and faith. He must have a firm hold on both. He will willingly involve his faith in the facts of life and just as willingly have the facts of society challenge his faith. He is participant in both poles of this dialogue but he is neither imposing an image of the "good society" nor "the right form of the church". He has a sense of direction under which he coordinates the processes of encounter which he stimulates, and which he presses toward policy decisions which reflect the obedience of the church's life in the world.
  
4. A professional: The planning officer is employed by the Diocese as a professional with certain training, skills, and intentions. He should be a professional in his concern for process. The planning process is a discipline which he understands and accepts on behalf of the organization for which he labors. His training in the process should equip him as a good guide and one who can be trusted to maintain the discipline.

As a professional the planning officer would be expected to have particular skill and interest in what we have called above "communication". He would understand that there is no single line of development either for a problem or a solution, and that there is always more than one answer possible. The inter-relationships of the various functions, the many concerns, and the variety of resources elicit the planning officer's special attention and skills. These inter-relationships also include the liaison with many other kinds of agencies and structures in the society. As a professional dedicated to conceptualizing the whole, a planning officer must understand the roles of the discreet elements and be able to effectively relate them in his work and in the process. Another important part of the professional stance for the planning officer is his future orientation which is based upon hope, and a sense of grace. He takes the present situation seriously but he understands the future in terms of the hope which the present changes produce. He should bring the best of contemporary skills and understand how to discover them and utilize them, but he clearly understands that many insights are the gift of grace. Thus by hope and grace he can bear the tensions of the role of the professional planner.

## B. A STAFF MEMBER

As a staff member the planning officer finds himself under burden of loyalty to the organization which is required of any other member. The job will require a set of relationships, some of which are common to all staff roles, some of which may be unique.

1. Staff relationships. The Planning Officer is directly responsible to the chief Executive Officer of the Diocese--i. e. the Bishop. In this relationship he should receive the necessary and supportive supervision, and should be responsible for an accounting of his service. He should benefit from the usual provisions of the personnel program and fulfill his responsibilities under the same.

The major working relationship of the Planning Officer is to the Diocesan Planning Committee. They bear the official responsibility within the Diocese for the planning process and the organization of its work. He is their staff for these purposes. As a professional guide this should be a relationship of mutual respect and participation. The committee bears the official responsibility for relating the product of the planning process to the policy-makers, i. e. Council. They will probably want to use the Planning Officer in helping them

fulfill this responsibility.

2. Staff work. As we have indicated earlier in this paper, staff work consists of the tasks related to all items on the Planning Agenda. Some typical work is: interviews, reading reports and preparing digests, working with task forces, many contacts for communication and coordination, attending meetings in the Diocese and in the community, preparing memos and reports, working with specialists and consultants, preparing items for the meeting Agenda, and so forth. Part of the discipline of a professional planner is to be able "to put it into writing".
  - a. A sizeable piece of the planning officers' work is a stimulator and consumer of research and survey. He should have a catholic interest in contributions in a wide range of fields, e. g. social and political sciences, human relations, contemporary literature, and some technical fields.

Another important piece of work is with task forces. The task force is a useful extension of personnel resources. It is an ad hoc group coopted to do a specific job, and is an efficient way to use other groups in the church or in the community to help in the planning process. A planning officer would be responsible for defining the job, recruiting the members of the task force, and providing the necessary liaison or supervision.

3. Professional resources. As a professional staff person the planning officer would have responsibility for seeking out, organizing, and utilizing a variety of specialized resources. One of the important resources he needs is a Technical Advisory Panel. This would include people who are knowledgeable about the planning process whether in or out of the church. It may not meet as a committee but it is a group to whom he could turn for advice and help in his own work as a professional planner for the church.

Another group of people would be specialists in a wide variety of fields who might be willing to voluntarily lend their expertise to the church through its planning process. For example, the planning director for a metropolitan area or a state planning commission may be happy to continually share with the Planning Officer for the Diocese a wide variety

of data and reports. Or a professor at a nearby university may be a specialist in automatic data processing, and would be willing to help the Planning Officer from time to time on problems of data collection and analysis.

A third kind of assistance would be the identification and recruitment of technical consultants. These are experts whose services are purchased by the Planning Committee to assist it in specific assignments. The Planning Officer would be the staff liaison, and an efficient channel for the utilization of such expertise. The planner in the church should also maintain a professional relationship with such organizations as the American Institute of Planners, the American Society of Planning Officials, the Religious Association, and other appropriate technical or professional bodies.

Funds should be provided in the budget of the Planning Committee or of the Planning Officer's operation to assure his active participation in such professional organizations. The Planning Officer should also have funds available for the purchase of a wide variety of technical and professional literature.

(There is further helpful discussion of the planning professional in "The Planning Process" by Perry Norton)

A proposed job description for a planning officer is attached to this paper as Appendix B.

IV SOME TYPICAL COSTS

ITEM	RANGE	ESTIMATE (1st Yr.)
<u>Office:</u>		
-space	75 - 200 per mo.	\$1,200.00
-supplies	1000 - 1800 per yr.	1,400.00
-postage & telephone	1500 - 2800 per yr.	2,000.00
-equipment	(1500 initial)	1,500.00
-materials	750 - 1200 per yr.	1,000.00
<u>Staff:</u>		
-Secretary & Statistical Asst.	4000 - 6500 per yr.	5,000.00
-Planning Officer	9500 - 12,500 per yr.	10,500.00
-S. S., Pension, etc.	1700 - 2300 per yr.	1,800.00
-Consultants	-----	1,500.00
<u>Other Expenses:</u>		
-Committee & Professional mtgs.	2000 - 3500 per yr.	2,400.00
-Staff expenses- local travel, meals, etal.	1400 - 2500 per yr.	1,800.00
-Travel	1200 - 2000 per yr.	1,400.00
-Miscellaneous	300 - 500 per yr.	500.00
		\$32,000.00

## V A POSSIBLE CALENDAR OF IMPLEMENTATION

What follows is a projection based on experience. I have tried to enumerate the items that seem important for the Tennessee situation. The time spans for accomplishment are typical. The dates are illustrative. Someone in the Diocese should translate this proposal into a possible calendar for implementing the planning process in the Diocese of Tennessee.

### A. SOME SPECIFIC ACTIONS

Given the decisions already made and the movement already under way in the Diocese to begin the planning process, there still remain several important decisions and actions to be taken over the next two months to firmly establish planning at the Diocesan level.

1. Adopt a job description for the Committee and designate a tentative budget for their use the remainder of this fiscal year--April 18, 19.
2. Screen a panel of possible committee members--April-May. Appoint the Committee--May.
3. Establish dates for the first training event for the new planning committee--May-June.
4. Following the training event, designate a chairman of the Diocesan Planning Committee and establish the first meeting date--May-June.
5. Adopt a job description for a full-time planning officer for the Diocese--June.
6. Designate a part-time staff person to help the Committee begin its work and to serve as the coordinator of the implementation of this entire calendar--April.

### B. NECESSARY INTERPRETATION:

It is exceedingly important to begin at once an interpretive process and to maintain a special interpretive emphasis at least through the Diocesan Convention next year. The interpretation should deal with what the planning process is, the decisions that have been made to introduce it into the Diocese with various related actions, and some of the possible impact this will have on Diocesan life and operation.

Where interpretation has not been carefully planned and faithfully executed there has always occurred substantial misunderstanding in some quarters of the Diocese about what is going on. This frequently has resulted in slowing down the implementation of the process, efforts to block changes growing out of initial stages, less than helpful rumors about intentions and reorganization, etal.

From my present knowledge of the Diocese I would suggest that there are at least five areas relevant to our calendar for implementing the planning process.

1. General: As soon as possible a major story should appear in the Diocesan newspaper and I would suggest that continuing stories appear in each issue until after the next Convention. I would also recommend a special communication from the Bishops and the Council to the Diocesan constituency. If this were sent out in June it could contain a description of the way the process has been implemented at the Diocesan level as well as a statement of the hopes held for the future.
2. Diocesan staff: At the earliest opportunity the Bishop should interpret to all those considered staff of the Diocese the steps now under way to implement the planning process and some of the vision which he and the Council hold for its usefulness in the life of the Diocese. I would suggest that a face to face meeting would be best, and this by the end of May if at all possible.
3. The clergy: There should be a special message from the Bishop to all of his clergy citing the canonical responsibilities of the Council for planning, enumerating the steps taken, and the steps proposed. This should be particularly beamed to inviting discussion among the clergy, perhaps in the respective clerical groupings which now exist with some knowledgeable Diocesan representative present. If this message went out by the end of April, the series of discussions could then be scheduled through May and June.
4. The parishes: A special message similar to those above should go from the Bishop to all vestrys and mission councils. They should be urged to disseminate this information to the congregation in an appropriate way or ways. Feedback should be welcomed.

5. The Convention: At the 1968 Convention of the Diocese there should be a major report and a carefully designed discussion process. If there are opportunities on a consistent basis to report prior to the Annual Convention through some such vehicle as geographical meetings, they should be utilized.

### C. ORIENTATION

There are formal processes similar to the event at the Montgomery Bell State Park in March which ought to be designed and executed for a variety of constituencies in the Diocese. It is not enough for people to be told that something is happening. Many key people need some orientation to what is being proposed so that they can get "the feel of it". Creating a climate of understanding and acceptance is essential to the effective operation of a planning process in an organization.

There are at least five groups in the Diocese who should be involved in such orientation processes.

1. The Council: This has already taken place for the Council in March.
2. The Departments and other bodies of the Diocese: These are the volunteer personnel most directly related to the operation of the Diocese and the impact of the planning process on the Diocesan structure--May or June.
3. The Bishops and all persons considered Diocesan staff: The Bishops and some of the staff have been through the March orientation. All others should be requested to participate in similar orientation as soon as possible--June.
4. The clergy (160): The Bishop should request all clergy to participate in such an orientation process. Since the size of the group would require a larger staff than is readily available it would probably be best to establish dates for three such events for clergy only. The dividends for such an approach are enormous--June, September, October.
5. All lay leadership at the Diocesan level not otherwise covered in 1, 2, 3--September or October.

### D. TRAINING

Beyond interpretation and orientation there is some specific training required when introducing a planning process into a major organizational system. There are new skills required and it is important to

provide these to the key people as early as possible. There is nothing more frustrating than trying to work in a new way without having gained the skills to do so. The immediate training needs would seem to be:

1. The Council: This is not training as planners, but rather with an emphasis on policy and the skills of policy making. There needs to be a thorough understanding of what policy is. They should have some image of what recommendations from a planning committee will look like. They should have some expectations about what the planning process will require of the policy-making body and some help in understanding better how to handle a most significant job --May or June.
2. The Planning Committee : As soon as they are officially appointed by the Council there should be an intensive three or four day training event on the planning process for this new committee. For most church people it is important to learn how to work as a planning committee, as opposed to just any other committee. In the case of the Diocese of Tennessee they will also have to face the necessity to learn how to work as a Planning Committee without staff or part-time staff at the outset--June or July.
3. The Bishops and the Diocesan Staff: As with the Council, the emphasis here is not so much on how to become planners as it is on how to relate to the planning process. As the Executive branch they need to be thoroughly acquainted with the planning process and what it can and cannot do for them--June-September.
4. The Planning Officer: When a planning officer is to be employed it should be ascertained what additional training he may need. Over the years our experience has been that most persons recruited as planning officers in the church need to take advantage of university offerings and/or major special training events offered periodically for such incompletely trained staff personnel. Provision for such advanced training should be part of the employment arrangements.

#### E. A MAJOR QUESTION

The program thus far outlined for implementing planning in the Diocese is restricted to the Diocesan operation per se. It is fairly reasonable to predict that within a relatively few months requests will begin to come in for assistance in developing the

planning process at regional levels and within the congregational framework. The introduction of planning into the parishes and missions should be by conscious decision of the Bishops and the Council. This should not be left to chance or haphazard development. The Diocese should carefully design the process by which planning can be implemented in its congregations and develop the resources to aid in such implementation.

This process requires a major orientation effort for clergy and the lay leaders of congregations. It requires a conscious decision by the policy makers in each congregation to institute planning and to create a planning committee. The planning officer at the Diocesan level should not be expected to service a hundred and twenty local units, nor to even offer them consultation about how to introduce planning. He will more than have his hands full staffing the Diocesan Planning operation. Volunteer consultants out of the Diocese can be carefully trained to render this kind of initiating service to local congregations. In addition to this kind of recruitment and training of personnel there will need to be established sufficient training events to help each congregational planning committee acquire the understanding of the process and the skills in planning which will give them some chance of succeeding at the task.

There are models available for this process of introducing planning into congregations. If the decision to ask the congregations to begin planning were made shortly, much of the orientation and some of the training could be designed jointly with what we have already proposed. However, if the decision cannot be made until next fall or winter, then there will have to be a separate series of events for that process.

The attached calendar visualizes the above recommendations and their time relationships. It does not include provision for introducing planning into congregations as just discussed.



CALENDAR FOR IMPLEMENTING PLANNING PROCESS  
DIOCESE OF TENNESSEE

Jan/ Mar April May June July Aug. Sept. Oct. Nov. Dec. Jan. Feb. Mar. April

	Jan/	Mar	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	April	
<b>SPECIFIC ACTIONS</b>																
1			X													
2					—		X									
3								—								
4									—							
5										X						
6				X												
<b>INTERPRETATION</b>																
1					—											
2					—											
3					—											
4					—											
5										—		X				
<b>ORIENTATION</b>																
1	—															
2							—									
3	—						—									
4								—								
5									—							
<b>TRAINING</b>																
1								—								
2							—									
3								—								
4									—							

## Proposed Job Description

for a

## Diocesan Planning Committee

The Council of the Diocese of Tennessee, having heretofore instituted a formal planning process for the Diocese in accordance with its Canonical responsibilities, hereby sets forth a general description of the authority and responsibilities of a Committee responsible for that process.

1. NAME: The name of the Committee shall be The Planning Committee of the Council of the Diocese of Tennessee, and commonly referred to as the Diocesan Planning Committee.
2. AUTHORITY: The Diocesan Planning Committee is specifically authorized by the Council to implement the planning process on behalf of the Council and in discharge of its Canonical responsibilities. The Committee shall work in close liaison with the Council and the Bishops of the Diocese, and shall report regularly to the Council.
3. MEMBERSHIP: The usual size of the Diocesan Planning Committee shall be five persons resident within the bounds of the Diocese. At no time shall the Committee membership number more than seven. The majority of members shall be lay persons.

All members shall be elected by the Council from a panel of names prepared by the Bishops in consultation with such other persons as they may deem helpful. The criteria for placement on the panel shall be those discussed in Council at Montgomery Bell State Park (March 2-4, 1967) and subsequently set forth in a Working Paper before the Council meeting April 18-19, 1967.

4. DEFINITIONS:

- a. Chairman - designation assigned to one member of the Diocesan Planning Committee by the Council. No specific term of office implied. Duties are to preside over all meetings of the Committee; to cause the work of the Committee to be efficiently organized; to present all Committee recommendations and reports to the Council. The chairman may delegate any of these duties, normally through written instructions.
- b. Other Officers: The Committee may designate other of its members from time to time to carry out specific functions required for the effective pursuit of its responsibilities.

- c. Staff work: This consists of the tasks related to all items on the Planning Agenda. The man-hours available to complete these tasks determine the speed at which the Committee moves and the volume of work the planning process can handle. There are several alternatives available:
- 1) The Planning Committee organizes its total work load and members accept assignments and complete the staff work.
  - 2) The Planning Committee organizes its total work load and uses task forces and paid assistants to complete the staff work.
  - 3) The Planning Committee delegates the organization of its work load to an employed professional planner. All of the above ingredients may still be utilized in the completion of the staff work. The mix may differ in given situations.
  - 4) A professional planner is employed and delegated responsibility for guiding the planning process. The Planning Committee is advisory to him. He is responsible for completion of the staff work.
- d. The Planning Process: This is the process for policy development discussed by the Council at the Montgomery Bell State Park meeting. It has also been presented and discussed within the Diocese on various occasions, both prior and subsequent to that meeting. It is described in various documents prepared by Rev. Donald Williamson, Professor Perry L. Norton, and Mr. Meryl Ruoss, consultant to the Pilot Diocese program in the Diocese of Tennessee.
5. DUTIES: The basic job of the Diocesan Planning Committee is to apply the planning process, or cause it to be applied, to all matters of concern for the mission of the church in the Diocese of Tennessee. The appropriate stance for this job is an inclusive definition of the church, a comprehensive view of the world in which it exists, and a special and constant focus on the future of both.

Specific duties shall include the following:

- a. To prepare and maintain a Policy Source Book for the Diocese. This shall contain all the enacted policy of the Diocese and shall be maintained in a current state as the authoritative guide to our understanding of mission in a given time, our commitment to implement it through the Diocese and its resources, and a basic reference for all matters of record, interpretation, and review.

- b. To solicit and receive appropriate matters of concern from the Council and Bishops, the Departments, other organizations and officers of the Diocese, congregations and clergy; to include concerns not so received, but emerging out of its own work and involvements.
  - c. To prepare and present to Council recommendations for new policy, and the amendment or abolition of existing policy. This shall be understood to include the adequate outline of programs to implement such policy, and, where feasible, precise program packages.
  - d. To develop a system of priorities for recommendation to the Council. Such system shall encompass all responsibilities, activities and commitments of the Diocese and its various agencies and organizations. The Planning Committee shall maintain the system of priorities in a current status, and shall regularly bring to the Council recommendations for required adjustments.
  - e. To assist the Council in the preparation of the annual report to the Convention, with special concern for the required projections of work and financial resources in future years.
6. PRACTICES: The Diocesan Planning Committee shall organize itself and its work for the most expeditious implementation of the planning process for the Diocese. To this end,
- a. The Planning Committee shall develop and maintain close communication with the Council and Bishops, the Departments and all other organizations of the Diocese, the congregations and any sub-diocesan structures of import for the work of the Church. Such communication shall also be developed and maintained with ecumenical endeavors and all appropriate planning efforts outside the usual Church structures, i. e. civic, social, educational, governmental, industrial,
  - b. The Committee shall request the active cooperation of any person or group within the Diocese who might assist it in its work; may create "task forces" to do particular parts of its work; may secure and employ technical assistance within the limits of its budget.
  - c. The Committee shall transmit its recommendations to the Council in writing, and all other communication of whatever nature shall be in writing. To the fullest extent practicable, written records shall be maintained of all work of the Committee, those who assist it, any task forces, and any staff employed.

- d. The Committee shall prepare and submit to the Council a request for financial resources reflecting the estimated ordinary expenses for its total work. Extraordinary expenses may be estimated and submitted to the Council separately.

This description of the authority, duties and practices of the Diocesan Planning Committee is intended as a general outline. It may be further amended by the Council as the need arises and as the Diocese's experience in planning develops.

Duties The Planning Officers of the Diocese

1. Develop and maintain, or supervise the implementation of the work load in the planning process of the Diocese as approved by the Diocesan Planning Committee.
2. Be responsible for the continuous functions of the planning process through his own staff and such, as well, as by the efforts of others participating in or contributing to the process.
3. Design and prepare reports, working papers, memos and suggested actions to be used by the Planning Agency which are sent to the Diocesan Planning Committee.
4. Prepare the Meeting Agenda of the Diocesan Planning Committee, including all materials required for that Agenda.
5. In consultation with the Bishop, prepare the suggested Meeting Agenda for the Council of the Diocese, including all materials required for that Agenda.
6. Design, assign and supervise the activities of all persons, staff, clerics, and special or working parties under the Diocesan Planning Committee.
7. Be responsible for the current maintenance of the Policy Source Book of the Diocese.
8. Represent the Diocese in appropriate civic, educational, governmental and professional planning bodies or committees.
9. Serve as planning advisor to the Bishop and other members of the executive branch of the Diocesan organization.

## JOB DESCRIPTION

for

## A PLANNING OFFICER

Title: PLANNING OFFICER, Diocese of Tennessee

Description: The Planning Officer is the member of the Diocesan organization responsible for staffing the planning process of the Diocese. He reports to the Bishop as Chief Executive Officer. His primary assignment is to work with the Diocesan Planning Committee in fulfilling the responsibilities of the Council of the Diocese for maintaining comprehensive, long-range plans for the development of the mission of the Church in Tennessee.

Duties: The Planning Officer of the Diocese:

1. Designs and executes, or supervises the implementation of the work load of the planning process of the Diocese as approved by the Diocesan Planning Committee;
2. Is responsible for the continuous functions of the planning process through his own skill and work, as well as by the efforts of others participating in or contributing to the process.
3. Designs and prepares reports, working papers, memos and suggested actions related to the Planning Agenda which he and the Diocesan Planning Committee maintain.
4. Prepares the Meeting Agenda of the Diocesan Planning Committee, including all materials required for that Agenda.
5. In consultation with the Bishop, prepares the suggested Meeting Agenda for the Council of the Diocese, including all materials required for that Agenda.
6. Designs, assigns and coordinates the activities of all persons, task forces, and specialists working for his office or the Diocesan Planning Committee.
7. Is responsible for the current maintenance of the Policy Source Book of the Diocese.
8. Represents the Diocese in appropriate civic, social, educational, governmental and professional planning bodies or processes.
9. Serves as planning advisor to the Bishops and other members of the executive branch of the Diocesan organization.

Requirements of work and preparation:

1. Considerable knowledge of the planning process and the methods of its application in a church system.
2. Experience in studying, analyzing, and utilizing research materials, technical and statistical information.
3. Ability to design, develop and coordinate the work of volunteers and specialists in the planning process.
4. Skills to establish and maintain cooperative working relationships with other elements of the Diocesan organization, ecumenical efforts, public officials, and other bodies outside of the church.
5. Demonstrated writing ability and other interpretive skills.
6. A recognized degree in planning; or an undergraduate degree in the social sciences with a B.D. in the sociology of religion or social ethics; special training in planning or theology, or experience in planning or church structure may be substituted in some part for the formal degrees.

